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Film Policy in Globalization: the Case of Mexico

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Abstract

The changing economic and technological conditions often referred to as 'globalization' have had a deep impact on the very nature of the state, and thus on the aims, objectives and implementation of cultural policy, including film policy. In this paper, I discuss the main changes in film policy there have been in Mexico, comparing the time when the welfare state regarded cinema as crucial to the national identity, and actively supported the national cinema at the production, distribution and exhibition levels (about 1920-1980), and the recent onset of neoliberal policies, during which the industry was privatized and globalized. I argue the result has been a transformation of the film production, from the properly 'national' cinema it was during the welfare state—that is, having a role in nation building, democratization processes and being an important part of the public sphere—into a kind of genre, catering for a very small niche audience both domestically and internationally. However, exhibition and digital distribution have been strengthened, perhaps pointing towards a more meaningful post-national cinema.

Keywords: film policy, Mexico, national cinema, globalization, audience development

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Introduction

The changing economic and technological conditions often referred to as 'globalization' have had a deep impact on the very nature of the state, and thus on the aims, objectives and implementation of cultural policy, including film policy. In this paper, I discuss the main changes in film policy there have been in Mexico and the impact these have had on Mexican cinema. I argue it has been transformed, from the national cinema it was during the welfare state—i.e. having a role in nation building, democratization processes and being an important part of the public sphere—into a kind of genre, catering for a very small niche audience both domestically and internationally. For while tax incentives, co-productions, and the widespread use of digital technology have enabled the industry to produce some 74 films per year on average since 2006, and most of these are aesthetically innovative and highly relevant to the key social issues of the day, Mexican cinema comprises at most 10 per cent of the available theatrical offer, consisting of 5,678 screens located at shopping centres frequented by less than 10 per cent of the population. I thus conclude the neoliberal reforms have had both positive and negative effects, improving the quality of production but not distribution, and greatly strengthening the position of exhibitors—albeit with mostly Hollywood productions.

However, there are two important reasons for cautious optimist. First of all, particular attention has been given to the socialization of children and young people in cinema, through participative audience development strategies that have met some success, as this article shows. Given the centrality of audiences for cultural production to thrive, and the importance of young audiences for film industries world wide, this is a remarkable achievement, bound to have broader repercussions as these more technologically literate audiences increasingly become 'produsers' [2] as well as consumers. And second, because cinema is today only a component of a digital audio-visual sphere in which online networks, straight to video/DVD production, public and

[2] After the term introduced by Alex Bruns in 2009 to merge the concept of 'producer' with that of 'user', referring to user-created content.

private television and alternative distribution circuits are becoming considerably more important. It is, I believe, this broader audio-visual mediascape that will increasingly be taken into consideration.

Background

The history and fortunes of the Mexican film industry are closely bound to the cultural policies that the successive administrations have followed. From its inception, cinema was crucial to the formation and development of national identity. With its mechanical reproduction of images, cinema was, like the nation-state itself, a product of the industrial revolution, and movie theatres accompanied urbanization processes, which were central to the development of nation-states. Further, the industrial features of cinema contributed to the cultural homogenization of its mass audience—often comprising either internal or external migrants—in a variety of ways. These ranged from the progressive standardization of the mode of reception in the search for efficiency and economic return, to the creation of an alternative public sphere. In order to bring respectability to their establishments, as Miriam Hansen's argument goes, theatre owners encouraged more self-disciplined, restrained, even passive behavior in contrast to the high audience participation that was a feature of the vaudeville (Hansen 2002). This eventually led to movie theatres being deemed 'safe' for women and welcoming for the working classes. The result was more (initial) inclusiveness of class and gender difference than had been the case in other earlier forms of leisure.

From the beginning of the 20th century, when some of the key battles of the Mexican Revolution (1910-1920) were first captured on film, a documentary tradition was inaugurated that continued to grow for the next sixty years. Moreover, from the 1930s, Hollywood genres were frequently adapted, transformed to suit local tastes or used as forms for local content, as Mexican literature and history were the inspiration of early historical films, including foundational national narratives and adaptations (Hart 2004, 5). Following the revolution and until the 1950s, a mix of public and private investment provided the funding for what became a thriving industry. The legal, cultural and infrastructural framework for this to happen was provided by several private production companies and by government intervention; the creation of

institutions including unions, a national film bank, two public distribution companies operating at both national and international levels, an association of workers, a star system, and a 50 per of screen time quotas for Mexican films. Moreover, during the Second World War, Hollywood's 'Good Neighbour' Policy favoured Mexican cinema over Argentina's, its closest rival, on account of Mexico's cooperation with the allies. By 1949 the film industry was the third largest in the country and one of the largest in the world: when the total population was 25 million, there were 1,500 theatres, 72 producing companies employing 32,000 workers and 4 major studios which exported their roughly 122 films per year throughout the Spanish-speaking world and the US Southwest (De la Garza 2006, 58). In sum, for most part of the twentieth century Mexican cinema was truly national in that it helped to forge and disseminate a common cultural background that cut across class, gender and ethnic cleavages, both in terms of narrative content and outreach and engagement. It also served to shape and develop a cultural industry that had a national scope. By the 1970s however, amid a widespread economic crisis, a combination of de-capitalisation, de-skilling, censorship and illegal exhibition practices that favoured Hollywood cinema started to have dire effects on film production, which was largely taken over by the state. Distribution and exhibition became nationalized as well. On the one hand, this state sponsorship led to some auteur-cinema production. But on the other, this also meant that Mexican films lost their audience, becoming all but irrelevant to the vast majority of the population (as discussed in more detail below). In this sense, Mexican cinema started a de-nationalisation process that I contend continues today. These developments took place in a historical context in which the state was taken to be the main engine of development and growth, the legitimate guarantor 'of the territorial organization of markets, livelihoods, identities and histories' (Appadurai 1996, 49).

This context however changed with globalisation, where it is private investment that takes over this role, with the state becoming increasingly a broker. Globalisation arrived to the Mexican film industry on 29 December 1992, when the New Cinema Law was passed, in line with the liberalisation of trade stipulated in the North American Free Trade Agreement, NAFTA. It superseded the 1949 Law of the Cinematographic Industry as well as its Reform, dating from 27 November 1952.

Significantly, the New Cinema Law dropped the word 'industry' from the title, thus signalling that a national film industry was no longer to be fostered, or at least it was no longer the goal. The three main issues the new law introduced were: first, the abandonment of the exhibition quota for Mexican cinema, which was to be immediately reduced from 50 per cent to 30 per cent, and then further on a yearly basis until it reached zero per cent by 1998; second, the liberalisation of ticket prices, which had until then been controlled, regarded as part of the so-called 'basic basket' of price-protected goods (Fernández Violante 2007, 74);[3] and third, the state near-monopoly exhibition circuit, Compañía Operadora de Teatros/Theatre Operator Company COTSA, was to be privatised, along with Television channels 7 and 13, which frequently screened Mexican cinema, and the America Studio, the second largest. The total package was worth $645 million USD. These privatisations also weakened the National Chamber of the Cinematographic Industry, including post-production and distribution companies, and the various film unions. The impact of these reforms on the national film industry was considerable.

Impact

On the one hand, the consequences were extremely negative. In terms of both market share and production for example, the decline was dramatic: 47per cent. Whereas 82 films were made per year under the former model, only 44 were made per year on average under the globalization model. The lowest point was reached in 1997 when only 9 films were made (De la Garza 2006, 145). Between 2000 and 2010, despite the increase in the number of screens, the offer had been reduced to just 252 films per year, of which only 25, that is 19per cent, were Mexican, whereas the figure before had been 71. And for the market share, it collapsed. It went from 170 million tickets sold per year, to a mere 10.9 million (Molina Ramírez 2010).

On the other hand, there were some positive consequences too. The reforms brought considerable foreign investment in the realm of exhibition[4]—even those who

[3] These consisted mostly of food items and energy and transportation costs.

[4] At the time of writing (2015) Mexico has the fifth largest number of screens in the world: 5,678. 43 per cent of the theatres have 8 or more screens, 53 per cent have

were among the harshest critics of the New Cinema Law admitted there was a dearth of screens, and that the controlled ticket price policy, while well-meaning, made recovering costs harder as production costs continued to rise. It was generally felt that access to public funding became more fair and transparent as a result of the reforms, and many more connections were set up with international film festivals. Importantly, the quality of the film production improved noticeably. Although there were fewer films, these were significantly better, aesthetically innovative and, crucially, relevant to the younger audiences. Indeed, all directors that ushered what later became known as 'The New Mexican Cinema' and its key films had their debuts in this critical period. Guillermo del Toro's first film, Cronos (1993) a stylistically accomplished story of a vampire, Alfonso Cuarón's Sólo con tu pareja/Love in the Time of Hysteria (1991), a dark comedy on the impact of AIDS, and Alejandro González Iñárritu's Amores Perros/Love's a Bitch (2000), with its network narrative of intertwined stories on violence, were all made during this decade of transition. The original, fresh approaches they brought and the way they were able to bring audiences back to the theatres was a much welcome development, especially when compared to the previous scheme whereby the state supported authorial filmmaking that lacked an audience, or the private sector invested in soft-porn.

All in all, liberalization meant the strengthening of the exhibition sector, with many more screens, more efficiently run, and a more profitable—albeit much reduced—offer; a wider diversity of relevant topics; and the nurturing of young talent. But production and distribution clearly needed additional support.

Amendments to the Law and Film Policy Proposals

To address this need, by 2001 the New Cinema Law was amended and a new Fund for Investment in Cinema, FIDICINE, was created. The quota for Mexican cinema was re-introduced and fixed at 10 per cent but it became difficult to enforce since it came with a requirement that 'the availability of the necessary number of copies in good conditions would be guaranteed, and that a suitable advertising and marketing

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between 1 and 7, and 5 per cent have one only, and of the total, 90 per cent are digital.

campaign would be in place to promote the films' (Molina Ramírez 2010).[5] Also, an important conference on film policy was held that gathered voices from the film community, on 5-6 June, organised by the Writers Guild, SOGEM; the Ministry for Radio, Television and Cinema; The Association of Film Directors; and the Film industry union (Ugalde 2007). Some of the key film policy recommendations that emerged from the meeting were:

- That visual literacy should become a key priority of cultural policy nationally, in the same way that literacy used to be when print-media prevailed. 'Film Studies' ought to be broadened to include theory and practice and ought to become a compulsory subject taught from primary school. Libraries should stock DVDs of fiction, documentary and experimental cinema along with books
- That policy addressed audience development
- That a screen quota be created for short films
- That prime time be taken into account when scheduling screen time for Mexican cinema
- That subtitling be preferred to dubbing, and that both be monitored so as to prevent them from becoming means for censorship
- That reforms be made to the inequitable allocation of the box office share—this being, at the time and since then, only 7per cent of the total for the producers, whereas about 60per cent goes to exhibitors (Ramírez 2013, 60)
- That the Society of Film Consumers be strengthened, so it could continue to monitor the operation of theatres and film-related advertising
- That the film industry and television worked in partnership to generate synergies. Taxation, a commitment of TV channels to purchase films or to invest in cinema, or concessions were among the schemes mentioned, with the links between French, Argentinian and Brazilian cinemas to their respective TV industries quoted as

[5] About half of the Mexican films shown every year have no advertising campaign (IMCINE 2014, 255). Interestingly, there seemed to be no correlation between an advertising campaign and box office success for national films (IMCINE 2014, 262).

examples of possible ways forward. This point has met some success. Between 2010 and 2014 it is estimated that some 22.3 million people watched Mexican films theatrically released over the same period on television. Indeed, according to IMCINE, television stopped being a mere window for exhibition, becoming instead a source of finance for the production of Mexican films (IMCINE 2014, 123). Analogue Television is to be phased out by the end of this year.

- That the New Cinema Law should be replaced with a more general Audio-visual Media Law that would consider television, the film industry, video, DVD, and satellite communication as parts or dimensions of an integrated and increasingly digital media-scape, which should work harmoniously and in conditions of a truly free market, avoiding the monopolies that had continued to emerge under NAFTA, to enable artistic expression and communication by audio-visual means.

As regards the latter point, opinions differ as to the impact that digital distribution channels are having on Mexican cinema. Exhibitors argue that while in the United States DVDs, digital downloading and TV account for 75 per cent of the total income, with theatrical distribution accounting for only 18 per cent, the situation in Mexico is quite the reverse: between 80 and 95 per cent of income comes from theatres (Ramírez 2013, 64). Moreover, a film's circulation via the other windows largely depends on its performance in the theatrical box office. However, there is broad agreement the trend is towards increasing importance of digital distribution channels. Digital downloads went from 24 million in 2009 to 96 million in 2010, a 400 per cent increase. However, in 2014 IMCINE put the average figure for the period between 2010-2014 at 46 million per year. Further, it was noted that regarding distribution controls there are already laws in place, but these lacked mechanisms for enforcement when related to the practices of the Hollywood majors. In 2012 an initiative aiming to restrict distribution for the top ten most promoted films so that no single film could at any point be shown on more than a fifth of the screens available in each chain failed to pass (Ramírez 2013, 65). It was also noted that piracy was having a significant negative impact on box office income.

To help with the recovery of production, in 2006 article 226 was added to the Income Tax Law, allowing tax payers to use up to 10per cent of their taxes to finance Mexican cinema. The same year 49 tax payers, among them two banks (Inbursa and Banco Azteca) contributed nearly $190 million MXN, which financed 31 films. By 2007 the fund had $500 million MXN and 59 films were made, with Microsoft among the participants in the scheme (Molina Ramírez 2007). According to the UNESCO Institute of Statistics, Mexico was number 13 on the list of countries with the highest number of feature films produced between 2005 and 2011 for theatrical release by market share and national film support (Table 1). However, although production has since continued to rise, only about 40 films reach theatrical exhibition, and more ominously, only one or two every year recover costs.

Table 1. 15 Countries with the Highest Annual Film Production on Average 2005-2011 (UNESCO 2013)

No	Country	Average production	Level of Production*	National Film Support
1	India	1,203	Very high	No
2	USA	757	Very high	Indirect
3	China	432	Very high	Yes
4	Japan	414	Very high	No
5	Russian Federation	292	Very high	Yes
6	France	239	Very high	Yes
7	United Kingdom	225	Very high	Yes
8	Germany	185	High	Yes
9	Spain	175	High	Yes
10	Republic of Korea	137	High	Yes
11	Italy	131	High	Yes
12	Argentina	108	High	Yes
13	**Mexico**	**94**	**High**	**Yes**
14	Brazil	89	High	Yes
15	Bangladesh	88	High	Yes

*Very high: 200 or more; high: 80-199

In the realm of exhibition, the tendency towards monopolies continued, with only two companies accounting for 87 per cent of the box office in this period. Mexican distributor and presently Head of the Mexican Film Institute IMCINE, Jorge Sánchez Sosa summarised the main problems thus: 'the market is saturated, there is a huge number of copies available for Hollywood films, which is always scheduled in prime time and backed up by very expensive advertising campaigns—roughly $15 million MXN, versus $1 million MXN for those Mexican films that can afford one (M. Cerrilla Noriega 2011, 36)—, making it very difficult for the national production to reach theatres or to stay longer than a week there' (Sánchez Sosa 2011, 8).[6] Overall, consumers are constrained by the choice available to them. Sánchez Sosa recommended niche filmmaking, catering for specific interests in addition to demographic features. By 2010 there were broadly two types of films made in Mexico: popular genres, which accounted for some 80 per cent of the box office for Mexican cinema, and had somehow managed to attract audiences: they boasted about 834,000 viewers per film per year, roughly the same amount of viewers that Hollywood films enjoy. But these represented only a minority of the total production: in 2010, they were only 10. The more contemplative, aesthetically complex films that tend to travel the festival circuit, garner prizes and represent 'the Mexican contribution to the global audio-visual space' (Ugalde 2010), 44 of which were made the same year, had only 16,744 viewers per film on average.

Another major conference held on 30 August 2010 at the National Film Archive, Cineteca Nacional, specifically aimed at putting forward reform proposals for the Cinema Law, further identified two important policy strategies, namely the creation of industry clusters, where interaction among staff of the various components of the film industry could take place for specialisation and to generate spill-over; and the identification of markets that shared values or a common cultural background, where films could easily be exported (Molina Ramírez 2010). With 470 million Spanish speakers, attempts to foster a Hispanic Cinema that would include Latin American and Spanish cinemas have taken place for some time. However, the initiative has had

[6] My translation. Unless otherwise indicated, all translations are mine.

limited success. In 2014, according to the Instituto Mexicano de Cinematografía/Mexican Film Institute IMCINE, out of 19 Mexican co-productions there were 12 with Spanish-speaking countries (6 with Argentina, 4 with Spain, 1 with Guatemala and 1 with Bolivia), compared to 7 with the United States (2014). As long as they are not distributed by the Hollywood majors, films in Spanish tend to face the same problems to reach final consumers that Mexican cinema faces. In 2014, the 14 members of Ibermedia, the association of film-producing Spanish-speaking countries, decided to create Digital Ibermedia, in collaboration with IMCINE, which houses it. It features 140 films in Spanish, and, importantly, several documents that provide contextual information and serve to frame the films in various ways. The aim is primarily educational, with Digital Ibermedia linked to museums, universities and other educational institutions, as well as a host of non-governmental organisations. It was expected that 58 documentaries would be added, mainly dealing with issues of 'Hispanic identities', later this year (2015). The goal is to have 260 fiction films on the catalogue by the end of the year. Filminlatino has been another important initiative in this regard. Due to start operating by the end of this year, it will be an online distribution channel, offering a wide variety of films from all over the world for adults and children. It will feature a blog on film-related issues, as well as articles and contextual information that links the recent production with films made in the past, creating a sense of continuity. While there will be a fee for viewing or downloading most films, Mexican cinema will be offered free of charge (IMCINE 2014, 198).

Research on film policy that defines globalisation, after David Harvey, as 'flexible accumulation of capital' has identified the same issues, albeit sometimes their meaning is interpreted differently. The trend towards co-productions for example is framed in terms of a risk-externalisation strategy for the conglomerates that have acquired film industries world-wide, rather than as mutually beneficial collaboration among participants, in search for a broader and common market (Caldwell 2008). Equally, the trend towards the formation of industrial clusters is also understood as part of the process which shaped those very conglomerates. Rodrigo Gómez and Argelia Muñoz (2011) have researched the effects of globalisation on the Mexican film industry under NAFTA using this framework. They found film production to be indeed

concentrated in clusters, mostly in 3 areas of Mexico City, and to be organised around principles or flexibility, but in response to lack of funding rather than specialisation. The various state agencies responsible for different sectors of the industry—such as the Mexican Film Institute (IMCINE), the National Council for the Arts and Culture (CONACULTA), the National Film Theatres (Cineteca Nacional)—worked in a disjointed fashion, and with minimum budgets. Production was highly concentrated in two oligopolies (95 per cent), one of these the main Television company, with only 5 per cent of independent film production companies, and all of them have access to state subsidies, although in a very unequal field. And of these, none was exclusively devoted to film-related activities anymore, with advertising, television production, graphic design and other multimedia activities ranking as very important. The meaning of this latter point is also interpreted differently when framed as part of debates on the social impact of digitisation, where it is understood positively as 'expanding cinema'.

Whether understood broadly as a by-product of flexible accumulation of capital world-wide, or at a more local level and with an emphasis on media change, as the outcome of cultural policy decisions and technological progression, it is undeniable that all the policy recommendations put forward since the globalization reforms were first introduced have had an impact on Mexican cinema, however interpreted. And the point related to audience creation and development is without doubt the one that is most promising, given its focus on children and young people. It is to this point that we now turn.

Audience Creation and Development

A comparative approach to successful film policy showed that when there had been a breakthrough—for instance in the cases of the Danish Act of 1997 that re-structured the industry, the Irish Higgins package of 1993, and the regulations that created the South Korea Film Council in 1999—audience creation and development had consistently been regarded as a key priority, starting with children from an early age. In Mexico, two civil associations, *La Matatena* and Juguemos a Grabar/Let's play making films, took this seriously.

In 1995 Liset Cotera founded La Matatena, the first film school for children in the country, along with the first international film festival for children. Both were

aimed at audience creation and development, widening children's access to cultural diversity in a Latin American context that is overwhelmingly dominated by Hollywood and in which a film policy for children was all but absent. It also suited the globalization project in that it aimed to provide the children with the foundations of a 'cosmopolitan citizenship'. Cotera put it thus:

> Unlike the cinema for children that is made by adults, in which children are addressed for profit, as consumers only […] I aim to introduce children to a cinema in which they are protagonists, camera shots are taken from their perspectives, and more importantly, address issues that children face and can be enjoyed by children in other countries, for many of the children's concerns, in as much as they are dependent on the adults around them, are in fact cross-cultural (Cotera quoted in (De la Garza 2013, 225).

The festival became the cornerstone on which practice-oriented film education for children started. First, because the more films children watch, the more they become conversant with a visual language they can then draw from and put into play for their own creations. And second because the need to have a qualified jury entirely comprised of children spun the film history and appreciation workshops, out of which the animation and documentary workshops followed as some of the children took a deeper interest into cinema, and their parents in their creativity development. La Matatena's ultimate goal is to run a festival with films entirely made by children. To date, the international children's film festival has shown more than 66 feature films from 58 countries and 114 films made by children in their workshops, to an audience of 100,000 children.[7] As it enters its 20th edition, La Matatena is beginning to have an

[7] In 2011 the festival featured 72 films from 21 countries. Among these, 6 were feature films, 3 documentaries, 13 were short films, 23 were short animation films, and 25 were short animation films made by children, 8 at La Matatena itself, and 1 at Juguemos a Grabar. 3 venues participated: Cineteca Nacional/the National Film Archive, Chapingo University and TEC de Monterrey, Santa Fe Campus.

impact on the Mexican film industry, especially as regards animation. It is however mostly circumscribed to Mexico City and the surrounding areas.

On the other hand, Juguemos a Grabar, in the state of Michoacan, is inscribed within the cultural industries paradigm that seeks to maximize the various social and economic benefits the arts can bring to a locality, especially in terms of the creation of jobs, social inclusion, and urban regeneration through cultural clustering. It started with the support of the state of Michoacán's Ministry of Culture, the Morelia City government, and the state's Institute for the Welfare of Women. Together these institutions provided $250,000 MXN in total, some $19,377.50 USD at that time. Yet, its entrepreneurial founder and Director, Sonia Aburto, soon mobilized the support of public and private museums for children, notably Papalote Museo del Niño/The Kite, Children's Museum; of Cinepolis, today the largest film theatre chain in the country and one of the largest in the world, with headquarters in Morelia; and of the Morelia film festival, also supported by Cinepolis, with a remit of promoting the national cinema. Aburto maintains the best way to further the creation and development of a film audience is through a partnership between civil society and the private sector, and she thus seeks to generate as many synergies between film theatres, museums, and film schools as possible (De la Garza 2013).

Juguemos a Grabar offers 40-hour modules delivered on Saturdays over a two year period to children aged between 8 and 15, hoping that this will instil in them a deep and enduring interest in film. The sessions focus on various aspects of video and filmmaking, from makeup and costume to acting and cinematography, and enlist the talent and expertise of professional actors, screenwriters, musicians and other media experts from the state of Michoacán. Children who finish all courses receive a very thorough technical training over the two-year period, learning from local media professionals from various areas of the industry. They are also trained in skills that cater specifically to the job market, such as interviewing and lighting a scene, skills not developed when learning animation. Juguemos a Grabar is especially active in the area of fundraising and public relations campaigns. By way of example, the documentary-making marathon organized for Children's day in 2009 at Morelia's main square received 48 submissions, and 4 were selected for video-making on the day. The

marathon lasted for 12 hours. Four editing booths were placed in each corner of the square, as the documentaries had to be ready for outdoor screening in the evening, making a public event out of the occasion. Prizes provided by sponsors included video cameras, day tickets to popular theme parks and children's museums, as well as guided tours of the film studios. Juguemos a Grabar is starting to fulfil another important function while it seeks to instil the love for cinema that will create loyal audiences, and beyond that, to introduce children to the skills they will need to be creators. Juguemos a grabar also seeks to become the first scheme of its type to realize the economic potential that cultural industries such as animation and video production can bring to the regions that host and sustain them.

Initiatives such as those of La Matatena and Juguemos a grabar are now being replicated across the country, but they face an uphill task. They operate within a highly precarious economic environment. They work on a per-project basis and are thus continuously bidding for funds to be able to run their programmes; moreover, the diverse background of their target population often makes the groups extremely challenging to teach.

Exclusion as the Organising Principle

At the time of writing, 23 years after the first neoliberal reforms were introduced to the film industry, it seems to have made a substantial comeback. As regards production, there were 130 films made, and 68 of these reached theatrical distribution. Quality continues to remain overall high. Moreover, for the first time in the last five years there were more filmmakers working on second and third films than on first works. The financial support provided in 2014 reached $810 million MXN, some $60 million USD. There was even a Mexican blockbuster, in terms of box office, La Dictadura Perfecta/The Perfect Dictatorship (Estrada, 2014), which sold 4.2 million tickets. 8 other national films sold just over a million tickets each. And in a country where there were only 10 festivals held in 2000, the number is now 100 (IMCINE 2014).

However, one must ask, who is this thriving industry for? For of all the consequences, negative and positive, that the large-scale privatisation of the film industry brought about which I have discussed here, the most important one is

without doubt the reconfiguration of the audience. While a rise in the number of screens and the possibility to recover investment through higher ticket prices was listed above among the benefits, the state-of-the-art multiplexes relocated to the wealthier urban areas and tickets proved too expensive for the working class audiences. A recent national survey commissioned by the National Film Institute IMCINE found that even in 2010 when the total population was 112 million (it is 125 million today), only 30 million attended cinemas at all, 18 per cent of respondents 5 or more times a year, and 8 per cent attended regularly (ie. 11 times a year). 190 million tickets were sold in 2010, compared to 450 million tickets on average that were sold annually during the 1980s, when the prices were still pegged to the 'basic basket' (M. Cerrilla Noriega 2011, 75). Of these, only 6 per cent went to see Mexican films. Moreover, all theatres have now concentrated on the largest 135 cities. Only urban areas with 340,000 inhabitants have at least one cinema. Just about more than half of the population, 56 per cent, live in these areas. Even considering the over 300 film clubs and 14 schemes of mobile cinema that operate regularly in rural areas (IMCINE 2014, 116), Inclusion continues to be a very pressing matter. In the light of this, I contend that while Mexican Cinema was truly national for most of the 20th century as explained in the introduction, today the word is best understood as an adjective that serves marketing purposes domestically and abroad, in the same manner that generic labels do: a film can be 'horror', 'thriller' or 'romance'. It can also be 'Mexican' in this new, de-nationalised fashion.

Conclusion

It is undeniable that film is culture, although the terms may be rather broad. Angeles Castro, former editor of the Mexican Cinema Journal and Director of the Fund for Investment and Support to Cinema, FIDECINE, put it thus:

> If culture is defined as the forces and discourses that shape us as human beings, stimulating our imagination, amplifying our perception of the world and enabling us to advance in science and technology, or, alternatively, to fail in all this […] it is clear that cinema is culture, and that it has a huge

> responsibility to build a better society. Thus, it deserves to be supported by the state (Castro Gurría 2011, 5)

But apart from culture so defined, cinema is also an industry, and its importance in terms of job creation, supplying foreign currency, participating in the 'branding' of a country and supporting the ancillary industries that are linked with it also deserves support, and indeed not only by the state but also the business community and the wider civil society. The key question though is what form that support should take. On the basis of previous experience, it would seem that for all its flaws the neoliberal model has proved overall a better option, but the need to continue educating children, monitoring exhibition and tackling exclusion remain very pressing issues.

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