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OPPORTUNITIES IN MEXICO: CULTURAL INDUSTRIES



Department of Foreign Affairs and International Trade
Ministère des Affaires étrangères et du Commerce international
Latin America & Caribbean Bureau

M A R K E T P R O F I L E - M E X I C O

Opportunities in Mexico: Cultural Industries was developed jointly by the Department of Foreign Affairs and International Trade (DFAIT) and Prospectus Inc.

This market profile is designed to provide an overview of the cultural industries market in Mexico. Although efforts have been made to avoid errors and inaccuracies in this document, it is not intended to be used as the only source of market information on this sector. We encourage the reader to use this publication as one of several resources for commercial dealings with Mexico.

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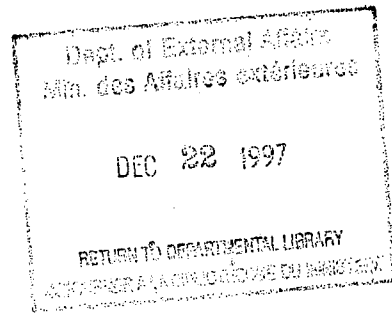
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CULTURAL INDUSTRIES

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Export
MEXICO

Mexico



THE NORTH AMERICAN FREE TRADE AGREEMENT (NAFTA)

The NAFTA expands Canada's free-trade area of 270 million people into a market of close to 361 million — a market larger than the population of the 15 countries of the European Union and one with a total North American output of more than \$7 trillion.

Mexico is Canada's most important trading partner in Latin America. Two-way merchandise trade with Mexico was just under \$6.5 billion in 1995 and is expected to exceed \$8 billion by the end of the decade.

Canadian direct investment in Mexico is growing rapidly, increasing from \$452 million in 1992 to over \$1.2 billion in 1994.

This guide has been prepared with the problems inherent to the new exporter in mind. However, it is not exhaustive. The differing circumstances, interests and needs of individual companies will influence their strategies for the Mexican market.

Further assistance can be obtained by addressing requests to the International Trade Centres (see Where To Get Help) or contact the InfoCentre at:

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*FaxLink is a faxback system which provides summaries on a range of Mexican markets. It must be contacted through your fax machine. Dial from your fax phone and follow the voice prompt instructions.

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THE NEED FOR NATIONAL IDENTITY

Canada and Mexico share the need to maintain distinct national identities in the face of strong influences from the American media.

The cultural industries make a substantial contribution to the economies of both Canada and Mexico. In 1994 they employed some 900,000 Canadians and generated direct and indirect sales exceeding \$29 billion. Comparable statistics are not available for Mexico, because so many participants are "informally" employed and not included in the official statistics. But the cultural sector is probably just as important to the Mexican economy.

In spite of its economic importance, the cultural sector cannot be assessed in the same terms as any other industry. Its significance goes beyond the creation of jobs and contribution to gross domestic product (GDP). Cultural expression is an essential element of any nation's national identity. Canada and Mexico have much in common in this respect. They share a special sensitivity to cultural issues, because of their proximity to the United States, and the massive exposure of their citizens to American culture. For this reason, both countries have consistently subsidized their cultural industries, both in terms of direct support and other incentives.

This public support has helped Canada's cultural sector to develop unique cultural "products," such as books, films, artwork, recordings and live performances. These products have received considerable exposure abroad as well as in Canada.

The opportunities for cultural products in Mexico have increased as a result of the North American Free Trade Agreement (NAFTA). The elimination of tariffs and reduction of barriers to labour mobility are only part of the reason. The publicity and debate surrounding NAFTA in Mexico has raised awareness of Canada and interest in Canadians to new levels. Many thousands of Canadians have visited Mexico in pursuit of new trade opportunities since NAFTA was implemented on 1 January 1994. As a result, Mexicans have come to understand more clearly the differences between Canadians and Americans. This is creating an increased interest in various aspects of Canadian culture.

It is difficult to adequately describe all of the cultural industries in terms of "markets." Only a few of Canada's cultural products are freely traded on open markets. Opportunities for cultural exchanges through publicly-sponsored programs are considerable. But these are generally arranged through contacts within the cultural communities rather than through conventional marketing. For this reason, this profile concentrates on those cultural products that do involve commercial markets.

With a few exceptions, the export markets in the cultural sector are concentrated in music and in film and television production. There are opportunities in these fields for artists, performers and technical personnel, as well as promoters and agents.

Many Canadian musicians have performed in Mexico. This includes individual classical artists who have been hired through their commercial agents to perform with Mexican orchestras. Popular music groups also perform regularly in Mexico in concerts and in nightclubs. There has been increased interest in the work of Canadian composers and songwriters. Recorded music by Canadian artists is also distributed in Mexico, mainly through multinational record companies.

Film, television and video production is another area of opportunity. Most of the cases identified for this profile involve Canadian television and video productions done in Mexico for Canadian consumption, or co-productions of English-language films for world consumption. No cases of production in Canada for the Mexican market were identified.

THE CULTURAL INDUSTRIES IN MEXICO

The film, television and music industries provide the best prospects for market-based exports of Canadian cultural products.

A definition of the cultural industries usually includes film, video and television production, sound recording, book publishing, the visual arts, the performing arts and new media. This market profile deals in depth only with film, television and video production, and music. Although there are many opportunities in the other areas, they tend to be very specialized and some of them are not easily discussed in the specific context of the Mexican market.

Opportunities for book publishing are discussed in other profiles in this series. The principal opportunities are for Canadian publishers to obtain the rights to Spanish-language books, to adapt them to the Mexican culture and style, and to publish them in Mexico. The experience of Canadian book publishers in small-volume publishing and their reputation for cultural sensitivity have created many opportunities for this kind of product. There is a particular demand in Mexico for “how-to” guides and for children’s books.

The visual arts involve many products that are sold through the market process, but in Mexico this market is limited to the very affluent. Since the devaluation of the peso in December 1994, the number of Mexicans who possess the dollar resources that are needed to buy foreign art has fallen drastically. Only about 20 percent of Mexican families have incomes in excess of C \$8,000 per year, and only about 2 percent have incomes of more than C \$80,000. While the latter category accounts for some 400,000 households — a significant market — the very wealthy tend to make their purchases while on trips abroad. Nonetheless, there is a small, specialized market for art sold through upscale art galleries in Mexico City, and to a lesser extent, in Monterrey and Guadalajara.

Opportunities in the performing arts are highly specialized. This subsector is less likely than the others to operate on a market basis, and the usual means of commercial market entry are, therefore, not generally applicable. Contacts for performances or tours in Mexico are, for the most part, arranged privately through the artistic community, typically as part of publicly-supported cultural exchanges.

The principal exception is live performances by musicians, primarily in the popular music and contemporary classical categories. In these cases, bookings are made on a commercial basis by agents. Since the same artists are often active in both the recorded and live performance categories, they are discussed in this profile under the music subsector.

The new media, which include CD-ROM, multimedia and the on-line dissemination of information, are growing rapidly throughout the world. These media generally involve the use of computers for their delivery. Mexico lags far behind the developed countries both in terms of the installed base of computers and the level of technology involved. The use of sophisticated computers is growing rapidly, but business users are much more likely than home users to have the necessary equipment. Therefore, the principal opportunities are for information dissemination rather than purely cultural products. Many Canadian companies are using the Internet, as well as CD-ROMs, to distribute information in Mexico. There is very little difference in the methods for doing this in Mexico than for any other country in the world.

FILM AND VIDEO

In Mexico, the term *cinematografía* is used to describe an industry that includes both film and television production. This subsector consists of companies that create *largometrajes* (feature films), *cortometrajes* (short films) and *videogramas* (video recordings). Television programs include those intended for broadcast over the airwaves or by cable television systems, as well as non-broadcast video productions for education and corporate promotion. The latter are distributed using videocassettes.

Although the film and television industries use distinctly different technologies, there is considerable overlap. Films are converted to videocassette for retail distribution. And film is often used as the original recording medium for productions intended only for television broadcast.

Film and television producers in Mexico belong to the *Cámara Nacional de la Industria Cinematográfica y del Videograma (Canacine)*, National Chamber of the Film and Television Industry. There is a separate national association for the cable television industry called *Cámara Nacional de la Industria de Televisión por Cable (Canitec)*.

As in Canada, the film and television industry is characterized by short-term projects and, for practical purposes, many technical workers and performers are self-employed. For this reason, unions and associations are active in protecting the rights of the various participants. Important organizations in this Mexican industry include:

- *El Sindicato de Trabajadores de la Industria Cinematográfica, Similares y Conexos de la República Mexicana (Stic)*, Film Industry Technical Workers Union, represents a wide variety of film industry technical workers.
- *El Sindicato de Trabajadores de la Producción Cinematográfica (STPC)*, Film Producers Union, split from the *Stic* in 1945 to represent feature film workers.
- *Asociación Nacional de Actores*, National Actors Association, represents actors and interpreters.
- *Asociación Nacional de Intérpretes*, National Interpreters Association, represents interpreters.
- *Sociedad General de Escritores de México*, Mexican Society of Writers, represents writers.
- *Sociedad de Autores y Compositores de México (SACM)*, Mexican Society of Authors and Music Composers, represents authors and composers.
- *Asociación Nacional de Ejecutantes de Música*, National Musicians Association, represents musicians.
- *Sociedad Mexicana de Directores y Realizadores de Cine, Radio y Televisión*, Mexican Society of Film, Television and Radio Directors, represents film, television and radio directors.

MUSIC

The music industry is strongly supported by the Government of Mexico. The *Consejo Nacional para la Cultura y las Artes (Conaculta)*, National Council for Culture and the Arts, provides financial assistance and directly operates music programs. In particular, classical music, which does not have deep cultural roots in Mexico, is strongly supported, most notably through public assistance to three symphonic orchestras. Canadian artists are regularly booked for performances with these orchestras. There has also been increasing interest in the work of Canadian classical composers.

Popular music is more market-driven, as it is in Canada. About 60 percent of the live performances at the 10-thousand-seat *Auditorio Nacional*, National Auditorium, involve popular music. International stars, including Canadian artists such as Brian Adams, perform there regularly. Others perform at music festivals which are very popular in Mexico, or at nightclubs. For example, the Mexico City

Hard Rock Café is the largest in the world, and has recently featured Canadian bands, including Toronto's Reggae Cowboys.

Artists of international calibre generally obtain bookings through agents through the same process used around the world. Emerging musicians and groups, both classical and popular, receive promotional assistance from the Canadian Embassy in Mexico. The embassy assists about 10 popular groups per year to perform in Mexico. It also works through the Canadian Music Competition to find young musicians who would benefit from Canada-Mexico exchange performances.

The music recording business in Mexico is dominated by large multinationals, most notably Sony and PolyGram. Although independent labels exist, there are very few. In general, they find it difficult to compete with multinational labels on one hand, and pirated music on the other. It is estimated that as much as 30 percent of the recorded popular music sold in Mexico is pirated.

THE FILM INDUSTRY

The production of Mexican films has declined sharply, but the cheaper peso is driving an increase in location shooting for foreign films in Mexico.

The film industry was hard hit by the economic crisis spawned by the devaluation of the peso in December 1994. Since 1992, the industry has also declined as a result of the phase out of the requirement that half of all theatre screen-time be devoted to Mexican movies. The minimum was reduced to 10 percent for 1997 and will be eliminated entirely in 1998.

In 1995, there were only 14 feature films released in Mexico, compared with 46 a year earlier. Ten of these were private productions, two were assisted by government, one was foreign-made and the other was produced by a cooperative. The television production company, *Televisine*, produced three films during 1995, with average budgets in the \$3 million Mexican peso range. Government/private feature films produced during the year had budgets slightly higher. *Pinturas Rupestres de Baja California*, for example, had a budget of \$4.2 million Mexican pesos.

FEATURE FILM PRODUCTION

There were just over 100 feature film producers registered with *Canacine* in 1995, with 96 of them located in Mexico City. About half of these producers are affiliated with the *Asociación de Productores y Distribuidores de Películas Mexicanas (APDPM)*, Mexican Association of Film Producers and Distributors, which is probably more representative of the feature film industry. According to the *APDPM*, most of these companies are very small operations. The only large feature-film producer in Mexico is *Grupo Cine de Televisa*, which is a subsidiary of *Televisine*. This company produced or co-produced 72 films, at an estimated cost of \$82 million Mexican pesos, between 1990 and 1994. This puts the average budget at well under C \$200,000 at the exchange rates that prevailed in late 1996. In 1994, the private film industry produced 37 feature films, at a cost of \$78 million Mexican pesos. In the same year, *Instituto Mexicano de Cinematografía (Imcine)*, the government-operated Mexican Film Institute, completed 9 feature films, at a cost of \$23 million Mexican pesos. Total 1994 production of 46 films compares with 101 in 1989. Production fell further to 14 in 1995.

Cámara Nacional de la Industria Cinematográfica y del Videograma (Canacine), National Chamber of the Film and Television Industry, attributes the decline of the industry to several factors. The number of weeks of screening of Mexican movies has been drastically reduced over the past few years, because the minimum Mexican content regulations have been relaxed. Distribution of Mexican films in other Spanish markets, including the US, has also fallen drastically. Some observers attribute this to low budgets and poor quality, resulting from under-capitalization of the industry. Others point to repetitive themes, with sex comedies and violent action stories predominating.

SHORT FILM PRODUCTION

Canacine defines a *cortometraje*, short film, as a movie of less than 60 minutes recorded on film ranging from 8 millimetres to 70 millimetres. There were 84 producers of short films registered with the chamber in 1995, a reduction from 107 a year earlier. Sixty-nine of these companies are also members of the *Asociación Mexicana de Filmadores (Amfi)*, Mexican Association of Film Production Companies, which reports that 51 produce live-action films and 6 use animation. The others are engaged in advertising and promotion. Of the 51 live-action producers, 2 were classified by *Amfi* as large and 8 as medium-sized outfits. Annual production of short films is estimated at about 2,000 units. According to an analysis by *Canacine*, about 95 percent of these productions are advertising commercials of 60 seconds duration or less. These are recorded on 35 millimetre film before being transferred to videotape for broadcast. The annual revenue of this subsector is estimated by *Canacine* at about \$500 million Mexican pesos.

CANADIAN COMPANIES IN MEXICO

EVEREST ENTERTAINMENT

Everest Entertainment is a Vancouver-based film production and distribution house. The three-year-old company is a subsidiary of Greenlight Films of Toronto. The company produced a 35 millimetre feature film called *Managua*, recently shot in Mexico City and Cuernavaca. Mexico was chosen as a shooting location because, except for a few exteriors, it was not practical to do this work in Managua, Nicaragua, where the story is set.

Robert Straight, Everest president and CEO, says that the Mexican line producers (individuals responsible for a particular section of the film shoot) did a good job of selling themselves and their country as the location. The cast was American, while the technical crew and equipment were Mexican. Mr. Straight says that there were several problems involving the availability of equipment, the quality of the Mexican work, as well as some contractual issues.

Some of the equipment rented in Mexico was not up to standard and, in some cases, equipment was not available at all. The problem was compounded by the fact that several foreign film projects were in progress in Mexico at the time. The telephone system also created considerable problems; for instance, sometimes it took six or seven attempts to transmit a fax.

The production required longer shooting days than usual, because the pace of work was "more Latin." But since the crew's normal working days are long, the overtime expense was reduced. Several shooting days were lost due to sickness among the cast caused by the food and the air quality in Mexico City.

The most serious problem was the poor quality of work done by the film processing lab. As a result, footage that was transferred to tape for editing was unusable. The solution was to bring the original film back to Canada for post production. Because Mr. Straight had been on location, he was able to reassure the film's financial backers that the quality of the original product was extremely high. But the situation was complicated when the Mexican film lab refused to release the footage until every Mexican contractor on the project had been paid. This was not a contractual right of the lab, but as a practical matter the producers had to pay for some work that had not actually been done in order to get possession of the film.

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POST-PRODUCTION FACILITIES

There are 11 companies registered with *Canacine* which are classified as laboratories. There are also 9 dubbing facilities and 24 film workshops. In addition, the *Universidad Nacional Autónoma de México (UNAM)*, National Autonomous University of Mexico, operates a film archive and laboratory.

Mexican laboratories are engaged in processing exposed film and printing films from imported negatives. There is much concern in this industry concerning competition from American and Canadian laboratories. The Mexican firms tend to use outdated technologies and are generally inefficient. There are three large film labs: *Estudios Churubusco Azteca*, *Filmolaboratorio* and *Televisión Cine*. Together they employ about 300 people out of about 450 for all 11 companies.

The language-dubbing facilities and workshops are almost all small companies with 15 employees or less. This dubbing business benefits from the fact that Spanish versions of foreign movies made in Mexico are regarded as high quality, and are accepted throughout Latin America. Nonetheless, competition from other countries, including American facilities in the Los Angeles area, has recently reduced the domestic market share. Regulations prohibiting the public exhibition of most movies dubbed into Spanish are also a major constraint on the industry, although movies can be dubbed for television. The application of Spanish subtitles for public exhibition involves less value-added than dubbing, but it is still an important activity.

FILM DISTRIBUTION

Income from films distributed in Mexico is derived from three sources. Audience-based fees are received directly from exhibitors or from subdistributors. Exhibition rights are also sold on a concession basis, by geographical zone, by timeframe or by number of exhibitions over a specified period.

The distribution industry has two main components. A group of companies known as "the majors" mostly distribute films produced by the large American film producers. They account for 65 percent of the market. Four companies are considered majors:

- International United Pictures (IUP) distributes productions of MGM, Paramount and Universal Pictures;
- Twentieth Century Fox distributes its own productions;

CANADIAN COMPANIES IN MEXICO

EVEREST ENTERTAINMENT

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There were no difficulties with work permits for the Canadian and American participants. The job required considerable patience, but the shooting was successfully completed in late 1996. Mr. Straight says that it is essential to have competent Mexicans on the production staff. "Make sure you have someone there working for you who has a good background and credentials," he says, "There is a lot of corruption, so be careful."

The final barrier was encountered in Canada when the company brought the film back for post production. Canadian customs officials demanded payment of a large amount of duty, even though the film was to be returned to the United States within a few weeks. As a result, the post production work almost went to Los Angeles. The officials eventually admitted the film, but the issue has not yet been officially resolved.

- *Columbia-Tri Star y Buena Vista* distributes productions of Touchstone Pictures, Hollywood Pictures and Walt Disney Pictures as well as its own; and
- *Videocine* distributes films by Warner Brothers as well as some by other producers. This company is also a major distributor of Mexican films.

Since the bankruptcy of *Películas Nacionales* in 1991, some of the majors also handle some Mexican films. IUP, for example, handled six Mexican movies between 1992 and 1994.

Independent distributors handle the remainder of the market. Mexican films account for 22 percent of the market and films from other countries 13 percent. According to *Canacine* estimates, the majors receive 86 percent of revenue from theatres and 95 percent of screen time.

Films must be authorized for public exhibition in Mexico by the *Dirección General de Radio, Televisión y Cinematografía*, General Directorate of Radio, Television and Cinematography of the *Secretaría de Gobernación*, the Secretariat of the Interior. The number of films approved fell from 446 in 1992 to 343 in 1994. *Videocine* had the largest market share in 1994, with 49 new releases, followed closely by *Columbia* with 47.

EXHIBITION

Movie theatres are not as popular in Mexico as they are in Canada. This is partly because about 30 percent of Mexican households earn no more than the minimum wage of about \$7,000 Mexican pesos per year, which was less than C \$1,000 in late 1996. The number of movie theatres or screens in Mexico fell from about 1,900 in 1989 to just under 1,500 in 1995. These screens serve a population of some 90 million. This is not sufficient to exhibit all of the films that are approved for showing by the government.

According to *Canacine* data, there are 16 film rooms for each million Mexican inhabitants. This compares with more than 90 in the United States. The density is higher in Jalisco and Nuevo León with 31 and 23 screens per million respectively. This is partly because the multi-screen theatres are more common in those locations. In the Federal District, a number of old theatres have been remodelled into multi-screen facilities. This added 28 screens in 1994, raising the region's density to 20 per million. Mexican theatres seat an average of 833 people per screen, which is very large by Canadian standards.

CANADIAN COMPANIES IN MEXICO

LES PRODUCTIONS DU VERSEAU

Les productions du Verseau of Montreal has been producing feature films, television programs and documentaries for more than 20 years. The company has also been involved in a variety of co-productions with other companies.

In 1993, a *Verseau* producer, Lyse Lafontaine, toured Mexico as part of a delegation from the Québec film industry. During the trip she was approached by an executive of *Macondo Cine Video*, a Mexican film producer, who proposed a Canada-Mexico joint production for a 35-millimetre feature film. After considerable negotiation, a deal was struck, and shooting took place in Tijuana and San Diego between August and November 1993. The finished production, *El Jardín del Edén*, (Garden of Eden) was released in 1994.

Negotiations were long and difficult. One obstacle was the fact that to obtain Canadian government co-production assistance, *Verseau* needed a share of the actual work done on the production, not just an equity share. The Mexicans were interested mainly in a source of capital. The company's bargaining position was strengthened by the generally low quality of Mexican audio facilities. Nonetheless, the negotiations took six months, which Ms. Lafontaine considers inordinately long. "We had to be very patient in negotiating," she says. "The negotiations turned out to be more difficult than the actual shoot itself." *Verseau* ended up with a 20 percent equity position in this C \$3 million production, and assumed responsibility for the location sound as well as the audio and visual post production, which was done in Montreal.

The production work itself faced the familiar problems of distance and language, but Ms. Lafontaine says that they were no worse than experienced in co-productions in other countries. Patience and perseverance were the keys to overcoming all of the important obstacles. She notes that the visiting Canadians were treated with cordiality and professionalism: "We were very warmly received by our Mexican counterparts. They are very open to alliances with companies other than American companies." Another positive factor was a similarity of production styles. Ms. Lafontaine says that both parties recognized the importance of "auteur" films. This is an area where Québécois producers have particular strengths.

continued on next page

MAJOR MEXICAN FILM THEATRE CHAINS

Chain	Screens
Organización Ramírez	321
Compañía Operadora de Teatros	135
Cinematografía Estrellas de Oro	69
Intecine	40
Cadena Real	36
Guillermo Quezada	31
Temo Espectáculos	27
Empresa Fantasio	19
Grupo Empresas Casa	17
Other chains	346
Independents	393
Total	1 434

Source: Cámara Nacional de la Industria Cinematográfica y del Videograma (*Canacine*), National Chamber of the Film and Television Industry, 1995.

The low number of screens relative to the population means that theatres in the large cities are very busy. In Mexico City, the demand for tickets has remained steady in the face of substantial price increases. Ticket prices rose by two-thirds relative to the minimum wage in 1994 alone, but they still average only about two Canadian dollars. The city's 211 theatres handled 28.2 million patrons in 1995, for a total revenue of \$335 million Mexican pesos. *Cinemex* has estimated that Mexico City could support 500 screens and 60 million annual patrons. The modern theatres are particularly busy, and this stimulates new theatre construction. *Cinemex* plans to construct 140 multiplex rooms in Mexico over the next five years. *Cinemark*, which already has 42 screens in 4 complexes in 4 states, is building 12 new rooms at the *Centro Nacional de las Artes*, in the Federal District.

According to *Canacine* data, in 1994, Mexico's 1,435 theatres fell into four categories:

- 616 rooms showing new releases;
- 95 rooms showing cultural films;
- 402 rooms showing second-run films; and
- 321 irregular rooms.

CANADIAN COMPANIES IN MEXICO

LES PRODUCTIONS DU VERSEAU

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In addition to financial assistance from Telefilm Canada, the company received help from the Canadian Embassy in Mexico City. Although the embassy staff were not as familiar with the film industry as they are with the traditional exporting industries, they were very helpful and hosted a reception for the release of the film. Permits both for the temporary import of equipment and for border crossings by personnel were handled by the Mexican producer. No unexpected difficulties were encountered, although the budget did include an unusually large amount for "public relations."

Ms. Lafontaine says that the biggest lesson she learned about working in Mexico is the importance of personal relationships. "Personal contacts are very important in Mexico, more important than here, and those contacts have to be carefully maintained," she says, "and it is important to verify, through your personal contacts, exactly who you are dealing with in any joint venture."

These theatres were operated by 43 chains, of which only about 10 percent were classified as large. At one time, *Compañía Operadora de Teatros* was the largest film exhibitor in Mexico. This was a government enterprise, formed in 1960 to facilitate public access to Mexican films. It operated at a loss for many years before being privatized. The new owners closed many money-losing theatres, and the chain is now Mexico's second-largest.

CONSUMER PREFERENCES

American films dominate the market, accounting for about 57 percent of the 290 films released in Mexico City in 1995. A recent survey identified Sylvester Stallone, Jean Claude Van Dame and Mel Gibson as Mexico's most popular movie actors.

There were only 39 Mexican movies exhibited in 1995, with the average showing of new releases in 10 theatres, compared with 24 theatres showing the average American film. Other important suppliers of films for exhibition were France and Italy. One Canadian film was exhibited in 1996, down from a high of four in 1992.

Action movies and animated films are the most popular foreign movies. The top 5 titles of 1995 were *Pocahontas*, *Muerte Súbita* (Sudden Death), *Apollo 13*, *Mundo Acuático* (Water World) and *Casper*. The leading Mexican film of the year, *Papa Sin Cásup*, showed in 40 theatres, compared with at least 60 for the top 5 foreign films.

THE TELEVISION AND VIDEO INDUSTRY

Canadian producers are taking increasing advantage of co-production opportunities with location shooting in Mexico, and post production at home.

The television and video industry is dominated by large Mexican companies, which produce their own programs and buy the rights to foreign programs.

Television is a much more important medium than theatres for the exhibition of films, both domestic and foreign. According to estimates by the *Cámara Nacional de la Industria de Radio y Televisión (Cirt)*, National Chamber of the Radio and Television Industry, about 92 percent of Mexican households have at least one television set. In 1995, there were about 51,000 movies shown on television, including cable and pay-for-view, with foreign films accounting for 83 percent of the market.

It is estimated that about 60 percent of Mexican households have a VCR. The proportion falls from 100 percent in the highest income bracket to about 50 percent for those earning between 2 and 10 times the minimum wage. Even in the lowest bracket earning the minimum wage or less, VCR ownership stands at 20 percent of households.

According to a survey conducted in Mexico City in 1996 for the *Reforma* newspaper, 70 percent of the population has access to a videotape player and 64 percent report that they rent movies. About 78 percent said that they used their VCRs to watch rented movies, while only 14 percent said they used them for off-air recording.

In Mexico, outlets that rent videocassettes are known as *videoclubs*. There are an estimated 6,500 video club outlets in the country, which is a reduction from almost 9,000 in 1991. This excludes the "informal" sector, which consists mostly of small unregistered companies and individual street vendors, many of whom distribute illegal pirated copies.

Videovisa dominates this market through its *Videocentro* chain of video clubs. It has contracts for exclusive video rights to American films distributed by the major producers. Many independent video rental clubs have been franchised by *Videovisa*, because pirating is otherwise the only way to gain access to the chain's catalogue. *Videovisa* has a second chain of *Videovisión* outlets with the right to buy titles outside of the *Videovisa* catalogue, and thus compete more directly with the independent video clubs. According to industry analysts, *Videovisa* controls about

three-quarters of the formal video rental market. The film distributor *Artecinema* is another major player through its *Videomax* outlets. Other chains include Blockbuster, *Multivideo* and *Cinexprés*.

The major chains distribute both Beta and VHS formats. The northern states tend to have higher proportions of VHS. According to *Videovisa*, outlets in Monterrey handle 75 percent VHS while the proportion is 50 percent in the Federal District. Outlets in the southern states generally handle only Beta.

VIDEO PRODUCTION AND DISTRIBUTION

Although *Cámara Nacional de la Industria Cinematográfica y del Videograma* (*Canacine*), National Chamber of the Film and Television Industry, registers companies separately as producers or distributors, the leading video producers also distribute. Nineteen companies are members of the *Asociación Nacional de Productores y Reproductores de Video* (*Anprovac*), National Video Producers Association. There is a separate video distributors' association called *Asociación Nacional de Comercializadores de Video* (*Ancovi*), National Association of Video Distributors. The leading companies include *Videovisa*, *Offer Video*, *Videomax*, *Mexcinema*, *Video Azteca*, *Comunicación en Video* and *Video Universal*.

According to industry observers, *Videovisa* is the leading distributor with almost 2,500 titles, followed by *Videomax* with about 2,000. These large firms benefit from the fact that they can handle distribution for film theatres and broadcast television as well as videocassette rental. This allows them to offer package deals to feature film producers.

The smaller video production companies are available for co-productions with Canadian producers. A number of Canadian television and video productions have taken advantage of opportunities for location shooting in Mexico. Mexico offers a wide range of locations and is usually chosen for its scenery and weather. This amounts to an import of Mexican scenery into Canada, but at the same time it widens the range of production styles available to Canadian producers. Technical staff who have worked in Mexico say that the equipment and skills of the Mexican companies are adequate for production under Canadian direction, but that post production and film-to-tape transfers are best done in Canada.

CANADIAN COMPANIES IN MEXICO

RIP ROAR MUSIC

Rip Roar Music has operated an independent recording studio in Clayton, Ontario since 1988. In 1995, the company wanted to make music videos for five new artists that it had recorded. But the budget was fairly tight at about C \$15,000 each. It was decided that bundling the five productions together into one shoot would create economies of scale that would make this feasible.

Since it was winter, the company decided to do the location shooting outside of Canada. On the basis of previous experience there, contacts in the production industry in Canada suggested Mexico. A Canadian crew from the Ottawa area travelled to Mexico for shooting in and around Mazatlán over five days in January 1996. The original recording was on 30-millimetre film for transfer to videotape. Lab processing and videotape transfer were done immediately afterwards, in Mexico City. The videotape was returned to Canada for editing at General Assembly, a technical facility located in Ottawa.

The company had generally good experience with this production, although there were a few obstacles. There was a very short pre-production schedule, and permission for the work had to be obtained from the Government of Mexico. Production Manager Carole-Anne Pilon says that Mexican officials in Ottawa were instrumental in the process. "The Mexican Embassy was great, very helpful," she says. "They wrote a letter on our behalf to the Mexican government, and issued our visas and work permits in record time — two days." Equipment was rented in Mexico, which avoided importation problems. There were no jurisdictional problems with Mexican unions.

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CANADIAN COMPANIES IN MEXICO

RIP ROAR MUSIC

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Rip Roar knew it would need a Mexican production company to assist with the project. Through contacts in Canada, the company got in touch with *Producciones Kitch*. This turned out to be a very successful relationship. As Ms. Pilon puts it: "The Mexican crew was great, we couldn't have asked for anything better. They were so on the ball and worked so hard that, even with a bit of a language barrier, there was never a problem." In fact, the only technical problem that the crew reported was with telecommunications. The Mexican phone system was unreliable and very expensive.

The Canadians say that they were extremely well received by the Mexicans they met, both colleagues in the industry and the general public. There was a lot of curiosity expressed about Canada and Canadians. Many of the crew felt a strong affinity with the Mexican people. The Mexican and Canadian technical crews also worked well together. Director of Photography Louis Durocher says, "Mexicans are very similar to Québécois ... they know how to work hard when there's work to be done, but they also know how to have fun. It was a very pleasant experience."

Cathy Boutwell, who handled administration and liaison, agrees that there were few problems with cultural barriers. "It was no different than working with people from any other culture," she said. "We work with a lot of Native artists and the same principles apply. Be polite and patient, and everything will happen as it should."

The most important lesson learned, according to Mr. J.C. Caprara, director of the shoot, is to take advantage of advice and contacts within the industry in Canada: "Local contacts are essential. Talk to Canadians who know Mexico, and take their advice." He also stresses the need for adequate pre-production time and technical readiness. As he summed it up: "Go there ahead of time and get acclimatized. Hire a good local driver. Bring a satellite phone."

TELEVISION BROADCASTERS

Televisa is the largest communications company in Latin America, and is a major television broadcaster and cable television operator. It is the parent company of *Videovisa*, which has exclusive rights to a large number of Mexican and foreign movies. This company also runs a chain of more than 1,500 video rental outlets throughout Mexico. *Televisa* obtained a concession for 62 television channels in 1993, which include the four major national channels. Its market share in Mexico City is estimated at 75 percent. Flagship *Canal 2* features "tele-novelas", soap operas, during prime time. *Televisa* is also a part-owner of *PanAm Sat*, the first privately-owned satellite system in Latin America, and operates a direct-to-home television service in partnership with several foreign companies. *Televisa's* programming includes several Canadian productions, including *Robot*, *Tiempos Inolvidables* (Ready or Not) and *El Caballero de las Tinieblas* (Forever Knight).

Televisión Azteca is Mexico's other major television broadcaster. It is owned by *Elektra*, which is also a major vendor of television sets. *Elektra* purchased *Televisión Azteca* from the government in 1993. The company broadcasts two network channels over 180 television stations, some of which have additional repeaters. *Azteca* operates *Canal 11* and *Canal 22*, both of which feature high-quality cultural and educational programs, with some of them being purchased in Canada.

Mutivisión is a large cable television provider. It carries 22 channels to about 1.5 million subscribers. It has exclusive rights to several American cable television channels. The company was granted concessions for new cable services in Guadalajara and Monterrey in 1994. It also operates a direct-to-home satellite television service.

THE MUSIC INDUSTRY

In spite of a number of obstacles, Canadian composers and performers are gradually breaking into the Mexican music scene.

The Government of Mexico plays a very large role in the nation's music sector. Scholarships and grants for Mexican artists are almost exclusively funded by the government, as are most concerts and exchange opportunities for musicians.

The recording industry is privately operated. Piracy is a serious problem for the industry, with recordings of popular artists readily available. The government is stepping up its efforts to fight piracy, but is hindered by legislation that classifies piracy and trafficking in pirated goods as an administrative rather than criminal offense.

Mexican artists are eager to learn new techniques, and since they can seldom afford to study abroad, they welcome foreign artists. The Mexican government, which is facing severe budget restraints, is also anxious to promote foreign artists in Mexico who can help develop local talent. The Mexican concert system has recently been modernized to include electronic reservations and payments. This is expected to make it easier for touring musicians from other countries to operate in Mexico.

THE NATIONAL COUNCIL FOR CULTURE AND THE ARTS

The *Consejo Nacional para la Cultura y las Artes (Conaculta)*, National Council for Culture and the Arts, is the principal public body responsible for Mexico's music policy and programs. It operates through three implementing agencies:

- *Instituto Nacional de Bellas Artes, Coordinación Nacional de Música y Opera (INBA)*, National Institute of Fine Art, Music and Opera Division;
- *Fondo Nacional para la Cultura y las Artes (Fonca)*, National Fund for Culture and the Arts; and
- *Centro Nacional de las Artes (CNA)*, National Arts Centre.

The *INBA* promotes music and opera throughout the country. It sponsors the *Orquesta Sinfónica Nacional*, National Symphony Orchestra and organizes some 900 concert programs every year. It also arranges festivals, conferences, educational programs and music contests for composers and musicians. The institute manages a "cultural interaction" program in cooperation with the *Secretaría del Relaciones Exteriores (SRE)*, Secretariat of Foreign Affairs. This is a foreign exchange program for musicians, composers, music teachers and congressmen. About one of every 15 exchanges is to Canada.

Fonca organizes concerts, exhibitions, and art classes in community centers. Some funding is obtained from private grants and nominal tuition fees charged for classes. The fund also provides grants for emerging artists to purchase instruments and rent exhibition facilities.

The *CNA* is considered one of the leading schools for the arts in Mexico. Aspiring musicians are usually required to study there, at least briefly, if they wish to obtain government backing and learn of scholarship opportunities.

THE SOCIETY OF AUTHORS AND MUSIC COMPOSERS

The *Sociedad de Autores y Compositores de Música (SACM)*, Society of Authors and Music Composers, has a mandate to protect and promote the interest of Mexican authors and composers of music. Until May 1997, only the *SACM* has the right to register, purchase and distribute composers' and authors' rights in Mexico. There are two types of music rights. Performing rights are for music used by television, cinema, radio, theatres and discotheques. Mechanical rights are for the recording of compact discs, videos and cassettes.

The *SACM* retains 20 percent of each national and international performing right and passes the rest on to the artist. The society also offers legal council to authors and composers.

As of May 1997, private law firms will be allowed to register and monitor the issuance and enforcement of rights for both performers and composers.

CANADIAN COMPANIES IN MEXICO

LE BUREAU D'ARTISTES DE MONTRÉAL

Le Bureau d'artistes de Montréal is an artists' agency specializing in classical music. During the company's year-and-a-half in business, it has planned and led tours in Mexico for two of its clients. These are the viola da gamba duo, *Les Voix Humaines*, and organist, Réjean Poirier.

Company founder Jean-Philippe Trottier says he was attracted to Mexico for a number of reasons. He knew that there is a growing interest in Mexico for classical music, and that Mexico was becoming more active in the international classical music circuit. He also speaks fluent Spanish, so there was no language barrier. In addition, he finds the Mexican people extremely "chaleureux" and enjoys dealing with them.

The problems encountered in booking the company's clients in Mexico were relatively minor, although Mr. Trottier observes that not all of them have a solution. There appears to be a different interpretation of time, as it relates to deadlines.

Scheduling has been difficult because of the uncertainties of the Mexican economy. Throughout the world, classical performers are booked one-to-two years in advance. But the unpredictability of Mexican funding cuts the lead time there to much less. This makes coordination of multi-country tours quite difficult.

Mr. Trottier also advises Canadians to be aware of exploring Mexican cuisine. The food is much more interesting and tasty than most Canadian dishes, but it can cause serious disturbances for the uninitiated, enough to jeopardize a performance.

Some performers have received financial assistance both from the Canada Council, and *le Conseil des arts et des lettres du Québec*. Mr. Trottier says that the Canadian Embassy in Mexico City was instrumental in organizing an additional concert date during one of his tours. He adds that the Mexican consulate in Montreal has also been extremely helpful.

The performers booked into Mexico by the *Bureau* have been well received both professionally and culturally. Mr. Trottier notes a strong affinity between Québécois, who are seen as "Northern Latins," and other Latin Americans. He adds that while Mexicans don't know a lot about Quebec, there is a great deal of curiosity about it.

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ORCHESTRAS

Mexico has three symphonic orchestras. *Orquesta Filarmónica de la Ciudad de México*, the Mexico City Philharmonic Orchestra, is sponsored by the Federal District of Mexico City. It is the most independent of Mexico's orchestras in terms of salaries, itinerary and the hiring of foreign musicians. It is also the most extensively endowed by the private sector.

The *Orquesta Sinfónica Nacional*, National Symphonic Orchestra of Mexico, is sponsored by *INBA*. This orchestra is strongly reliant on emerging local talent, and is almost entirely dependent on funds from the government.

The *Orquesta Filarmónica de la Universidad Autónoma de México*, Philharmonic Orchestra of the National Autonomous University of Mexico, is considered to have the broadest repertoire of any of Mexico's orchestras.

During an interview, an official of the *Orquesta Filarmónica de la Ciudad de México* said that salaries are paid by the Federal District of Mexico City, while other expenses are sponsored by private companies. Major private sponsors include *Transportación Marítima Mexicana*, *Transportación Aérea Mexicana (Tamsa)*, and the Spanish Embassy. He added that Canadians, Russians and Americans are the best in the classical music field and are highly sought-after to work with the Mexican philharmonic orchestras. Two Canadian musicians have been working with the orchestra for the past four years.

RECORDING COMPANIES

Recording in Mexico is dominated by the large multinational firms. The Mexican media giant *Televisa*, and three other Mexican companies are interested almost exclusively in "superhit" material, according to industry observers. Small independent labels are rare, because they find it difficult to compete with the majors on one hand and pirates on the other.

Sony is the industry leader in terms of sales, while Polygram is considered more technologically advanced.

Sony's sales in Mexico are divided as follows:

- 1.6 percent international music;
- 23.5 percent Mexican music;
- 65.5 percent popular music;
- 1 percent rock music; and
- 0.5 percent classical music.

CANADIAN COMPANIES IN

MEXICO

LE BUREAU D'ARTISTES DE MONTRÉAL

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Mr. Trotter says that building on this cultural affinity by learning about Mexico is the key to doing business there. "Don't think of Mexico as an underdeveloped country," he says. "While there is poverty there, it cannot be judged by our northern standards. In our culture, material wealth is all-important. The Mexicans possess other things, things which we have lost, for example, their sense of family and community. Above all, learn to like, and to love, the Mexican people, and be loved by them."

Sony imports most of its classical albums from the US and Europe. A Sony executive said that classical music in Mexico is competitive, considering that this type of music is not part of the traditional culture. The company has recording contracts with the *Orquesta Sinfónica Nacional*, National Symphony Orchestra of Mexico and the *Orquesta Filarmónica de la Universidad Autónoma de México*, Philharmonic Orchestra of the University of Mexico.

Usually only music groups who can afford to pay are able to record with independent record labels. Of four Canadian groups performing in Mexico in November 1996, only one recorded the performance. This type of recording is usually done for commemorative rather than commercial purposes.

PIRACY

Mexico has a large black market for illegal copies of compact discs, videos and especially audio cassettes. Unofficial estimates place the black market at 20 to 30 percent of the formal market. Most pirated recordings are of internationally-known groups and artists. Classical and unknown artists are not usually pirated by retailers, but emerging artists are reportedly victimized by some larger recording companies.

TELEVISA

Televisa is the biggest television network in Latin America. It produces two music channels and manages a school for music and acting. *Televisa* claims that 99 percent of its students are ultimately employed by the company's television and other media operations. All students are Mexican and few foreigners are involved in *Televisa* productions.

THE NATIONAL AUDITORIUM

The 10,000-seat *Auditorio Nacional*, National Auditorium, is the largest private theatre in Mexico, being the venue for the most important performances in the country. About 60 percent of its shows involve popular music, 20 percent dance and theatre, and about 8 percent classical music.

Once or twice a year the auditorium features Canadian artists such as Brian Adams or Alanis Morissette. They come to Mexico not as Canadians but as international stars. The *Auditorio Nacional* is under a special administration until the year 2001. The company is facing financial problems, and *INBA* will finance its maintenance and reparation work in exchange for free use of its facilities.

TECHNOLOGY

Executives of the large record labels say that most of the recording equipment they use is manufactured in Mexico. On the other hand, *Televisa* said that it imports all of its technology from Japan, the US and Europe. An official of the *Orquesta Filarmónica de la Ciudad de México*, Mexico City Philharmonic said that the orchestra buys most of its instruments from the United States.

PROMOTING CANADIAN CLASSICAL MUSIC COMPOSERS THE CANADIAN MUSIC CENTRE

The Canadian Music Centre (CMC) is a non-profit agency that promotes and distributes the work of Canadian classical composers. The Centre has regional offices in Sackville, Montreal, Toronto, Calgary and Vancouver. It receives funding from the Canada Council, provincial arts councils, municipalities and private foundations. It also receives membership fees from associated composers and earns revenue from the sale of scores, concert tickets and records that are published under its own label.

David Parsons is CMC's Ontario regional director. He feels that Mexico offers considerable potential for Canadian composers and has been active in promoting their work to potential Mexican buyers. But he is quick to add that the CMC's interest is in cultural exchange, not commercial trade. "Mexico is interesting because of the rich cultural and musical heritage that exists there," he says, "but so much of this activity is forced because of trade links." The CMC is very interested in a cultural exchange with Mexico. He adds, "I just hope that trade interests alone don't drive it."

In Mr. Parson's view, Canada and Mexico have much in common in their efforts to maintain a distinct national identity. "I think that artists in Mexico and Canada work in a similar way to define an identity that is in contrast to the United States," he says. "The advantage that the Mexicans have, that we don't, is that they have a more cohesive cultural root and a stylistic basis to develop, and that's very exciting to watch."

In the autumn of 1995, the *Quartetto Latin-Americano*, a contemporary classical music string quartet from Mexico City, came to Toronto on a tour organized by Ann Summers International. The performance included a piece written for this group by José Evangelista, a Canadian composer. Mr. Parsons saw this as an opportunity to promote other Canadian composers, and he quickly organized an impromptu reception for the *Quartetto*. Twelve local composers who write music appropriate for string quartets were invited to attend, and the CMC paid to have copies made of one of the scores of each composer's choice. "It wasn't anything specific about Mexico that prompted this event," Mr. Parsons noted, "It's just that this was an international group which performs 20th century work who would be potentially interested in the work of some of our members."

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BREAKING INTO THE MEXICAN MUSIC INDUSTRY

The level of interest in Mexico within the Canadian music community far exceeds actual participation in Mexican projects. To assess the barriers that might be holding them back, an independent researcher circulated a questionnaire to more than 60 individuals and organizations across Canada. This informal survey, which was conducted in late 1996, covered independent record labels, distributors, agents, musicians, composers, music publications and many professional associations. The latter included local offices of the American Federation of Musicians, the Society of Composers, Authors and Publishers of Canada and the Canadian Music Centre.

In addition, many organizations agreed to make copies available to members on bulletin boards and at meetings. The questionnaire was also posted on music newsgroups on the Internet and several copies were distributed by hand at music venues.

Only 12 responses were received. But the consistency of the results suggests that the responses may be representative. Three respondents identified themselves as composers, authors or publishers; four as independent record labels or distributors; two as agents or managers; two as musicians; and one as a promotion and distribution agency. None of the respondents reported doing business in Mexico, but all of them expressed interest and said that there were opportunities in Mexico.

They identified several real or perceived obstacles:

- unfamiliarity with the Mexican music business (10);
- audio/video piracy (8);
- stability of Mexican currency (7);
- lack of assistance programs for market entry (6);

PROMOTING CANADIAN CLASSICAL MUSIC COMPOSERS THE CANADIAN MUSIC CENTRE

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Saul Bitran, a member of the *Quartetto*, described this event from the Mexican point of view. He recalls that "The composers there brought scores for quartets which we took home and there were several which we liked." The composers involved include John Beckwith, David Deane, Walter Buczinski, John Rea, Murray Adaskin, and Alexina Louie.

Mr. Bitran says that the group is trying to put together a program consisting exclusively of Canadian music for string quartets. "The idea is to present that program in Canada but the hope is to put the best of those pieces in our permanent repertoire and tour in Latin America and the United States." He adds that Mexican musicians feel a special affinity with Canadians. "We love to go to Canada. We feel a great connection with audiences there — much more so than in the United States. In the music from Canada there is an urgency and an expressiveness which is very similar to the work of composers in Mexico."

Like some others interviewed for this profile, Mr. Bitran sees cultural exchange as a more important driving force than commercial trade. "We all hope that [the North American Free Trade Agreement (NAFTA)] will translate into more cultural exchanges," he says. "In a way, it is easier to increase trade in culture. There are no deficits or balances — we just need to know more about each other."

- economic feasibility of distribution (6);
- language barriers (5);
- economic feasibility of touring (4);
- receptiveness of Mexican audiences to Canadian products (4); and
- lack of faith in the Mexican music business infrastructure (3).

Four respondents also expressed concern about the reliability of performing rights reporting coming from Mexican radio, television and film. This contradicts the opinion of the Canadian Performing Rights Association (SOCAN), who claim that their reciprocal agreement with Mexico is operating in a reasonably thorough and timely way. Industry observers in Mexico say that no radio royalties have been collected for the past several years, but that other users of recorded music pay royalties reasonably efficiently.

Several Canadians with experience in the Mexican music industry were interviewed for this profile and they were asked about their experience with barriers to entry. Their chief concerns were the stability of Mexican currency and a fear of piracy. The former is less of a concern to classical music artists and major pop artists who contract in Canadian or US dollars. But it is more of a concern for independent artists seeking to set up their own tours without the benefit of major international representation. Piracy is a primary concern for popular music artists.

INTERNATIONAL CLASSICAL MUSIC SCENE

Many Canadian classical performers enjoy international reputations and are routinely booked as individuals by orchestras around the world. The pianist Anton Kuerti is one of several Canadians who have been invited to play in Mexico. This is seen as part of the world market for classical musicians and is not regarded as a Mexico-specific issue. Host orchestras in Mexico, just like those in other countries, hire artists of international calibre through their agents for negotiated fees. Then they arrange for travel and working visas on a standard contract basis. The host orchestras are not especially interested in talent from any particular country — they are just filling guest engagement positions with the orchestra.

In Mexico, symphonies, ballet and opera orchestras have been publicly supported. Ann Summers, who books Canadian artists in Mexico, traditionally says that the wealthier orchestras simply pay the prevailing fees of foreign performers. Groups with less funding are generally able to pay prevailing international rates — or at least make competitive offers. Some of this activity has dropped off since the devaluation of the peso in December 1994.

POPULAR MUSIC IN MEXICO

REGGAE COWBOYS AND THE HEADSTONES

In May 1996, the Canadian Embassy sponsored a Canada Friendship Festival in Mexico City showcasing two Toronto bands, the Reggae Cowboys and the Headstones. The arrangements were made by International Music Distributors (IMD), an independent Canadian music distributor.

Five live shows were presented for public audiences of about 800 people each. There were additional performances at the Hard Rock Café and *Casa Rasta*, which are Mexico City nightclubs. Dianne Brooks, of the Reggae Cowboys, recalls that, although their concerts were well received by fans, it was difficult to "plant anything to come back to." Brooks' impressions were that it was difficult to bring product into Mexico for sale, and that music retailing seemed to be closed to independents. "People there were really receptive to our music," she said. "The press was very gung-ho, we had coverage on television and in print and the people were really into it. But it was difficult to get product down there afterwards to support the fact that you were there." Ms. Brooks also expressed concern about recording piracy in Mexico. The distribution situation is likely to improve since the Reggae Cowboys recently signed with Mercury/PolyGram, a major multinational distributor and Mexico's second-largest record label.

The Headstones were invited back to Mexico with help from the Department of Foreign Affairs and International Trade (DFAIT) officials in Mexico in collaboration with their manager, Joe Bamford of Resort Music and Universal Music (formerly MCA Records) in Mexico. The group travelled to Guadalajara in December 1996, where they performed at the Guadalajara Book Fair, followed by a two-week tour of other venues. Mr. Bamford says that the most recent tour was an outcome of his encounter with a DFAIT official from Mexico at the 1996 Canadian Music Week, which focused on Mexico.

Ms. Summers says that the North American Free Trade Agreement (NAFTA) has not, as hoped, simplified the visa requirements for Mexican, American and Canadian managers and producers. "We are hoping to be able to enjoy the same situation as in the European Community," she says, "there are no work permits or frontiers. This means that people are able to move freely. They still pay taxes but there are no work permits, just reciprocal work agreements." She adds that within NAFTA this is far from a level playing field. In Mexico and the US, advance applications must be made by the local presenter. Foreign artists coming into Canada have a much easier time. "They can arrive at our border with their contract in-hand, pay a C \$150 fee and enter," she says. "It takes about 40 minutes at most and this puts Canadians at a disadvantage."

Since the classical music community is international in scope, many Canadian classical musicians are represented by agents in other countries. Ms. Summers, for example, also represents Mexican artists who perform internationally. Óscar López, a Chilean-born guitarist from Calgary, is another example. He is represented by an American agent, Susan Martínez. She says that Mr. López' potential in Mexico is "huge" but says that she has had problems breaking into this market. Since Mr. López is an instrumental performer who is fluent in Spanish, he does not face direct cultural barriers. But Ms. Martínez says that language and culture do present obstacles when negotiating bookings and arranging tours. "There are language and stylistic hurdles," she says, "but we are convinced it is an important market in the long run, although it's not a primary market."

Ms. Martínez has been more successful in distributing recorded music in Mexico than booking personal appearances. Óscar López recordings are available in Mexico through an arrangement between a large independent American label and a Mexican music distributor. Ms. Martínez says she will continue to work on booking personal performances in Mexico and sums up the prospects there as "difficult but promising."

TRENDS AND OPPORTUNITIES

The economic crisis has sharply reduced government subsidies and the production of feature films. But movie theatres in the big cities are booming on the strength of foreign films.

The cultural industries were badly hurt by the economic crisis that followed the abrupt devaluation of the peso in December 1994. By mid-January 1995, the peso had lost half of its value relative to the US dollar. Consumer spending on cultural products fell sharply in the face of a 7 percent drop in gross domestic product (GDP) and a surge in unemployment. Government subsidies for cultural activities were sharply curtailed.

Mexico will continue to be an excellent location for Canadian television and video producers, who require settings which are unavailable in Canada, especially during the winter. Mexican television broadcasters are expected to continue purchasing Canadian television programs. But sales are not expected to expand over the medium term, because of the peso devaluation combined with the fact that the market is relatively saturated. There are also limits on the number of programs that can be dubbed into Spanish.

The film industry was harder hit by the peso devaluation in December 1994. Production of feature films fell from 46 in 1994 to 14 in 1995, although this was partly offset by increased location shooting in Mexico by foreign producers. According to industry experts, the most important film made in 1995 was *Pinturas Rupestres de Baja California*, directed by Carlos Bolado and produced by the government film agency, *Instituto Mexicano de Cinematografía (Imcine)*. The budget was \$4.2 million Mexican pesos, roughly C \$700,000. Other notable releases included *Édipo, el Alcalde*, a Mexico-Colombia-Spain co-production filmed in Colombia at a cost of \$3.5 million Mexican pesos; and *Cilantro y Perejil*, produced by *Televisine* and *Constelación Filmas*, with a budget of \$5.5 million Mexican pesos.

Televisine completed three other films during 1995, including *Perdóname Todo*, *Dólares por una Ganga*, and *Papa Sin Catsup* at a combined cost of about \$10 million Mexican pesos. Other private producers completing feature films in 1995 included, *Frontera Films*, *Producciones Unic*, *Dinamo Producciones* and *Producciones México*.

In spite of the crisis, a number of Mexican theatre chains continued their expansion plans during 1995. For example, Dallas-based *Cinemark de México* reportedly invested US \$10 million to renovate the *Pedro Armendariz* cinema in

Mexico City. It was converted to a 12-screen complex with a total of almost 2,500 seats. *Cinemark* had several other projects underway during 1996, including a new 10-screen complex in Pedregal, which will cost US \$20 million.

Cinemex de México, an American-Canadian-Mexican venture, also completed major new facilities in the Mexico City region. They include *Cinemex Santa Fe*, with 14 theatres and 3,399 seats; *Cinemex Altavista*, with 6 screens and 1,225 seats; and *Cinemex Manacar* with 9 screens and 1,435 seats. During 1996, *Cinemex* had three new projects including 26 screens under development in the Federal District and the State of Mexico.

United Artists is the other major foreign company currently expanding its Mexican film theatres, with recent investments of US \$30 million. These projects include 12 new theatres in the Federal District, 10 in Aguascalientes and 12 in Guadalajara.

THE REGULATORY ENVIRONMENT

The Mexican government both supports and regulates the cultural industries, especially the mass media.

The Government of Mexico has a number of programs designed to promote the cultural industries. The most important of these is the *Fondo Nacional para la Cultura y las Artes (Fonca)*, National Fund for Culture and the Arts. This agency has separate programs designed to promote Mexican culture in a wide range of media. Among other responsibilities, *Fonca* administers the *Programa de Fomento a Proyectos y Conversiones Culturales*, a cultural activities promotional program.

Because they reach such a wide audience, the film and broadcast industries attract special attention from the government. They are regarded as national cultural assets and are both supported and regulated. Two secretariats are involved in different aspects of these industries:

- The *Secretaría de Gobernación (SG)*, Secretariat of the Interior, is responsible for setting official standards, or *normas oficiales*, concerning the exhibition of films and television programs. Film and television regulations are administered separately by the *Dirección General de Radio, Televisión y Cinematografía*.

■ The *Secretaría de Educación Pública (SEP)*, Secretariat of Public Education is responsible for the cultural aspects of film and television. It operates through the *Consejo Nacional para la Cultura y las Artes (Conaculta)*, National Council on the Arts and the *Instituto Mexicano de Cinematografía (Imcine)*, Mexican Film Institute. They conduct programs to encourage domestic production of films that promote Mexican culture, and to coordinate government activity in the sector.

Copyright protection is governed by the *Dirección General del Derecho del Autor*.

Under the *Ley de las Cámaras de Comercio y de las de Industria*, law governing the chambers of commerce and industry associations, companies in the film and television industry are required to belong to the *Cámara Nacional de la Industria Cinematográfica y del Videograma (Canacine)*, National Chamber of the Film and Television Industry. Producers, distributors and exhibitors of both films and video recordings, as well as laboratories and other technical providers are all specifically required to join. In 1995, *Canacine* reported that it had 2,175 members. Two-thirds of the members are engaged in film production and about 18 percent in television production. Many companies in the industry also belong to more specialized voluntary industry associations.

The *Ley Federal de Cinematografía*, Law of the Film Industry, was enacted in December 1992 to replace an earlier law that was last amended in 1952. It is designed to promote the development of the Mexican film industry. The regulatory aspects of the new law are administered by *Imcine*. Among other things, it includes sanctions against illegal copying of films and video recordings.

Some aspects of this law have been controversial. It will phase out the requirements for minimum screen time for Mexican productions. The former law had required exhibitors to devote a minimum of 50 percent of screen time to Mexican films. This requirement was reduced beginning in 1993, and is set at 10 percent until the end of 1997, at which time it will be eliminated. This measure is expected to reduce the resources available to the domestic film industry.

Another controversial aspect of the law is that it empowers the *Dirección General de Radio, Televisión y Cinematografía* to vary the limits on the number of foreign films that can be dubbed into Spanish. The agency has already authorized *Televisa* and *Televisión Azteca*, the two largest exhibitors of televised movies, to dub more than 100 movies for exhibition on television. Additional authorizations are anticipated. This move is supported by the dubbing companies but opposed by the artistic community.

MARKET ENTRY STRATEGIES

Canadian music composers and performers who are not known in Mexico can gain exposure through music contests and festivals, as well as help from the Canadian government offices in Mexico.

Canadian music composers and performers who are internationally known generally work in Mexico as part of an established international market. Emerging and alternative artists must generally make themselves known before their work can be sold in Mexico. Classical performers often participate in contests as a means of gaining exposure. *Consejo Nacional para la Cultura y las Artes (Conaculta)*, National Council on Culture and the Arts, operating through the *Instituto Nacional de Bellas Artes (INBA)*, *Coordinación Nacional de Música y Opera*, National Institute of Fine Art, Music and Opera Division, organizes many contests to which foreigners are admitted. Directors of national institutions are usually very open to meeting musicians or composers and advising them on potential opportunities.

For popular music, radio exposure is considered essential for success, even though the radio stations have not paid royalties for several years. *Televisa* and a music promotion company called *Ocesa* spend heavily on touring artists. But industry participants say they are looking mainly for names that are already well-known internationally.

Alternative and emerging groups can gain exposure mainly through cultural festivals, which are popular events in Mexico. The most important festivals are the *Cervantino* in Guanajuato in October and the *Feria Internacional del Libro*, International Book Fair in Guadalajara in November. The latter was dedicated to Canada in 1996.

Canadian film and television producers typically go to Mexico for location shooting, with post production done at home. Thus, they are buyers rather than sellers and their usual concerns are with finding qualified suppliers rather than market entry. The Mexican industry associations are a good source of contacts, but contacts in Canada are often the best way to evaluate potential suppliers. The main exception is when the Canadian company takes an equity position in a co-production with a Mexican partner. Telefilm Canada supports this type of production. A small number of Canadian films are distributed for exhibition in Mexico, generally through the large multinational distributors.

CANADIAN CULTURAL PROMOTION PROGRAM

The Canadian Embassy in Mexico has an active program for promoting Canadian culture, including music. One of its activities is promoting popular music groups. Canadian groups interested in Mexico can send a disc or video along with contact details for a manager or recording company. The embassy will evaluate the product and advise whether there is a place for it in the Mexican market. The evaluation is based on how creatively the work conveys a Canadian image. If the group is accepted, the embassy will prepare an itinerary for live appearances and meetings with the media, and will help with promotion and sponsorships. The embassy assists eight-to-ten popular music groups per year.

The embassy also assists classical musicians. For example, winners of the Canadian Music Competition — usually ten-to-thirteen year-olds — are matched with Mexican musicians to play in concert.

The embassy publishes *Canadá Artes* four times a year. As of November 1996, it is available on the Internet at <http://www.canada.org.mx/>. Half of the articles are written by Mexican artists who have studied in Canada, worked with Canadian artists or performed their works. The other half is written by Canadians. The publication disseminates information about cultural activities in Mexico and about Canada-Mexico exchanges.

WHERE TO GET HELP

CANADIAN GOVERNMENT DEPARTMENTS AND SERVICES IN CANADA

DEPARTMENT OF FOREIGN AFFAIRS AND INTERNATIONAL TRADE (DFAIT)

DFAIT is the Canadian federal government department most directly responsible for trade development. The InfoCentre should be the first contact point for advice on how to start exporting. It provides information on export-related programs and services, acts as an entry point to DFAIT's trade information network, and can provide copies of specialized export publications and market information to interested companies.

InfoCentre

Tel.: 1-800-267-8376 or (613) 944-4000

Fax: (613) 996-9709

FaxLink:* (613) 944-4500

InfoCentre Bulletin Board (IBB):

Tel.: 1-800-628-1581 or (613) 944-1581

Internet: <http://www.dfait-maacci.gc.ca>

*FaxLink is a faxback system which provides summaries on a range of Mexican markets. It must be contacted through your fax machine. Dial from your fax phone and follow the voice prompt instructions.

The Mexico Division, Latin America and Caribbean Bureau promotes trade with Mexico. There are several trade commissioners at the Embassy of Canada in Mexico City, as well as in the satellite offices in Monterrey and Guadalajara. Trade commissioners can provide a range of services including introducing Canadian companies to potential customers in Mexico, advising on marketing channels, assisting those wishing to participate in trade fairs, helping to identify suitable Mexican firms to act as agents, and compiling strategic business intelligence on potential foreign customers.

Latin America and Caribbean Bureau — Mexico Division (LMR)

Department of Foreign Affairs and International Trade

Lester B. Pearson Building

125 Sussex Drive

Ottawa, ON K1A 0G2

Tel.: (613) 996-5547

Fax: (613) 996-6142

INTERNATIONAL TRADE CENTRES (ITCs)

International Trade Centres have been established across the country as a convenient point of contact to support the exporting efforts of Canadian firms. The centres operate under the guidance of DFAIT and all have resident trade commissioners. They help companies determine whether or not they are ready to export, assist firms with market research and planning, provide access to government programs designed to promote exports, and arrange for assistance from the trade commissioners in Ottawa and trade officers abroad. Contact the International Trade Centre nearest you:

Newfoundland

International Trade Centre

P.O. Box 8950

Atlantic Place

215 Water Street

Suite 504

St. John's, NF A1B 3R9

Tel.: (709) 772-5511

Fax: (709) 772-2373

Prince Edward Island

International Trade Centre

P.O. Box 1115

Confederation Court Mall

134 Kent Street

Suite 400

Charlottetown, PE C1A 7M8

Tel.: (902) 566-7443

Fax: (902) 566-7450

Nova Scotia

International Trade Centre

P.O. Box 940, Station M

1801 Hollis Street

Fifth Floor

Halifax, NS B3J 2V9

Tel.: (902) 426-7540

Fax: (902) 426-2624

New Brunswick

International Trade Centre

P.O. Box 1210

1045 Main Street

Unit 103

Moncton, NB E1C 1H1

Tel.: (506) 851-6452

Fax: (506) 851-6429

Quebec International Trade Centre
5 Place Ville-Marie
Suite 800
Montreal, PQ H3B 2G2
Tel.: (514) 283-6328
Fax: (514) 283-8794

Ontario International Trade Centre
Dominion Public Building
1 Front St. West
Fourth Floor
Toronto, ON M5J 1A4
Tel.: (416) 973-5053
Fax: (416) 973-8161

Manitoba International Trade Centre
P.O. Box 981
400 St. Mary Avenue
Fourth Floor
Winnipeg, MB R3C 4K5
Tel.: (204) 983-5851
Fax: (204) 983-3182

Saskatchewan International Trade Centre
The S.J. Cohen Building
119-4th Avenue South
Suite 401
Saskatoon, SK S7K 5X2
Tel.: (306) 975-5315
Fax: (306) 975-5334

International Trade Centre
1919 Saskatchewan Drive
Sixth Floor
Regina, SK S4P 3V7
Tel.: (306) 780-6124
Fax: (306) 780-6679

Alberta
**Edmonton office is
also responsible for
Northwest Territories*

International Trade Centre
Canada Place
9700 Jasper Avenue
Room 540
Edmonton, AB T5J 4C3
Tel.: (403) 495-2944
Fax: (403) 495-4507

International Trade Centre
510-5th Street S.W.
Suite 1100
Calgary, AB T2P 3S2
Tel.: (403) 292-6660
Fax: (403) 292-4578

British Columbia International Trade Centre
P.O. Box 11610
300 West Georgia Street
Suite 2000
Vancouver, BC V6B 6E1
Tel.: (604) 666-0434
Fax: (604) 666-0954

**Vancouver office is also
responsible for the Yukon*

WORLD INFORMATION NETWORK FOR EXPORTS (WIN EXPORTS)

WIN Exports is a computer-based information system designed by DFAIT to help Canada's trade development officers abroad match foreign needs to Canadian capabilities. It provides users with information on the capabilities, experience and interests of more than 24,000 Canadian exporters. For general information, call (613) 944-4WIN(4946); to register on WIN Exports, call (613) 996-2057, or fax 1-800-667-3802 or (613) 944-1078.

PROGRAM FOR EXPORT MARKET DEVELOPMENT (PEMD)

PEMD is DFAIT's primary export promotion program. It supports a variety of activities to help Canadian companies expand into export markets.

PEMD shares up to 50 percent of eligible expenses. Program financial assistance is a repayable contribution, not a grant, and must be approved in advance. Funded activities include:

- Market Development Strategies, which consist of a package of support for visits, trade fairs, and market support initiatives, under one umbrella of the company's marketing plan.
- New to Exporting Companies, which provides a vehicle for these companies to seek out individual export opportunities, either through a market identification visit or participation in an international trade fair.
- Capital Projects Bidding for specific projects outside Canada involving international competition/formal bidding procedures.
- Trade Association Activities undertaken by non-sales national trade or industry associations on behalf of their member companies.

For general information, call the InfoCentre at 1-800-267-8376. For applications for assistance through this program, call the International Trade Centre nearest you. In Quebec, PEMD is administered by the 13 regional offices of the Federal Office of Regional Development (FORD Q), listed separately below.

INTERNATIONAL FINANCING

DFAIT helps Canadian exporters interested in pursuing multilateral business opportunities financed by international financing institutions (IFIs). Canadian exporters and trade associations can access market data, obtain a better understanding of the competition, and determine if an IFI-funded market opportunity is practical and worth pursuing. DFAIT can provide information and advice on the availability of Canadian government-funded assistance programs and can assist companies in developing effective export marketing. For further information, contact:

International Financing Division
Department of Foreign Affairs and International Trade
Lester B. Pearson Building
125 Sussex Drive
Ottawa, ON K1A 0G2
Tel.: (613) 944-0910
Fax: (613) 943-1100

TECHNOLOGY INFLOW PROGRAM (TIP)

Managed by DFAIT and delivered domestically by the Industrial Research Assistance Program, National Research Council, TIP is designed to help Canadian companies locate, acquire and adopt foreign technologies by promoting international collaboration. Industry Canada (IC) also helps in program promotion. TIP officers respond to requests to identify technology sources and opportunities for cooperation between Canadian and foreign firms. The Program also helps Canadian firms make exploratory visits abroad to identify and gain first-hand knowledge of relevant foreign technologies, as well as how to negotiate to acquire them. For information, call (613) 993-5326.

DEPARTMENT OF CANADIAN HERITAGE

Broadcasting Policy Branch
Department of Canadian Heritage
15 Eddy Street
Third Floor
Hull, PQ K1A 0M5
Tel.: (819) 997-7354
Fax: (819) 997-6352

CANADA COUNCIL

Canada Council
350 Albert Street
Twelfth Floor
Ottawa, ON K1P 5V8
Tel.: 1-800-263-5588 or (613) 237-3400
Fax: (613) 566-4390

INDUSTRY CANADA (IC)

IC was created with a broad mandate to make Canada more competitive by fostering the growth of Canadian businesses, by promoting a fair and efficient marketplace for business and consumers, and by encouraging commercial ventures in scientific research and technology. In the area of small business, it has been given specific responsibility to:

- develop, implement and promote national policies to foster the international competitiveness of industry; the enhancement of industrial, scientific and technological development; and the improvement in both the productivity and efficiency of industry;
- promote the mobility of goods, services, and factors of production within Canada;
- develop and implement national policies to foster entrepreneurship and the start-up, growth and expansion of small businesses;
- develop and implement national policies and programs respecting industrial benefits from procurement of goods and services by the Government of Canada; and
- promote and provide support services for the marketing of Canadian goods, services and technology.

The regional offices of IC work directly with Canadian companies to promote industrial, scientific and technological development. They help clients recognize opportunities in a competitive international marketplace by providing services in the areas of business intelligence and information as well as trade and market development. IC also promotes and manages a portfolio of programs and services.

The following are areas in which IC regional offices have special competence:

- access to trade and technology intelligence and expertise;
- entry points to national and international networks;
- industry-sector knowledge base;

- co-location with International Trade Centres connected to DFAIT and Canadian posts abroad;
- client focus on emerging and threshold firms; and
- business intelligence.

Business Service Centre

Industry Canada
235 Queen Street
First Floor, East Tower
Ottawa, ON K1A 0H5
Tel.: (613) 941-0222
Fax: (613) 957-7942

NAFTA Information Desk

Industry Canada
235 Queen Street
Fifth Floor, East Tower
Ottawa, ON K1A 0H5
Fax: (613) 952-0540

STRATEGIS

Canada's largest business web site, Strategis, gives business direct access to the latest information on specific industries, export opportunities, company capabilities, international intelligence and business contacts via the Internet. It also includes information on new technologies and processes, management experts, market services, government programs, micro-economic research and much more. In addition to these information resources, Strategis provides businesses with easy access to Industry Canada experts. Canadian companies will be able to browse the site to find out about market opportunities in Canada and abroad, new state-of-the-art technologies, key alliances, training resources and government programs. The International Business Information Network, one section of the site, contains first-hand information on products in demand, market conditions, competitors and business opportunities abroad.

Strategis

Industry Canada
235 Queen Street
Ottawa, ON K1A 0H5
Tel.: (613) 954-5031
Fax: (613) 954-1894
Internet : <http://www.hotline.service@strategis.ic.gc.ca/>

REVENUE CANADA

Revenue Canada, Trade Administration Branch provides service and information on NAFTA regulations in English, French and Spanish. Revenue Canada publications and customs notices are also available by calling or faxing the NAFTA Information Desk.

NAFTA Information Desk

Revenue Canada, Trade Administration Branch
555 Mackenzie Avenue
First Floor
Ottawa, ON K1A 0L5
Tel.: 1-800-661-6121, or (613) 941-0965
Fax: (613) 952-0022

CANADIAN INTERNATIONAL DEVELOPMENT AGENCY (CIDA)

An important possible source of financing for Canadian ventures in Mexico is the special fund available through CIDA under the Industrial Cooperation Program (INC). This program provides financial contributions to stimulate Canadian private-sector involvement in developing countries by supporting long-term business relationships such as joint ventures and licensing arrangements. INC supports the development of linkages with the private sector in Mexico by encouraging Canadian enterprises to share their skills and experiences with partners in Mexico and other countries. A series of INC mechanisms help enterprises to establish mutually beneficial collaborative arrangements for the transfer of technology and the creation of employment in Mexico.

There are five INC mechanisms that help eligible Canadian firms to conduct studies and that provide professional guidance and advice to potential clients. Where a project involves environmental improvement, technology transfer, developmental assistance to women, job training or job creation, early contact with CIDA's Industrial Cooperation Division is suggested. An important CIDA criterion is that the project creates jobs in Mexico without threatening jobs in Canada. In fact, most CIDA-assisted projects have produced net increases in Canadian jobs. For more information, contact:

Industrial Cooperation Division

Canadian International Development Agency
200 Promenade du Portage
Hull, PQ K1A 0G4
Tel.: (819) 997-7905
Fax: (819) 953-5024

ATLANTIC CANADA OPPORTUNITIES AGENCY (ACOA)

Atlantic Canadian companies seeking to develop exports to Mexico may be eligible for assistance from the ACOA. The Agency works in partnership with entrepreneurs from the Atlantic region to promote self-sustaining economic activity in Atlantic Canada.

ACOA provides support to businesses as they look to expand existing markets through the development of marketing plans. Efforts include monitoring trade opportunities arising from global economic change, communications efforts to promote the region, trade missions and associated activities, as well as better coordination with federal and provincial bodies that influence trade and investment opportunities. For more information, contact:

Atlantic Canada Opportunities Agency
Blue Cross Centre
644 Main Street
P.O. Box 6051
Moncton, NB E1C 9J8
Tel.: 1-800-561-7862
Fax: (506) 851-7403

THE FEDERAL OFFICE OF REGIONAL DEVELOPMENT (QUEBEC), (FORD Q)

FORD Q is a federal regional economic development organization. Through its commitment to provide services tailored to its clients, FORD Q supports the development of the economic potential of all regions of Quebec and the creation of viable jobs by promoting a business climate in which small- and medium-sized enterprises (SMEs) can grow and prosper. FORD Q uses the relevant and sought-after expertise of the federal government to work with the entrepreneurial spirit of Quebecers in every region and improve their competitive position. It also seeks, through strategic activities and partnerships in the community, to improve the business climate, an essential factor in the growth of SMEs.

FORD Q provides one-stop access to federal services and programs aimed at SMEs, particularly with regard to innovation, research and development (R&D), design, market development and entrepreneurship. Through its 13 Small Business Access Centres, FORD Q provides access to Team Canada export services and programs in the areas of awareness, export preparation, information, networking, advice and counselling, funding and access to funding.

In terms of access to funding, PEMD, with the exception of the component on preparing projects for submission, is

delivered through the Small Business Access Centres. IDEA-SME, a FORD Q program, can also support firms during the export process. In addition, through alliances with banks, Small Business Access Centre advisors can facilitate access to funding for foreign marketing strategy projects.

Small Business Access Centre
Abitibi/Témiscamingue
906 5th Avenue
Val d'Or, PQ J9P 1B9
Tel.: (819) 825-5260
Fax: (819) 825-3245

Small Business Access Centre
Bas Saint-Laurent/Gaspésie/Îles-de-la-Madeleine
212 Belzile Street
Suite 200
Rimouski, PQ G5L 3C3
Tel.: (418) 722-3282
Fax: (418) 722-3285

Small Business Access Centre
Bois-Francs
Place du Centre
150 Marchand Street
Suite 502
Drummondville, PQ J2C 4N1
Tel.: (819) 478-4664
Fax: (819) 478-4666

Small Business Access Centre
Côte-Nord
701 Laure Boulevard
Suite 202B
P.O. Box 698
Sept-Îles, PQ G4R 4K9
Tel.: (418) 968-3426
Fax: (418) 968-0806

Small Business Access Centre
Estric
1335 King Street West
Suite 303
Sherbrooke, PQ J1J 2B8
Tel.: (819) 564-5904
Fax: (819) 564-5912

Small Business Access Centre
Île de Montréal
800 Place Victoria Tower
Suite 3800
P.O. Box 247
Montreal, PQ H4Z 1E8
Tel.: (514) 283-2500
Fax: (514) 496-8310

Small Business Access Centre
Laval/Laurentides/Lanaudière
Tour du Triomphe II
2540 Daniel-Johnson Boulevard
Suite 204
Laval, PQ H7T 2S3
Tel.: (514) 973-6844
Fax: (514) 973-6851

Small Business Access Centre
Mauricie
Immeuble Bourg du Fleuve
25 des Forges Street
Suite 413
Trois-Rivières, PQ G9A 2G4
Tel.: (819) 371-5182
Fax: (819) 371-5186

Small Business Access Centre
Montérégie
Complexe Saint-Charles
1111 Saint-Charles Street West
Suite 411
Longueuil, PQ J4K 5G4
Tel.: (514) 928-4088
Fax: (514) 928-4097

Small Business Access Centre
Nord-du-Québec
800 Place Victoria Tower
Suite 3800
P.O. Box 247
Montreal, PQ H4Z 1E8
Tel.: (514) 283-5174
Fax: (514) 283-3637

Small Business Access Centre
Outaouais
259 Saint-Joseph Boulevard
Suite 202
Hull PQ J8Y 6T1
Tel.: (819) 994-7442
Fax: (819) 994-7846

Small Business Access Centre
Quebec City/Chaudière/Appalaches
905 Dufferin Avenue
Second Floor
Quebec City, PQ G1R 5M6
Tel.: (418) 648-4826
Fax: (418) 648-7291

Small Business Access Centre
Saguenay/Lac-Saint-Jean
170 Saint-Joseph Street South
Suite 203
Alma, PQ G8B 3E8
Tel.: (418) 668-3084
Fax: (418) 668-7584

WESTERN ECONOMIC DIVERSIFICATION CANADA (WD)

WD is responsible for federal economic development activities in Western Canada. The Department works in partnership with the western provinces, business, industry associations and communities to stimulate the western Canadian economy.

WD's "New Directions" program will work to enhance the export position of western companies by boosting their competitiveness in domestic and global markets.

The Department no longer provides repayable loans to individual companies, but seeks new innovative partnerships within both the public and private sectors. These partnerships will address the needs of small- and medium-sized enterprises for information, business services and capital, particularly for high growth industries critical to Western Canada's economic diversification.

One of WD's new products focused on export development is the International Trade Personnel Program. This federal-provincial initiative links export-focused western firms with recent post-secondary graduates. The program accomplishes two important socio-economic goals: it gives companies the extra person-power they need to penetrate new markets, and it gives recent graduates valuable work experience. Under the new program, the length of export-development projects may vary from one to three years. Approved projects will be eligible for assistance ranging from C \$7,500 for one year, to a maximum of C \$37,500 per graduate over the three-year period. For more information, contact:

Western Economic Diversification Canada
The Cargill Building
240 Graham Avenue
Suite 712
P.O. Box 777
Winnipeg, MB R3C 2L4
Tel.: (204) 983-4472
Fax: (204) 983-4694

EXPORT DEVELOPMENT CORPORATION (EDC)

EDC helps Canadian exporters compete in world markets by providing a wide range of financial and risk management services, including export credit insurance, financing to foreign buyers of Canadian goods and services, and guarantees.

EDC's products fall into four main categories:

- export credit insurance, covering short- and medium-term credits;
- performance-related guarantees and insurance, providing cover for exporters and financial institutions against calls on various performance bonds and obligations normally issued either by banks or surety companies;
- foreign investment insurance, providing political risk protection for Canadian investments abroad; and
- export financing, providing medium- and long-term export financing to foreign buyers of Canadian goods and services.

EDC has established relationships with leading commercial and public sector institutions in Mexico and Latin America. For more information on the range of services available, please refer to the customer teams below.

Base and Semi-Manufactured Goods Team:

Tel.: (613) 598-2823
Fax: (613) 598-2525

Consumer Goods Team:

Tel.: (613) 597-8501
Fax: (613) 598-2525

Emerging Exporters Team:

Tel.: 1-800-850-9626
Fax: (613) 598-6871

Financial Institutions Team:

Tel.: (613) 598-6639
Fax: (613) 598-3065

Forestry Team:

Tel.: (613) 598-2936
Fax: (613) 598-2525

Engineering and Professional Team:

Tel.: (613) 598-3162
Fax: (613) 598-3167

Industrial Equipment Team:

Tel.: (613) 598-3163
Fax: (613) 597-8503

Information Technologies Team:

Tel.: (613) 598-6891
Fax: (613) 598-6858

Transportation Team:

Tel.: (613) 598-3164
Fax: (613) 598-2504

For information on the full range of EDC services, contact any of the following EDC offices:

Ottawa Export Development Corporation
151 O'Connor Street
Ottawa, ON K1A 1K3
Tel.: (613) 598-2500
Fax: (613) 598-6858

Vancouver Export Development Corporation
One Bentall Centre
505 Burrard Street
Suite 1030
Vancouver, BC V7X 1M5
Tel.: (604) 666-6234
Fax: (604) 666-7550

Calgary Export Development Corporation
510-5th Street S.W.
Suite 1030
Calgary, AB T2P 3S2
Tel.: (403) 292-6898
Fax: (403) 292-6902

Winnipeg Export Development Corporation
330 Portage Avenue
Eighth Floor
Winnipeg, MB R3C 0C4
Tel.: (204) 983-5114
Fax: (204) 983-2187

Toronto Export Development Corporation
National Bank Building
150 York Street
Suite 810
P.O. Box 810
Toronto, ON M5H 3S5
Tel.: (416) 973-6211
Fax: (416) 862-1267

London Export Development Corporation
Talbot Centre
148 Fullarton Street
Suite 1512
London, ON N6A 5P3
Tel.: (519) 645-5828
Fax: (519) 645-5580

Montreal Export Development Corporation
Tour de la Bourse
800 Victoria Square
Suite 4520
P.O. Box 124
Montreal, PQ H4Z 1C3
Tel.: (514) 283-3013
Fax: (514) 878-9891

Halifax Export Development Corporation
Purdy's Wharf, Tower 2
1969 Upper Water Street
Suite 1410
Halifax, NS B3J 3R7
Tel.: (902) 429-0426
Fax: (902) 423-0881

NATIONAL RESEARCH COUNCIL (NRC)

Canadian companies hoping to succeed in the Mexican marketplace may require additional technology to improve their competitiveness. The NRC works with Canadian firms of all sizes to develop and apply technology for economic benefit. The Council manages the Industrial Research Assistance Program (IRAP), a national network for the diffusion and transfer of technology.

The IRAP network, working primarily with small- and medium-sized Canadian firms, supports the process of developing, accessing, acquiring, implementing and using technology throughout Canadian industry. IRAP has a 50-year history of providing technical advice and assistance to Canadian firms and has acquired a reputation as one of the most flexible and effective federal programs. IRAP takes advantage of the advice of industrial technology advisors who are situated in more than 165 different locations within approximately 90 communities across Canada, including numerous provincial technology centres, the NRC's own laboratories and research institutes, federal government departments, and technology transfer offices in Canadian universities. For further information, contact:

Industrial Research Assistance Program
National Research Council
Montreal Road
Building M-55
Ottawa, ON K1A 0R6
Tel.: (613) 993-1790
Fax: (613) 952-1079

CANADIAN COMMERCIAL CORPORATION (CCC)

CCC, a Crown corporation, provides Canadian exporters with valuable assistance when they are selling to any foreign government, or to an international organization. In such sales, CCC acts as a prime contractor and guarantor for the sale of Canadian goods and services to the foreign customer.

CCC certifies the Canadian exporter's financial and technical capabilities, and guarantees to the foreign buyer that the terms and conditions of the contract will be met. CCC's participation in a sale provides Canadian suppliers with the tangible backing of their own government, enhancing their credibility and competitiveness in the eyes of foreign customers. This can often lead to the negotiation of more advantageous contract and payment terms.

The Progress Payment Program, developed by CCC in cooperation with Canada's financial institutions, makes pre-shipment export financing more accessible to small- and medium-sized exporters. The program allows an exporter to draw on a special line of credit, established by his or her principal banker for a particular export sale. In most instances, the borrowing costs will approximate those associated with a typical demand line of credit. The program is available for transactions with foreign government and private sector buyers.

For more information about CCC and its programs, contact:

Canadian Commercial Corporation
50 O'Connor Street
Eleventh Floor
Ottawa, ON K1A 0S6
Tel.: (613) 996-0034
Fax: (613) 995-2121

KEY CONTACTS IN CANADA

BUSINESS AND PROFESSIONAL ASSOCIATIONS

Society of Composers, Authors and Music Publishers of Canada (SOCAN)
41 Valleybrook Drive
Don Mills, ON M3B 2S6
Tel.: (416) 445-8700
Fax: (416) 445-7108

Canadian Independent Record Production Association
214 King Street West
Suite 604
Toronto, ON M5H 3S6
Tel.: (416) 593-1665
Fax: (416) 593-7563

Canadian Recording Industry Association
1250 Bay Street
Suite 400
Toronto, ON M5R 2B1
Tel.: (416) 967-7272
Fax: (416) 967-9415

Télé Film Canada
600 de la Gauchetière Street West
Fourteenth Floor
Montreal, PQ H3B 4L8
Tel.: (514) 283-6363
Fax: (514) 283-8212

Canadian Council for the Americas (CCA)
The Council is a non-profit organization formed in 1987 to promote business interests in Latin American as well as Caribbean countries. The CCA promotes events and programs targetted at expanding business and building networking contacts between Canada and the countries of the region.

Canadian Council for the Americas
Executive Offices
360 Bay Street
Suite 300
Toronto, ON M5H 2V6
Tel.: (416) 367-4313
Fax: (416) 367-5460

Alliance of Manufacturers and Exporters Canada
99 Bank Street
Suite 250
Ottawa, ON K1P 6B9
Tel.: (613) 238-8888
Fax: (613) 563-9218

Alliance of Manufacturers and Exporters Canada
75 International Boulevard
Fourth Floor
Etobicoke, ON M9W 6L9
Tel.: (416) 798-8000
Fax: (416) 798-8050

The Canadian Chamber of Commerce
55 Metcalfe Street
Suite 1160
Ottawa, ON K1P 6N4
Tel.: (613) 238-4000
Fax: (613) 238-7643

Forum for International Trade Training Inc.
155 Queen Street
Suite 608
Ottawa, ON K1P 6L1
Tel.: (613) 230-3553
Fax: (613) 230-6808

Language Information Centre
240 Sparks Street RPO
Box 55011
Ottawa, ON K1P 1A1
Tel.: (613) 523-3510

Open Bidding Service
P.O. Box 22011
Ottawa, ON K1V 0W2
Tel.: 1-800-361-4637 or (613) 737-3374
Fax: (613) 737-3643

Canadian Standards Association
178 Rexdale Blvd.
Etobicoke, ON M9W 1R3
Tel.: (416) 747-4000
Fax: (416) 747-4149

Standards Council of Canada
45 O'Connor Street
Suite 1200
Ottawa, ON K1P 6N7
Tel.: (613) 238-3222
Fax: (613) 995-4564

MEXICAN GOVERNMENT OFFICES IN CANADA

The Embassy of Mexico and Mexican consulates can provide assistance and guidance to Canadian companies in need of information about doing business in Mexico. For more information, contact:

Embassy of Mexico
45 O'Connor Street
Suite 1500
Ottawa, ON K1P 1A4
Tel.: (613) 233-8988
Fax: (613) 235-9123

Mexican Consulate in Ottawa
45 O'Connor Street
Suite 1500
Ottawa, ON K1P 1A4
Tel.: (613) 233-6665
Fax: (613) 235-9123

OTHER MEXICAN CONSULATES GENERAL IN CANADA

Consulate General of Mexico
2000 Mansfield Street
Suite 1015
Montreal, PQ H3A 2Z7
Tel.: (514) 288-2502/4916
Fax: (514) 288-8287

Consulate General of Mexico
199 Bay Street
Suite 4440
P.O. Box 266, Station Commerce Court West
Toronto, ON M5L 1E9
Tel.: (416) 368-2875/8141/1847
Fax: (416) 368-8342

Consulate General of Mexico
810-1130 West Pender Street
Vancouver, BC V6E 4A4
Tel.: (604) 684-3547/1859
Fax: (604) 684-2485

MEXICAN FOREIGN TRADE COMMISSIONS

Banco Nacional de Comercio Exterior (Bancomext) is the Mexican Foreign Trade Commission and has offices in Canada. It offers credits, export guarantees and counselling services to Mexican companies seeking to do business in Canada.

MEXICAN BANKS WITH OFFICES IN CANADA

Banco Nacional de México (Banamex), *Banca Serfin* and *Banca Confia* are private-sector banks which offer specialized services through their international trade information centres. The centres participate in a computerized communications network with access to numerous economic, governmental and financial databases throughout the world. These banks are located throughout Mexico and maintain offices in Toronto.

Banco Nacional de México (Banamex)
1 First Canadian Place
Suite 3430
P.O. Box 299
Toronto, ON M5X 1C9
Tel.: (416) 368-1399
Fax: (416) 367-2543

Banca Serfin
BCE Place
Canada Trust Tower
161 Bay Street
Suite 4360
P.O. Box 606
Toronto, ON M5J 2S1
Tel.: (416) 360-8900
Fax: (416) 360-1760

Banca Confia
150 York Street
Suite 408
Toronto, ON M5H 3A9
Tel.: (416) 955-9233
Fax: (416) 955-9227

CANADIAN GOVERNMENT DEPARTMENTS AND SERVICES IN MEXICO

TRADE AND ECONOMIC DIVISION

THE EMBASSY OF CANADA IN MEXICO

The Trade and Economic Division of the Canadian Embassy in Mexico can provide vital assistance to Canadians venturing into the Mexican market. The trade commissioners are well-informed about the market and will respond in whatever measures possible to support a Canadian firm's presence in Mexico.

Trade and Economic Division

The Embassy of Canada in Mexico

Schiller No. 529

Col. Polanco

11560 México, D.F.

México

Tel.: (52-5) 724-7900

Fax: (52-5) 724-7982

Internet address for *Canadá Artes*:

<http://www.canada.org.mx/>

Canadian Consulate

Edificio Kalos, Piso C-1

Local 108-A

Zaragoza y Constitución

64000 Monterrey, Nuevo León

México

Tel.: (52-8) 344-3200

Fax: (52-8) 344-3048

Canadian Consulate

Hotel Fiesta Americana

Local 30-A

Aurelio Aceves No. 225

Col. Vallarta Poniente

44110 Guadalajara, Jalisco

México

Tel.: (52-3) 616-6215

Fax: (52-3) 615-8665

KEY CONTACTS IN MEXICO

GOVERNMENT DEPARTMENTS

Secretariat of the Interior (Radio, Television and Film Directorate)

Secretaría de Gobernación

Dirección General de Radio, Televisión y Cinematografía

Av. Roma No. 41

Col. Juárez

06600 México, D.F.

México

Tel.: (52-5) 420-8106/8107

Fax: (52-5) 420-8114

Secretariat of Public Education

(National Counsel of the Arts and Culture)

Secretaría de Educación Pública (Consejo Nacional para la Cultura y las Artes)

Dirección General de Bibliotecas

Av. Revolución No. 1877, Piso 9

Col. Barrio Loreto San Angel

01000 México, D.F.

México

Tel.: (52-5) 550-7914, 616-5050 ext. 462 and 502

Fax: (52-5) 550-7098

Mexican Film Institute

Instituto Mexicano de Cinematografía (Imcine)

Av. Tepic No. 40

Col. Roma Sur

06760 México, D.F.

México

Tel.: (52-5) 574-0502/0644/4328

Fax: (52-5) 574-1705

National Fund for the Arts and Culture

Fondo Nacional para la Cultura y las Artes (Fonca)

Av. México-Coyoacán No. 371, Piso 2

Col. Xoco

03330 México, D.F.

México

Tel.: (52-5) 605-5439/6180

Fax: (52-5) 605-5533.

National Autonomous University of Mexico
(Film Division)
UNAM Dirección General de Actividades Cinematográficas
(DGAC)
Av. San Idelfonso No. 43
Col. Centro
Delegación Cuauhtémoc
06020 México, D.F.
México
Tel.: (52-5) 704-3700, 702-4454, ext. 212

BUSINESS AND PROFESSIONAL ORGANIZATIONS

National Council for the Arts and Culture
Consejo Nacional para la Cultura y las Artes (Conaculta)
Av. Arenal No. 40
Col. Guadalupe Chimalistac
01050 México, D.F.
México
Tel.: (52-5) 662-0715/0432
Fax: (5-25) 662-6080

National Chamber of the Film and Television Industry
Cámara Nacional de la Industria Cinematográfica y del Videograma (Canacine)
Calz. Gral. Anaya No. 198
Col. San Diego Churubusco
04120 México, D.F.
México
Tel.: (52-5) 688-0442
Fax: (52-5) 688-8810

National Chamber of the Radio and Television Industry
Cámara Nacional de la Industria de Radio y Televisión (Cirt)
Av. Horacio No. 1013
Col. Polanco
115500 México, D.F.
México
Tel.: (52-5) 726-9909
Fax: (52-5) 545-4165

National Chamber of the Cable Television Industry
Cámara Nacional de la Industria de Televisión por Cable (Canitec)
Av. Monte Albán No. 281
Col. Narvarte
03020 México, D.F.
México
Tel.: (52-5) 682-0173
Fax: (52-5) 682-0881

National Institute of Fine Art
Instituto Nacional de Bellas Artes (INBA)
Difusión y Relaciones Públicas
Reforma y Auditorio Nacional s/n
Módulo A, Piso 2
Col. Bosques de Chapultepec
11560 México, D.F.
México
Tel.: (52-5) 280-7097/5474
Fax: (52-5) 280-4865

Mexico City Philharmonic Orchestra
Orquesta Filarmónica de la Ciudad de México
Perférico Sur No. 5141
Col. Isidro Fabela
14030 México, D.F.
México
Tel.: (52-5) 606-8034

National Symphonic Orchestra
Orquesta Sinfónica Nacional
Av. Regina No. 52, Primer Piso
Col. Centro
06080 México, D.F.
México
Tel.: (52-5) 709-8118, 3410
Fax: (52-5) 709-3533

Philharmonic Orchestra of the National Autonomous University of Mexico
Orquesta Filarmónica de la Universidad Autónoma de México
Centro Cultural Universitario
Sala de Conciertos
Nezahual y Coyotl
Insurgentes No. 3000
04510 México, D.F.
México
Tel.: (52-5) 622-7110 to 7113
Fax: (52-5) 665-1270

Mexican Society of Authors and Music Composers
Sociedad de Autores y Compositores de Música (SACM)
Av. Mayorazgo No. 129
Col. Xoco, Delegación Benito Juárez
03330 México, D.F.
México
Tel.: (52-5) 604-7733
Fax: (52-5) 604-7923

**Union of Employees of the Radio and Television
Production Industries**
*Sindicato de Trabajadores de la Industria de la Radiodifusión y
la Televisión, Similares y Conexos de la República Mexicana
(Siirt)*

Av. Huatabampo No. 6
Col. Roma Sur
06760 México, D.F.
México
Tel.: (52-5) 574-6040/7343
Fax: (52-5) 584-9255

National Council of Communications Professionals
*Coordinación Nacional de Trabajadores de los Medios de
Comunicación*

Av. Balderas No. 68, Piso 2
Col. Centro
México, D.F.
México
Tel.: (52-5) 728-2956
Fax: (52-5) 512-3215

**Union of Technical Personnel for the Film Production
Industry**

*Sindicato de Trabajadores Técnicos y Manuales de Estudios y
Laboratorios de la Producción Cinematográfica, Similares y
Conexos de la República Mexicana*

Av. Fresas No. 12
Col. del Valle
03100 México, D.F.
México
Tel.: (52-5) 575-0655
Fax: (52-5) 575-2508

National Actors Association

Asociación Nacional de Actores
Av. Altamirano Nos. 126 y 128
Col. San Rafael, Del. Cuauhtémoc
06470 México, D.F.
México
Tel.: (52-5) 535-4019, 566-8886
Fax: (52-5) 535-4019

National Association of Interpreters

Asociación Nacional de Intérpretes (ANDI)
Av. Tonalá No. 59, 3er Piso
Col. San José Insurgentes
03900 México, D.F.
México
Tel.: (52-5) 207-9533, 525-4059
Fax: (52-5) 207-9889

Mexican Society of Writers

Sociedad General de Escritores de México (Sogem)
Av. José María Velasco No. 59, 3er Piso
Col. San José Insurgentes
03900 México, D.F.
México
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Fax: (52-5) 593-6017

National Editorial Industry Chamber

Cámara Nacional de la Industria Editorial Mexicana (Caniem)
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Col. San Diego Churubusco, Del. Coyoacán
04120 México, D.F.
México
Tel.: (52-5) 604-5838, 688-2011/2211
Fax: (52-5) 604-4347

**Mexican Society of Directors and Producers of Film,
Radio and Television**

*Sociedad Mexicana de Directores y Realizadores de Cine, Radio y
Televisión*

Av. Félix Parra No. 130
Col. San José Insurgentes
03900 México, D.F.
México
Tel.: (52-5) 651-9633/9047
Fax and Tel.: (52-5) 651-9611/9633/9047

Mexican Association of Camera Technicians

Asociación Mexicana de Filmadores (Amfi)
Calz. Gral. Anaya No. 198
Col. San Diego Churubusco
04120 México, D.F.
México
Tel.: (52-5) 605-00555/9876
Fax: (52-5) 605-9876

Mexican Association of Radio and Video Producers

*Asociación Mexicana de Productores de Fonogramas y
Videogramas (Amprofon)*
Av. Francisco Petrarca No. 223
Interior 303
Col. Chapultepec Morales
11560 México, D.F.
México
Tel.: (52-5) 254-1993, 204-8829
Fax: (52-5) 203-8754

MEXICAN COMPANIES

Televisa, S.A. de C.V.
Calle Corregidora No. 2000
Col. Santa Fe
01210 México, D.F.
México
Tel.: (52-5) 261-2458
Fax: (52-5) 261-2494

Televisión Azteca (Elektra)
Periférico Sur No. 4121
Col. Fuentes de Pedregal
14141 México, D.F.
México
Tel.: (52-5) 645-4080 ext. 1380, 420-1313 ext. 1506 & 1507,
645-4458
Fax: (52-5) 631-3146

Multivisión
Av. Copérnico No. 183
Col. Anzures
11590 México, D.F.
México
Tel.: (52-5) 254-1856, 4446
Fax: (52-5) 255-1570

Comunicación Cultural, A.C.
Av. Fernández Leal No. 21
Col. Barrio la Conchita
04020 México, D.F.
México
Tel.: (52-5) 658-4323, 1677
Fax: (52-5) 658-1677

TRADE SHOWS AND FESTIVALS

Cervantino Festival
Festival Cervantino
Av. Alvaro Obregón No. 273, Piso 4
Col. Roma
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México
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- \$1 to 5 million
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Company: _____

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