



CHAPTER

## 22 Media Ownership and Concentration in Mexico

Juan Enrique Huerta Wong, Rodrigo Gómez García, Eli Noam, Paul Mutter

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### Abstract

This chapter examines media ownership and concentration in Mexico. Following an overview of the Mexican media scene, the chapter describes print media (newspapers), audiovisual media (radio, broadcast television, multichannel TV platforms, and film), telecommunications media (wireline and wireless telecom), and Internet media (Internet Service Providers and online news market). Mexico has one of the most concentrated audiovisual and telecommunication markets in the world, and this is unlikely to change in the near future, despite governmental efforts and the creation of a new regulatory system. The telecom sector is dominated by Carlos Slim, possibly the world's richest man. Broadcasting is controlled by Televisa. And the newspaper sector is substantially led by OEM. While new technologies such as multichannel platforms have introduced some competitiveness to the market, concentration indicators have either stabilized or increased since 2000.

**Keywords:** Mexican media market, media industry, TV platforms, print media, audiovisual media, telecommunications, Internet, Slim, Azcarraga, OEM Mexican media market, media industry, TV platforms, print media, audiovisual media, telecommunications, Internet, Slim, Azcarraga, OEM

**Subject:** Economic Sociology, Social Research and Statistics

### Introduction

The Government of Mexico promotes economic competitiveness through regulations and actions that enforce a level playing field for the economic agents involved. It is also responsible for creating the necessary conditions for a pluralist media system in tune with the diversity of the population. Pundits have often presented their arguments for either more or less federal regulation without much data about the industry's actual concentrated nature.<sup>1</sup> Debates take place in an environment where an audiovisual duopoly and a telecommunications monopoly face the public interest.<sup>2</sup>

An example of this is the debate between the two private owners whose media holdings dominate the audiovisual and telecommunications sectors: Emilio Azcárraga Jean and Carlos Slim. Azcárraga is the CEO of Grupo Televisa, the largest Spanish-language media group in the world, while Slim is the CEO of the national telecommunications major Telmex and its mobile arm, Telcel. On March 23, 2012, Azcárraga published a broadside in *The Wall Street Journal* titled "Carlos Slim Needs More Competition."<sup>3</sup> Azcárraga took to the influential US business daily to announce that Grupo Televisa is open to a third, fourth, or even a national broadcaster entering the Mexican market—albeit under certain conditions set by Grupo Televisa. First, if these new broadcast competitors were to be US-based companies, then they ought to be governed by the same mechanism that in the US prohibits foreign investors "from owning more than 25% of any television station."<sup>4</sup> Second, Azcárraga asserted that if Slim moved to invest in broadcast television, then the telecommunications sector should also be opened to greater competition, by citing an OECD study that states:

Mexico loses 2.2% of its gross domestic product each year because of astronomically high cellphone rates, low Internet penetration, and mediocre connectivity. Mexico has 10% as many wireless Internet subscribers per 100 inhabitants as Turkey. Its cellular phone rates are by far the most expensive in the OECD. Relative to other OECD countries, Mexico is ranked last in terms of investment in telecommunications per capita; but, says the study, “profit margins of the incumbent nearly double the OECD average.”

Slim struck back against Azcárraga’s editorial by arguing that Mexico’s high pay-TV subscription rates are not the result of his Grupo Carso’s monopoly in telecommunications—the group’s holdings account for 70% of Mexico’s mobile phone market, 74% of its fixed broadband services, and 80% of the country’s landline telephony market—but due to the lack of competitiveness in the audiovisual sector. In summary, Azcárraga claims that Grupo Carso’s domination of the national telecom market accounts for one of the highest rates of fixed and cell phone fees in the world, and correspondingly, Slim claims that Grupo Televisa’s domination in broadcast and cable TV is the cause of Mexico’s extremely high-paid TV subscription rates.

We have prepared this chapter in order to illustrate how concentration indices are often overlooked in the public debate over media concentration and ownership. They would better inform the discussion of initiatives and public policies that are proposed to reorganize the Mexican media market. First, we provide information about the dimensions of the Mexican media market in order to contextualize the data and the results that are to follow. The three indices we use (C<sub>4</sub>, HHI, and the Noam Index) to measure concentration emphasize the governing role of the main corporations and total concentration in the media market. The US approach to measuring competitiveness is not followed here as a regulatory model *for* Mexico per se, but as an international standard of comparison. A review of the main media and telecommunication companies in Mexico will demonstrate that while these media majors act globally, they think locally when it comes to asset ownership.

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## Print Media

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### Newspapers

p. 676 It is not possible to calculate daily readership for newspapers in Mexico accurately because publishers inflate the print runs beyond projected demand, despite the fact that Mexico has a certification authority set up to prohibit this practice. We can offer some general observations based on other socioeconomic data: specifically, that despite an increase in literacy (the national rate now stands at over 90%, up from 85% in the early 1990s), readership does not seem to be rising accordingly. In part, this is because of Mexico's 28.8 million registered households, 42% of have access to a multichannel platform and 90% own a radio, and 4 as a result the national media culture is much more audiovisually inclined.<sup>5</sup> In addition, the reading public regards political commentary and reporting in Mexican dailies as hopelessly partisan due to the role of party politics in the industry.

In the 1960s and 1970s, for example, the daily *El Excelsior* was the leading daily, running highly influential editorials in 250,000-copy daily print runs. But *El Excelsior* began to suffer financially when state-sponsored advertising was withdrawn in the late 1970s due to the paper's growing criticism of the long-ruling party, the Institutional Revolutionary Party (PRI). Despite the departure of the "offending" editorial staff in 1976, allegedly under intense government pressure, political advertising did not rebound and the daily's economic slide continued. This suggests that it had been the state-sponsored political advertising, and not the daily's high audience shares, that made its market leadership possible during the 1960s and 1970s.<sup>6</sup> Our research suggests that competitiveness in the industry only truly began when new political parties finally challenged the ruling party's political monopoly in the 1990s. The newspaper market in Mexico was stable for most of the period the PRI held power, with few new dailies opening after the late 1960s, but when the opposition National Action Party (PAN) won the presidency for the first time in 2000, a number of new titles emerged under new publishers. Of course, because new dailies and editorial voices have become associated with PAN and other opposition parties, readers are still generally cynical about Mexican newspapers' political coverage.

The leading newspaper publisher in Mexico today is the Organizacion Editorial Mexicana (OEM), which expanded under PRI rule when it acquired many of the independent media group Garcia Valseca's titles. Today, OEM owns *Esto*, a sports daily with the highest print circulation numbers nationwide, and a network of regional newspapers under the brand name *El Sol* (except for the state of Monterrey, where *El Sol*, originally a Garcia Valseca title, belongs to the publishing company Grupo Reforma). OEM's audience shares have begun to fall due to the rise of new regional players, since Mexican newspapers operate on a regional marketing and distribution model pioneered by Garcia Valseca. Increased competition for audience shares and advertising revenues takes place mainly in Mexico City and other metropolitan areas with a population of at least one million. While there is more competition among newspapers in these cities today than there has ever been before, the audience shares in these urban markets have not added a significant number of new readers. In fact, the dailies with the highest print circulations in Mexico have shown a relatively significant decrease over the past few years. These newspapers include the two leading sports dailies, *Esto* and *Ovaciones*; the crime blotter *La Prensa*; and the popular regional daily *El Norte*. As noted earlier, newspapers focusing on political coverage are not print circulation leaders due to the public's disdain for their coverage (Table 22.1).

**Table 22-1.** Daily Newspapers (Market Shares by Circulation), 2004–2010

	2004	2008	2010
Organizacion Editorial Mexicana (OEM)	54.9	56.7	59.4
Grupo Reforma	12.6	11.7	9.9
El Universal	12.6	9.0	5.4
Demos/La Jornada	4.5	6.3	4.5
Grupo Milenio (Grupo Multimedios)	5.4	6.3	4.5
Editorial Ovaciones		8.1	6.3
Others <sup>a</sup>	10.0	10.0	10.0
Total Annual Circulation (1,000)	2,794	3,279	4,320
Total Revenue (mil MXN) <sup>1</sup>	1,015	1,822	2,400
Total Revenue (mil US\$)	132	164	213
C4	86	86	81
HHI	3,381	3,578	3,736
<i>N</i> (>1%)	5	6	6
Noam Index	1,512	1,461	1,525

1 Estimated.

When disaggregating publishing groups by titles, concentration indices show a notable decrease as a result of increased regional competition. But the cost of advertising for the dailies focusing on political content is not at all correlated with these dailies' circulation numbers, suggesting that print runs have more to do with advertising revenue than audience shares. Those dailies specializing in political coverage, in fact, have the highest advertising costs. For example, in 2010, *El Excélsior* had print runs that were consistently 80% less than *Esto*'s totals in the same period, and a full-page advertisement in *Esto* cost only one-third of what it would cost to run the same advertisement in *El Excélsior* (Table 22.2).

**Table 22-2.** Newspapers Advertising Costs, 2010<sup>1</sup>

	Total Cost (MXN)	Total Cost (US\$)
<i>Esto</i>	38,275	3,062
<i>La Prensa</i>	30,213	2,417
<i>El Excélsior</i>	115,000	9,200
<i>El Universal</i>	157,088	12,567
<i>El Financiero</i>	116,250	9,300
<i>Ovaciones</i>	44,500	3,560
<i>Reforma</i>	132,325	10,586
<i>La Jornada</i>	108,750	8,700
<i>El Norte</i>	79,875	6,390
<i>Ovaciones 2a Ed</i>	44,500	3,560
<i>Milenio Diario</i>	129,325	10,346

1 Based on the cost of a full-page ad, the most expensive type of print ad buy-in, for each paper's lead section (the US equivalent would be "Section A" in a daily such as *The New York Times* or *The Washington Post*).

p. 677 The public mistrust of political coverage partly explains why sports and crime newspapers have larger audience shares than political dailies, and these audience shares help them keep their advertising costs lower. In contrast, the low readership of the other dailies compels them to raise advertising costs in order to break even. Interestingly, most of a daily's revenue from political advertising comes directly from the political parties, so these ad placements are not based on any measure of their effectiveness in influencing

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## Audiovisual Media

### Radio

There are 1,594 radio stations in Mexico. Of that number, 1,053 have commercial licenses and 541 are nonprivate broadcasters that are not allowed to feature commercial advertising. There are also two national public networks, IMER and Radio Educación, and several regional networks that belong to universities, local government offices, and indigenous tribes. Due to the plurality of state and nonstate broadcasters in the radio market, it manages to show greater social diversity and inclusion than television broadcasting, though social and community networks are technically considered "illegal" stations (they do not have commercial licenses or nonprivate permissions). Corporate sponsors are gradually increasing their presence in this sector: the percentage of overall advertising spending on radio increased from 8% of the national total in 2004 to 10% by 2010, amounting to US\$400 million (MXN 5 billion).<sup>7</sup> Pop and folk music stations are ranked as the most popular types of programming.<sup>8</sup>

The available data for this sector refer only to the number of stations. This allows us to identify the groups' size by stations, but not by audiences. The indices' results suggest a low concentration in the Mexican radio market, though not all radio groups operate at the national level (Table 22.3).

**Table 22-3.** Radio Group (Number of Stations), 2011

	# Stations	% Stations
Grupo ACIR	169	16.0
Grupo Radiorama (PRISA Group, Spain)	116	11.0
Azcárraga Family	116	11.0
Televisa Radio Group	64	6.0
Grupo Fórmula (Radio Fórmula, Azcárraga Family)	52	5.0
Grupo CMR <sup>1</sup>	94	9.0
Grupo Ramsa	74	7.0
Grupo Radio Centro (GRC)	68	6.5
Corporadio	52	5.0
MVS Radio (MVS Comunicaciones)	52	5.0
Grupo Radio México (GRM)	27	2.5
Grupo Multimedios	21	2.0
Cadena Rasa	21	2.0
Firmesa	21	2.0
ABC Radio	16	1.5
Grupo Imagen	16	1.5
Others	190	18.0
Totals	1,053	100.0
Total Revenue (mil MXN)	5,000	
Total Revenue (mil US\$)	400	
C4	47	
HHI	743	
<i>N</i> (>1%)	14	
Noam Index	199	

Source: PAPIIT Project, UNAM IN301111.<sup>2</sup>

- 1 Both GRC and GRM's board of directors are chaired by the same man, Francisco Aguirre Gomez.
- 2 Vega Montiel, Aimée, coordinator. "El Seminario Internacional Acceso y participación de las mujeres en las industrias de comunicación: de los diagnósticos a las experiencias." Ciudad Universitaria. Torre II de Humanidad, Mexico City, Mexico. Nov. 8, 2012. <[http://www.ceiich.unam.mx/0/60EncFic.php?tblEncuentrosAcad\\_id=1066](http://www.ceiich.unam.mx/0/60EncFic.php?tblEncuentrosAcad_id=1066)>.<sup>1</sup>

## Broadcast TV

Broadcast television in Mexico has always been a highly concentrated market and has a monopolistic structure that is dominated by Grupo Televisa. Today, its three national networks and one regional broadcaster hold the greatest audience shares nationwide. Its news shows are the most popular in the country and are regarded as agenda setters in political debates.<sup>9</sup> Grupo Televisa also has four multichannel platforms offering triple-play services, an interest in film production and distribution (Videocine), the radio market (Televisa Radio), and in wireless telecom (Iusacell).<sup>10</sup> Its international holdings include a stake in the Spanish television broadcaster *laSexta* and a 5% stake in the Spanish-language television network Univisión that operates in the United States. Grupo Televisahas now become the main audiovisual content producer and distributor in the international Spanish-language markets.<sup>11</sup>



Between 1972 and 1993, Grupo Televisa's Channel 2 (*Canal de las Estrellas*), Channel 5 (*Canal 5*), Channel 9 (formerly Channel 8), and regional Channel 4 were the only commercial broadcasters in the country. Its only other "competitor" was the public broadcaster Imevisión, organized in 1982, with its three main channels: Channel 7, Channel 13, and Channel 22.<sup>12</sup> During this period, Grupo Televisa's executives had a tacit understanding with PRI leaders that as long as its channels were not overly critical of the PRI, political roadblocks would not be thrown up to prevent Grupo Televisa from expanding its operations.<sup>13</sup> This allowed Grupo Televisa to implement a successful vertical integration strategy in distribution and content production and to accumulate capital to invest in cable and satellite TV.

Grupo Televisa's monopoly was challenged after 1993, when Imevisión was privatized. At that time, the Mexican conglomerate Grupo Salinas entered the market through its subsidiary TV Azteca (now usually referred to simply as "Azteca"), becoming Grupo Televisa's primary competitor during the 1990s. Azteca offers three primary channels—Channel 7, Channel 13 (*Azteca Trece*), and Channel 40 (*Proyecto 40*)—along with an international channel based out of the United States, Azteca América. The competition between the two media groups reached a climax in 1997, when Azteca won the highest ratings of any broadcast TV network in Mexico to date.<sup>14</sup> The market shares of both companies have varied little since then, although Grupo Televisa's four domestic channels retain a combined market share three times that of Azteca's three. Since Azteca primarily broadcasts at a regional level, it has not been able to surpass its 1997 high-water mark, and from the 2000s to the present it has retained on average 28–30% of the national market share.

Since 2009, Mexican broadcast television consumed the lion's share of national advertising spending, which differentiates it from other Latin American countries such as Argentina and Brazil. In 2009, Argentine broadcast television consumed a 42% share of its national advertising spending, while the Brazilian broadcasting market took in 40% of its respective national advertising spending.<sup>15</sup> Mexican broadcast television, though, has held between 65% and 58% of national advertising revenue in recent years, and in the 1990s and 2000s it often accounted for up to 70% of national advertising spending.<sup>16</sup> In 2010, the sector's advertising revenue was valued at US\$4.2 billion (MXN 52 billion), or 58% of all national advertising spending in Mexico.<sup>17</sup> Though still higher than the advertising revenues of other countries' broadcast TV markets, considering the market share of the sector as a whole, concentration indices have been falling due to new market entries and greatly reduced viewership in terrestrial television. In 2005, for example, the average Mexican viewer saw up to 527 minutes of broadcast television programming per day, but by 2009 this number had fallen to an average of 273 minutes per day.<sup>18</sup> The decline is the result of increased growth among multichannel platforms (Tables 22.4, 22.5).

**Table 22-4.** TV Broadcasting (Audience Shares by Prime Time Viewership) 1995–2010

	1995	2000	2005	2010
Grupo Televisa (Azcárraga Family) <sup>1</sup>	91.0	70.4	68.6	68.3
Azteca (Grupo Salinas) <sup>2</sup>	7.0	26.8	30.0	28.2
Others	2.0	2.8	2.5	3.5
C4	98.0	97.2	98.6	96.5
HHI	8,334	5,682	5,612	5,472
<i>N</i> (>1%)	2	2	2	2
Noam Index	5,893	4,018	3,968	3,869

Source: Observatory with the companies' data (F-20 Reports and Annual reports presented to the BMV) and IBOPE.

1 Data for Channel 2, Channel 4, Channel 5, and Channel 9.

2 Data for Channel 7, Channel 13, and from 2007 on, Channel 40.

**Table 22-5.** TV Broadcasting (Market Shares by Revenue), 2006–2010

	2006	2007	2010
Grupo Televisa (Azcárraga Family)	67.0	63.0	61.0
Azteca (Grupo Salinas)	29.0	27.0	30.0
Other	3.0	10.0	9.0
Total Revenue (mil MXN)	29,333	31,578	35,175
Total Revenue (mil US\$)	2,640	2,842	2,814
C4	96	89	91
HHI	5,346	4,673	4,746
<i>N</i> (>1%)	3	3	3
Noam Index	3,123	2,701	2,772

Source: Observatory of industries, policies and consuming culture with data from Cofetel (2011), the companies' annual reports (F-20) and AAAP (2007, 2009).

p. 681 **Multichannel TV Platforms**

Cable and direct-to-home (DTH) satellite are the primary platforms in use for Mexican multichannel distribution. According to the Federal Commission of Telecommunications (Cofetel), the Mexican pay-TV market was valued at US\$1.2 billion (MXN 8 billion) in 2005 and US\$2.6 billion (MXN 32.5 billion) in 2010. Since 2007, all cable TV companies have been offering triple-play packages that include Internet, television, and telephony services. In fact, investment in the sector (in 2006, it stood at US\$418 million (MXN 4.6 billion) and reached US\$1.1 billion (MXN billion) by 2010) represents 18.8% of total telecommunications investment in the country.

DTH is the fastest growing market segment in the paid TV sector, with its audience shares rapidly increasing.<sup>19</sup> The spectacular growth of satellite TV is the result of the market entry of a new provider, Dish-México (MVS Comunicaciones), in 2008. Its entry ended the monopoly that SKY México had held over the market since 2005.<sup>20</sup> Satellite providers also have the advantage of being able to broadcast nationally, while cable companies do not have their own nationwide infrastructure to transmit. In 2010, the increased competition among multichannel platforms resulted in a 1.1% decrease in service costs (Figure 22.1).<sup>21</sup>

**Figure 22.1**

 Multichannel Platforms (Audience Shares by Subscription), 1995–2010

Multichannel Platforms (Audience Shares by Subscription), 1995–2010

p. 682 Grupo Televisa also dominates the pay-TV market in Mexico. It has rapidly increased its audience shares in recent years, leading to an oligopolistic structure. Grupo Televisa's properties include 15 pay-TV channels, the regional operator TVI-MTY (in Monterrey, the country's third most populous metropolitan area) and Cablemás, which operates in 43 cities and 16 states. By the end of 2011, Grupo Televisa held four multichannel platforms, three cable companies, and one satellite TV provider, representing a 50% multichannel market share.<sup>22</sup> The Mexican Federal Commission for Economic Competition (CFC) authorized the acquisitions of TVI-MTY and Cablemás on the grounds that Grupo Televisa was "the only firm that can balance [out] Telmex" in the market.<sup>23</sup> The CFC also imposed must-offer and must-carry conditions on Grupo Televisa, mandating that it offer its broadcast and paid TV channels to all multichannel providers.<sup>24</sup> These obligations drew criticism from Grupo Televisa because they were not applied to Grupo Televisa's main DTH competitor, Dish-México, when it entered the market (Table 22.6).

**Table 22-6.** Multichannel Video Platforms: Cable MSOS, DTH, MMDS (Audience Shares by Subscribers), 2007–2010

	2007		2008		2009		2010	
	Total Subscribers (1,000)	%	Total Subscribers (1,000)	%	Total Subscribers (1,000)	%	Total Subscribers (1,000)	%
Megacable	1,298	20.0	1,483	20.0	1,592	20.0	1,757	17.0
Telecable (Grupo Hevi)	150	2.0	183	2.0	220	3.0	300	3.0
Cablecom (Slim Carlos, Grupo Carso)	357	5.0	610	8.0	747	9.0	780	8.0
Cablemás, TVI-MTY, Cablevisión, SKY México (Azcárraga Family, Grupo Televisa)	3,098	48.0	3,393	46.0	3,742	47.0	5,012	50.0
Dish México (MVS Comunicaciones)	500	8.0	422	6.0	730	9.0	1,324	13.0
Others	1,113	17.0	1,341	18.0	1,003	13.0	874	9.0
Total Subscribers (1,000)	6,517		7,431		8,035		10,046	
Total Revenue (mil MXN)		1,333						32,500
Total Revenue (mil US\$)		1,200						2,600
C4		81		80		85		88
HHI		2,797		2,620		2,771		3,022
<i>N</i> (>1%)		5		5		5		5
Noam Index		1,250		1,171		1,239		1,351

Source: Observations of industries, policies, and consuming culture from Cofetel (2011) and the companies' annual reports from 2008 to 2011.

## Film

The film industry has not yet recovered from the financial crisis it suffered between 1994 and the early 2000s when the Mexican peso experienced severe devaluation (the impact of the currency devaluation was so severe that in 1997 and 1998, there were only 9 and 11 feature films, respectively, produced in-country).<sup>25</sup> In 2010, Mexican productions accounted for 6% of audience shares and 5.6% of box office sales. In contrast, US productions from the Hollywood majors accounted for 90% of audience shares and 91% of box office sales.<sup>26</sup> This was despite a history of quotas and restrictions on American imports, including a long prohibition against dubbing into Spanish from a foreign language—a severe handicap in a country where illiteracy used to be high. Mexico has been among the top 20 countries worldwide in box office receipts since 2007, and it is ranked fifth in number of sold tickets worldwide per annum.<sup>27</sup> Ticket sales have increased steadily since 2007, with a per capita rating of 1.7 tickets per annum, and so the number of theaters in the country has increased in response from 3,958 in 2006 to 4,946 in 2010.

In film distribution, the US-based Hollywood majors have completely dominated the market. The two main Mexican distribution companies, Gussi and Corazón, combined hold only a 10.1% market share (Table 22.7).<sup>28</sup>

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**Table 22-7.** Film Production/Distribution (Market Shares by Box Office %), 2010

	2010
Walt Disney Pictures (US)	20.1
Paramount (Viacom, US)	14.9
Warner Bros. (Time Warner, US)	16.8
20th Century Fox (News Corp., Murdoch Family, US/UK/AUS)	12.6
Universal (GE/Comcast, US)	7.4
Sony-Columbia (Japan/US)	9.1
Corazón	5.2
Gussi	4.9
Videocine (Azcárraga Family, Grupo Televisa)	2.8
Others	6.2
Total Revenue (mil MXN) <sup>1</sup>	10,925
Total Revenue (mil US\$)	874
C4	65
HHI	1,263
<i>N</i> (>1%)	9
Noam Index	421

Source: CANACINE, 2010.

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Unlike the distribution market, the exhibition market is led by Mexican enterprises and is highly concentrated as a result of a merger between Cinemex and Multimédios Cinemas. Today, almost 90% of the exhibition market is divided among just two companies, Cinépolis and Cinemex-Multimédios. Cinépolis also operates in several Central American countries (Table 22.8).

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**Table 22-8.** Film Exhibition (Market Shares by Box Office %), 2010

	<b>Total # of Theaters</b>	<b>Box Office %</b>
Cinépolis	2,305	61.0
Cinemex-MMC	1,655	26.0
Cinemark (US)	312	6.0
Lumiere	140	2.0
Others	536	5.0
Total	4,946	100.0
C4	89.0	92.0
HHI	3,452	4,437
<i>N</i> (>1%)	5	5
Noam Index	1,543	2,219

Source: CANACINE (2011), IMCINE (2011).

## Audiovisual Media

### Radio

There are 1,594 radio stations in Mexico. Of that number, 1,053 have commercial licenses and 541 are nonprivate broadcasters that are not allowed to feature commercial advertising. There are also two national public networks, IMER and Radio Educación, and several regional networks that belong to universities, local government offices, and indigenous tribes. Due to the plurality of state and nonstate broadcasters in the radio market, it manages to show greater social diversity and inclusion than television broadcasting, though social and community networks are technically considered “illegal” stations (they do not have commercial licenses or nonprivate permissions). Corporate sponsors are gradually increasing their presence in this sector: the percentage of overall advertising spending on radio increased from 8% of the national total in 2004 to 10% by 2010, amounting to US\$400 million (MXN 5 billion).<sup>7</sup> Pop and folk music stations are ranked as the most popular types of programming.<sup>8</sup>

The available data for this sector refer only to the number of stations. This allows us to identify the groups' size by stations, but not by audiences. The indices' results suggest a low concentration in the Mexican radio market, though not all radio groups operate at the national level (Table 22.3).

**Table 22-3.** Radio Group (Number of Stations), 2011

	# Stations	% Stations
Grupo ACIR	169	16.0
Grupo Radiorama (PRISA Group, Spain)	116	11.0
Azcárraga Family	116	11.0
Televisa Radio Group	64	6.0
Grupo Fórmula (Radio Fórmula, Azcárraga Family)	52	5.0
Grupo CMR <sup>1</sup>	94	9.0
Grupo Ramsa	74	7.0
Grupo Radio Centro (GRC)	68	6.5
Corporadio	52	5.0
MVS Radio (MVS Comunicaciones)	52	5.0
Grupo Radio México (GRM)	27	2.5
Grupo Multimedios	21	2.0
Cadena Rasa	21	2.0
Firmesa	21	2.0
ABC Radio	16	1.5
Grupo Imagen	16	1.5
Others	190	18.0
Totals	1,053	100.0
Total Revenue (mil MXN)	5,000	
Total Revenue (mil US\$)	400	
C4	47	
HHI	743	
<i>N</i> (>1%)	14	
Noam Index	199	

Source: PAPIIT Project, UNAM IN301111.<sup>2</sup>

- 1 Both GRC and GRM's board of directors are chaired by the same man, Francisco Aguirre Gomez.
- 2 Vega Montiel, Aimée, coordinator. "El Seminario Internacional Acceso y participación de las mujeres en las industrias de comunicación: de los diagnósticos a las experiencias." Ciudad Universitaria. Torre II de Humanidad, Mexico City, Mexico. Nov. 8, 2012. <[http://www.ceiich.unam.mx/0/60EncFic.php?tblEncuentrosAcad\\_id=1066](http://www.ceiich.unam.mx/0/60EncFic.php?tblEncuentrosAcad_id=1066)>.<sup>1</sup>

## Broadcast TV

Broadcast television in Mexico has always been a highly concentrated market and has a monopolistic structure that is dominated by Grupo Televisa. Today, its three national networks and one regional broadcaster hold the greatest audience shares nationwide. Its news shows are the most popular in the country and are regarded as agenda setters in political debates.<sup>9</sup> Grupo Televisa also has four multichannel platforms offering triple-play services, an interest in film production and distribution (Videocine), the radio market (Televisa Radio), and in wireless telecom (Iusacell).<sup>10</sup> Its international holdings include a stake in the Spanish television broadcaster *laSexta* and a 5% stake in the Spanish-language television network Univisión that operates in the United States. Grupo Televisahas now become the main audiovisual content producer and distributor in the international Spanish-language markets.<sup>11</sup>



Between 1972 and 1993, Grupo Televisa's Channel 2 (*Canal de las Estrellas*), Channel 5 (*Canal 5*), Channel 9 (formerly Channel 8), and regional Channel 4 were the only commercial broadcasters in the country. Its only other "competitor" was the public broadcaster Imevisión, organized in 1982, with its three main channels: Channel 7, Channel 13, and Channel 22.<sup>12</sup> During this period, Grupo Televisa's executives had a tacit understanding with PRI leaders that as long as its channels were not overly critical of the PRI, political roadblocks would not be thrown up to prevent Grupo Televisa from expanding its operations.<sup>13</sup> This allowed Grupo Televisa to implement a successful vertical integration strategy in distribution and content production and to accumulate capital to invest in cable and satellite TV.

Grupo Televisa's monopoly was challenged after 1993, when Imevisión was privatized. At that time, the Mexican conglomerate Grupo Salinas entered the market through its subsidiary TV Azteca (now usually referred to simply as "Azteca"), becoming Grupo Televisa's primary competitor during the 1990s. Azteca offers three primary channels—Channel 7, Channel 13 (*Azteca Trece*), and Channel 40 (*Proyecto 40*)—along with an international channel based out of the United States, Azteca América. The competition between the two media groups reached a climax in 1997, when Azteca won the highest ratings of any broadcast TV network in Mexico to date.<sup>14</sup> The market shares of both companies have varied little since then, although Grupo Televisa's four domestic channels retain a combined market share three times that of Azteca's three. Since Azteca primarily broadcasts at a regional level, it has not been able to surpass its 1997 high-water mark, and from the 2000s to the present it has retained on average 28–30% of the national market share.

Since 2009, Mexican broadcast television consumed the lion's share of national advertising spending, which differentiates it from other Latin American countries such as Argentina and Brazil. In 2009, Argentine broadcast television consumed a 42% share of its national advertising spending, while the Brazilian broadcasting market took in 40% of its respective national advertising spending.<sup>15</sup> Mexican broadcast television, though, has held between 65% and 58% of national advertising revenue in recent years, and in the 1990s and 2000s it often accounted for up to 70% of national advertising spending.<sup>16</sup> In 2010, the sector's advertising revenue was valued at US\$4.2 billion (MXN 52 billion), or 58% of all national advertising spending in Mexico.<sup>17</sup> Though still higher than the advertising revenues of other countries' broadcast TV markets, considering the market share of the sector as a whole, concentration indices have been falling due to new market entries and greatly reduced viewership in terrestrial television. In 2005, for example, the average Mexican viewer saw up to 527 minutes of broadcast television programming per day, but by 2009 this number had fallen to an average of 273 minutes per day.<sup>18</sup> The decline is the result of increased growth among multichannel platforms (Tables 22.4, 22.5).

**Table 22-4.** TV Broadcasting (Audience Shares by Prime Time Viewership) 1995–2010

	1995	2000	2005	2010
Grupo Televisa (Azcárraga Family) <sup>1</sup>	91.0	70.4	68.6	68.3
Azteca (Grupo Salinas) <sup>2</sup>	7.0	26.8	30.0	28.2
Others	2.0	2.8	2.5	3.5
C4	98.0	97.2	98.6	96.5
HHI	8,334	5,682	5,612	5,472
N (>1%)	2	2	2	2
Noam Index	5,893	4,018	3,968	3,869

Source: Observatory with the companies' data (F-20 Reports and Annual reports presented to the BMV) and IBOPE.

1 Data for Channel 2, Channel 4, Channel 5, and Channel 9.

2 Data for Channel 7, Channel 13, and from 2007 on, Channel 40.

**Table 22-5.** TV Broadcasting (Market Shares by Revenue), 2006–2010

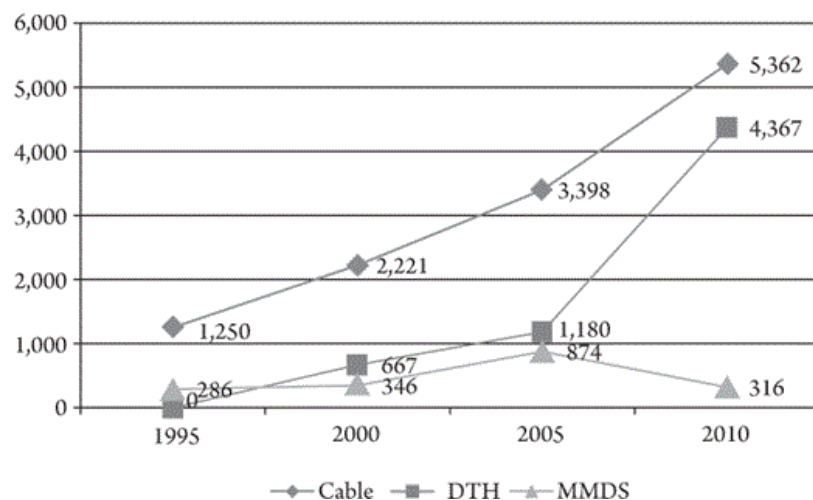
	2006	2007	2010
Grupo Televisa (Azcárraga Family)	67.0	63.0	61.0
Azteca (Grupo Salinas)	29.0	27.0	30.0
Other	3.0	10.0	9.0
Total Revenue (mil MXN)	29,333	31,578	35,175
Total Revenue (mil US\$)	2,640	2,842	2,814
C4	96	89	91
HHI	5,346	4,673	4,746
<i>N</i> (>1%)	3	3	3
Noam Index	3,123	2,701	2,772

Source: Observatory of industries, policies and consuming culture with data from Cofetel (2011), the companies' annual reports (F-20) and AAAP (2007, 2009).

p. 681 **Multichannel TV Platforms**

Cable and direct-to-home (DTH) satellite are the primary platforms in use for Mexican multichannel distribution. According to the Federal Commission of Telecommunications (Cofetel), the Mexican pay-TV market was valued at US\$1.2 billion (MXN 8 billion) in 2005 and US\$2.6 billion (MXN 32.5 billion) in 2010. Since 2007, all cable TV companies have been offering triple-play packages that include Internet, television, and telephony services. In fact, investment in the sector (in 2006, it stood at US\$418 million (MXN 4.6 billion) and reached US\$1.1 billion (MXN billion) by 2010) represents 18.8% of total telecommunications investment in the country.

DTH is the fastest growing market segment in the paid TV sector, with its audience shares rapidly increasing.<sup>19</sup> The spectacular growth of satellite TV is the result of the market entry of a new provider, Dish-México (MVS Comunicaciones), in 2008. Its entry ended the monopoly that SKY México had held over the market since 2005.<sup>20</sup> Satellite providers also have the advantage of being able to broadcast nationally, while cable companies do not have their own nationwide infrastructure to transmit. In 2010, the increased competition among multichannel platforms resulted in a 1.1% decrease in service costs (Figure 22.1).<sup>21</sup>

**Figure 22.1**

Multichannel Platforms (Audience Shares by Subscription), 1995–2010

Grupo Televisa also dominates the pay-TV market in Mexico. It has rapidly increased its audience shares in recent years, leading to an oligopolistic structure. Grupo Televisa's properties include 15 pay-TV channels, the regional operator TVI-MTY (in Monterrey, the country's third most populous metropolitan area) and Cablemás, which operates in 43 cities and 16 states. By the end of 2011, Grupo Televisa held four multichannel platforms, three cable companies, and one satellite TV provider, representing a 50% multichannel market share.<sup>22</sup> The Mexican Federal Commission for Economic Competition (CFC) authorized the acquisitions of TVI-MTY and Cablemás on the grounds that Grupo Televisa was "the only firm that can balance [out] Telmex" in the market.<sup>23</sup> The CFC also imposed must-offer and must-carry conditions on Grupo Televisa, mandating that it offer its broadcast and paid TV channels to all multichannel providers.<sup>24</sup> These obligations drew criticism from Grupo Televisa because they were not applied to Grupo Televisa's main DTH competitor, Dish-México, when it entered the market (Table 22.6).

**Table 22-6.** Multichannel Video Platforms: Cable MSOS, DTH, MMDS (Audience Shares by Subscribers), 2007–2010

	2007		2008		2009		2010	
	Total Subscribers (1,000)	%	Total Subscribers (1,000)	%	Total Subscribers (1,000)	%	Total Subscribers (1,000)	%
Megacable	1,298	20.0	1,483	20.0	1,592	20.0	1,757	17.0
Telecable (Grupo Hevi)	150	2.0	183	2.0	220	3.0	300	3.0
Cablecom (Slim Carlos, Grupo Carso)	357	5.0	610	8.0	747	9.0	780	8.0
Cablemás, TVI-MTY, Cablevisión, SKY México (Azcárraga Family, Grupo Televisa)	3,098	48.0	3,393	46.0	3,742	47.0	5,012	50.0
Dish México (MVS Comunicaciones)	500	8.0	422	6.0	730	9.0	1,324	13.0
Others	1,113	17.0	1,341	18.0	1,003	13.0	874	9.0
Total Subscribers (1,000)	6,517		7,431		8,035		10,046	
Total Revenue (mil MXN)		1,333						32,500
Total Revenue (mil US\$)		1,200						2,600
C4		81		80		85		88
HHI		2,797		2,620		2,771		3,022
<i>N</i> (>1%)		5		5		5		5
Noam Index		1,250		1,171		1,239		1,351

Source: Observations of industries, policies, and consuming culture from Cofetel (2011) and the companies' annual reports from 2008 to 2011.

## Film

The film industry has not yet recovered from the financial crisis it suffered between 1994 and the early 2000s when the Mexican peso experienced severe devaluation (the impact of the currency devaluation was so severe that in 1997 and 1998, there were only 9 and 11 feature films, respectively, produced in-country).<sup>25</sup> In 2010, Mexican productions accounted for 6% of audience shares and 5.6% of box office sales. In contrast, US productions from the Hollywood majors accounted for 90% of audience shares and 91% of box office sales.<sup>26</sup> This was despite a history of quotas and restrictions on American imports, including a long prohibition against dubbing into Spanish from a foreign language—a severe handicap in a country where illiteracy used to be high. Mexico has been among the top 20 countries worldwide in box office receipts since 2007, and it is ranked fifth in number of sold tickets worldwide per annum.<sup>27</sup> Ticket sales have increased steadily since 2007, with a per capita rating of 1.7 tickets per annum, and so the number of theaters in the country has increased in response from 3,958 in 2006 to 4,946 in 2010.

In film distribution, the US-based Hollywood majors have completely dominated the market. The two main Mexican distribution companies, Gussi and Corazón, combined hold only a 10.1% market share (Table 22.7).<sup>28</sup>

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**Table 22-7.** Film Production/Distribution (Market Shares by Box Office %), 2010

	2010
Walt Disney Pictures (US)	20.1
Paramount (Viacom, US)	14.9
Warner Bros. (Time Warner, US)	16.8
20th Century Fox (News Corp., Murdoch Family, US/UK/AUS)	12.6
Universal (GE/Comcast, US)	7.4
Sony-Columbia (Japan/US)	9.1
Corazón	5.2
Gussi	4.9
Videocine (Azcárraga Family, Grupo Televisa)	2.8
Others	6.2
Total Revenue (mil MXN) <sup>1</sup>	10,925
Total Revenue (mil US\$)	874
C4	65
HHI	1,263
<i>N</i> (>1%)	9
Noam Index	421

Source: CANACINE, 2010.

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

Unlike the distribution market, the exhibition market is led by Mexican enterprises and is highly concentrated as a result of a merger between Cinemex and Multimédios Cinemas. Today, almost 90% of the exhibition market is divided among just two companies, Cinépolis and Cinemex-Multimédios. Cinépolis also operates in several Central American countries (Table 22.8).

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**Table 22-8.** Film Exhibition (Market Shares by Box Office %), 2010

	Total # of Theaters	Box Office %
Cinépolis	2,305	61.0
Cinemex-MMC	1,655	26.0
Cinemark (US)	312	6.0
Lumiere	140	2.0
Others	536	5.0
Total	4,946	100.0
C4	89.0	92.0
HHI	3,452	4,437
<i>N</i> (>1%)	5	5
Noam Index	1,543	2,219

Source: CANACINE (2011), IMCINE (2011).

## Telecommunications Media

### Wireline Telecom

The Mexican telecommunications market has grown substantially since 1998. That year, the entire sector generated US\$8.9 billion (MXN 80.9 billion) in revenue. By 2010, its annual turnover was US\$31 billion (MXN 388 billion). With growth, though, have come high concentration indices: the wireline (and wireless) sector is characterized by oligopoly.<sup>29</sup>

The start of this process can be dated back to 1990, when the Mexican government decided to privatize the state monopolist Telmex. The government considered breaking Telmex up into several regional companies, divvying up Telmex's assets by the type of service they provided and selling the entire entity to a private owner. The government chose the latter option in 1996 based on the view that consumer costs would fall and the availability of fixed telephony would increase, and the media tycoon Carlos Slim's conglomerate Grupo Carso gained control of all of Telmex's assets.<sup>30</sup> Twenty years later, Mexico now faces a national debate over the future of Telmex because, due to the absence of competitors in the market, Mexican consumers are charged some of the highest per capita fixed telephony rates in the world.

Grupo Carso's Telmex has held a monopoly over landline telephony in Mexico since 1990, when it started joint operations with Southwestern Bell (AT&T, United States) and France Telecom (France). In 2010, Telmex had 15.6 million landline subscribers and 7.4 million broadband subscribers. In 2010, the company's landline segment reported US\$9.1 billion (MXN 114 billion) in revenue.<sup>31</sup>

It is estimated that the total number of wireline subscribers in Mexico stands at is 19.4 million, including those operated by the cable companies (providers do not make detailed figures available for independent research). The data that are available do suggest, however, that privatization has not had the desired effects of lowering prices and increasing the number of lines in service. There are 17.3 telephone lines per 100 people in Mexico, a rate much lower than in the United States and Canada in 1980.<sup>32</sup> Telmex's emphasis on protecting its local and long-distance call markets has been accompanied by government regulations favoring vertical and horizontal concentration plans. Because Telmex charges such high rates as a carrier, competitors for local services have focused on commercial line rather than residential line expansion. Axtel/Avantel has become Telmex's only real competitor in the wireline market, and it offers satellite services rather than traditional terrestrial connections. Some cable companies—such as Maxcom, Megacable, and Cablevisión—have started to offer IP telephony, but this has not won an appreciable audience share yet (Table 22.9).



**Table 22-9.** Wireline Telecom (Market Shares by Revenue), 1988–2010

	1988	1992	1996	2008	2010
Telmex (Carlos Slim, Grupo Carso)	100.0	100.0	100.0	85.0	85.0
Axtel/Avantel				5.0	5.2
Alestra				1.0	3.5
Maxcom				2.0	2.0
Megacable				1.0	2.3
Cablevisión, Cablemás (Azcárraga Family, Grupo Televisa)					1.7
Others				6.0	7.0
Total Subscriptions (1,000)	4,381	6,754	8,826	18,937	19,891
Total Revenue (mil MXN) <sup>1</sup>				34,000	
Total Revenue (mil US\$)				3,060	
C4	100	100	100	93	96
HHI	10,000	10,000	10,000	7,292	7,324
<i>N</i> (>1%)	1	1	1	5	6
Noam Index	10,000	10,000	10,000	3,261	3,002

Source: Authors' table using data from The Competitive Intelligence Unit (2011) and the companies.

- 1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

p. 686 As with local telephony, Telmex is the main long-distance telephone service carrier and provider. Telmex has offered its services to end users for a rate below the one legally established for other long-distance providers. ↪ The CFC therefore accused Telmex of monopolistic behavior, but no government action has yet been brought against Telmex. Whether smaller competitors will be able to continue doing business given Telmex's reduced long-distance rates is an open question (Table 22.10).

**Table 22-10.** Wireline Telecom—Long-Distance Telephony (Audience Shares by Subscribers), 1997–2010

	1997	1998–2000	2000–2004	2010
Telmex (Carlos Slim, Grupo Carso)	85.2	71.9	73.4	97.0
Axtel/Avantel	6.0	13.6	9.9	2.1
Alestra (AT&T, US)	4.9	9.3	8.8	
Iusacell (Grupo Salinas/Grupo Televisa)	0.6	1.55	1.5	
Marcatel	0.2	0.5	1.0	
Protel	0.1	0.4	0.2	
Telnor (Telmex) (Carlos Slim, Grupo Carso)	3.0	2.3	2.7	
Bestel (Carlos Slim, Grupo Carso)		0.2	1.1	
Maxcom			<0.1	
TeleReunión <sup>1</sup>			0.9	
Axtel			0.6	
GTM			<0.1	
Others				0.9
Total Revenue (mil MXN)				
Total Revenue (mil US\$)				
C4	99.0	97.1	94.7	100.0
HHI	7,329	5,447	5,568	9,433
<i>N</i> (>1%)	7	8	12	12
Noam Index	3,665	2,436	2,236	6,690

Source: (Mariscal and Rivera 2007); Telmex (2011).

1 TeleReunión merged with Maxcom in 2012.

## Wireless Telecom

Grupo Carso also dominates the mobile telephony market. At the beginning of the 1990s, Telcel, Carso's subsidiary specializing in mobile phones, became the main competitor for Iusacell, the then-dominant firm owned jointly by Grupo Televisa and Azteca's parent, Grupo Salinas. As a result of financial difficulties in the mid-1990s, Iusacell decided to focus mostly on post-payment telephone lines for urban markets. In response, Telcel focused on offering prepaid service contracts to low and median income populations outside of the major metropolitan centers. Telcel's campaign was extremely successful (the demographic targeted represented no less than 50% of the entire population and was underserved by Iusacell), and Telcel emerged as the clear market leader by 1995. Mobile telephony is the most popular personal communication medium in Mexico, with 84% of the public having coverage.<sup>33</sup> Each month, 700,000 new mobile lines are added to the market—mostly by low-income consumers and predominantly by Telcel—and the mobile market is the main driver of the telecommunications sector's overall growth.<sup>34</sup>

In 2010, Telmex reorganized Telcel into América Móvil, which offers wireless products and directory services in Mexico and is now a major wireless provider in Latin American markets through its international operator, Claro. At the end of 2010, Telcel held a market share of 79.5% in Mexico (reflecting the strategy to win lower income customers, 58.7 million people, representing 90.1% of all Telcel subscribers, held prepaid plans). In 2010, the revenues generated by Telcel's wireless services in Mexico were US\$11.7 billion (MXN 146 billion), or 26% of its consolidated income that year and Telcel users accounted for 28.5% of the total number of mobile phone users in Mexico. Telcel's main domestic competitors are Iusacell and Telefónica (Spain), although it also competes with Nextel Mexico, owned by NII Holdings (US), in certain areas of the country.<sup>35</sup>

Internationally, Grupo Carso and Spain's Telefónica are the main competitors in most of the world's Spanish-language markets. In Mexico, Telcel holds a much higher audience and market share than Telefónica's Movistar. Concentration is high for wireless, but not as high as it is for wireline (Table 22.11).

**Table 22-11.** Wireless Telecom (Market and Audience Shares by Revenue and Subscribers), 1997–2009

		1997	2000	2004	2008	2009	2012
Telcel (Carlos Slim, Grupo Carso)	% Subscribers				72.0	71.0	69.9
	% Revenue	63.7	73.1	77.2	69.0	69.0	70.8
Movistar México (Telefonica, Spain)	% Subscribers				20.0	21.0	19.1
	% Revenue	11.4	9.0	15.1	14.0	14.0	22
Pegaso <sup>1</sup>	% Subscribers			4.0	Movistar (2002)		
	% Revenue						
Iusacell (Grupo Salinas/Grupo Televisa)	% Subscribers				4.0	4.0	7.1
	% Revenue	22.9	11.7	3.9	6.0	5.0	5.7
Unefon <sup>2</sup>	% Subscribers					Iusacell (2008)	
	% Revenue		1.1	3.8			
Portatel	% Subscribers						
	% Revenue	1.9	1.1				
Nextel (NII Holdings, US)	Subscribers				3.0	4.0	3.9
	% Revenue				12.0	12.0	4
Total Subscribers (1,000)					77,395	83,150	98,909
Total Revenue (bil MXN)					163	230	265.1
Total Revenue (bil US\$)					14.6	16.1	20.1
<i>N</i> (>1%)		4	6	4	4	4	4
C4 (Audience Shares)					99.0	100.0	100
HHI (Audience Shares)					5,609	5,514	5,316

Noam Index (Audience Shares)				2,805	2,757	2,658
C4 (Market Shares)	99.9	97.8	100.0	100.0	100.0	100
HHI (Market Shares)	4,716	5,580	6,218	5,137	5,126	5,545
Noam Index (Market Shares)	2,358	2,278	3,109	2,569	2,563	2,773

- 1 Movistar México acquired Pegaso in 2002.
- 2 Iusacell purchased Unefon in 2008.

## Wireline Telecom

The Mexican telecommunications market has grown substantially since 1998. That year, the entire sector generated US\$8.9 billion (MXN 80.9 billion) in revenue. By 2010, its annual turnover was US\$31 billion (MXN 388 billion). With growth, though, have come high concentration indices: the wireline (and wireless) sector is characterized by oligopoly.<sup>29</sup>

The start of this process can be dated back to 1990, when the Mexican government decided to privatize the state monopolist Telmex. The government considered breaking Telmex up into several regional companies, divvying up Telmex's assets by the type of service they provided and selling the entire entity to a private owner. The government chose the latter option in 1996 based on the view that consumer costs would fall and the availability of fixed telephony would increase, and the media tycoon Carlos Slim's conglomerate Grupo Carso gained control of all of Telmex's assets.<sup>30</sup> Twenty years later, Mexico now faces a national debate over the future of Telmex because, due to the absence of competitors in the market, Mexican consumers are charged some of the highest per capita fixed telephony rates in the world.

Grupo Carso's Telmex has held a monopoly over landline telephony in Mexico since 1990, when it started joint operations with Southwestern Bell (AT&T, United States) and France Telecom (France). In 2010, Telmex had 15.6 million landline subscribers and 7.4 million broadband subscribers. In 2010, the company's landline segment reported US\$9.1 billion (MXN 114 billion) in revenue.<sup>31</sup>

It is estimated that the total number of wireline subscribers in Mexico stands at is 19.4 million, including those operated by the cable companies (providers do not make detailed figures available for independent research). The data that are available do suggest, however, that privatization has not had the desired effects of lowering prices and increasing the number of lines in service. There are 17.3 telephone lines per 100 people in Mexico, a rate much lower than in the United States and Canada in 1980.<sup>32</sup> Telmex's emphasis on protecting its local and long-distance call markets has been accompanied by government regulations favoring vertical and horizontal concentration plans. Because Telmex charges such high rates as a carrier, competitors for local services have focused on commercial line rather than residential line expansion. Axtel/Avantel has become Telmex's only real competitor in the wireline market, and it offers satellite services rather than traditional terrestrial connections. Some cable companies—such as Maxcom, Megacable, and Cablevisión—have started to offer IP telephony, but this has not won an appreciable audience share yet (Table 22.9).



**Table 22-9.** Wireline Telecom (Market Shares by Revenue), 1988–2010

	1988	1992	1996	2008	2010
Telmex (Carlos Slim, Grupo Carso)	100.0	100.0	100.0	85.0	85.0
Axtel/Avantel				5.0	5.2
Alestra				1.0	3.5
Maxcom				2.0	2.0
Megacable				1.0	2.3
Cablevisión, Cablemás (Azcárraga Family, Grupo Televisa)					1.7
Others				6.0	7.0
Total Subscriptions (1,000)	4,381	6,754	8,826	18,937	19,891
Total Revenue (mil MXN) <sup>1</sup>				34,000	
Total Revenue (mil US\$)				3,060	
C4	100	100	100	93	96
HHI	10,000	10,000	10,000	7,292	7,324
<i>N</i> (>1%)	1	1	1	5	6
Noam Index	10,000	10,000	10,000	3,261	3,002

Source: Authors' table using data from The Competitive Intelligence Unit (2011) and the companies.

- 1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

p. 686 As with local telephony, Telmex is the main long-distance telephone service carrier and provider. Telmex has offered its services to end users for a rate below the one legally established for other long-distance providers. ↪ The CFC therefore accused Telmex of monopolistic behavior, but no government action has yet been brought against Telmex. Whether smaller competitors will be able to continue doing business given Telmex's reduced long-distance rates is an open question (Table 22.10).

**Table 22-10.** Wireline Telecom—Long-Distance Telephony (Audience Shares by Subscribers), 1997–2010

	1997	1998–2000	2000–2004	2010
Telmex (Carlos Slim, Grupo Carso)	85.2	71.9	73.4	97.0
Axtel/Avantel	6.0	13.6	9.9	2.1
Alestra (AT&T, US)	4.9	9.3	8.8	
Iusacell (Grupo Salinas/Grupo Televisa)	0.6	1.55	1.5	
Marcatel	0.2	0.5	1.0	
Protel	0.1	0.4	0.2	
Telnor (Telmex) (Carlos Slim, Grupo Carso)	3.0	2.3	2.7	
Bestel (Carlos Slim, Grupo Carso)		0.2	1.1	
Maxcom			<0.1	
TeleReunión <sup>1</sup>			0.9	
Axtel			0.6	
GTM			<0.1	
Others				0.9
Total Revenue (mil MXN)				
Total Revenue (mil US\$)				
C4	99.0	97.1	94.7	100.0
HHI	7,329	5,447	5,568	9,433
<i>N</i> (>1%)	7	8	12	12
Noam Index	3,665	2,436	2,236	6,690

Source: (Mariscal and Rivera 2007); Telmex (2011).

1 TeleReunión merged with Maxcom in 2012.

## Wireless Telecom

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- 1 Movistar México acquired Pegaso in 2002.
- 2 Iusacell purchased Unefon in 2008.

## Internet Media

### Internet Service Providers (ISP)

p. 688 Since 2000, home Internet access rates have risen from 5% at the start of the decade to 61% by 2010, though the digital gap has grown wider between metropolitan and rural areas. The ISP ↵

p. 689 ↵

p. 690 ↵

p. 691 ↵

market is highly concentrated: Telmex's Prodigy has a distinct advantage over its competitors as both a bidder and a carrier and as a result dominates the market (Table 22.12).

**Table 22-12.** Internet Service Providers (Market Shares by Revenue), 2007–2011

	2007	2008	2009	2010	2011
Prodigy (Telmex) (Carlos Slim, Grupo Carso)	74.2	78.2	83.9	74.0	76.9
Grupo Televisa (Azcárraga Family)	14.0	11.5	8.9	12.0	6.8
Cablevisión	14.0	11.5	8.9	8.0	6.8
Cablemás				3.0	
TVI-SKY (News Corp., Murdoch Family, US/UK/AUS)				1.0	
Megacable	8.6	8.2	7.2	6.0	5.9
Axtel/Avantel	2.8	2.1		7.0	10.4
Maxcom	0.4			1.0	
Total Revenue (mil MXN)	4,311			9,988	
Total Revenue (mil US\$) <sup>1</sup>	388			799	
C4	99.6	100.0	100.0	99.0	100.0
HHI	5,784	6,319	7,170	5,706	6,103
N (>1%)	5	4	3	6	6
Noam Index	2,892	3,160	4,140	2,552	3,051

1 This revenue figure is an estimate based on data collected in this study: it is based on average per capita revenues reported for several other countries in this study with similar per capita income.

### Online News

In contrast to the print sector, online political coverage is the most popular web content, and the most successful sites are those that provide free content, though this means that existing outlets' online editions actually dominate the sector rather than new online-only outlets. Paid online subscription service is not popular and has not caught on (Table 22.13).



**Table 22-13.** Online News Media (Market Shares by Monthly Unique Visitors), 2009–2010

	2009	2011
<i>El Universal de México</i>	9.5	15.8
MSN (Microsoft, US)	10.9	
<i>elmundo.es</i> (Unidad Editorial S.A., Spain)	6.0	3.8
Yahoo! News (US)	5.5	
<a href="http://oem.com.mx">oem.com.mx</a> (OEM)	4.7	4.3
<a href="http://elpais.com">elpais.com</a> (PRISA Group, Spain)	4.3	2.8
<a href="http://mediosmasivos.com.mx">mediosmasivos.com.mx</a> (Medios Masivos Mexicanos S.A.)		11.6
<a href="http://aee.com.mx">aee.com.mx</a> (AEE Periodicos Network)		14.4
<a href="http://milenio.com">milenio.com</a> (Grupo Multimedios)	3.1	7.0
<i>20minutos.es</i> (Multiprensa y Más S.L., Spain)		4.9
<a href="http://excelsior.com.mx">excelsior.com.mx</a> ( <i>El Excélsior</i> )		2.3
<a href="http://CNN.com">CNN.com</a> (Time Warner, US)	2.8	
Total Revenue (mil MXN)	Estimate based on visitor number	
Total Revenue (mil US\$)		
C4	32	49
HHI	341	711
<i>N</i> (>1%)	8	9
Noam Index	121	237

Source: [comScore.com](http://comScore.com).

## Internet Media

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Megacable	8.6	8.2	7.2	6.0	5.9
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<a href="http://oem.com.mx">oem.com.mx</a> (OEM)	4.7	4.3
<a href="http://elpais.com">elpais.com</a> (PRISA Group, Spain)	4.3	2.8
<a href="http://mediosmasivos.com.mx">mediosmasivos.com.mx</a> (Medios Masivos Mexicanos S.A.)		11.6
<a href="http://aee.com.mx">aee.com.mx</a> (AEE Periodicos Network)		14.4
<a href="http://milenio.com">milenio.com</a> (Grupo Multimedios)	3.1	7.0
<i>20minutos.es</i> (Multiprensa y Más S.L., Spain)		4.9
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## Conclusion

Mexico has one of the most concentrated audiovisual and telecommunication markets in the world, and this is unlikely to change in the near term. Looking forward, we believe discussion of concentration studies in Mexico needs to move toward more descriptive analyses. While new technologies such as multichannel platforms have introduced some competitiveness to the market, concentration indicators in general have either stabilized or increased since 2000. Moreover, both Grupo Televisa and Azteca are now further expanding their interests in telecommunications through triple-play service offers, which would only accentuate concentration in paid TV, Internet access, and telephony (Table 22.14).

**Table 22-14.** Sector Concentration (Noam Index), 1988–2010

	1988	1992	1995– 1996	1997	2000	2004– 2005	2007	2008	2009	2010
Broadcast TV (by Audience Shares)			5,910		4,029	3,980				3,880
Broadcast TV (by Market Shares)						3,791	3,314			3,366
Multichannel TV Platforms (by Audience Shares)							1,250	1,171	1,239	1,352
Radio Group (by # of Stations)										176
Film (by Box Office %)										2,219
Wireline Telecom (by Market Shares)	10,000	10,000	10,000			3,261		3,002		
Wireline Telecom—Long-Distance Telephony (by Market Shares)				3,665	2,436	2,236				6,690
Wireless Telecom (by Market Shares)				2,358	2,278	3,108		2,569	2,563	
ISPs (by Total # of Subscribers)							2,892	3,160	4,144	2,263

Though the media market is highly concentrated, political rivalry will make it difficult for reforms to take place. In the 2012 presidential election, Grupo Televisa was accused of influencing its audiences to benefit Enrique Peña Nieto, the PRI candidate. In turn, Grupo Carso was accused of helping Nieto's rival, Andres Manuel Lopez-Obrador, leader of the opposition Party of the Democratic Revolution (PRD). Given that Nieto won his 2012 reelection campaign, increased regulatory scrutiny is more likely to be seen in the telecommunications sector rather than in the audiovisual sector, as Grupo Televisa's executives have made it quite clear to Mexican politicians that reforms in the audiovisual sector should primarily come at the expense of Grupo Carso's monopolistic practices, rather than Grupo Televisa's.

The ongoing dispute between Emilio Azcárraga Jean, Carlos Slim, and their respective political partisans over the opening up of the audiovisual and telecom markets to greater competition will shape the future of the Mexican media market for years to come.

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## Conclusion

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Mexico has one of the most concentrated audiovisual and telecommunication markets in the world, and this is unlikely to change in the near term. Looking forward, we believe discussion of concentration studies in Mexico needs to move toward more descriptive analyses. While new technologies such as multichannel platforms have introduced some competitiveness to the market, concentration indicators in general have either stabilized or increased since 2000. Moreover, both Grupo Televisa and Azteca are now further expanding their interests in telecommunications through triple-play service offers, which would only accentuate concentration in paid TV, Internet access, and telephony (Table 22.14).

**Table 22-14.** Sector Concentration (Noam Index), 1988–2010

	1988	1992	1995– 1996	1997	2000	2004– 2005	2007	2008	2009	2010
Broadcast TV (by Audience Shares)			5,910		4,029	3,980				3,880
Broadcast TV (by Market Shares)						3,791	3,314			3,366
Multichannel TV Platforms (by Audience Shares)							1,250	1,171	1,239	1,352
Radio Group (by # of Stations)										176
Film (by Box Office %)										2,219
Wireline Telecom (by Market Shares)	10,000	10,000	10,000			3,261		3,002		
Wireline Telecom—Long-Distance Telephony (by Market Shares)				3,665	2,436	2,236				6,690
Wireless Telecom (by Market Shares)				2,358	2,278	3,108		2,569	2,563	
ISPs (by Total # of Subscribers)							2,892	3,160	4,144	2,263

Though the media market is highly concentrated, political rivalry will make it difficult for reforms to take place. In the 2012 presidential election, Grupo Televisa was accused of influencing its audiences to benefit Enrique Peña Nieto, the PRI candidate. In turn, Grupo Carso was accused of helping Nieto's rival, Andres Manuel Lopez-Obrador, leader of the opposition Party of the Democratic Revolution (PRD). Given that Nieto won his 2012 reelection campaign, increased regulatory scrutiny is more likely to be seen in the telecommunications sector rather than in the audiovisual sector, as Grupo Televisa's executives have made it quite clear to Mexican politicians that reforms in the audiovisual sector should primarily come at the expense of Grupo Carso's monopolistic practices, rather than Grupo Televisa's.

The ongoing dispute between Emilio Azcárraga Jean, Carlos Slim, and their respective political partisans over the opening up of the audiovisual and telecom markets to greater competition will shape the future of the Mexican media market for years to come.



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Mexico has the fifth-highest concentration rate of the countries surveyed, with a weighted average C4 of 97% in 2010 (Table 22.15). This is due to the hold over electronic media and telecommunications that two companies possess. Carlos Slim's Grupo Carso, through its América Móvil branch, effectively controls the wireless, wireline, and ISP markets. In platform media, it has a 67% market share (Table 22.17). Emilio Azcárraga's family controls Grupo Televisa with its 69% market share in television broadcasting, which translates into a 46% market share in content media alone (Table 22.16). In newspapers, the largest Mexican print media group (OEM) held 59.4% of the market in 2012. Such control has spurred Mexican legislators to pass laws that create a new regulatory agency for electronic media, IFT, with considerable independence and professionalism in comparison to the past regulator, to reduce market power. Slim's wireline Telmex and wireless Telcel subsidiaries were said to cost the Mexican economy each year \$25 billion due to the absence of real competition. América Móvil was such a giant that its revenue was larger than that of the next five largest companies in Mexico combined.

**Table 22-15.** National Media Industries Concentration in Mexico

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Power Index in Country	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Grupo Carso	4,095	57	4,185	59	0.4	0.1
Televisa	700	15.1	580	14.2	-3	0.2
TV Azteca	102	4	83	3	-3.2	-0.1
NII Holdings (Mexico/US) <sup>1</sup>	97	8	11	3	-15	-1
Megacable	23.4	1.4	26	2	1.88	0.08
Organizacion Editorial Mexicana (OEM)	18	0.3	19	0.3	0.6	-0.002
Google (US)	5.2	0	17	0.2	38.04	0.03
MVS Comunicaciones	2	0.3	14	1.1	104	0.13
Disney (US)	6.3	0.3	12	0.6	14	0.04
Time Warner (US)	4	0.3	8	0.5	14	0.04
Murdoch Interests (US)	5	0.3	5	0.4	-1	0.01
El Universal	1.0	0.1	0.6	0.06	-7	-0.003
Grupo Reforma	1.0	0.1	0.5	0.05	-7.6	-0.004
La Jornada	0.1	0.03	0.1	0.02	-2	-0.001
Grupo Multimedios	0.2	0.03	0.1	0.02	-6.4	-0.001
Medios Masivos Mexicanos	0.1	0.007	0.2	0.02	33.5	0.002
<b>Media Concentration Index</b>			<b>2004/5</b>	<b>2011 or Most Recent</b>	<b>% Change Annual Average</b>	
Total Revenue: Nat'l Media Industry (mil US\$)			21,710	30,526	7	
Total Voices ( <i>n</i> )			31	33	1.1	
Net Voices ( <i>n</i> )			28	30	1.2	
Public Ownership (%)			0.0	0.0	0.0%	
Foreign Ownership (%)			19	20	0.2	
C4 Average—Weighted			97	97	-0.1	
HHI Average—Weighted			5,936	5,315	-2	
C1 Average—Weighted			69	68	0	
Noam Index Average—Weighted			2,576	2,078	-3.22	
Pooled Overall Sector C4			83.7	75.7	-2.0%	
Pooled Overall Sector HHI			3,685	3,777	0.4	
Pooled Overall Sector Noam Index			679	447	-6	

Market Share of Top Ten Companies: Nat'l Media Industry (%) 96.4 97 0.1  
(Pooled C10)

National Power Index 5,204 5,298 0.3

1 Formerly Nextel; it is no longer part of Sprint (and not acquired by Softbank).

**Table 22-17.** Top Platform Media Companies in Mexico

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)
Grupo Carso	5,867	75	4,778	67	-3.1	-1.3
Grupo Televisa	134	7.2	197	8.3	7.9	0.18
NII Holdings (Mexico/US) <sup>1</sup>	116	10	13	3.2	-15	-1.1
Megacable	19.3	1.2	21.3	1.6	1.7	0.1
MVS	1.6	0.3	12	1	103	0.1
TV Azteca	0	0	0	0	0	0
Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average			
Public Ownership (%)	0.0	0.0	0.0%			
Foreign Ownership (%)	21	21	-0.04			
C4 Average—Weighted	98	98	0.1			
HHI Average—Weighted	6,198	5,603	-2			
C1 Average—Weighted	77	70	-1			
National Power Index	6,298	5,407	-2.4			

1 Formerly Nextel; it is no longer part of Sprint (and not acquired by Softbank).

**Table 22-16.** Top Content Media Companies in Mexico

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)
Grupo Televisa	3,613	56	2,623	46.0	-5	-2
TV Azteca	628	21.7	528	17.6	-4.0	-1.0
OEM	139	2.3	136	2.2	-0.6	-0.03
Megacable	44.8	2.2	51.7	3.0	3.8	0.2
Disney (US)	39	2	73	4	15	0.3
MVS Comunicaciones	4.0	0.7	30	2.3	108	0.3
Time Warner (US)	27.1	1.6	51	3	15	0.24
Murdoch Interests (US)	30	1.7	29	2.3	-0.5	0.01
Grupo Carso	3	0.6	11	1.4	51	0.14
Google (US)	32.1	0	108	1.2	40	0.2
Grupo Reforma	6	0.5	3.3	0.34	-7	-0.02
Medios Masivos Mexicanos	0.5	0.04	1.5	0.1	35	0.02
El Universal	6.3	0.5	4	0.4	-6.5	-0.02
Grupo Multimedios	1.1	0.2	0.7	0.2	-6.1	-0.01
La Jornada	0.8	0.17	0.7	0.12	-1.5	-0.0
<b>Media Concentration Index</b>		<b>2004/5</b>		<b>2011 or Most Recent</b>		<b>% Change Annual Average</b>
Public Ownership (%)		0.0		0.0		0.0%
Foreign Ownership (%)		9.0		15.8		1.14
C4 Average—Weighted		91		85		-1
HHI Average—Weighted		4,589		3,778		-3
C1 Average—Weighted		60		51		-1
National Power Index		4,598		3,699		-3.3

In order to encourage deconcentration, Mexico's foreign direct investment rules for telecommunications and broadcast television have been relaxed to allow an ownership up to 100% and 49% in these industries, respectively, doubling the pre-existing limits for both. These limits accounted for the fact that of all the Spanish-language markets surveyed, Mexico is the only one without a presence by Telefónica (Spain)—or any foreign participation in its wireline markets. In contrast, América Móvil, often operating under the name of "Claro", is the fourth-largest wireless provider internationally with 252 million subscribers.

p. 695 Mexico's newspaper market is unique in that much of its advertising revenue comes from ↵

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the country's political parties rather than commercial enterprises. At least 58% of total commercial advertising spending in Mexico per annum goes to broadcast television—and, by extension, Grupo Televisa, which also has a 50% market share of the multichannel platform market through its Cablemás, second only to the domestic operator Megacable. Because so much news is consumed through audiovisual media rather than print, even the largest Mexican print media group (OEM), which held 59.4% of newspaper market share in 2012 (down from an even higher 63% in 2009), accounts for less than 3% of overall content media

p. 700 revenues. ↵

## p. 694 **Mexico—Data Summaries**

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Mexico has the fifth-highest concentration rate of the countries surveyed, with a weighted average C4 of 97% in 2010 (Table 22.15). This is due to the hold over electronic media and telecommunications that two companies possess. Carlos Slim's Grupo Carso, through its América Móvil branch, effectively controls the wireless, wireline, and ISP markets. In platform media, it has a 67% market share (Table 22.17). Emilio Azcárraga's family controls Grupo Televisa with its 69% market share in television broadcasting, which translates into a 46% market share in content media alone (Table 22.16). In newspapers, the largest Mexican print media group (OEM) held 59.4% of the market in 2012. Such control has spurred Mexican legislators to pass laws that create a new regulatory agency for electronic media, IFT, with considerable independence and professionalism in comparison to the past regulator, to reduce market power. Slim's wireline Telmex and wireless Telcel subsidiaries were said to cost the Mexican economy each year \$25 billion due to the absence of real competition. America Móvil was such a giant that its revenue was larger than that of the next five largest companies in Mexico combined.

**Table 22-15.** National Media Industries Concentration in Mexico

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the Overall National Media Market (%)	Company Power Index in Country	Company Power Index in Country	Company Power Index in Country	Company Share of the Overall National Media Market (%)
Grupo Carso	4,095	57	4,185	59	0.4	0.1
Televisa	700	15.1	580	14.2	-3	0.2
TV Azteca	102	4	83	3	-3.2	-0.1
NII Holdings (Mexico/US) <sup>1</sup>	97	8	11	3	-15	-1
Megacable	23.4	1.4	26	2	1.88	0.08
Organizacion Editorial Mexicana (OEM)	18	0.3	19	0.3	0.6	-0.002
Google (US)	5.2	0	17	0.2	38.04	0.03
MVS Comunicaciones	2	0.3	14	1.1	104	0.13
Disney (US)	6.3	0.3	12	0.6	14	0.04
Time Warner (US)	4	0.3	8	0.5	14	0.04
Murdoch Interests (US)	5	0.3	5	0.4	-1	0.01
El Universal	1.0	0.1	0.6	0.06	-7	-0.003
Grupo Reforma	1.0	0.1	0.5	0.05	-7.6	-0.004
La Jornada	0.1	0.03	0.1	0.02	-2	-0.001
Grupo Multimedios	0.2	0.03	0.1	0.02	-6.4	-0.001
Medios Masivos Mexicanos	0.1	0.007	0.2	0.02	33.5	0.002
<b>Media Concentration Index</b>			<b>2004/5</b>	<b>2011 or Most Recent</b>	<b>% Change Annual Average</b>	
Total Revenue: Nat'l Media Industry (mil US\$)			21,710	30,526	7	
Total Voices ( <i>n</i> )			31	33	1.1	
Net Voices ( <i>n</i> )			28	30	1.2	
Public Ownership (%)			0.0	0.0	0.0%	
Foreign Ownership (%)			19	20	0.2	
C4 Average—Weighted			97	97	-0.1	
HHI Average—Weighted			5,936	5,315	-2	
C1 Average—Weighted			69	68	0	
Noam Index Average—Weighted			2,576	2,078	-3.22	
Pooled Overall Sector C4			83.7	75.7	-2.0%	
Pooled Overall Sector HHI			3,685	3,777	0.4	
Pooled Overall Sector Noam Index			679	447	-6	



Market Share of Top Ten Companies: Nat'l Media Industry (%) 96.4 97 0.1  
(Pooled C10)

National Power Index 5,204 5,298 0.3

1 Formerly Nextel; it is no longer part of Sprint (and not acquired by Softbank).

**Table 22-17.** Top Platform Media Companies in Mexico

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)	Company Power Index in Country	Company Share of the National Platform Media Market (%)
Grupo Carso	5,867	75	4,778	67	-3.1	-1.3
Grupo Televisa	134	7.2	197	8.3	7.9	0.18
NII Holdings (Mexico/US) <sup>1</sup>	116	10	13	3.2	-15	-1.1
Megacable	19.3	1.2	21.3	1.6	1.7	0.1
MVS	1.6	0.3	12	1	103	0.1
TV Azteca	0	0	0	0	0	0
Media Concentration Index	2004/5	2011 or Most Recent	% Change Annual Average			
Public Ownership (%)	0.0	0.0	0.0%			
Foreign Ownership (%)	21	21	-0.04			
C4 Average—Weighted	98	98	0.1			
HHI Average—Weighted	6,198	5,603	-2			
C1 Average—Weighted	77	70	-1			
National Power Index	6,298	5,407	-2.4			

1 Formerly Nextel; it is no longer part of Sprint (and not acquired by Softbank).

**Table 22-16.** Top Content Media Companies in Mexico

	2004/5		2011 or Most Recent		% Change Annual Average	
	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)	Company Power Index in Country	Company Share of the National Content Media Market (%)
Grupo Televisa	3,613	56	2,623	46.0	-5	-2
TV Azteca	628	21.7	528	17.6	-4.0	-1.0
OEM	139	2.3	136	2.2	-0.6	-0.03
Megacable	44.8	2.2	51.7	3.0	3.8	0.2
Disney (US)	39	2	73	4	15	0.3
MVS Comunicaciones	4.0	0.7	30	2.3	108	0.3
Time Warner (US)	27.1	1.6	51	3	15	0.24
Murdoch Interests (US)	30	1.7	29	2.3	-0.5	0.01
Grupo Carso	3	0.6	11	1.4	51	0.14
Google (US)	32.1	0	108	1.2	40	0.2
Grupo Reforma	6	0.5	3.3	0.34	-7	-0.02
Medios Masivos Mexicanos	0.5	0.04	1.5	0.1	35	0.02
El Universal	6.3	0.5	4	0.4	-6.5	-0.02
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La Jornada	0.8	0.17	0.7	0.12	-1.5	-0.0
<b>Media Concentration Index</b>		<b>2004/5</b>		<b>2011 or Most Recent</b>		<b>% Change Annual Average</b>
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## Notes

1. For instance, on October 10, 2004, President Vicente Fox issued a decree that abrogated the Federal Law for Radio and Television regarding state-sponsored advertising content.
2. An example of commercial operators and the government's collaboration in this regard was the passage of the 2006 Radio, Television, and Telecommunications Law, which was called the "Televisa Law" due to that media group's influence in devising the legislation, as well as in its unanimous approval in just five minutes by the Deputies Chamber without debate.
3. Azcárraga, Emilio. "Carlos Slim Needs More Competition." *The Wall Street Journal*. 22 Mar. 2012. Jan. 16, 2013. <<http://online.wsj.com/article/SB10001424052702304724404577293070405826732.html>>. ↵
4. This is a sore point for Azcárraga because he would like to significantly expand Grupo Televisa's 5% stake in the Spanish-language Univisión network (it is the fifth largest terrestrial broadcaster in the United States by audience share), but US law prohibits him from doing so.
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