The History of Broadcast Television Monopoly in Mexico (1950-1993)

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Monopoly is a critical category for understanding modern economic dynamics. It is the most important and dominant fraction of capital, and it is essentially developed and expressed in the field of product manufacturing and service provision. Its most operative and institutional product is the large company. From its earliest days, the Mexican television has always been dominated by monopoly capital, because almost all television production groups have been represented by large companies or parts of business groups. It is possible to establish three great periods in the monopoly television history in Mexico: the first one, from the middle of the 40's until 1955, in which the capital participating in the emerging activity are organized and until the creation of Telesistema Mexicano; the second one from the middle of the 60's until 1972, when the monopoly, besides including the operation of private companies, adds the state activity in television. Finally, the third one started with the creation of Televisa (1973) and included the foundation of the state network Imevisión. This period ended in 1993 marked by the privatization of this state network.

Keywords: television, monopoly, large company, history

INTRODUCTION

The monopoly issue is one of the most relevant topics for understanding modern economics and the development of one's own economic history since the end of the 19th century. Television, seen as an economic activity cannot escape this condition.

The "monopoly" issue is one of the most repeated topics in research publications about this media. In this paper we propose to deepen the discussion about the television monopoly and its presence throughout the historical development of the country's media.

Monopoly and Large Company

The research we carry out has its main base in the category of monopoly capital or monopoly itself. We start from the fact that, like any other category, monopoly capital has a historical status. Monopolies, textually referred to as: "A specific form of market in which there is only one bidder, who, due to his/her dominant position, in the absence of competition can impose the prices that interest him/her most in order to reach the maximum profit" (Tamames and Gallego, 2006, page 543), have been found in various production systems.

Here we will address the concept of monopoly in capitalist society. In this sense, monopoly is the result of the evolutionary process of free competition and of the two central powers that regulate the development and reproduction of capital: concentration and centralization.

Concentration and centralization gave birth to a clear distinction between the different proportions of capital - among other attributes - and the birth of monopoly capital, the dominant capital once the stage of free competition had ended. The monopoly's old ways of the mercantilist period settled their power in the market control. On the other hand, the monopoly of the capitalist stage bases its power in the capacity to control means of production and, in this way, to become the hegemonic capital and to count on the possibility of appropriating systematically an extraordinary profit.

The joint-stock company or stock corporation is the legal form that best suits the needs of the monopoly capital, because the individual capitalist may own all the shares representing the company's capital, or if several people's capitals were gathered, to each one of them corresponded the aliquot portion of shares in proportion to the amount of his/her invested capital. The "individual capital" could be converted into "collective capital".

Monopoly capital is organized functionally through the modern large company, a powerful and flexible structure with the capacity to be active in all phases of economic reproduction, both productive and financial. The most important characteristics of the modern large company are as follows:

- a) Tendency towards the permanent growth of its production and distribution scale (Baran and Sweezy, 1975, page 10).
- b) Permanent tendency towards combination through mergers and acquisitions.
- c) Operation in several productive units or service providers (Chandler, 1996, page 28).
- d) Ability to organize both supply and production, allowing the development of a variety of goods and services (Chandler, 1996, page 38).
- e) Simultaneous operation in several locations.
- Tendency to do business beyond national borders, in order to become in a multinational (Lenin, n/s, page 744).
- g) Articulator of diverse phases in the reproduction process, which includes grouping production, distribution, supply, financing, etc. under the same scope.
- h) Unification of the productive capital forms with the banking capital (Aguilar M., 1975, page
- i) Establishment of a professional management, in which shareholders do not always take part (Chandler, 1996, page 51).
- j) Price management replacing the market mechanism (Baran and Sweezy, 1975: 50).
- k) Separation of functional capital and ownership capital, shareholders or founders are divested from management.

All the above characteristics were developed gradually and naturally at different rates in the main television companies in the country, especially in Telesistema Mexicano and Televisa.

Free Competition and Television

Free competition is often attributed with a substantial number of qualities without considering that the very logic of competition inevitably leads to monopoly. On the historical level, free competition practically ended in the mid-nineteenth century and from that time the hegemonic system has been imposed by monopoly capital.

In this way, this historical transition has a huge importance for the Mexican economy because when it reaches its capitalist stage, the world economic structure is moving towards its imperialist phase (Aguilar M., 1968, page 203). The Mexican economy never experienced, in practice, a free competition stage.

In the case of television services, the conditions that allowed a free competitive market to operate never existed, as defined by Parkin (2009, page 240): a large number of buyers and sellers of similar products; free entry and exit from the market by providers and buyers; companies that are no longer operating have no advantages over new ones; and there is a price information transparency.

It is very important to mention that at no stage during its development has Mexican television production and distribution met these conditions. In fact, the television business has been an inexhaustible source of practices that inhibit any competition. As a result, throughout its history, a handful of forces that constitute the monopoly of Mexican television have prevailed.

The Initial Battle to Get Control Over Television

The first television broadcasts were made in the mid-1920s and regular broadcasting began in 1936. The world war frustrated the progress of the new service and it was during the post-war period that television was able to redirect its ascending path in developed countries. It was a service that used the spectrum - the air - to broadcast the signal emitted by a station and captured by antennas from televisions: the broadcast television.

In the United States, where the television service was placed in the hands of private companies, the forces of the television monopoly were organized early on, leading to the establishment of the three most powerful organizations (networks): NBC, ABC and CBS (Bustamante, 1999, page 32).

In the country, since the 1940s there has been a battle between national and foreign capitals in order to obtain the first licenses to operate the Mexican television service. In the end, two great groups, already monopolists, were imposed: those of the Azcárraga and Ávila Camacho-O'Farrill-Alemán groups.

Azcárraga's interests in television were not only part of the monopoly capital because of the investment amount the family risked in the new service, but because due to the diversity of businesses in which the Azcárraga family was involved, in fact, they operated an economic group that was focused on their radio stations -notably the XEW station- and had diversified into other entertainment sectors: radio station, Mexican Radio Programs (Mejía Barquera, 2007); copyrights on music, Promotora Hispanoamericana de Música and Editorial Mexicana de Música (Hernández Lomelí, 2004, page 52); film studios, Churubusco Azteca (Pérez Turrent, 2015, pages 15-16), and movie theaters.

At the same time, the interests of the Ávila Camacho-O'Farrill-Alemán ¹ group were also diversified, since in addition to entering into the television world they were present in one of the most important newspapers in Mexico, *Novedades*, (Cole, 1971, page 112); in a radio station, XEX (Sosa Plata, 1993, page 29), to which should be added the English-language newspaper *The News* and several magazines. In the case of this group, it is notoriously remarkable that they took advantage of the State's strength - the heads of the three families held public offices - to gain a privileged position within the new activity.

Not only because their activities are diversified, but also because of their operations magnitude, television companies are practically from their origin- part of the large Mexican company. Table 1 offers comparative elements that allow us to appreciate how television stations have a greater density of income, invested capital and staff within the service sector since the early 1960s.

TABLE 1 MEXICO, INDICATORS OF ECONOMIC ESTABLISHMENTS IN THE SERVICE SECTOR, 1960

Concept	Figures per establishment				
-	Incomes 1/		Invested capital 1/		Staff employed
Total establishments					
Services	\$	156	\$	369	3
Media					
Newspapers and magazines	\$	2,465	\$	1,797	41
Radio	\$	732	\$	913	17
Television	\$	8,357	\$	7,951	89
Largest establishments sector					
Services ^{2/}	\$	2,782	\$	7,800	40
Media					
Newspapers and magazines 3/	\$	4,391	\$	3,333	76
Radio ^{4/}	\$	1,060	\$	1,313	24
Television 4/	\$	10,158	\$	9,627	120

^{1/} Thousands of Mexican pesos.

Source: Prepared with information from Secretaría de Industria y Comercio, 1965.

The Mexican state worked as an incubator for some of the founding powers of Mexican television. The most important are those of the family of Maximino Avila Camacho, secretary of Communications and Transportation (1941-1945), brother of the president bearing the same surname and father-in-law of Rómulo O'Farrill. And also, those of the Alemán family stand out, because under the tutelage of President Miguel Alemán Valdés (1946-1952) the first television concessions were granted, and the service began to be offered. Thus, under the protection of the power of the State, they took advantage from their status to increase their fortunes and impose themselves as usufructuaries in the new economic activity.

In addition, as part of the very economic logic of Mexican television in its original phase, the State ensured the practical absence of regulation in the television service during the first 10 years of its existence and until the promulgation of the Federal Law on Radio and Television in 1960, which benefited the emerging monopoly.

The Telesistema Predominance Stage

The long process that began in the 1940s to establish the monopoly model of Mexican television operation ended in 1955 with the creation of Telesistema Mexicano (Telesistema). Several studies suggest that the company's creation was the result of strong competition between the Azcárraga and Ávila Camacho-O'Farrill-Alemán groups, which headed channels 2 and 4, respectively, since the early 1950s. The dominant narrative points out that this strong competition forced the search for a way out: the merging of interests. Although there is no statistical, accounting or financial evidence of this competition, the protagonists' witnesses are taken as certain, but at the same time, other facts are left aside that suggest that from the very moment television arises, the two fractions of monopoly capital were already negotiating an agreement for the joint operation of the television service.

There are several facts that suggest the existence of this long negotiation which can be described here:

1) The creation of a television station in Matamoros (XELD-TV) co-owned by O'Farrill-Azcárraga. The goal was to provide a signal to some populations in South Texas (Television Magazine, 1951, page 40).

²/ 11 or more employees.

³/ 6 or more employees.

⁴/ 4 or more employees.

- 2) The agreement announced in November 1952 to merge XEX (O'Farrill) and XEQ (Azcárraga) radio stations (Zabludovsky, 1952, page 1).
- 3) The relocation, in 1953, of channel 4 studios—property by O'Farrill—to Televicentro (Zabludovsky, Antena, 1953, page 6), the home office of Grupo Azcárraga.
- 4) The December 1954 agreement allowing the Azcárraga and O'Farrill channels to establish jointly repeaters within the Republic (Zabludovsky, 1954, page 1).

Finally, at the beginning of 1955, the creation of Telesistema Mexicano was announced as the result of the union of the interests of Azcárraga and Ávila Camacho-O'Farrill-Alemán. Ownership of the new company was shared equally by both business groups (although Alemán was not formally listed as a shareholder) (Mejía Barquera, 1981, pages 540-541) and gave way to the development of a professional company, with a departmental administrative structure and that was integrating professional managers to undertake various management tasks.

Telesistema was not the owner of the concessionary companies' shares, it acted under the name of a consortium that coordinates the operations of the stations owned by the groups involved, especially in the areas of programming and marketing.

Beyond Telesistema, the granting of concessions allowed some stations outside the country's capital to remain in the hands of local entrepreneurs.

The instability in which non-monopoly channels operated led Telesistema to integrate them into its affiliation and chain system in the future, supplying them with programming and advertising and, in some cases, associating them through the purchase of a minority part of the local channel's shares. This was the beginning of the chain system that made Azcárraga so successful in the radio business and became the way in which some of the small entrepreneurs became a functional part of this large company's operation.

Telesistema became the most powerful force that controlled the development of the Mexican television monopoly, which did not exclude that other parties could operate new television channels. In this way, apart from the local entrepreneurs, at the end of the 60s, under the scope of the new law that regulated this sector and thanks to the approval of the State, other important groups entered the television business.

These include, obviously, the interests of Grupo Monterrey, an important group of diversified companies (industry and finance) whose central figure was the Garza Sada family. The Aguirre Gómez family, owner of several radio stations and with lesser capitals, the radio entrepreneur Guillermo Salas and the film entrepreneur Manuel Barbachano Ponce, also stand out. Ultimately, thanks to state management, Grupo Monterrey, Salas and Barbachano joined behind the consortium Televisión Independiente de México (TIM by its Spanish acronym) - channel 8 - (Sosa Plata and Esquivel Villar, 1997, pages 97-98) and the Aguirre on channel 13. The fortune of the new concessionaires was differentiated.

On the one hand, the Grupo Monterrey was under the control of TIM; Salas and Barbachano practically left the television business; on the other hand, the Aguirres granted their concession to the State.

According to the dominant narrative, TIM and Telesistema faced each other in a competition that caused them significant economic damage and, as a result, they were forced to unite their efforts and create Televisa. Once again, there is the argument that had justified the creation of Telesistema a little more than 15 years ago and, again, there is a lack of conclusive information on the effects of competition (sales, prices, financial results) and the narrative of those involved has to be considered as valid.

However, the existence of other conditions which could have influenced the agreement between the two companies are not considered. It emphasizes the need to make strong investments to give a real impulse to the television service that, until the beginning of the 70's showed a backwardness. It is suffice to state that 40% of households did not have access to electricity and 78% of households did not have a TV (Secretaría de Industria y Comercio, 1973, pages 173, 175-177, 180-181). According to official figures, around 1972 about 79 television channels operated in the country: 77 concessions and two permits ² (Nacional Financiera, 1981, page 366).

Estimates made by the author suggest that these stations reached 45 cities, with a total reach of 34.6% of the population. The relative delay was well summarized by Antonio Ortiz Mena (1998, page 230), Treasury

Secretary between 1958 and 1970: "In Mexico we had to accept the challenge involved in the transformation of telecommunications. I discussed this with President Diaz Ordaz and he agreed. In general, the Mexican people were poorly communicated and uninformed [...] By the mid-1960s, television coverage was still very limited [...]".

At the end of the 1960s, the television monopoly incorporated a new component: the State as producer and distributor of television signals. In the past, the State had promoted the creation of an educational channel in Mexico City (channel 11) and had achieved the broadcasting of some contents in the Telesistema network, such as the Telesecundaria since 1968. But, maybe as a result of the big legitimacy crisis at the end of the 1960s, the State began to make efforts to develop its own network of television stations and produce content. The bankruptcy of Aguirre's family on Channel 13 offered them the possibility of obtaining a concession that would become the backbone of several stations under government control. The television monopoly integrated the force of the State as an active element.

From Televisa to the End of Imevisión

The challenges associated with the need to expand the broadcasting infrastructure, as well as the economic problems that faced the country, could be considered more relevant than those taken into account in the creation of Televisa.

Concerning the first point, we have referred to above, and on the second one, we have to consider that Echeverría's government, from the beginning, has been facing the weakening of the so-called developmental model, and the economy shows increasing problems in maintaining its growth and investment rhythm.

The creation of Televisa would make it possible to better face these realities and at the same time consolidate the power of the old Azcárraga-Ávila Camacho-O'Farrill-Alemán alliance, which would now be joined by Grupo Monterrey holding 25% of the shares. Just two years later (1974), Grupo Monterrey would be divided into several consortiums, Grupo Alfa (Alfa, 2010) would be created, led by the Garza Sada family, and the shares of the new television consortium would remain under the control of this conglomerate ³.

Between 1972 and 1993 the State granted 416 television concessions, almost 7 times more than all those granted between 1950 and 1972. In the case of Televisa, at the end of 1982 it received 90 concessions (Secretaría de Comunicaciones y Transportes, 1982, pages 62-75) -the largest package in the country's history until then- to which we would have to add another 9 individually concessioned channels. And as if that wasn't enough, in 1993 Televisa received another package of 62 more concessions (Secretaría de Comunicaciones y Transportes, 1993 pages 27-28).

In this way, the television conglomerate was able to exponentially expand its presence in the country by having in 1993: Channel 2 a network of 136 stations, Channel 5 a ntework of 23 stations and 11 stations for Channel 4 (Grupo Televisa, 1994, page 14). It had achieved to extend its power in the broadcast television under difficult economic conditions that even led its partner, the Grupo Alfa, to sell its package of shares in the television due to the fragile financial situation in which it found itself (Martínez Assad, 1984, page 29) ⁴. Total control of the consortium returned to the founding families: Azcárraga, Ávila Camacho-O'Farrill and Alemán.

In addition to the expansion of its broadcast television network, between 1973 and 1993 Televisa became a converging consortium consisting of the content production and distribution activities (pay television, broadcast television in the United States, broadcast television in Chile and Peru, magazine and newspaper publishing, free-to-air radio, record and film production, and outdoor advertising); operation of telecommunications networks (personal messages and satellites); and entertainment activities (football teams). Its diversification reached such a degree that in 1993 it sold the equivalent of 1.8 billion dollars and occupied a prominent place among the 500 most important companies in the country (Grupo Televisa, 1993, pages 59-83).

Televisa had achieved a constant increase in its operation scale, operating different units and offering a variety of products and services -beyond broadcast television-, having presence in several locations and becoming a multinational. In addition, the management team was professionalized as never before and the

Board of Directors was reorganized to include company partners. The cherry on the cake was the initial offering of its shares on the stock exchange in 1991. Televisa was obviously a large modern company.

The granting of new concessions allowed the inclusion of new business groups into television, but several of them linked to Televisa. This is the case of SIPSE (Yucatán), Pacífico (Sinaloa) and Multimedios (Nuevo León) groups because some of their stations were affiliated to a Televisa network and even the capital consortium was a minority shareholder in some of the channels operated by the regional capitals.

Smaller capitals, which occasionally operated one or two stations, became part of Televisa's networks or produced their content locally, but never developed a power that could face the large consortium's power. Once again, there would be another period in which there would be no real competition in the broadcast television service.

The State, at the same time, developed its own network of stations. With notable differences, the strategy of developing State television prevailed throughout three six-year periods, culminating in the creation of the Instituto Mexicano de la Televisión (Imevisión) in 1993 and the development of two national networks -channels 7 and 13- that at their highest point were able to operate almost a hundred television stations.

During this period, the television monopoly was organized into two large groups: the one controlled by Televisa and the one operated by the State without major conflicts or real confrontations. As Sánchez Ruiz (1983) states:

The "Mexican formula" of television, at that time, was constituted by a duopoly (between the State and Televisa) that granted a small group of entrepreneurs a real monopoly, at least within the private sector itself, of the ownership and control of a highly influential media. On the other hand, in terms of actual network incursion and the operation of the television system as a whole, Televisa became the real quasi-monopoly over public attention, and advertisers' money (page 293).

At the moment that the formula reached its maximum development, in other words, when the Imevisión network was already deployed, a fundamental change was registered: under cover of the serious crisis of the Mexican economy and the prevalence of the new neoliberal thinking, the State decided to privatize Imevisión. The Mexican television monopoly would move, in that way, towards its contemporary stage.

The Eternal Monopoly

In economic terms, monopoly essentially means power: the lasting ability to impose interests and obtain portions of profit and resources that the monopoly itself has not produced.

This has been the permanent feature in the history of Mexican television. The conditions for a real competition that would be an incentive to provide a better-quality service - in terms of image, sound and content - to the Mexican public never existed. The participation of the Mexican State did not even radically change this situation; on the contrary, everything indicates that in the end it served to perpetuate the power of the television monopoly in the country.

Our paper does not address the contemporary stage of television in Mexico, it is strictly focused on its great historical phase. The contemporary story begins with the creation of Televisión Azteca and includes the signing of the Free Trade Agreement and the recent auction for television frequencies carried out by the authority in 2017. However, there does not seem to be any element that would lead us to believe that "now is the time" when competition will truly blossom.

Everything suggests that to this day broadcast television has not succeeded in overcoming its monopoly condition and that in the future it may be emphasized - by merging or liquidating new participants - in the face of the fast-declining audiences and advertising in the broadcast television business.

In conclusion, the period lived between 1950 and 1993 can be baptized as the one of the eternal monopoly and there does not seem to be any condition for this situation to be overcome in the future. But this new stage will have to be analyzed a few years later by the new generation of media historians.

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ENDNOTES

- 1. For several years the presence of the Alemán family was hidden in the television business and specifically in Telesistema Mexicano. Formally, it is up to the placement of Televisa shares in the stock market when it is reported that the Alemán family were company shareholders.
- 2. It should be noted that there is no official information regarding the date on which the channel corresponding to each concession or permit granted entered into operation. On the other hand, there is no available information regarding the additional stations linked to the concessions, which allowed the coverage to be extended to populations close to the one established for the concession broadcasting group.
- 3. Originally Alfa operated Hojalata y Lámina (steel), Empaques de Cartón Titán (cardboard), Draco (mining) and its participation in Televisa.
- 4. Martínez Assad (1984) states that Alfa sold "a significant proportion of its shares".

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