The Economic Contribution of Copyright-Based Industries in Mexico

Prepared for

The World Intellectual Property Organization

Victoria Márquez-Mees
Mariano Ruiz Funes
Berenice Yaber

December 2006

* The survey was commissioned by the World Intellectual Property Organization. Ms. Marquez-Mees who acted as lead author / coordinator of the project is an Associate Director of PROA||StructurA and has worked extensively in the cultural industries arena; Mr. Funes and Ms. Yaber are respectively Director General and Partner at GEA||StructurA, a leading economic and political analysis consultancy firm in Mexico.

Note

The views expressed in this report are those of the authors and as such are not intended to reflect the views of the World Intellectual Property Organization.

StructurA is a group of leading consultancy firms specialized in providing integral services to the main economic sectors of Mexico and to governmental institutions.

The group specializes in economic and political analyses, communications and public and government relations with a focus on promoting competitive conditions.

Contact:

Victoria Márquez-Mees	Telephone: +52.55.91493362	*vmm@proa.structura.com.mx*
Mariano Ruiz-Funes	Telephone: +52.55.5639900	*mrf@gea.structura.com.mx*

Executive Summary

Mexico is a country with a rich cultural tradition that is locally cherished and internationally acknowledged and valued. One would therefore expect, when embarking on a survey such as the one the World Intellectual Property Organization (WIPO) commissioned in December 2005, to find a dynamic cultural sector in which creativity and innovation pave the way for cultural industries in general and copyright-based industries in particular. The purpose of the study was to measure, as accurately as data limitations allowed, the contribution made by copyright-based industries to the Mexican economy by applying the WIPO methodological framework in terms of value added, employment and foreign trade.

The study found that in 2003, value added for the total of the Mexican copyright-based industries amounted to 259,071,480 Mexican pesos which represented 4.77 percent of GDP. Employment for these industries was reported at 1,787,464, 11.01 percent of total employment according to census figures for the same year. The contribution of the copyright-based industries to the economy, as measured by value added, was slightly above the construction sector (4 percent).

During the period 1998-2003, copyright-based industries faced a reduction in economic contribution mainly due to their slower annual average growth (0.73 percent) compared to that of the economy as a whole (2.5 percent average annual growth).

In contrast, employment generation during the same period grew 24 percent. This reflects the importance of copyright-based industries as employment generators.

In terms of foreign trade, both imports and exports reported growth during the study period and represented totals for 2003 of 11 percent and 14 percent respectively, reporting an overall trade surplus of US$4,032 million, in contrast to the overall Mexican trade deficit.

The study also showed a change in the inner structure of copyright-based industries, with an increase in the contribution of core copyright industries (from 26 percent in 1998 to 32 percent in 2003 for value added) and a reduction in the contribution of interdependent industries (from 46 percent in 1998 to 38 percent in 2003).

The Economic Contribution of Core Copyright-Based Industries

During the period 1998 to 2003, the economic evolution of core copyright-based industries resulted in the following:

- The total number of economic establishments in these industries increased 6 percent, from 91,945 in 1998 to 97,109 in 2003.

- Total employment rose 47.3 percent, with a total of 178,000 new jobs created between 1998 and 2003, representing an annual average growth of 9.5 percent. Nevertheless, the total income, measured in Mexican pesos in 1998, reported an 11.1 percent fall, which indicates an important deterioration in remuneration for people working in this sector.

- In this period, value added generated by these industries grew 30.6 percent in real terms.

- Lastly, the investment indicators reveal a more moderate increase compared to those of value added and employment: fixed capital formation decreased by 14.8 percent during the same period, while fixed assets increased 3.6 percent in real terms

If we analyze the above findings we can reach relevant conclusions regarding Mexican core copyright industries. On the one hand, the number of premises and personnel employed represented more than 3 percent of the national total in the two-year reference period,[1] where growth in the contribution of employees went from 2.72 percent to 3.41 percent in the 1998 – 2003 period. In terms of value added, the shares are 2.47 percent and 2.6 percent respectively, showing a positive trend for core industries during the study period.

On the other hand, the fall in the income variable, from 3.2 percent in 1998 to 2.8 percent in 2003 reflects an important deterioration in remuneration to employees, thus counteracting the increase in employment in these industries in terms of quality.

In contrast, the negative trend for remuneration corresponding to core industries in the reference period should be noted as this decreased by an average of 2.3 percent annually in real terms, while capital formation increased 0.3 percent and 4.2 percent in comparison to the national level. This reflects a fall in human and fixed capital investments that will most probably make a negative contribution to the growth of core industries in the next few years.

Economic Indicators Core Industries vs National Total 1998-2003

(Annual percentage variations in real terms)

Source: INEGI

[1] Mexico's totals include industry, commerce and services; the primary sector is excluded (agriculture, livestock, forestry and fishery) and mining. See Chapter II for details of sectors included.

Finally, the study found that the Mexican copyright-based industries made a smaller contribution to the economy compared to other countries, although not significantly lower than the average.

For the future of these industries it is expected that with more effective enforcement of copyright protection legislation and the introduction of policies that generate an adequate investment environment, copyright-based industries will recover lost ground and provide ample employment opportunities for the country in general.

Another relevant recommendation resulting from this report is the need to create a satellite account for the cultural sector thus allowing for a more accurate and timely estimation of its contribution, as well as for the setting of priorities on policymaking.

Table of Contents

Acknowledgements

Our grateful thanks for their continued support, expert advice and time to everyone involved in this project but especially to:

Dimiter Gantchev, Creative Industries Division, World Intellectual Property Organization, for his patience and wise advice.

José Luis Zofio, Universidad Autónoma de Madrid, for his expert advice as one of the few economists working entirely in the cultural field.

Victor Manuel Guizar, INDAUTOR, for believing that we could produce this report, his support during the process and his continued friendship.

Marcelo di Pietro, World Intellectual Property Organization, for his help, support and friendship.

Roberto Cantoral, SACM, for his advice and strength in pushing for stronger enforcement of the rule of law in Mexico.

To all cultural leaders, artists and creators whom we had the pleasure of meeting and who shared their expertise in this field.

To our family and friends who have for the last year constantly seen us working, complaining and creating this report.

Last, but not least, to César Alday, the best research assistant we could have ever found: best of luck in the world of economics.

Chapter I. Introduction

Copyright is recognized as one of the basic human rights in article 27, paragraph 2 of the Universal Declaration of Human Rights which states "Everyone has the right to the protection of the moral and material interests resulting from any scientific, literary or artistic production of which he is the author."[2] This protection offers the possibility of developing and promoting the production of creative works that have traditionally been highly valued by society in terms not only of the value of their cultural heritage but more recently recognized for their contribution to economic growth.

Copyright, as a subject for study within the legal profession, has received little or no attention from economists, in spite of its representing one of the core production factors in the cultural industries. Recently, however, governments in different countries have started to recognize the economic importance of copyright and the industries which emerge as a result of copyright protection in a global environment where traditional economic systems based on agriculture and manufacture are slowly transforming into knowledge-based economies where intangible goods and works form the basis of growth and development.

This is linked to a series of factors:

- The growing acknowledgement of the role of intellectual property in post-industrial societies.
- The widening scope of copyright generated by the continuous innovation in digital technologies.
- As a result of this digital revolution, copyright-protected works are an essential element in e-commerce transactions.

In the case of Mexico, all the above factors contribute to the rich cultural heritage of our country which must be considered as a vital resource available for the promotion and growth of the industries that make it the basis of their output. Nevertheless, Mexico has been slow in taking advantage of such a wealth of resources as a motor for the country's development and it has continued to consider these industries to be merely a valuable cultural heritage and tradition. The main reason for this shortsightedness has been the lack of hard economic data to support the thesis that if properly promoted and supported, copyright-based industries could become one of the core elements for Mexico's economic growth and employment generation.

In December 2005, the Creative Industries Division of the World Intellectual Property Organization (WIPO), with the endorsement of the National Copyright Institute of Mexico, commissioned Victoria Márquez-Mees as lead consultant and *Grupo de Economistas Asociados (GEA||StructurA)* to produce a report measuring the economic contribution of copyright-based industries to the Mexican economy following the methodology developed by WIPO and published in 2003 under the title *Guide on Surveying the Economic Contribution of the Copyright-Based Industries.*

In accordance with the terms of reference set by WIPO the survey aims at measuring the economic contribution of copyright and neighboring rights-based industries in Mexico, as well as improving the working of these industries.

[2] See *www.unhchr.ch/udhr.* Universal Declaration of Human Rights, Office of the High Commissioner for Human Rights.

Prior to the present survey, only one other study, by the economist Ernesto Piedras, commissioned by a group of Mexican copyright collecting societies, has attempted to estimate the contribution of copyright-based industries in the Mexican case.[3] Therefore, it is expected that the present report will serve to generate greater awareness of the importance of copyright and its related industries for economic growth as well as to initiate the process of periodic measurement to evaluate their performance over time.

The research process involved in the production of this survey included the revision and classification of statistical data, carrying out a series of interviews with industry leaders, copyright collecting societies, government authorities and experts in the field, the revision of available literature for each of the industries and sectors analyzed and estimating the selected variables using the WIPO methodology for the calculation of the economic contribution of copyright-based industries in Mexico.

Following the terms of reference, the report is divided into six chapters: Chapter II presents the methodology used for estimating value added, employment and trade for the Mexican copyright-based industries; Chapter III gives a short summary of copyright protection in Mexico; Chapter IV is dedicated to estimating the economic contribution of the three selected variables for copyright-based industries (CBI), an analysis of the groups within the CBI and an international comparison of the Mexican CBI contribution with respect to a group of selected countries; Chapter V gives a more detailed background analysis of a group of core copyright industries and their recent performance. Finally, Chapter VI presents a series of conclusions and recommendations based on the findings of the study.

We hope that the present report will be seen not as an overriding conclusion to a final study but as a first step in a process of estimation requiring deeper analysis and research within a group of industries that, following international trends, will keep growing in importance if an adequate legal and economic environment is provided at the global and local levels.

[3] Piedras, Ernesto. *¿Cuánto vale la cultura? Contribución económica de las industrias protegidas por el derecho de autor en México* 2004. ISBN 968 7903 79 1. Study commissioned by the *Sociedad de Autores y Compositores de Música, SGC de IP, Sociedad General de Escritores de México, SGC de IP, Consejo Nacional para la Cultura y las Artes and Cámara Nacional de la Industria Editorial Mexicana.*

Chapter II. Study Methodology

This study has been commissioned by WIPO and its purpose is to estimate the economic contribution of industries and activities protected by copyright in Mexico through three main indicators: value added generated by the copyright-based industries, their share in employment and their contribution to foreign trade. The study follows the methodology proposed by WIPO for the measurement of the economic contribution of these industries. This methodology was published in 2003 under the title *Guide on Surveying the Economic Contribution of the Copyright-Based Industries*[4] and it outlines the methodological approach for identifying the contribution of copyright-based industries to the economy.

2.1. Definition of categories

Cultural industries include all those industries that combine the creation, production and marketing of intangible and cultural content. These industries produce "content" based on creativity and information under an economic system where intangible goods have increasingly gained importance and whose scope has expanded thanks to digital technology. This content is typically protected by copyright and may take the form of goods and/or services. By this definition, and in response to the main purpose of this study, it is possible to identify the sectors within the cultural industries that form part of what WIPO has termed copyright-based industries (CBI). Industries protected by copyright are those devoted to creation, production and manufacture, performing, broadcasting, communication and exhibitions, or distribution and sale of works and other protected materials.

WIPO's approach to measurement of the economic contribution made by copyright-based industries has been aimed at categorizing these sectors according to the degree to which copyright protection constitutes a fundamental factor in their growth, development and strengthening in terms of production, employment and foreign trade. "Being a property right, the copyright in a work acquires a value which can be measured; it enables it to be traded and to participate fully in economic life."[5]

Industries within this field are divided into fully or predominantly copyright-based industries and those others that to a lesser extent depend on copyright-based content. These industries can also be defined as "core" copyright industries, i.e., industries which predominantly produce or distribute copyright-based goods, and "non-core" industries, i.e., those that support or are interrelated with "core" copyright industries.[6]

The category of core copyright-based industries includes those industries whose main purpose is to produce protected materials for final consumption, whether for local or international markets, as well as those industries whose main purpose is the distribution of protected materials to businesses and/or private consumers. Also included in this category are industries that not only produce but also distribute protected materials.

[4] See *Guide on Surveying the Economic Contribution of the Copyright-Based Industries,* WIPO Publication No. 893(E), ISBN 92-805-1225-7, Geneva, WIPO 2003.
[5] *ibid*, page 19.
[6] *ibid*

Interdependent industries may be identified through the analysis of each chain in their pre-production and post-production stages. As presented in WIPO's methodology, these interdependent CBI are dedicated to production, manufacturing and sale of equipment whose total or fundamental function is to facilitate the creation, production or use of works and other materials protected by copyright.[7]

Partial industries are those in which some of the industrial activities are related to works and other materials protected by copyright and may involve the creation, production, manufacture, dissemination, communication or exhibition, as well as distribution and sale of these works and materials. In this category only those activities that are related to copyright-based works and materials should be included when estimating the economic contribution.

Finally, non-dedicated support industries are those that dedicate part of their activities to facilitating the dissemination, communication, distribution or sale of copyright-based works and materials that have not been included in the core category.

Table 2.1 shows the WIPO breakdown of the activities that make up each of the aforementioned categories and this may help the reader to clarify the industries and activities included in each category:

[7] *ibid*, page 33.

Table 2.1. WIPO List of Copyright-Based Industries[8]

Category	Industry	Subgroups
CORE INDUSTRIES	Press and Literature	Authors, writers, translators; Newspapers; News agencies; Magazines; Book publishing; Cards and maps, directories and other published material; Pre-press, printing and post-press of books, magazines, newspapers, advertising materials; Press and literature retail and wholesale (bookstores, newsstands, etc.); Libraries.
	Music, Theater, Opera	Composers, arrangers, choreographers, directors, performers and others; Printing and publication of music; Production of recorded music; Recorded music wholesale and retail (sales and rental); Artistic and literary creation and interpretation; Staging and related agencies (reservations, tickets, etc.).
	Motion Picture and Video	Writers, directors, actors, etc; Motion picture and video production and distribution; Motion picture exhibition.
	Radio and Television	National radio and television broadcasting companies; Other radio and television broadcasters; Independent producers; Cable TV (systems and channels); Allied services.
	Photography	Studios and commercial photography; Photographic agencies and libraries.
	Software and Databases	Programming, development and design, manufacturing; Wholesale and retail prepackaged software (business programs, video games, educational programs, etc.); Database processing and publishing.
	Visual and Graphic Arts	Artists; Art galleries, wholesale and retail; Picture framing and other allied services; Graphic design.
	Advertising	Agencies, buying services.
	Copyright Collecting Societies	

[8] See Appendix 1 in the WIPO *Guide on Surveying the Economic Contribution of the Copyright-Based Industries.*

INTERDEPENDENT INDUSTRIES	Television equipment, radios, video-recorders, CDs, DVDs and cassette players, electronic gaming equipment and other similar equipment	Manufacturing Wholesale and retail (sales and rental)
	Computers and equipment	Manufacturing Wholesale and retail (sales and rental)
	Musical instruments	Manufacturing Wholesale and retail (sales and rental)
	Photography and movie equipment	Manufacturing Wholesale and retail (sales and rental)
	Recording material	Manufacturing Wholesale and retail (sales and rental)
	Paper	Manufacturing Wholesale and retail (sales and rental)
PARTIAL INDUSTRIES	Apparel, textiles and footwear Jewelry and coins Other handicrafts Furniture Household goods, china and glass Wall coverings and carpets Toys and games Architecture, engineering and surveying Interior design Museums	
NON-DEDICATED SUPPORT INDUSTRIES	General wholesale and retail General transportation Telephony and Internet	

Source: WIPO

2.2. Identification and selection

According to the above and following the WIPO methodology, the first step taken to estimate the contribution of copyright-based industries to the Mexican economy involved the identification and selection of categories to be included in each of the sectors proposed by the methodology, subject to the availability of recent reliable statistical data and the level of disaggregation.

The first decision made during this process was to apply selection criteria for categories and activities as close as possible to that used in *Copyright Industries in the U.S. Economy: the 2004 Report*.[9] Given that this is the first US report which follows the new definitions and guidelines set out in the 2003 WIPO Guide and that the statistical information used is of similar periodicity, and given the similarity of industrial systems and close trade relations resulting from the participation of the two countries in the North Free Trade Agreement (NAFTA), we decided not only to provide more reliable and comprehensive cross-country data comparisons between the two neighboring economies.

However, it should be mentioned that in spite of much common ground as regards economic structures, there persist differences between the two countries due to their different cultural, resource and development structures, which, as we will see, have resulted in two relevant factors as regards data selection:

a. The more developed and sophisticated industrial structures of the US have given way to a series of economic activities which do not yet exist in Mexico. Therefore, not all activities reported for the US study have a counterpart in the Mexican case.

b. In the case of Mexico, a more limited reporting system means that not all statistical information available in the case of copyright-based industries is reported at the lowest aggregation level, i.e., as a class of economic activity, which is the case for the US statistical data.

This limitation forced the authors to use whenever possible the statistical data at its most disaggregated level; that is the class of economic activity equivalent to the US class data. In those other cases where there was no corresponding census information available at the class level, a decision to use the subdivision information was taken. Examples of this are the use of a subdivision for the rental of computing equipment and electronic appliances (Subdivision 53221 and Subdivision 53242) as no data was reported at the class level. Appendix 6 shows in more detail the implication of these two issues for the Mexican core copyright-based industries and the selection made for the present study.

The classification system used in keeping with the US study was the North American Industrial Classification System (NAICS).[10] It is important to point out that NAICS was selected due to the comparability of statistical reporting that it offers for the three signatories to NAFTA. This classification system was designed, agreed and signed by the *Instituto Nacional de Estadística, Geografía e Informática (INEGI),* Statistics Canada and

[9] Siwek, Stephen, *Copyright Industries in the US Economy: The 2004 Report.* Economists Incorporated, prepared for the International Intellectual Property Alliance. ISBN 0-9634708-2-5. 2004, reproduced in WIPO (2006) *National Studies on Assessing the Economic Contribution of the Copyright Industries.*

[10] This study is based on the 2002 revised version of NAICS which incorporates creative and broadcasting activities by Internet.

the Office of Management and Budget of the US, allowing for broad comparability of economic activities among the countries by implementing the collection and grouping of statistical data under a common methodology that not only facilitates comparability but homologizes statistical concepts and category definitions. In addition to this, and in contrast to the systems used before, NAICS includes the "mass media information" sector that was nonexistent prior to 1997 and now contains those industries that create and disseminate copyright protected goods. NAICS also allows for comparison with all the economic activities of the UN's Uniform International Industrial Classification Revision 3 (CIIU-3), which is the reference system for classifiers of activities in most countries.

2.3. Statistical sources used

In line with the above methodology and NAICS, the present analysis has been produced using the statistical information containted in the Economic Census series report by INEGI which is the official body in charge of statistical information in Mexico. This is published every five years and covers the diverse economic activities performed on the Mexican territory.

The Economic Census reports the economic situation of establishments or businesses on a specific date. This method of data collection makes it unfeasible to derive exact aggregate macroeconomic variables such as gross national product (GNP), government consumption, public investment, etc., as to obtain these variables, economic relationships among households, governments, businesses and foreign trade must be analyzed. These economic relationships are not fully reported in the census with the exception of activities performed by businesses, which provided the only source of information.

The 2004 Economic Census collected basic economic information on all economic activities performed in the country (except those given in Table 2.2) which are grouped in NAICS as follows:

- Agriculture, cattle farming, forestry, fishing and hunting
- Mining
- Supply of electricity, water and gas
- Construction
- Manufacturing
- Wholesale
- Retail
- Transportation, mail and warehousing
- Mass media information
- Financial services and insurance
- Real estate and rental
- Professional, scientific and technical services
- Business support services, waste disposal and other remedial services
- Education
- Health and social security
- Cultural and sports services and other entertainment services
- Temporary accommodation services and the food and drink industry
- Other services except governmental activities
- Governmental activities and those of other international organizations.

The Economic Census 2004 gives information collected on all businesses[11] operating during the information collecting period (March 1 to June 30, 2004) and dedicated to non-primary economic activities.

Table 2.2. Economic Activities excluded from the 2004 Economic Census

From sector 11	All activities except fishing (branch 1441) and aquaculture (classes 112522, shrimp farming and 112519, animal aquaculture).
From sector 48-49	All classes 485112, public transport both urban and suburban in public transport of fixed routes; 485311, taxi stand services; 485312, taxi services; 485320, limousine services; crude oil pipeline transportation; and 486990, pipeline transportation of all other products except oil derivatives.
From sector 71	Class 712190, caves, natural parks and other national heritage sites.
From sector 72	Class 722330, food services in mobile units.
From sector 81	Class 813210, Religious associations and organizations; 813220, political associations and organizations; and 814110, households with domestic help.
From sector 93	Class 932110, international organizations; and 932120, diplomatic missions and extraterritorial units.

The 2004 Economic Census coverage on manufacturing activities was performed by door-to-door canvassing at all urban locations and industrial parks but using a representative sample for the rest of the territory.

The level of disaggregation of the census is dictated by the North American Industrial Classification, which splits the economy into 20 sectors, 95 subsectors, 309 branches and, at its most detailed level, 1051 activity classes. For the 2004 Economic Census, 959 classes of a total of 1051 were covered.

It is important to highlight the limitations of the census as regards economic establishments. It only takes into account those businesses that operate in fixed or semi-fixed units. It does not take into account non-permanent business locations, nor business operations carried out in households, where production activities are performed for self-consumption or when services are offered and performed outside the business location.

The decision to rely on public information was made based on the time and scope of the study as well as on the quality of other data collected. Based on this, one of the most relevant recommendations resulting from this study is the need to create a satellite account for the CBI which would enable the systematic reporting of disaggregated data on these industries and generate a larger pool of statistical information.

[11] In the 2004 Economic Census, business is an economic unit that in one permanent physical location combines actions and resources under the control of one sole owner or entity, dedicated to the production of goods, the whole or part of one or more good, the sale or purchase of goods or services.

As mentioned earlier, the study aims at measuring value added, employment and foreign trade for CBI. In keeping with this, the value added measurement was obtained using the data reported for the census gross value added variable of the Economic Census produced by INEGI, which provided the most recent information available at the time of the study. The use of this variable is consistent with the direct approach included in section 6.4.4.1 of the WIPO Guide.[12] In order to clarify the scope of the value added measurement, readers should be aware that the total gross value added given in the census is defined as the value of the production added during the work process, by the creative and transformative activity of the personnel, the capital and the organization (production factors) exerted on the materials consumed in the execution of the economic activity.

The census gross value added (CGVA) is the result of deducting intermediate consumption from total gross production; it is referred to as "gross" as fixed capital consumption has not yet been deducted. CGVA is reported at producer prices, which is equal to the price charged by the producer less value added tax (VAT) charged to the consumer. The census might report negative CGVA in the case of non-profit-making activities (cultural activities), which do not usually generate income, obtaining their resources from donations, subsidies or other grants. This produces negative CGVA reporting.

As regards business units within the public sector, their data is generally excluded as they differ greatly in nature from those of the private sector regarding their aims and reporting system which makes it extremely difficult to provide information as required by the Economic Census.

In terms of employment, the statistical data used includes all personnel employed by the business and by other businesses that provided services to the former and took up at least one third of the working day. Staff included in this definition can be part-time, full-time, project-based or voluntary. This variable does not include the informal sector of the economy nor household employment for self-consumption as all employment has to be reported by an economic establishment as defined above.

As a consequence, the information derived from the census is different from that provided by the national accounting system, although they complement each other in clarifying the economic situation.

In all cases, the categories and classes used by sector correspond to the WIPO methodology in *The Guide on Surveying the Economic Contribution of the Copyright-Based Industries (see Appendix 5* List of classes and sub-classes by sector).

Finally, as regards the foreign trade estimation of CBI, the World Trade Atlas database produced by the National Bank for Foreign Trade (BANCOMEXT) was used and categorization was made based on tariff item numbers in the Atlas database. This database, however, given its structure and aggregation, presented limitations in the itemization of some tariff items in relation to the categories of each of the sectors being analyzed. For example, in estimates of non-dedicated foreign trade industries, the variable was taken as the difference between total exports and imports of core, interdependent and partial industries and total exports and imports, with the exception of the oil industry.

[12] See Page 48 of *The Guide on Surveying the Economic Contribution of the Copyright-Based Industries.*

Finally, to understand the trend in CBI performance for the three estimated variables, the study analyzes the industries' performance for the years 1998 and 2003. That a historic comparison could be made was of extreme importance in order to document how the industries performed during the period 1998-2003 and how we can expect them to evolve, subject to innovation and stronger rule of law in the future.

However, certain comparability limitations among data from the two periods analyzed must be mentioned. On the one hand, there are differences in classification between the 2002 and 1997 Mexico NAICS which are the result of a permanent revision and updating process. The second factor relates to the operative implementation of the system. The classification process involves the definition of classes that are very similar in nature and generate confusion at the moment of assigning a code, thus affecting census results and historic comparability. Although these limitations do not affect the overall trends of the industries during the 1998–2003 time period, the reader must bear in mind that an exact comparison between the aggregates is not feasible.

2.4. Determination of copyright factors

In terms of aggregation of the different sectors, it is worth mentioning that the exercise of measuring the economic contribution of the copyright-based industries must take into account the fact that not all participating industries per segment (core, interdependent, partial and non-dedicated) can fully attribute their contribution to the economy to copyright. As reported in the WIPO Guide: "In analyzing any copyright-based industry one faces the problem of how to eliminate elements that cannot be fully attributed to copyright."[13] In view of this, the Mexican study has used a weighting system that seeks to establish the proportion of the copyright-based component of an industry. In the case of the core copyright-based industries the contribution can easily be given a copyright factor of 1, but in the other industries the factors must acknowledge the lesser contribution of copyright to the overall result. A more detailed study would establish these factors according to the production process of each industry and the participation of copyright in it. In the absence of information related to the specific process and participation in the production chains of these industries in Mexico, an in-depth analysis is beyond our remit. We have therefore decided to use a simple average of two existing weighting schemes: the US and the Hungarian[14] models.

The use of these models is based on the following reasoning: on the one hand, the set of weights from the US is relevant to the Mexican case; this is because of the common use of the information classification systems resulting from NAICS and the assumption that both countries share similar industrial structures given the close linkage of their economies. On the other hand, the use of the Hungarian model is based on the fact that this is a mid-income level country with similar development levels to Mexico; thus, it may be assumed that both industrial structures share similar characteristics.

[13] *ibid*, page 57.
[14] Penyigey,Krisztina & Péter Mukácsi.*The Contribution of Copyright-based Industries in Hungary.* Hungarian Patent Office. November 2005. Reproduced in WIPO (2006) *National Studies on Assessing the Economic Contribution of the Copyright Industries.*

As a result, a simple average of the two weighting sets per industry provides an adequate estimate for Mexico. It is recommended that future studies improve on this by making one of their aims the estimation of a country-specific weighting system that reflects the Mexican industrial structure and the contribution made by copyright in each case with greater accuracy.

2.5. Study limitations

Finally, it is important to mention the specific limitations encountered by the study in following the WIPO methodology.

On the one hand, the study has met limitations based on the availability of recent statistical information. In the case of other country studies available, the measurement of the economic contribution of copyright-based industries was carried out using gross domestic product (GDP). In the Mexican case, measuring the economic contribution of the total gross value added estimated for copyright-based industries as a ratio of GDP would result in an underestimation of their participation as it would exclude government participation in the different sectors that comprise CBI, as well as economic activities performed by households, independents and those in the informal sector of the economy. This is in line with other studies such as that prepared for Canada.[15]

In addition to the above, and with the aim of preserving the highest economic rigor regarding the measurement of the contribution of copyright-based industries, it was decided to focus the analysis on the formal sector of the Mexican economy using only the official indicators available. If we consider that this economy has maintained a high degree of informality to date, the decision to measure only the formal sector of the economy – especially in a sector whose employment structure, unlike other sectors, has a high number of independent workers and informal productive structures – entails an underestimation of the economic contribution of the copyright industries to the country's economy. However, given the lack of a generally-accepted methodology in the area of informal cultural sector measurement, we agreed that the study would not take account of the estimates for this segment.

However and bearing in mind the limitations stated, an estimation of its contribution has been made for comparison purposes by incorporating value added into total CBI VAT at 15 percent, this being one of the elements present in GDP but not in the estimate of total value added. This means that when comparing the Mexican findings with those for other countries as regards the economic contribution, we should be aware that there will be a degree of underestimation of the contribution of these industries to the total economy with the estimated contributions serving as a proxy for a more rigorous estimate which is impossible with the available data.

Finally, real term figures for all CBI categories have been calculated applying the same general GDP deflator. As pointed out by Dr. Zofio we are aware that a better approach in terms of accuracy would be to apply differentiated deflators; however this would have required estimating deflators and that goes beyond the

[15] *The Economic Contribution of Copyright Industries to the Canadian Economy* prepared for Canadian Heritage, Wall Communications, March 31, 2004, page 66, reproduced in WIPO (2006) *National Studies on Assessing the Economic Contribution of the Copyright Industries.*

scope of this study. Therefore, the reader must be aware that figures have been produced to facilitate the analysis of general trends.

In summary, we believe that in spite of the limitations both statistical and structural faced in performing the measurements, the present study adequately reflects the economic importance of the copyright-based industries in Mexico and serves to highlight the development trends in each sector. The following chapters will aim at presenting general and specific findings that mark the economic behavior of the CBI and allow us to generate a series of recommendations related to the challenges and opportunities of the industries and their future performance.

Chapter III. Copyright Protection in Mexico

Creative capacity is, to a greater or lesser degree, inherent in humans and any creator of an intellectual work of whatever type is considered an author. The protection of an author and his/her work is constituted by a series of rules aimed at promoting and offering an incentive to creativity by acknowledging ownership of rights and ensuring economic benefits. In consequence, copyright protection offers conditions that are necessary for the promotion of investment in the areas of creativity and innovation.

The purpose of copyright is the protection of literary and artistic works by way of recognizing an author and creator's broad spectrum of exclusive and non-exclusive rights.

Copyright protection reflects two types of interests generally referred to as economic rights and moral rights.

The creators' economic rights enable them to receive an income from their creations. Copyright grants authors the exclusive right to authorize others to use their work under the terms agreed upon by the parties and to take legal action in case of unauthorized use. Economic rights are acknowledged by copyright legislation worldwide and they usually include all relevant commercial activities, from physical copying of books, staging of plays and other forms of choreography, to reproduction of works on the Internet.

Furthermore, creators have another non-pecuniary interest in their works, which is that of deciding whether they can be released in the public domain, to demand acknowledgment of authorship and to object to any use that may be perceived as prejudicial to the integrity of the work. These prerogatives are known as the author's moral rights.

It is universally accepted that the protection of copyright flows automatically from the act of creating and does not require any formal deed. This principle is safeguarded by a variety of international conventions signed by most countries. The most important conventions are:

- 1886: The Berne Convention for the Protection of Literary and Artistic Works (revised in 1971)
- 1952: The Universal Copyright Convention (UCC) (revised in 1971)
- 1961: The International Convention for the Protection of Performers, Producers of Phonograms and Broadcasting Organizations (known as the Rome Convention)
- 1971: The Convention for the Protection of Producers of Phonograms against Unauthorized Duplication of their Phonograms
- 1994: The Agreement Between the World Intellectual Property Organization and the World Trade Organization
- 1995: The Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS Agreement)

Today, most countries have signed up to one or more of these treaties under which creators are ensured the respect of their rights in Member States and minimum homogeneous protection standards are offered to them.

Protection of copyright and neighboring rights is essential for the promotion of individual creativity, the development of cultural industries and the promotion of cultural diversity. This legal protection provides creators with legal security regarding the use of their works by third parties and reduces the risk of unauthorized copying or piracy. It is clear that piracy or non-observance of copyright legislation destroys creation and incentives for distribution of cultural products.

In the case of Mexico, copyright law was incorporated in the 1824 Constitution, which set forth the power of Congress to "promote illustration, ensuring exclusive rights for a limited period of time to authors regarding their respective works."[16]

The Literary Property Decree (*Decreto sobre Propiedad Literaria*) was published in 1846. This legal instrument included 18 Articles and integrated copyright into the Ownership Right. This Decree was incorporated to the Civil Code on August 8, 1870 and was slightly modified in the 1884 Civil Code.[17]

The 1917 Constitution incorporated copyright into Article 28 and the 1928 Civil Code regulated matters concerning authorship discipline in three chapters (Articles 1181 to 1280).

As a participant in the Inter-American Expert Conference for the Protection of Copyright, Pan-American Union, held in June 1946, Mexico signed the Inter-American Convention on Copyright in Literary, Scientific and Artistic Works.

With the purpose of making the Mexican Copyright Legislation compatible with the commitments under the above-mentioned Convention, the first Copyright Act was issued on December 31, 1947 and published in the Federation's Official Gazette on January 14, 1948. This Federal Act granted the creator the rights of publication of his/her work through any means, representation for profit, transformation, communication, translation and partial or total reproduction in any form; it extended copyright protection twenty years after the death of the creator and for the first time considered certain copyright violations to be offenses.

In addition to this, the Copyright Act of 1947 owes its importance to the introduction of the protection of works from the moment of their creation, whether they are registered or not. The legal change allowed Mexican law to meet international copyright standards.

On December 20, 1955, Mexico adhered to the Convention for the Protection of Literary and Artistic Works.

On December 29, 1956, a second Act was issued, under which the Directorate of Copyright was created, and in 1957, Mexico became a co-founder of the Universal Copyright Convention. The new law set out a more precise definition of performers' rights by establishing their right to receive economic remuneration for the broadcasting and communication of their works. The law also became the first regulator of authorial societies.

On December 21, 1963, a series of reforms and additions to the Act were made defining moral and economic rights; guaranteeing access to cultural goods; regulating the right to public performances and setting specific rules for the operation and administration of authors' societies while widening the catalogue of offenses derived from copyright violation.

[16] 1824 Constitution, Title III, Section Five of the Legislature, Article 50.
[17] The section on Mexico's copyright background has been taken from information produced by the *Instituto Nacional del Derecho de Autor (INDAUTOR).*

On December 20, 1968, Mexico signed the Berne Convention for the Protection of Literary and Artistic Works and, in 1974, the Paris Act.

On January 1982, further amendments and additions to the law were made, including resolutions on works and performances used for marketing purposes and widening protection terms for creators, performers and musicians.

In 1991, the catalogue of creative activities protected by copyright was augmented by including photographic, cinematographic, audiovisual, radio and television works and software. As regards the latter, limitation on backup copies was included. The reforms also included rights for phonogram producers and the catalogue of offenses was again revised and enlarged. Penalties were increased and administrative issues clarified.

Further amendments and additions were made in December 1993, giving a longer term of protection of up to 75 years after the creator's demise and abandoning the regime of public domain, allowing for the free use and communication of works that, because of the time elapsed, were no longer under copyright protection.

Finally, on December 29, 1996, the new Copyright Act was issued and became effective as of March 24, 1997. It was conceived as a need to modernize the legal framework in order to respond to technological development as well as to incorporate the signed international commitments into Mexican legislation (such as NAFTA). The Act led to the setting up of the *Instituto Nacional del Derecho de Autor* (INDAUTOR/National Copyright Institute) as a separate body under the Ministry of Education. This Act foresaw an extension of the validity of economic rights from 50 to 75 years effective from the author's death or the death of the last co-author.

On July 23, 2003, the decree to amend the Copyright Act *(Decreto de Reformas y Adiciones a la Ley Federal del Derecho de Autor)* was published. This reform was aimed at strengthening the powers of collection of copyright collecting societies and the management of public communication rights.

The reform included the recognition of a compulsory right in favor of the author or his/her heir to benefit economically from the income generated by public communication of his/her work. With this action, the handing over of economic rights in favor of a third party was neutralized.

In addition, coverage was extended by establishing the protection of copyright to "any media known or to be known".

The legal effects of the author's economic rights were extended to a 100-year term after his/her death. Thus, Mexico became the country with the longest protection for creators in Latin-America. In the case of musicians or performers, this period was extended from 50 to 75 years from the first recording of a performance on a phonogram or of an unrecorded work or the first radio, television or any other media broadcast.

Finally, on September 14, 2005 the Decree by which reforms and additions to the provisions of the Federal Copyright Act were carried out was published in the Federal Official Gazette. The following amendments are relevant:

1. A constitutional principle stating that acquired international commitments are of a binding nature and overrule any counterargument stated in the LFDA (Federal Copyright Act).

2. A new provision for copyright on photographic works, payment of royalties and payment of property damage and damage to reputation is introduced.

3. Confirmation that the right to public distribution is of an exclusive nature in favor of phonogram producers.

4. Several aspects related to the exercise of follow-up or participation right *(droit de suite).*

As mentioned, according to Mexican legislation, the protection and promotion of intellectual property is basically managed by The Mexican Institute of Industrial Property (IMPI) and INDAUTOR.

IMPI is a public decentralised body of the Ministry of the Economy, charged with providing technical and professional support to the administrative authority and providing guidance and advisory services to the private sector for industrial property in Mexico. It also deals with copyright infringement as it relates to economic rights. This division on moral and economic rights is seen by some legal experts as an unnecessary administrative complexity of intellectual property legislation.

The National Copyright Institute (INDAUTOR) is responsible for the promotion and protection of copyright, the promotion of the creation of literary and artistic works, the public copyright registry, and the investigation of copyright infringement. It is an administrative body and its functions as regards enforcement are of a civil nature.

Although recently set up, it has already managed to develop highly efficient processes for both registry and complaints. It has been awarded several ISO 9000 recognitions and its organisational culture is based on active training of its employees to enable them to develop a strong knowledge base on a very new subject for Mexico.

In the matter of intellectual property rights' enforcement, responsibility is shared by another institution, the *Procuraduría General de la República* (PGR), the federal body in charge of investigating crime. They have formed a special unit *Unidad Especializada en Investigación de Delitos contra los Derechos de Autor y la Propiedad Industrial* following a system of specialisation and an attempt to answer specific reports on articles 424 *bis* and 424 III in Matters of Copyright of the Federal Penal Code and Articles 223 and 223 *bis* of the Federal Law of Industrial Property on crimes related to trademarks.

The anti-piracy strategy implemented by the Fox administration (2000-2006) is supported by an inter-institutional body that includes the participation of the different ministries (SE, SHCP, PGR, SEP, SSP, SFP, PROFECO) affected by the phenomenon as well as the private sector. The inter-institutional body is divided into three working committees: legislation, inspection and training.

To promote greater awareness of the piracy problem and its impact on the economy among the population, a fourth committee was created to work on communication and awareness-raising. At this stage it is not clear what the inter-institutional body has achieved nor what the Calderón administration will set as its priorities in this matter.

As mentioned, Mexico has constantly revised its copyright legislation since the early twentieth century and has been able to move towards international standards through the signing of the different copyright and intellectual protection treaties. At present it has one of the most developed copyright legal frameworks in the world.

However, the everyday reality of the Mexican legal system is the weakness of the rule of law, not only as regards intellectual property but as a countrywide factor that reduces incentives for investment as well as the possibility for effectively combating illegal activities.

In the case of copyright protection this is more serious, as the subject matter is still not widely known by the general public and creators have very little power to enforce their rights.

In order for Mexico to provide a good environment that fosters creation and promotes investment within copyright-based industries, it needs more than good copyright legislation.

On the one hand, there should be a proper law enforcement system that guarantees equity for all parties and the effective protection of rights.

On the other, greater awareness of the law, its implications and the reasoning behind it is necessary. The population in general has little knowledge of the legal framework and scope for copyright protection. At present, consumers and distributors of pirated goods justify their actions by protesting against multinationals, claiming reduced purchasing power and complaining about the gross social inequities in our economic system.

This lack of awareness of the law also applies to sectors which, as a result of their activities, obtain economic benefit from products and services protected by copyright. This also means the judiciary in general which lacks the expertise and manpower to deal with copyright violations. All of these factors make compliance, payment of rights, complaints and legal processes expensive and ineffective.

Mexico can and should keep reforming its copyright protection legislation but this will not be possible without a strong program to strengthen the rule of law and an effective scheme against piracy at all levels.

Chapter IV. Estimate of the Economic Contribution of Copyright-Based Industries in Mexico

As mentioned earlier, copyright-based industries (CBI) in Mexico according to the WIPO classification comprise a series of sectors and activities divided into four groups: core, interdependent, partial, and non-dedicated.

This chapter addresses the statistical estimation of the contribution of these industries to the Mexican economy through the use of three main economic indicators: value added, employment and foreign trade for the two-year reference period, 1998 and 2003. The initial sections focus on the measurement of the economic contribution of each of the variables as regards all CBI; the following sections look into the individual economic contribution of each of the groups (core, partial, interdependent and non-dedicated), while the last section compares the Mexican findings with those of the three other countries: Canada, Hungary and the US.

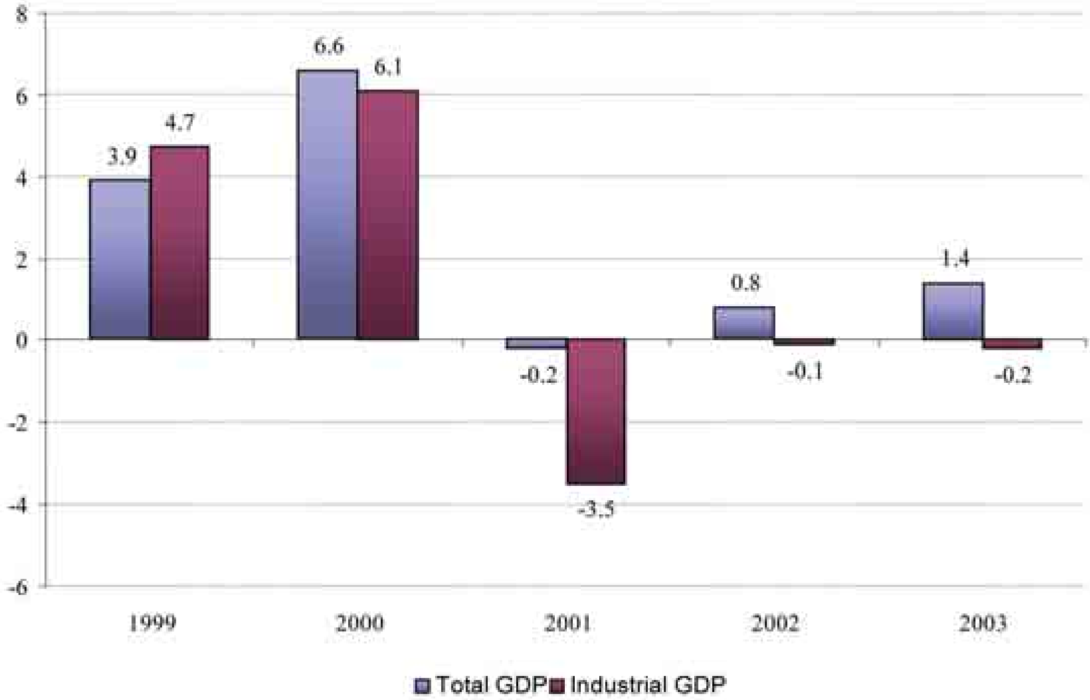
Finally, as has already been mentioned, the statistical information used for the estimation of the variables is taken from the 1999 and 2004 Economic Census produced by the *Instituto Nacional de Estadística, Geografía e Informática* (INEGI) (the official statistical body in Mexico) and the World Atlas published by *Banco Nacional de Comercio Exterior* (The National Bank of Foreign Trade) (BANCOMEXT). The international comparisons make use of the findings reported in the relevant country studies.

4.0. General economic outlook

In order for the reader to more clearly understand Mexican copyright-based industries and their performance during the 1998-2003 period, a general overview on how the economy was performing during the same period is indispensable. First, the period being studied marked the end of one administration (the Zedillo presidency 1994-2000) and the first three years of the Fox administration (2000-2006). The start of the latter was marked by a reduction in the GDP growth rate, especially at the industry level. GDP grew at an average rate of 2.5 percent annually, while industrial GDP had an average annual 1.4 percent growth rate with negative growth rates for the 2001-2003 period.

This slowing of the economy affected the CBI as well and can, in general, help explain the poorer performance for 2003 as compared to 1998 estimates, in addition to other factors that affected them directly.

Chart 4.1. Total and industrial real GDP
(Annual growth rates)



Source: INEGI

4.1. Value added of copyright-based industries in Mexico

Total value added for copyright-based industries (CBI) in Mexico for the year 2003 amounted to 259,071,480 pesos, representing 8.07 percent of the total census value added. For the year 1998, and according to Table 4.1, the CBI reported a value added of 157,485,574 pesos (9.58 percent of total census value added). This implies that for the period 1998-2003, both in nominal and real terms (See Table 4.2) total copyright-based industry value added reported an absolute real growth of 3.69 percent, which, if making an average annual estimate (0.73 percent annual growth) meant that the CBI grew at a slower rate than the economy during the period. This can be explained by a series of factors listed below on which the study will report in more detail later:

- Weak enforcement of the rule of law
- Growth in piracy rates
- Government policies that favored the growth of the informal sector
- Progressive loss of a young industrial sector due to NAFTA and the opening up of the economy
- Public policies that reduced support to culture and its linked industries
- Fall in disposable income

This slower growth, versus more dynamic performances in other sectors of the Mexican economy, generated a reduction in the contribution of the CBI to total value added. We find a fall in participation from 9.58 percent in 1998 to 8.07 percent in 2003.

When comparing the contribution of copyright-based industries to GDP, we find this same effect in the participation of a CBI value added proxy (value added + VAT)[18] to GDP. For 1998, the estimated contribution of the CBI to GDP was 5.15 percent, which by 2003 had fallen to 4.77 percent (see Table 4.3).

Table 4.1. CBI Total and Per Industry: Value Added and Employment 1998 - 2003 Comparative

COPYRIGHT-BASED INDUSTRIES	Number Employed (Units) 1998	2003	Value Added (Thousands of Pesos) 1998	2003
CORE	376,210	554,218	40,609,231	84,120,840
INTERDEPENDENT	526,229	592,549	74,067,178	91,634,879
PARTIAL	372,544	410,955	27,561,859	46,481,271
NON-DEDICATED	169,649	229,741	15,247,305	36,834,491
TOTAL CBI	1,444,632	1,787,464	157,485,574	259,071,480
Total Industrial Census	13,827,025	16,239,536	1,643,397,302	3,208,379,859
CBI Contribution with regard to the total	**10.45%**	**11.01%**	**9.58%**	**8.07%**

Source: Estimates based on INEGI data

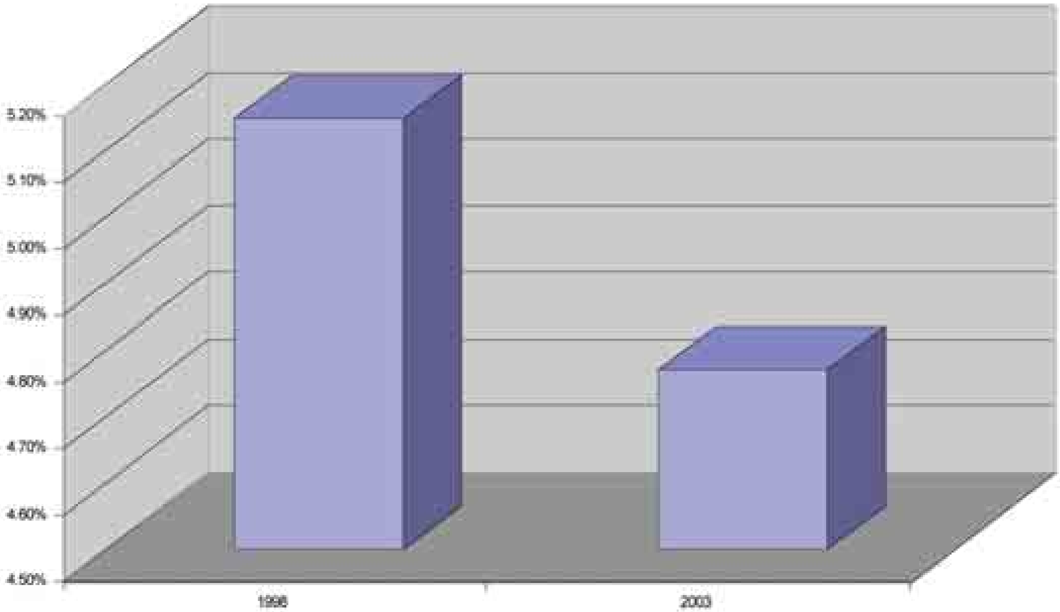
Table 4.2. CBI: 1998 - 2003 Real Value Added Comparative
Thousands of Pesos in Real Terms 1998 = 100

CBI GROUPS	1998	2003
CORE	40,609,231	53,026,948
INTERDEPENDENT	74,067,178	57,763,546
PARTIAL	27,561,859	29,300,230
NON-DEDICATED	15,247,305	23,219,224
CBI TOTAL	157,485,574	163,309,948
CENSUS TOTAL	1,643,397,302	2,022,454,758
% CBI / TOTAL INDUSTRIAL CENSUS	**9.58%**	**8.07%**
% CBI/ GDP	**5.15%**	**4.77%**

Source: Estimates based on INEGI data

[18] See Chapter II, section 2.3 for more details on methodology and comparison estimates.

Chart 4.2. Contribution of Copyright-Based Industries to GDP



Source: Estimates based on INEGI data

In terms of the contribution of value added per group of industries, we find that the share of the core industries with respect to the total increased, as well as that for the non-dedicated segment. Simultaneously, the interdependent and partial industries' shares have decreased (see Table 4.3).

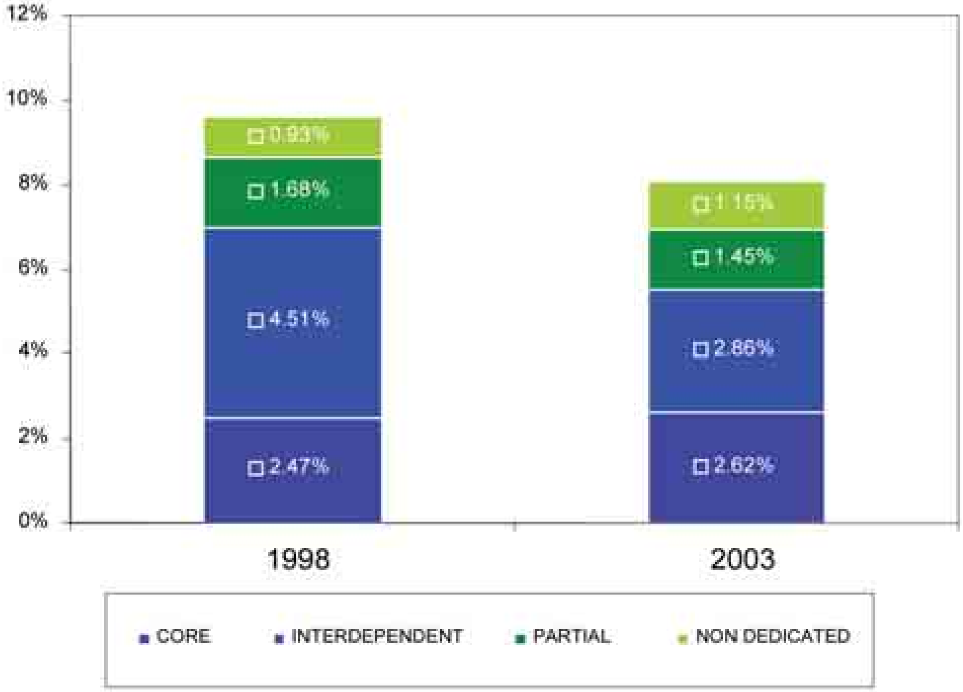
Table 4.3. Contribution of the CBI to Total

Share by Group of Industries with regard to Total Census	Employment Number Employed		Value added Thousands of pesos 1998=100 Real Terms	
	1998	2003	1998	2003
CBI TOTAL	**10.45%**	**11.01%**	**9.58%**	**8.07%**
CORE	2.72%	3.41%	2.47%	2.62%
INTERDEPENDENT	3.81%	3.65%	4.51%	2.86%
PARTIALS	2.69%	2.53%	1.68%	1.45%
NON-DEDICATED INDUSTRIES	1.23%	1.41%	0.93%	1.15%

Source: Study estimates based on INEGI data

As regards structural shares, we find especially relevant the decrease shown by the interdependent group from 4.51 percent in 1998 to 2.86 percent in 2003 (see Chart 4.3).

Chart 4.3. CBI: Participation in Total Census Value Added



Source: Study estimate based on INEGI data

4.2. Employment in copyright-based industries in Mexico

In terms of employment, the CBI registered an increase in the number employed during the study period as reflected in Table 4.4.

Table 4.4. Employment 1998 - 2003

	Number Employed (Units)	
	1998	**2003**
CORE	376,210	554,218
INTERDEPENDENT	526,229	592,549
PARTIALS	372,544	410,955
NON-DEDICATED	169,649	229,741
TOTAL CBI	**1,444,632**	**1,787,464**
Total Industrial Census	13,827,025	16,239,536
CBI Contribution with regard to the Total	**10.45%**	**11.01%**

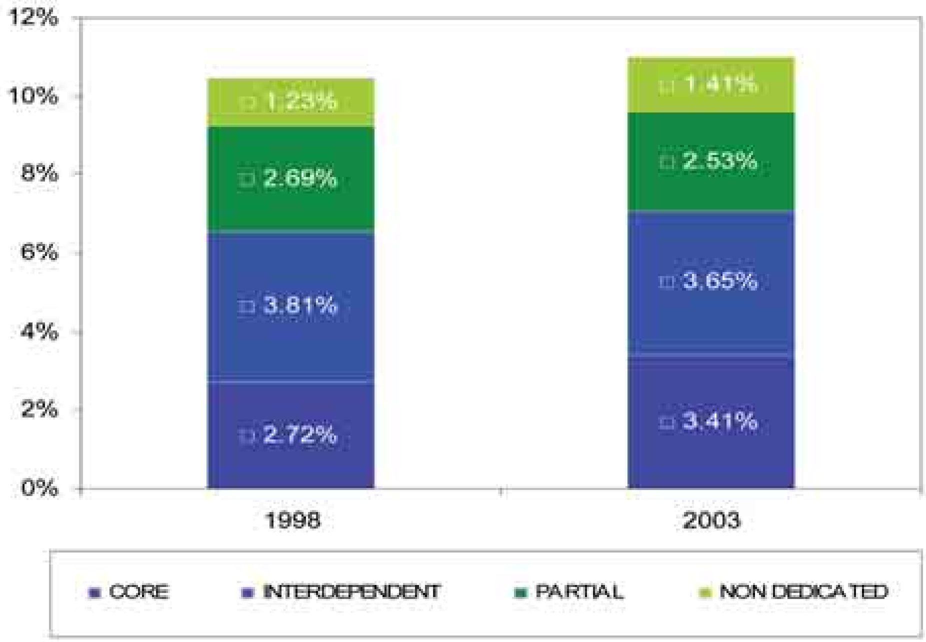
Source: Study estimate based on INEGI data

The CBI reported a level of employment of 1,444,632 employees (10.45 percent of the total workforce) for 1998. Five years later, the 2003 data reported 1,787,464 employees, representing 11.01 percent of the total workforce.

Therefore for the period 1998-2003, employment not only grew in number of employees (24 percent), but also showed an increase in share of total employment from 10.45 percent to 11.01 percent. This reflects the importance of the CBI as employment generators during what was a particularly complex period for employment creation in the Mexican economy as a whole.

As shown in Chart 4.4, the employment share of the CBI grew from 1998 to 2003, reflecting the importance of these industries as employment generators, particularly in the case of the core group. These findings are of special relevance to an economy such as Mexico which requires the creation of at least one million jobs annually to absorb the growing labor force. Clearly, the CBI seem to provide one of the answers.

Chart 4.4. Copyright-Based Industries: Employment Contribution



Source: Study estimate based on INEGI data

4.3. Foreign trade of copyright-based industries in Mexico

In terms of foreign trade, we find that both imports and exports in these industries grew during the period 1998 to 2003 by 26 and 28 percent respectively, producing a 39 percent global increase in trade surplus (see Table 4.5).

However, and as shown in greater detail in the following section, the core industry component reflects a growth in the trade deficit as a result of a significant drop in exports by these industries. Likewise, partial and non-dedicated industries reveal trade deficits for the year 2003. The only component of the CBI with a trade surplus was the one linked to the interdependent industries.

These findings seem to indicate a growth in domestic consumption of copyright-based goods which is not being satisfied by local production. In this sense, there seems to be an economic incentive to increase local production with greater investment in these industries as long as local products can compete in terms of cost with imported goods.

Table 4.5. Copyright-Based Industries:1998 -2003 Foreign Trade Comparative

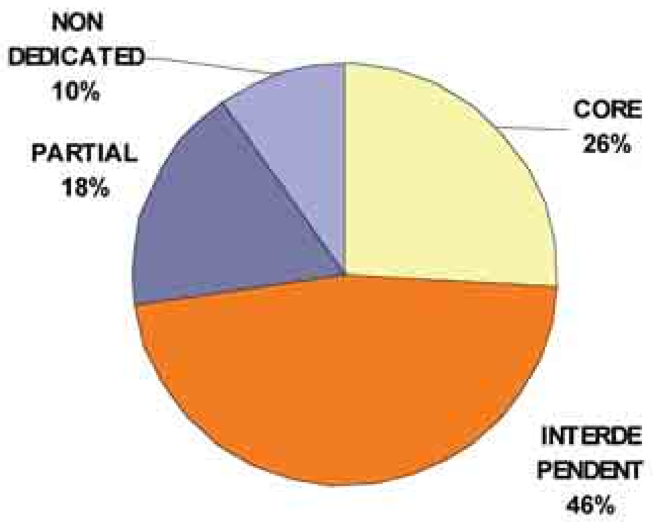
Copyright-Based Industries	Imports Millions of US$		Exports Millions of US$		Trade Balance Millions of US$	
	1998	2003	1998	2003	1998	2003
CORE	459	546	299	220	-160	-326
INTERDEPENDENT	7,227	7,970	11,859	15,156	4,632	7,186
PARTIAL	613	891	756	679	143	-212
NON-DEDICATED	9,927	13,666	8,213	11,051	-1,715	-2,616
CBI TOTAL	**18,226**	**23,073**	**21,127**	**27,105**	**2,900**	**4,032**

Source: Estimate based on BANCOMEXTdata

4.4. Contribution of copyright-based industries per industrial group

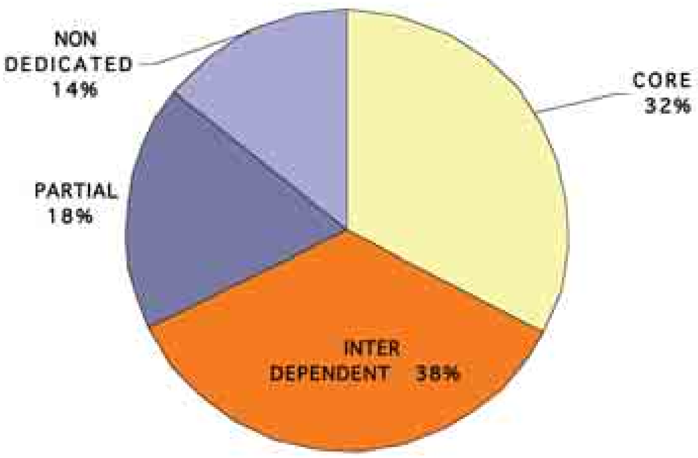
In structural terms, the contribution of the value added generated by the interdependent sector, 46 percent in 1998 and 38 percent in 2003, stands out and is followed by the contribution of the core industries (26 percent and 32 percent). In addition, the growth of contributions from core industries resulting from a decline in the contribution of interdependent industries is worth mentioning.

Chart 4.5. **Value Added of Copyright-Based Industries: Contribution per Industrial Group, 1998**



Source: Estimates based on INEGI data

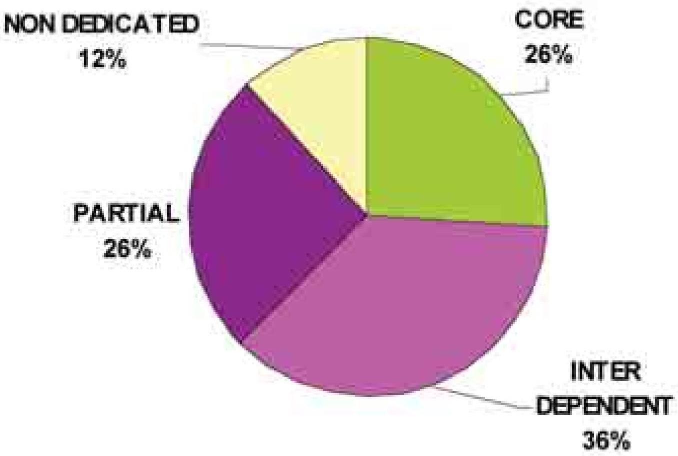
Chart 4.6. **Value Added of Copyright-Based Industries: Contribution per Industrial Group, 2003**



Source: Estimates based on INEGI data

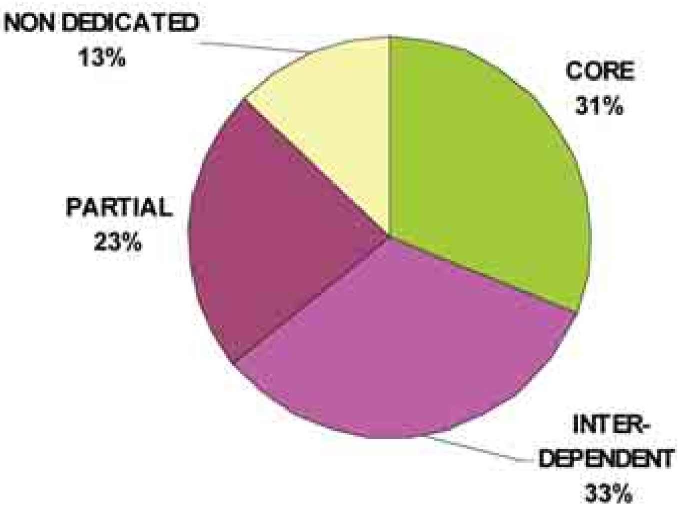
As regards employment, the same trend was maintained, with the highest contribution from interdependent industries within all the CBI (36 percent and 33 percent, respectively) and a rising tendency in core industries, from 26 percent in 1998 to 31 percent in 2003.

Chart 4.7. Employment in the Copyright-Based Industries 1998-2003: Share per Industrial Group



Source: Estimates based on INEGI data

Chart 4.8. Employment in the Copyright-Based Industries Share per Industrial Group, 2003



Source: Estimates based on INEGI data

Finally, if we analyze the composition of the CBI in terms of core and non-core industries, we discover that it is the latter component which makes the highest contribution, although the core component shows a growing contribution between 1998 and 2003. The contribution of value added produced by core industries to the CBI total value increased from 25.7 percent in 1998 to 32.4 percent in 2003 and for employment, from 26 percent in 1998 to 31 percent in 2003. This indicates the growing importance of core copyright industries to the Mexican economy, due to the increasing importance of these industries globally and this should be encouraged by strengthening them.

In summary, we conclude that despite the fact that the CBI have reduced their contribution to the total Mexican economy during the reference period, within the CBI the core industry component has gained in importance. In addition, the results show that the CBI are important generators of employment, which would reinforce the value of investment in the sector in terms of human resources as well as material resources in a country where employment generation is one of the fundamental challenges faced.

In order to obtain more information on the performance and economic structure of these industries within the Mexican economy the following sections offer an analysis of the economic contributions of the CBI per group.

4.5. Economic contribution of core copyright-based industries

As shown in Table 4.6, during the period 1998 to 2003, the economic evolution of core copyright-based industries gave the following results:

- The total number of economic establishments in these industries increased 6 percent, from 91,945 in 1998 to 97,109 in 2003.

- Total employment rose 47.3 percent, with a total of 178,000 new jobs generated between 1998 and 2003 representing an annual average growth of 9.5 percent. Nevertheless, total income, measured in constant Mexican pesos in 1998, reported a fall of 11.1 percent, which indicates an important deterioration in remuneration for people working in the sector.

- In this period, value added generated by these industries grew 30.6 percent in real terms.

- Lastly, the investment indicators reveal an increase of more moderate dimensions compared to that of value added and employment: fixed capital formation decreased by 14.8 percent during the same period, while fixed assets increased 3.6 percent in real terms.

Table 4.6. Core Copyright-Based Industries: 1998 - 2003
Number of Units and Thousands of 1998 Constant Pesos = 100

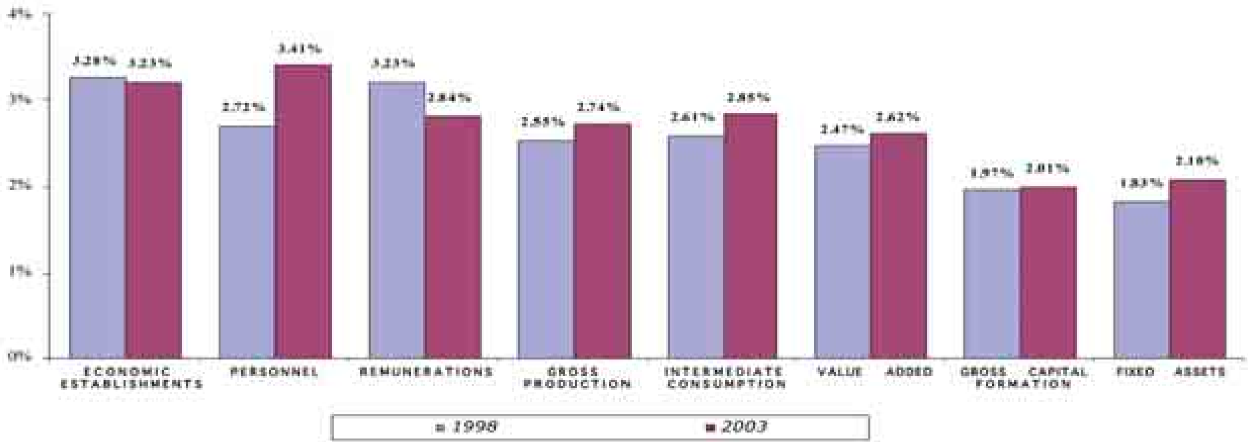
Economic Indicators	1998	2003	Real % Growth 1998-2003
Economic establishments (Number of units)	91,945	97,109	5.6
Employed Personnel (Number of people)	376,210	554,218	47.3
Remunerations (Thousands of pesos)	16,862,829	14,997,293	-11.1
Gross production (Thousands of pesos)	94,743,984	108,789,308	14.8
Value added (Thousands of pesos)	40,609,231	53,039,622	30.6
Gross capital formation (Thousands of pesos)	3,995,919	3,406,200	-14.8
Fixed assets (Thousands of pesos)	46,335,273	48,022,637	3.6

Source: INEGI

If we analyze the above findings we can reach relevant conclusions regarding core copyright industries (see Chart 4.9). On the one hand, the number of premises and personnel employed represent more than 3 percent of the national total in the two-year reference period,[19] where growth in the contribution of employed personnel went from 2.72 percent to 3.41 percent in the period 1998–2003. In terms of value added, the shares were 2.47 percent and 2.6 percent respectively, which also show a positive trend for core industries in the reference period.

On the other hand, the fall in the income variable, from 3.2 percent in 1998 to 2.8 percent in 2003, reflects an important deterioration in remuneration to employees, which counteracts the increase in employment of these industries in terms of quality.

Chart 4.9. Contribution of Core Copyright-Based Industries to the Economy
Percentage of Total



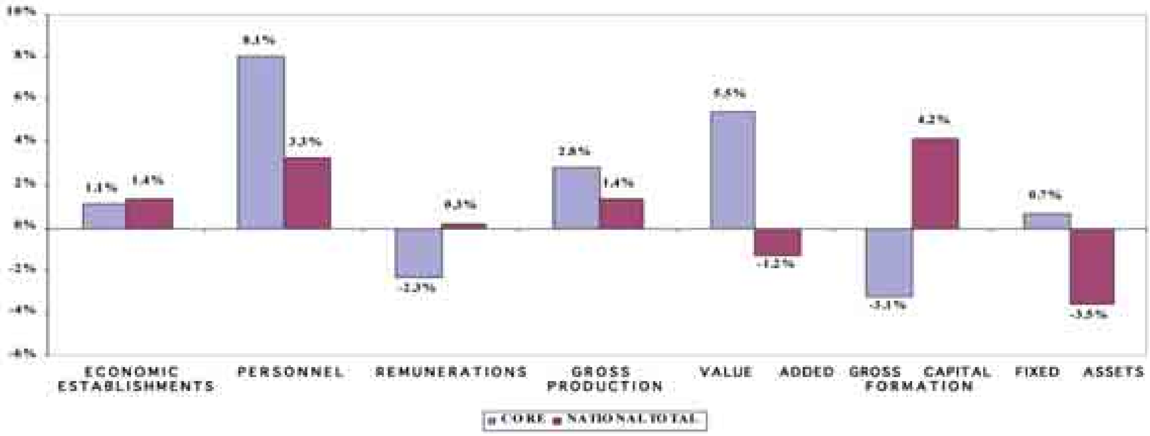
Source: INEGI

[19] The totals include industry, commerce and services; the primary sector is excluded (agriculture, livestock, forestry, fishery and mining). See Chapter II for details of sectors included.

As shown in Chart 4.10, the performance indicators of the core industries during the period 1998 to 2003 were better than those for the national level, particularly regarding the number of employees (which in core industries increased by an average of 8.1 percent annually compared to 3.3 percent for the economy as a whole), gross production (2.8 percent and 1.4 percent in real terms, respectively), value added (5.5 percent and -1.2 percent) and value of assets (0.7 percent and 3.5 percent).

In contrast, importance should be given to the lowering of remuneration corresponding to core industries in the reference period, decreasing by an average of 2.3 percent annually in real terms, while capital formation increased 0.3 percent and 4.2 percent in comparison to the national level. This reflects a fall in human and fixed capital investment that will probably contribute negatively to the growth of the core industries in the next few years.

Chart 4.10. Economic Indicators: Core Industries vs National Total 1998-2003 (Annual percentage variations in real terms)



Source: INEGI

Regarding the contribution of value added of the core industries to total value added for 2003, we find that the former made a 2.62 percent contribution. In terms of employment, their contribution is 3.41 percent of the total recorded employment.

Table 4.7. Value Added, 2003
Thousand Pesos 1998 = 100

Core Industries	Total CAV Mexico	Contribution
53,026,948	2,022,454,758	2.62%
Total CBI (core + non core)	**Total CAV Mexico**	**Contribution**
163,309,948	2,022,454,758	8.07%

Source: Study estimates based on INEGI data

Table 4.8. Employment 2003
Number Employed

Core Industries	Total CAV* Mexico	Contribution
554,218	16,239,536	3.41%
Total CBI (core + non-core)	Total CAV Mexico	Contribution
1,787,464	16,239,536	11.01%

**CAV: Industrial Census Value added*
Source: Study estimates based on INEGI data

4.6. Structure of core industries

In relation to the sectorial structure of the copyright-based core industries, the highest relative contribution was made by press and literature. In 2003 it represented 36 percent of all personnel employed in the core group, 32 percent of production and 33 percent of value added. This contribution was maintained despite the fact that in the period 1998 to 2003 there was a drastic reduction from a level of nearly 40 percent in the three indicators for 1998.

Next in importance is radio and television, which, although employment levels are lower when compared to other sectors (9.8 percent of the total), in 2003 it generated 24 percent of the total production and 28 percent of value added. This sector registered a substantial increase in its contribution as a result of the emergence of new products and services, such as cable television and DTH (which were not included in the 1998 Census).

During the period 1998 to 2003, the software and database sector decreased in all its indicators and the film and video sector reported a fall in the generation of value added.

Table 4.9. Sectorial Structure of Copyright-Based Core Industries: Percentage Contribution to Total

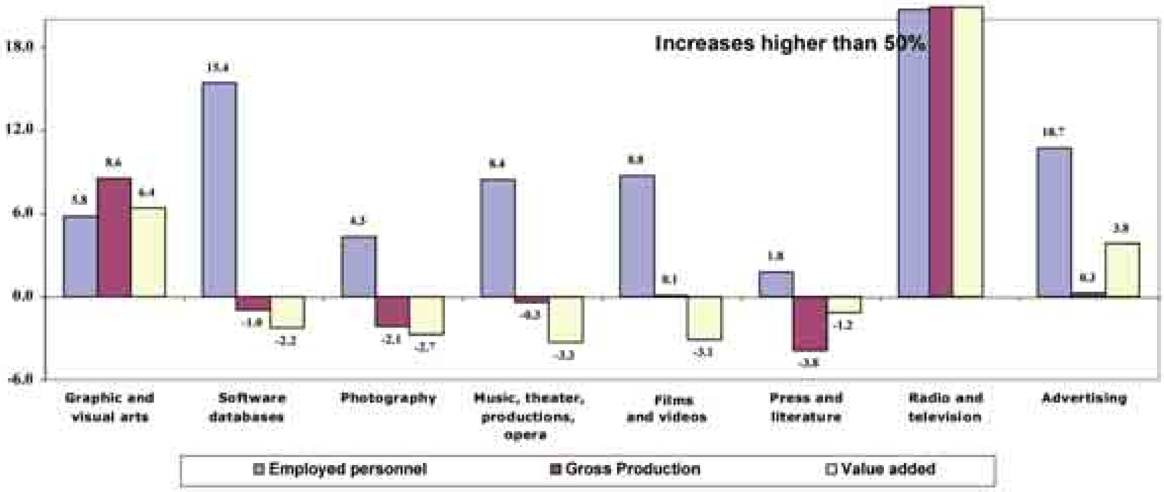
Industry	Employees		Value added		Imports		Exports	
	1998	2003	1998	2003	1998	2003	1998	2003
Advertising	10.6	12	10.4	9.6	-	-	-	-
Copyright Collecting Societies[20]	0	0.4	0	0				
Graphic and Visual Arts	5.3	4.7	3.1	3.2	5.8	1.9	4.8	4.5
Motion Picture and Video	7.9	8.2	6.8	4.4	1.3	1.4	1.5	4.3
Music, Theater and Opera	11	11.2	15.4	10	0.1	0.2	0	0
Photography	5.8	4.9	2.6	1.7	4.6	4.7	3	7.5
Press and Literature	48.2	35.8	45.5	32.8	88.2	91.8	90.7	83.6
Radio and Television	1.8	9.8	2	28.4	-	-	-	-
Software and Databases	9.3	13	14.4	9.8	-	-	-	-
Total	100	100	100	100	100	100	100	100

The data related to foreign trade of some industries were not included due to lack of statistical information.
Source: INEGI, BANCOMEXT

In summary, the behavior of the sectors grouped under the copyright-based industries during the period 1998 to 2003 can be explained as follows: a substantial increase was seen in radio and television activities (52 percent in personnel employed, 38 percent in production and 80 percent in annual value added); relatively favorable in graphic and visual arts, theater and opera, and advertising services; and an unfavorable evolution in terms of production and value added in software and databases, despite reflecting a significant increase in the workforce; and unfavorable for all items of photography and press and literature.

[20] It is worth noting that no statistical data is reported for copyright collecting societies for 1998. Also relevant is the fact that for 2003, the statistical information shows negative values due to the formal structure of these societies and the class incorporates data on other societies and associations not linked to the activity in question.

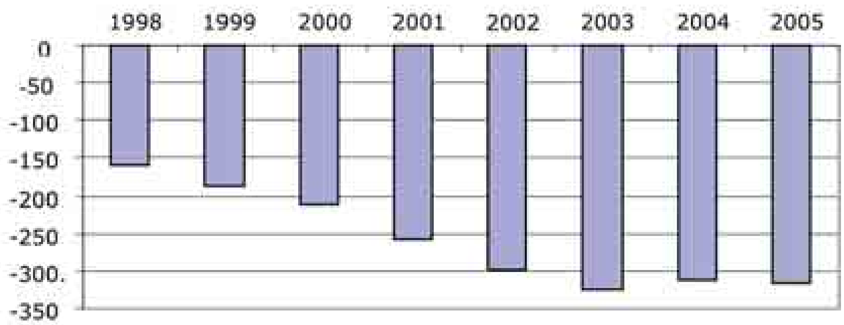
Table 4.11. **Indicators by Sector of the Core Industries Annual Percentage Variations in Real Terms**



Source: INEGI

With regard to foreign trade, during the period 1998 to 2005, the core CBI registered a trade deficit of US$316 million in 2005, well above the US$160 million deficit reported in 1998.

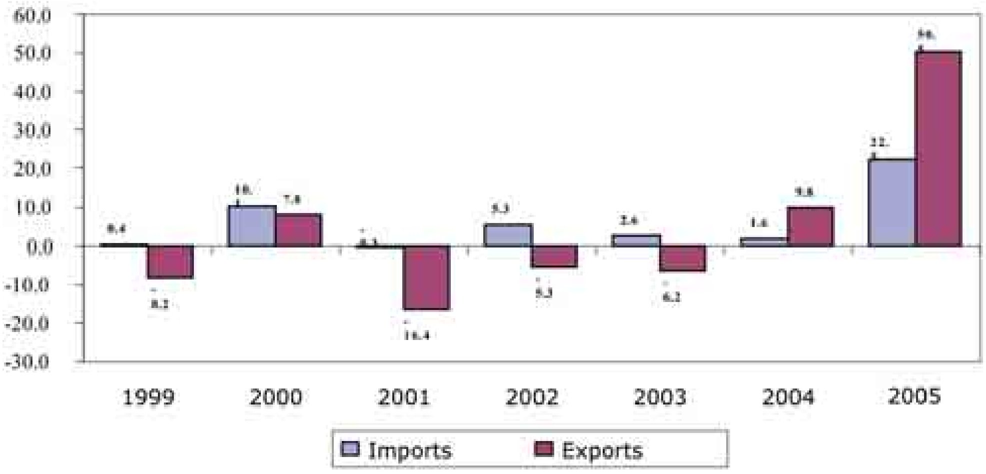
Chart 4.12. **Trade Balance of Core Industries Millions of US$**



Source: INEGI

The above was the result of a rise in imports from 1998 to 2005 at an annual rate of 5.8 percent, whereas exports rose only by 2.8 percent.

Chart 4.13. **Imports and Exports of Core Industries Annual Percentage Variations**



Source: BANCOMEXT

In general terms the industry trade deficit can be attributed to two sectors: press and literature, and photography, the sectors that report a higher level of foreign trade.

Table 4.10. **Foreign Trade of Core Industries by Sector: Millions of US$**

SECTOR	1998	1999	2000	2001	2002	2003	2004	2005	Rate of Change 1998-2005
IMPORTS									
Graphic and Visual Arts	26.5	9.0	13.3	14.4	13.7	10.6	14.1	20.1	-3.9
Motion Picture and Video	5.9	4.3	7.3	5.8	6.6	7.6	5.7	4.8	-2.9
Music, Theater and Opera	0.5	0.6	0.6	0.8	0.9	1.1	0.9	0.6	2.2
Photography	21.3	21.5	23.3	22.2	36.6	25.8	33.9	133.6	30.0
Press and Literature	405.0	425.6	463.1	462.6	474.7	501.1	499.9	520.2	3.6
TOTAL	**459.2**	**461.0**	**507.6**	**505.9**	**532.4**	**546.0**	**554.5**	**679.3**	**5.8**

EXPORT	1998	1999	2000	2001	2002	2003	2004	2005	% Change
Graphic and Visual Arts	14.4	14.0	45.3	12.8	7.5	9.9	12.6	13.7	-0.7
Motion Picture and Video	4.5	3.8	7.1	6.3	8.7	9.5	9.8	10.8	13.2
Music, Theater and Opera	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-1.3
Photography	9.0	19.2	31.9	28.9	20.2	16.6	13.3	15.8	8.4
Press and Literature	271.2	237.6	211.9	199.5	198.2	184.0	205.9	323.3	2.5
TOTAL	**299.2**	**274.7**	**296.2**	**247.7**	**234.7**	**220.0**	**241.6**	**363.6**	**2.8**
TRADE BALANCE									
Graphic and Visual Arts	-12.1	5.0	31.9	-1.6	-6.3	-0.7	-1.5	-6.4	
Motion Picture and Video	-1.3	-0.5	-0.2	0.5	2.2	2.0	4.1	6.0	
Music, Theater and Opera	-0.5	-0.5	-0.5	-0.7	-0.8	-1.0	-0.8	-0.6	
Photography	-12.3	-2.3	8.5	6.7	-16.4	-9.2	-20.6	-117.8	
Press and Literature	-133.8	-188.0	-251.2	-263.1	-276.5	-317.1	-294.0	-196.9	
TOTAL	**-160.0**	**-186.2**	**-211.4**	**-258.2**	**-297.8**	**-326.0**	**-312.9**	**-315.7**	

Source: BANCOMEXT

Within the sectors that constitute the core CBI, the following are the most important aspects of the period 1988 to 2003.

- In graphic and visual arts, the two most relevant sub-sectors, graphic design and fashion design, registered substantial increases above the average in all the indicators: employment, production and value added.

- In software and databases, electronic information processing and web sites showed almost no growth, while software production decreased substantially.

- In the case of photography, a moderate increase was observed in the two industrial classes in which it is featured.

- In music, theater and opera, the classes of activity corresponding to ticket sales and event promotion registered accelerated growth, which was partially offset by the poor performance of music recording, production and distribution, as well as that of theater and dance companies.

- In motion picture and video, almost all classes recorded a negative performance, with the exception of film distribution.

- In press and literature the performance per class was mixed: favorable in printing and book publishing, newspapers and magazines, as well as directories and integrated mailing lists; but the rhythm of activities linked to trade, especially retail, decreased substantially.

- In radio and television, as previously seen, the important growth of the sector resulted from the incorporation of new activities of recent inception into the Mexican economy, which, in 2003 generated a high volume of jobs and value added; among these we find programming and distribution for pay television systems, creation and broadcasting of content over the Internet. This clearly reflects technological innovations in these sectors.

- In advertising, substantial expansion was reported in: production, promotion agencies, media agencies and distribution of advertising material.

4.7. Structure of non-core industries

The creative process, as reported in WIPO's methodological guide, clearly represents an economic activity in itself since it adds value within the production process. Nevertheless, the total economic effect of these industries is not only linked to production activities, but also to other activities carried out along the production chain; mainly, distribution and consumption.

The economic effects generated in this way take different forms and use diverse methods depending on the character of the work. For this reason, measurement of the economic contribution of a product or good protected by copyright requires the analysis of those activities that result from the multiple effects of copyright upon the economy – those of the creators, rights holders, distributors, users, equipment manufacturers, and advertising agents, among others. Chart 4.14, extracted from WIPO's methodological guide, enables us to identify these links.[21]

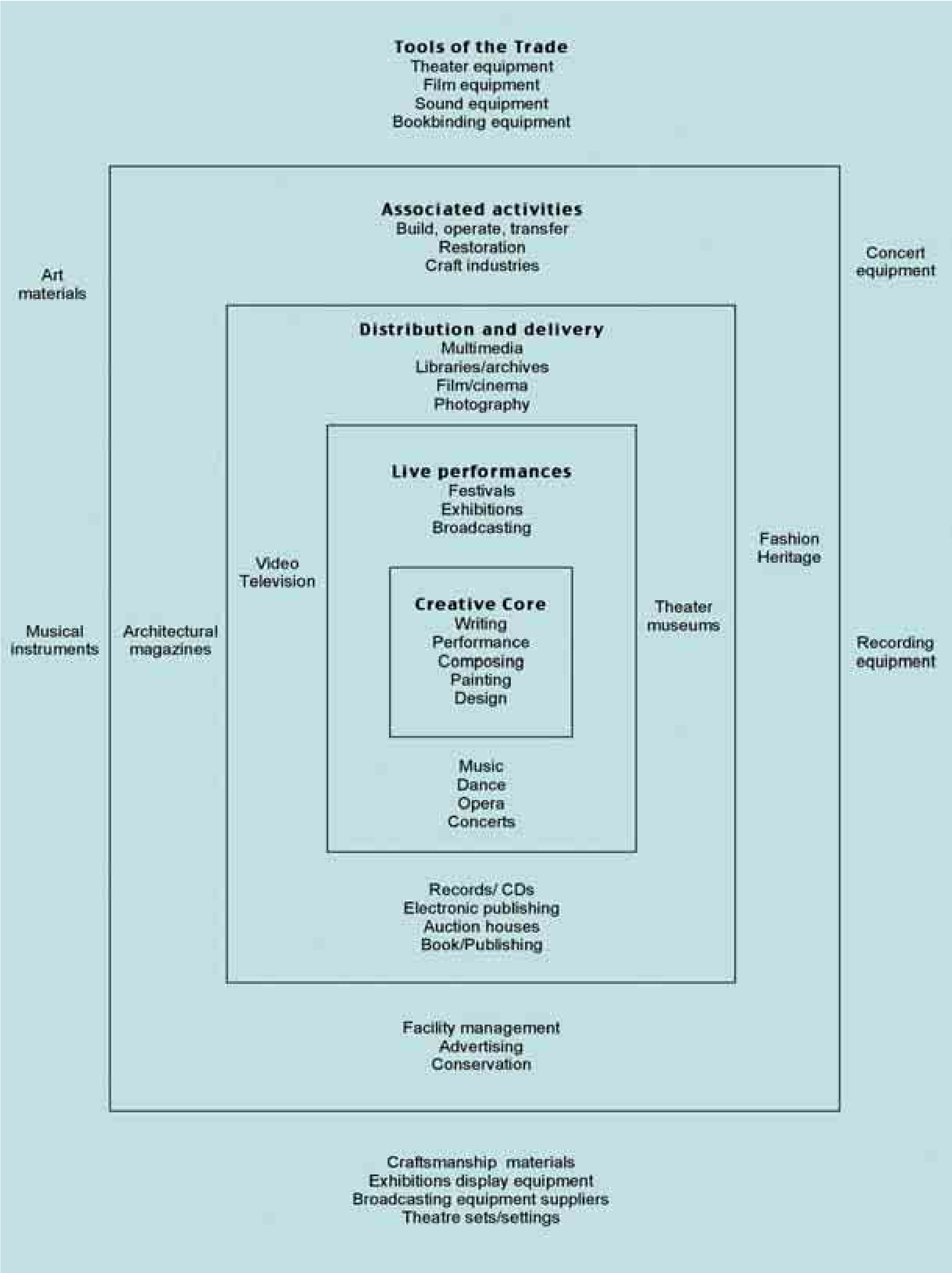
According to the above, the estimate of the economic contribution of copyright-based industries requires that all the activities in the value chain be taken into account, bearing in mind that the contribution of each one will not have the same weight as those generated by the core industries.

As defined by WIPO, "the weighting process represents the establishment of the proportion of the copyright-based component of an industry. It has to be done in relation to all industries that are not core copyright-based industries where the contribution will be counted as 100 percent."[22]

In the next section, we will revise our three indicators (value added, employment and foreign trade) for the non-core industries: interdependent, partial and non-dedicated.

[21] WIPO. *idem*, page 25.
[22] WIPO. *idem*, page 57.

Table 4.14. Creative Industries



Source: WIPO

Table 4.11 shows the value added estimated for non-core copyright-based industries that can be attributed to copyright protection through the application of the estimated weighting factors.[23]

Table 4.11. Non-Core Industries. Weighted Value Added 1998 – 2003
Thousands of Pesos (in real 1998 = 100 and nominal terms)

INDUSTRY GROUPS		1998	2003	% change
NON-CORE	Nominal	116,876,343	174,950,640	49.69%
	Real	116,876,343	110,283,000	-5.64%
INTERDEPENDENT	Nominal	74,067,178	91,634,879	23.72%
	Real	74,067,178	57,763,546	-22.01%
PARTIALS	Nominal	27,561,859	46,481,271	68.64%
	Real	27,561,859	29,300,230	6.31%
NON-DEDICATED	Nominal	15,247,305	36,834,491	141.58%
	Real	15,247,305	23,219,224	49.69%

*The figures reported in the census have been multiplied by a weighting factor that estimates the portion of these sectors that are in effect protected by copyright.
(The formula used is **b=α C**; where **α** is the estimated copyright factor of the contribution to the economic contribution of partial industries in all CBI, **C** is the statistical figure reported by INEGI and **b** is the final figure reported in this table.

Source: Estimates based on INEGI data

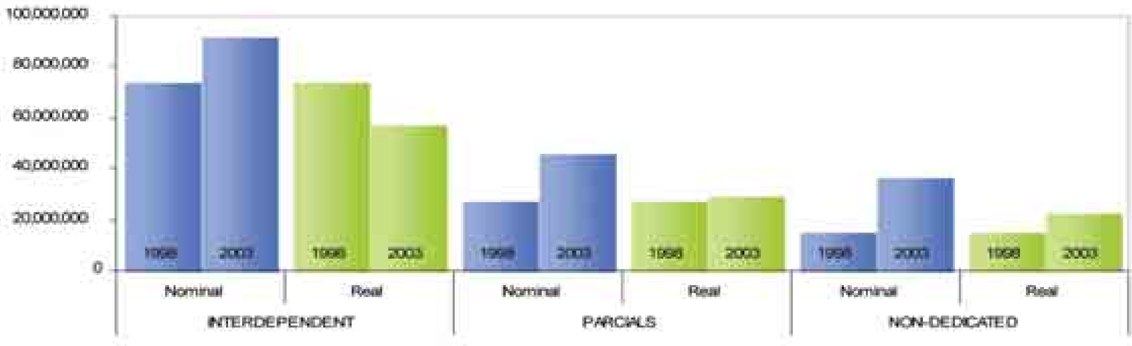
In general, during the reference period, the non-core CBI reported a 5.64 percent fall in value added in real terms, which resulted in a negative effect of the economic contribution of total CBI. This overall reduction is explained as the result of the diverse growth performance of each sector in terms of real value added.

As shown in Chart 4.15, the value added of interdependent industries decreased significantly (-22.01 percent in real terms); at the same time, partial industries showed an increase (6.31 percent) while non-dedicated industries grew significantly (49.69 percent).

Given the importance of interdependent industries in estimating the economic contribution of CBI,[24] this real drop in their value added variable greatly affected them, and could not be counteracted by the increase in the partial and non-dedicated industries in view of their lower copyright contribution to the performance of total CBI.

[23] See Chapter II, section 2.4. for a detailed explanation of the calculation of copyright factors to estimate the economic contribution of Mexican CBI.
[24] Interdependent copyright industries made a bigger contribution to CBI than partial or non-dedicated support industries.

Chart 4.15. Non-Core Industries Comparative Value Added 1998-2003
Thousands of Pesos in Nominal and Real Terms



Source: Estimates based on INEGI data

4.8. Structure of interdependent industries

Interdependent industries are those industries dedicated to the production, manufacture and sale of equipment whose function is primarily aimed at facilitating the creation, production and use of works and other protected materials. Based on this, and according to WIPO methodology, interdependent industries include manufacture, wholesale and retail for the following sectors:

- Television, radios, VCRs, CDs, DVDs and cassette players, electronic gaming equipment and other similar equipment
- Computers and equipment
- Musical instruments
- Photographic and film equipment
- Recording materials
- Paper

In terms of measuring the economic contribution of interdependent industries, we have to analyze the type of goods produced and their link to copyright products. The consumption of some of the products from these industries is entirely complementary to those of the core industries and, in this case, their economic contribution should be measured in full since their consumption depends on the availability of the protected works: television, radio, VCRs, CD/DVDs and cassette players, electronic gaming equipment, musical instruments and computers and equipment.

A second group of goods produced by the interdependent industries does not exist primarily for activities or functions related to copyright-protected works. The main function of these products does not depend on protected works; on the contrary, they facilitate the use of these protected works. In this sense, their contribution to the CBI is partial and this should be taken into consideration.

As explained in Chapter II of this study, the estimate of the copyright contribution of non-core industries follows the weighting methodology and factors used in the US and Hungarian studies cited earlier and applies a simple average of the two-country factors to estimate proxy weighting factors for the Mexican case.

To simplify, this section considers that all interdependent industries respond to the principle of total complementarity, leaving the differentiation between the first and second group of interdependent industries mentioned above for future study.

According to the above, the interdependent industries generated a value added of 91,634,879 pesos in the year 2003, reflecting a growth rate compared to the 1998 value added (74,067,178 pesos) of around 23.7 percent in nominal terms.

However, as can be seen in Table 4.12, in real terms the value added of interdependent industries fell 22 percent mainly as a result of the deterioration of the computing and equipment sector as well as the paper sector.

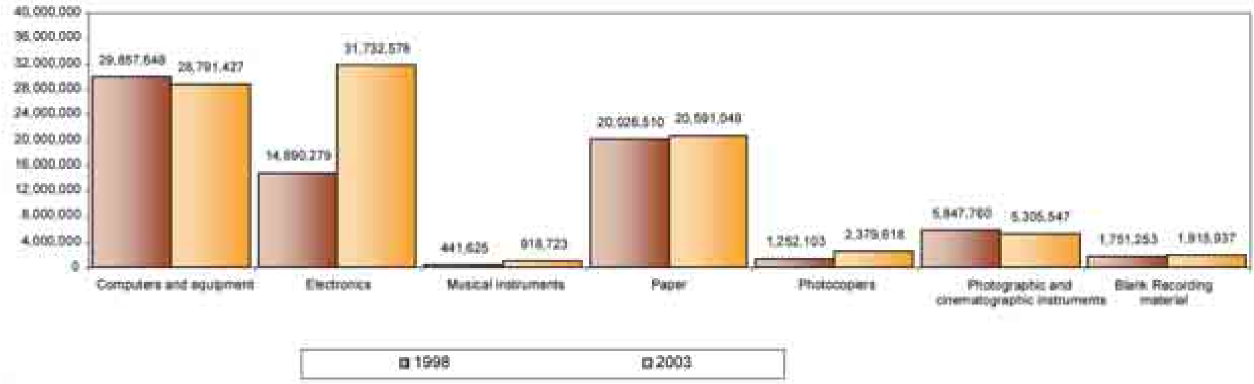
Table 4.12. Interdependent Industries: Value Added per Sector of Activity

INTERDEPENDENT INDUSTRIES	Value Added Thousands of Pesos			
	Nominal Terms		Real Terms	
	1998	2003	1998	2003
Total	**74,067,178**	**91,634,879**	**74,067,178**	**57,763,546**
Computers and equipment	29,857,648	28,791,427	29,857,648	18,149,147
Electronics	14,890,279	31,732,578	14,890,279	20,003,150
Musical instruments	441,625	918,723	441,625	579,132
Paper	20,026,510	20,591,049	20,026,510	12,979,905
Photocopiers	1,252,103	2,379,618	1,252,103	1,500,031
Photography and motion picture	5,847,760	5,305,547	5,847,760	3,344,438
Recording material	1,751,253	1,915,937	1,751,253	1,207,742
Deflactor				1.5864

Source: INEGI

For the interdependent industries, it is evident that computers, electronic equipment and paper are their highest contributing sectors. Therefore, falls in any of these will have a greater effect on the performance of the interdependent industries than any other (see Chart 4.16).

Chart 4.16. Interdependent Industries: Composition of Value Added 1998 -2003. Thousands of current Pesos



Source: INEGI

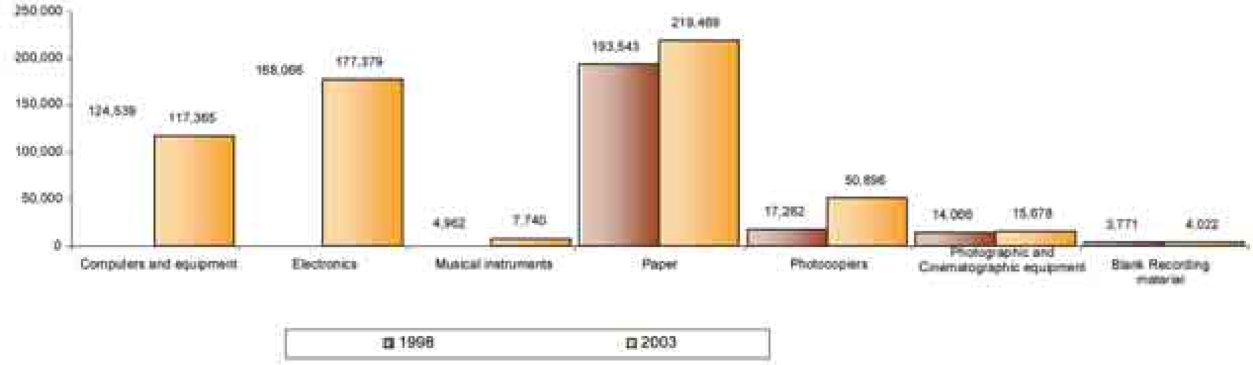
Interdependent industries experienced a 12.6 percent increase in the number of personnel employed between 1998 and 2003. This growth in employment is more or less apparent in all sectors, except for computers and equipment (see Table 4.13 and Chart 4.17).

Table 4.13. Interdependent Industries: Employment per Sector 1998-2003 Number Employed

INTERDEPENDENT INDUSTRIES	Number Employed (Units)		
	Units		% change
	1998	2003	
Total	526,229	592,549	12.6%
Computers and equipment	124,539	117,365	-5.7%
Electronics	168,066	177,379	5.5%
Musical instruments	4,962	7,740	55.9%
Paper	193,543	219,469	13.39%
Photocopiers	17,282	50,896	94.5%
Photographic and cinematographic instruments	14,066	15,678	11.46%
Blank recording material	3,771	4,022	6.6%

Source: INEGI

Chart 4.17. Interdependent Industries: Employment 1998-2003
Number Employed



Source: INEGI

In terms of foreign trade, during the study period imports increased by 10.3 percent while exports grew by 27.8 percent, allowing for the maintenance of the trade surplus. This performance was led by the electronic products sector, which cannot be disaggregated due to limitations in the availability of foreign trade statistics. Yet, it seems that this most probably includes a significant contribution from the products generated by the in-bond industry, as well as from the computers and equipment sector.

Table 4.14. Interdependent Industries: Foreign Trade
US$ Millions

Interdependent Industries	Imports		Exports		Trade Balance	
	Millions of US$					
	1998	2003	1998	2003	1998	2003
Total	**7,227**	**7,970**	**11,859**	**15,156**	**4,632**	**7,186**
Computers and equipment	-	-		-	-	-
Electronics	3,672	4,106	9,929	13,451	6,256	9,345
Musical instruments	37	54	74	50	37	-4
Paper	2,811	3,399	833	1,032	-1,978	-2,367
Photocopiers	458	173	676	138	217	-35
Photographic and cinematographic instruments	248	238	348	486	99	247
Blank recording material	-	-		-	-	-

Source: BANCOMEXT

4.9. Structure of partial industries

Partial industries are those industries in which a segment of the activities is related to copyright-protected works and materials and which can involve creation, production and manufacture, performing, broadcasting, communication and exhibition or distribution and sales.[25] Partial industries include the following:

- Architecture, engineering, surveying
- Household goods, china and glass
- Jewelry and coins
- Other crafts
- Toys and games
- Furniture
- Museums
- Wall coverings and carpets
- Apparel, textiles and footwear

All of these sectors include some activities and products that result from copyright, but they also include other non-copyright-linked activities. Their importance in estimating the economic contribution of copyright-based industries is partial and as such, a copyright factor that acknowledges this limited participation has been applied.

This section analyses partial industries in Mexico and their participation in the economic contribution of CBI. As in the case of interdependent industries, the tables and charts given have taken into consideration the copyright factor that seeks to estimate the degree of contribution of these industries to total CBI.

During the study period, the value added for these industries increased by 69 percent in nominal terms, from 27,561,859 pesos in 1988 to 46,481,271 in 2003. In real terms, this represented a 6.31 percent growth for interdependent industries as a whole.

[25] WIPO. *idem*, page 33.

Table 4.15. Partial Industries: Weighted Value Added 1998 -2003
Thousands of Pesos in Nominal and Real Terms

PARTIAL INDUSTRIES*	Value Added			
	Nominal Terms		Real Terms	
	1998	2003	1998	2003
Total	**27,561,859**	**46,481,271**	**27,561,859**	**29,300,230**
Apparel, textiles and footwear	143,505	116,848	6,199,152	6,760,345
Architecture	10,803,938	17,441,379	10,803,938	10,994,459
Furniture	495,429	555,084	495,429	349,906
Household goods, china and glass	7,322,413	14,118,964	7,322,413	8,900,120
Jewelry and coins	505,405	862,716	505,405	543,827
Museums	71,069	91,311	71,069	57,559
Other crafts	192,316	224,333	192,316	141,412
Toys and games	1,879,569	2,293,604	1,879,569	1,445,811
Wall coverings and carpets	1,174	1,664	92,568	106,791

*The figures reported in the census have been multiplied by a weighting factor that estimates the portion of these sectors that are protected by copyright. (The formula used is **b=a C**; where **a** is the estimated copyright factor of the contribution of partial industries to the economy in all CBI, **C** is the statistical figure reported by INEGI and **b** is the final figure reported in this table.

Source: Estimates based in INEGI data

Employment for partial industries reported a 10 percent rate of growth during the period, from 372,544 employees in 1998 to 410,955 in 2003. This overall growth in employment was primarily the result of an increase in the household goods and architecture sectors.

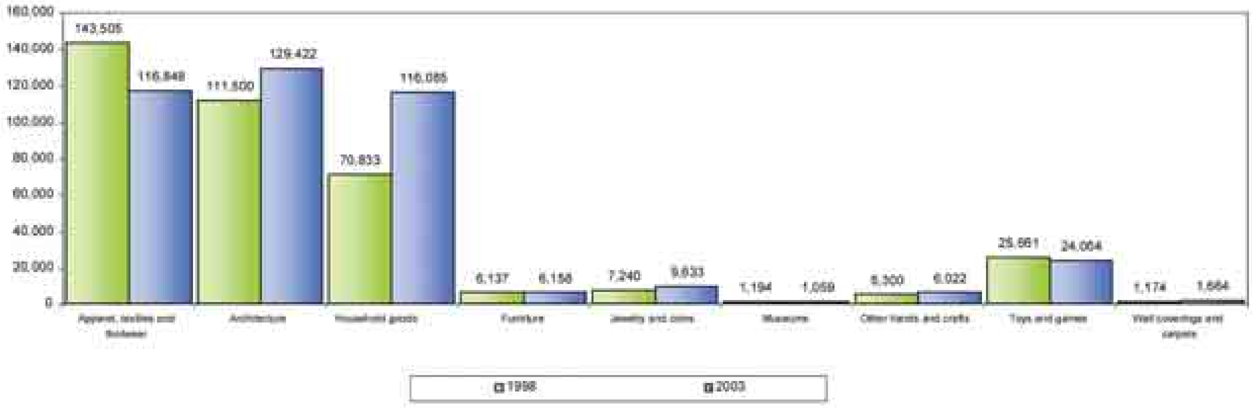
However, a decrease in the partial industries was reported in toys and games, museums and apparel, textiles and footwear (see Table 4.16).

Table 4.16. Partial Industries: Employment 1998-2003
Number Employed

PARTIAL INDUSTRIES	Number Employed Weighted Units	
	1998	2003
Total	**372,544**	**410,955**
Apparel, textiles and footwear	143,505	116,848
Architecture	111,500	129,422
Furniture	6,137	6,158
Household goods	70,833	116,085
Jewelry and coins	7,240	9,633
Museums	1,194	1,059
Other handicrafts	5,300	6,022
Toys and games	25,661	24,064
Wall coverings and carpets	1,174	1,664

Source: Estimates based on INEGI data.

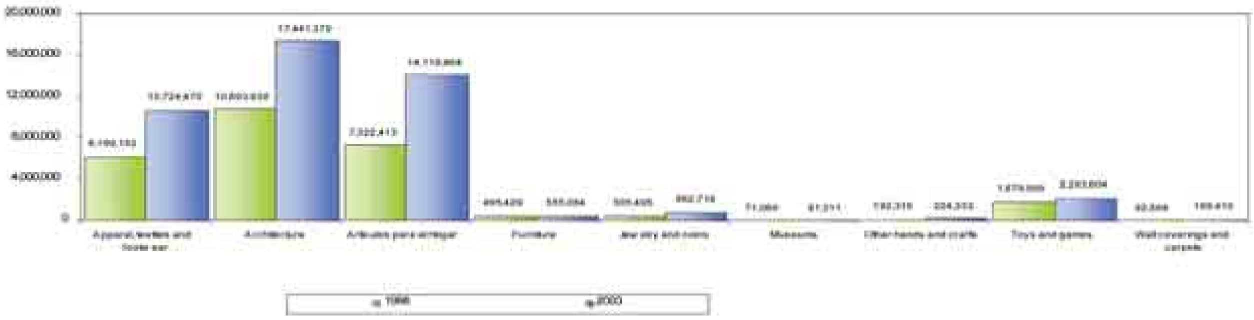
Chart 4.17. Partial Industries: Employment by Sector 1998- 2003.
Weighted Units



Source: Estimates based on INEGI data

In terms of the composition of the partial copyright industries, those that stand out for their contribution are, in order of importance, architecture, household goods, apparel, textiles and footwear and toys.

Chart 4.18. **Partial Industries: Value Added 1998 - 2003**
Thousands of Pesos (nominal weighted terms)



Source: Estimates based on INEGI data

Finally, as regards foreign trade variables, partial copyright industries have increased their level of imports, generating a trade deficit with only one surplus reported in the jewelry and coins and furniture items.

Table 4.17. **Partial Industries: Foreign Trade 1998 - 2003**
Millions of US$ (weighted)

Partial Industries	Imports (Millions of US$)		Exports (Millions of US$)		Trade Balance (Millions of US$)	
	1998	2003	1998	2003	1998	2003
Total	**613**	**891**	**756**	**679**	**143**	**-212**
Apparel, textiles and footwear	227.38	325.44	125.24	102.26	-102	-223
Architecture	-	-	-	-	-	-
Furniture	8.15	11.02	22.19	21.15	14	10
Household goods	134.28	205.34	166.40	187.67	32	-18
Jewelry and coins	128.48	140.63	176.32	204.23	48	64
Museums	-	-	-	-	-	-
Other handicrafts crafts	-	-	-	-	-	-
Toys and games	114.35	208.46	265.41	163.58	151	-45
Wall coverings and carpets	-	-	-	-	-	-

Source: Estimates based on BANCOMEXT data

4.10. Structure of non-dedicated support industries

Non-dedicated support industries are those industries in which a portion of the activity is related to facilitating broadcasting, communication, distribution or sales of works and other copyright-protected goods, but that have not been included in the core industries.[26] These include:

- General wholesale and retail
- General transportation
- Telephony and Internet

These industries have an economic effect on the CBI as part of the production and distribution chain of copyright-based goods, but to a lesser degree than the other industries. Thus, to estimate their economic contribution, we have once again applied a weighting factor aimed at quantifying their participation in the economic contribution of the CBI to the Mexican economy.

In addition, a careful selection of classes and subclasses was made, eliminating those that, in our view, have no link to copyright protection and the industries within CBI groups.

Table 4.18. Non-Dedicated Industries: Value Added 1998- 2003
Thousands of Pesos (weighted figures in nominal and real terms)

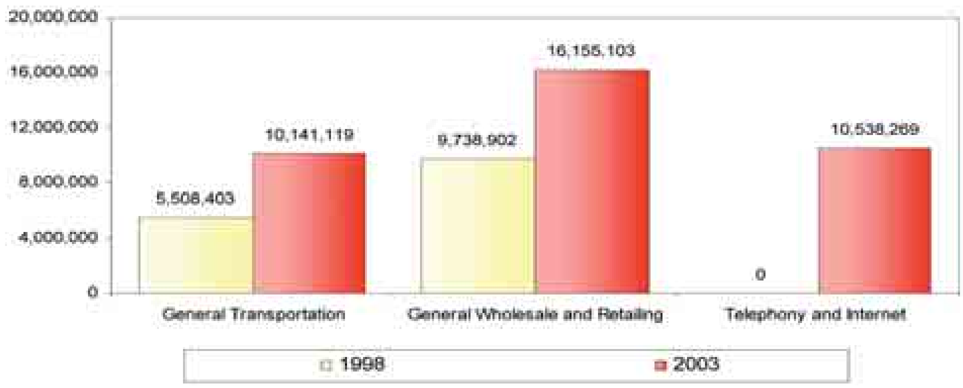
NON-DEDICATED INDUSTRIES*	Value Added			
	Nominal Terms		Real Terms	
	1998	2003	1998	2003
Total	**15,247,305**	**36,834,491**	**15,247,305**	**23,219,224**
General transportation	5,508,403	10,141,119	5,508,403	6,392,620
General wholesale and retail	9,738,902	16,155,103	9,738,902	10,183,634
Telephony and Internet	0	10,538,269	0	6,642,970
Deflator				1.5864

Telephony and Internet were not registered independently in 1998 as reflected by the zero figure for that year.
Source: Estimates based on INEGI data

In terms of value added, the non-dedicated industries report an important increase of 52 percent in real terms, with the rapid development of the telephony and Internet sector that resulted from the introduction of technological innovations in IT during the period under study. This sector's dynamism has created a breakthrough for the CBI in terms of broadcasting of copyright-based works, on the one hand, and of the degree of response from the legal system as regards copyright protection.

[26] WIPO, *idem*, page 35.

Chart 4.19. Non-Dedicated Industries. Value Added 1998-2003. Thousands of Pesos (weighted nominal terms)



Source: Estimates based on INEGI data

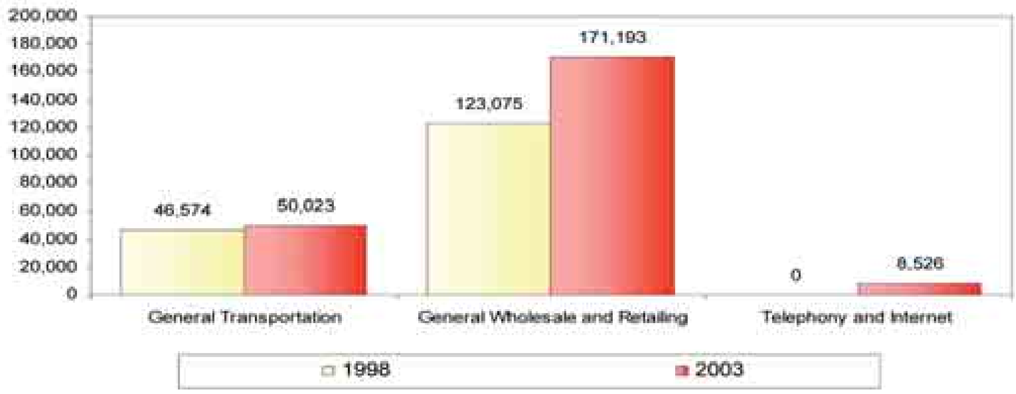
In terms of employment, an important increase of 35.4 percent in the number of personnel employed between 1998 and 2003 in these industries was reported as shown in Table 4.19.

Table 4.19. Non-Dedicated Industries: Employment 1998 – 2003. Weighted Units

NON-DEDICATED INDUSTRIES	Number Employed (Units)	
	1998	2003
Total	**169,649**	**229,741**
General transportation	46,574	50,023
General wholesale and retail	123,075	171,193
Telephony and Internet	0	8,526

Source: Estimates based on INEGI data

Chart 4.20. Non-dedicated Industries. Employment 1998 - 2003
Weighted Units



Source: Estimates based on INEGI data

Finally, as regards foreign trade for the non-dedicated segment, a strong trade deficit (derived from a greater increase in imports than that reported in exports) persists.

Table 4.20. Non-Dedicated Industries: Foreign Trade
Millions of US$ (weighted figures)

NON-DEDICATED INDUSTRIES*	Imports		Exports		Trade Balance	
	Millions of US$					
	1998	2003	1998	2003	1998	2003
Total	9,927	13,666	8,213	11,051	-1,715	-2,616

• Source: The original statistics were obtained from BANCOMEXT and they appear different. A contribution to the CBI weighting factor was later applied to them.

Source: Estimates based on BANCOMEXT World Database

In summary, in the five year period, the non-dedicated industries showed strong growth that can be attributed to innovation related to the development and growth of IT and communications. However, the sector shows a continuing dependence on imports which in general reflects the strong dependence of the Mexican economy on foreign markets and a weakness of the local market in terms of production that would allow it to compete effectively. Also relevant is the capacity of labor absorption during the period which once again confirms the importance of the sector as a generator of employment.

4.11. International comparisons

We have analyzed the national composition of Mexican copyright-based industries and their contribution to the local economy. However, given the increasingly global nature of the CBI and to meet the aims of the study, a comparison with certain other countries is made in this section.

The selection of countries with which to establish an international comparison of copyright industries was made, based on the following:

- Countries that had carried out similar studies using the WIPO methodology
- Countries that, using the WIPO methodology, had data for 1998 and 2003 or close time periods
- Countries with a close link with Mexico as regards their trade relationship and level of development

As a result of the above, the countries selected were Canada,[27] the US[28] and Hungary.[29]

The comparison is made in relative terms of the contribution of copyright-based value added to GDP in the four countries and regarding the composition of the CBI in each.

Table 4.21. International Comparisons

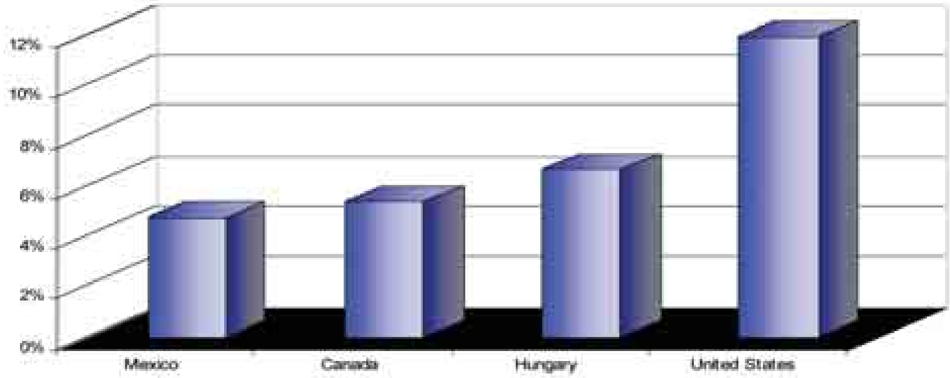
Country	Data Year	CBI Value Added as percentage of GDP
Canada	2002	5.33
Hungary	2003	6.67
Mexico	2003	3.31
United States	2002	9.59

Source: INEGI and country studies

As regards the importance of copyright-based industries as a percentage of GDP, the US leads with a 12 percent share, followed by Hungary with 6.67 percent, and 5.34 percent for Canada. In the case of Mexico, the CBI represented only 4.77 percent of GDP for the year 2003.

[27] *The Economic Contribution of Copyright-Based Industries in Canada: the 2004 Report,* prepared for: Canadian Heritage by Wall Communications, March 31, 2004.
[28] *Copyright Industries in the U.S. Economy: the 2004 Report,* prepared for the International Intellectual Property Alliance by Stephen Siwek, Economists Incorporated, 2004, ISBN 0-9634708-2-5.
[29] *The Economic Contribution of Copyright-Based Industries in Hungary:* the 2005 Report, prepared by Dr. Krisztina Penyigev and Dr. Peter Munkacsi, Hungarian Patent Office, November 2005.

Chart 4.21. International Comparison of the Economic Contribution of the CBI



Note. Data used for Canada and the US is for 2002; Mexico and Hungary use data for 2003.

The lower level of participation of copyright-based industries to GDP in Mexico compared to other countries is a reflection of different issues:

- A slower process for bringing Mexican intellectual property legislation into line with international standards, not only as regards the law itself but primarily as regards awareness and the rule of law
- A flourishing informal sector that affects copyright-based industries more than others
- Public policies that have reduced support for these industries in Mexico
- The slower introduction of innovative communication technologies such as telephony and Internet especially in rural areas
- The continuing belief among the industries' stakeholders that these activities are more a cultural heritage than a potential source of economic growth and development

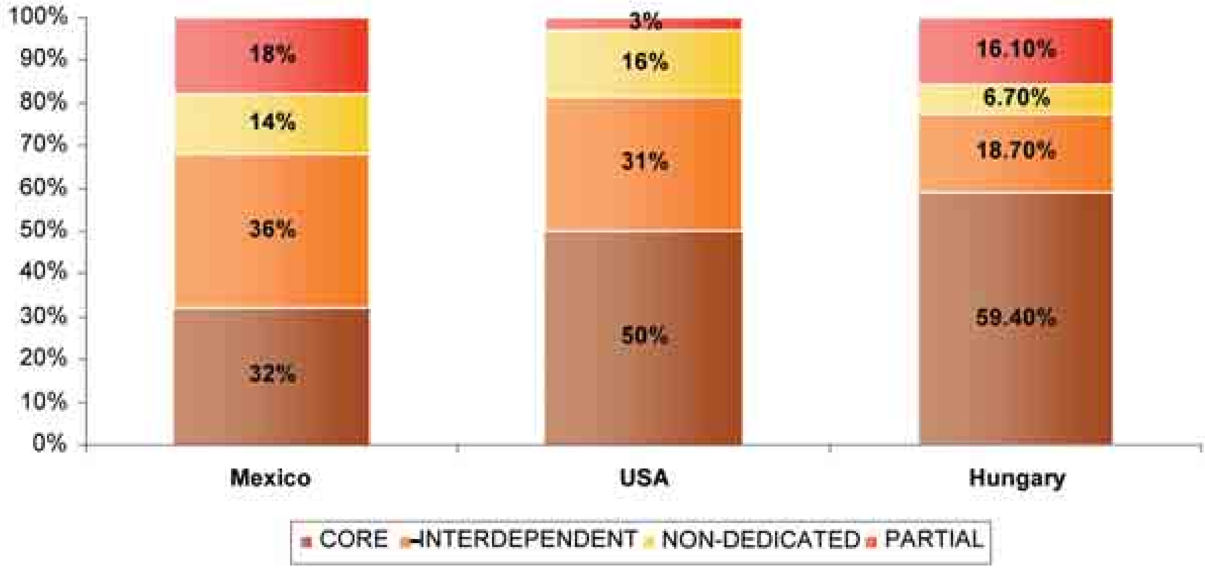
As regards the internal composition of these industries among the countries compared, we find that while Mexican core industries represent 32 percent of total copyright industries, in Canada and the US they represent 43 percent and 50 percent respectively, with a figure of 59.4 percent for Hungary.

Table 4.22. Value Added. Industrial Structure Contribution per Country

INDUSTRY GROUP	Mexico 2003	US 2002	Hungary 2002	Canada 2002
CORE	32%	50%	59.40%	42.55%
INTERDEPENDENT	36%	31%	18.70%	57.45%
NON DEDICATED	14%	16%	6.70%	
PARTIAL	18%	3%	16.10%	

For non-core industries, these appear stronger for Mexico and the US, while Hungary reports a smaller contribution (see Chart 4.22).

Chart 4.22. Composition of Copyright Based Industries in Selected Countries



In general, we find stronger copyright industries in the other three countries included in this comparative analysis, but the growth in share of core copyright-based industries vs. non-core industries, the positive expectations regarding economic growth for the Mexican economy and a slow but progressive strengthening of the rule of law in Mexico must surely translate into a growing contribution of these industries to our economy.

As will be reviewed in the next section, copyright-based industries include quite diverse sectors as regards their historic and economic performance and one can expect that the growth of each will depend on sector-specific factors.

In general terms, Mexican CBI could improve their performance in the coming years subject to receiving higher levels of investment both in human and physical capital that could increase productivity as well as the quality of the employment generated within the sectors. However, these levels of investment will not be increased if tighter protection of copyright and effective measures against piracy are not effected by the incoming presidential administration.

Chapter V. Description of the Evolution of some Core Copyright-Based Industries in Mexico

The present chapter aims at describing the recent evolution of some of the core copyright-based industries in Mexico in order to give the reader a general overview of how each industry has evolved and the specific nature of its present economic situation. As mentioned earlier, culture in Mexico has generally been regarded as a fundamental element of heritage and therefore worth keeping alive through government support. However, the notion of these industries as a source of economic growth has been less-well accepted and explains not only the lack of the availability of hard economic data but also the limited level of investment as compared to other sectors of the economy.

As shown in Chapter II, core copyright-based industries are divided into nine main groups:

- Press and Literature;
- Music, Theater and Opera;
- Motion Picture and Video;
- Radio and Television;
- Photography;
- Software and Databases;
- Visual and Graphic Arts;
- Advertising;
- Copyright Collecting Societies.

The economic activities of these industries and therefore their growth are based on copyright protection. Thus, it is of great relevance to not only review the statistical data for each sector but also to present the recent evolution of these activities as part of the arguments that explain performance and future trends.

In Mexico, as elsewhere, many factors explain the development of the sectorial structure in these industries in global terms:

- Technological trends marked by ongoing innovation, specifically in the development of information technology
- A growing global communication network that opens up new alternatives for the daily dissemination and distribution of contents
- The introduction of new regulations in the fields of protection of copyright, personal data safety and others related to trade and exploitation of copyright-protected works to keep up with the innovative process
- The transformation of economic structures that have taken countries from primary sector-based economies towards service-based economies where knowledge and content become the main inputs

These global trends have gradually permeated into the Mexican economy and taken on a local behavioral pattern defined by a series of changes that have occurred here in the last decade. These changes have radically altered the scene for copyright-based industries and might, if properly managed, support their long-term development. At present, among the most relevant are:

- A greater openness of the Mexican economy that has accelerated the introduction of new technologies and greater contact with global issues
- A growing awareness of the importance of our rich cultural and artistic heritage at the international level
- A growing social appreciation of this heritage as inherent to the Mexican culture, accompanied by a change in perception which increasingly takes into account its economic value as an industry that can help promote economic growth and development
- A greater awareness and understanding of copyright protection among authorities and the general public which has led to a stronger legal framework, more sensitive to the industry's needs
- A stronger, though still ineffective rule of law, which is essential for the protection of intellectual property rights

These global and local trends have slowly changed the CBI scene, but they are still the first steps in the development process of these industries and of the economic structure of Mexico. As will be seen in the next sections, copyright-based industries are highly dependent on government support which is still offered as a subsidy to preserve cultural identity, instead of being offered as an attractive investment venture that can support the much-needed growth in employment and value added.

In Chapter IV, the contribution of the copyright-based industries was shown using only statistical data without consideration of the cultural and human elements that accompany their growth. The economic contribution of the CBI is directly linked to the richness in terms of economic, human, natural and, especially, cultural resources of Mexico. Therefore, a study of this kind cannot simply submit raw statistics and estimates of the contributions of these industries to explain performance and future trends. The present chapter aims at presenting a brief description of the evolution of some of the core sectors as a background to the estimates presented and the general trends observed. This will enable the reader to understand the particularities faced by Mexico in the development and growth of these industries and the challenges that we all face in their consolidation.

The diversity of factors, both of a global and a local nature, has produced a slow and modest consolidation of the copyright-based industries which, nevertheless, require a sector-specific analysis in order for us to understand their behavior and be able to define alternatives for the growth of each one.

If we review the statistical information in the Mexican case, the core components of the copyright-based industries show an outstanding contribution in terms of value added in the sectors of press and literature, radio and television, and music. In terms of the employment contribution, press and literature and the music sectors are the most important (see Tables 5.1 and 5.2).

Table 5.1. Core Industries by Sector of Activity 1998 and 2003

CORE INDUSTRIES	Employment Number Employed		Value Added Thousands of Pesos 1998 = 100		Imports Millions of US$		Exports Millions of US$	
	1998	2003	1998	2003	1998	2003	1998	2003
Total	**376,210**	**554,218**	**40,609,231**	**53,026,948**	**459**	**546**	**299**	**220**
Advertising	39,994	66,381	4,210,902	5,076,059	-	-	-	-
Copyright Collecting Societies	-	1,940	-	-9,075	-	-	-	-
Graphic and Visual Arts	19,770	26,249	1,249,793	1,704,785	27	11	14	10
Motion Picture and Video	29,831	45,391	2,745,634	2,349,135	6	8	5	10
Music, Theater and Opera	41,501	62,239	6,259,120	5,287,935	1	1	0	0
Photography	21,951	27,118	1,055,238	919,167	21	26	9	17
Press and Literature	181,371	198,647	18,460,632	17,414,690	405	501	271	184
Radio and Television	6,715	54,372	799,298	15,070,495	-	-	-	-
Software and Databases	35,077	71,881	5,828,614	5,213,756	-	-	-	-

Source: INEGI, BANCOMEXT

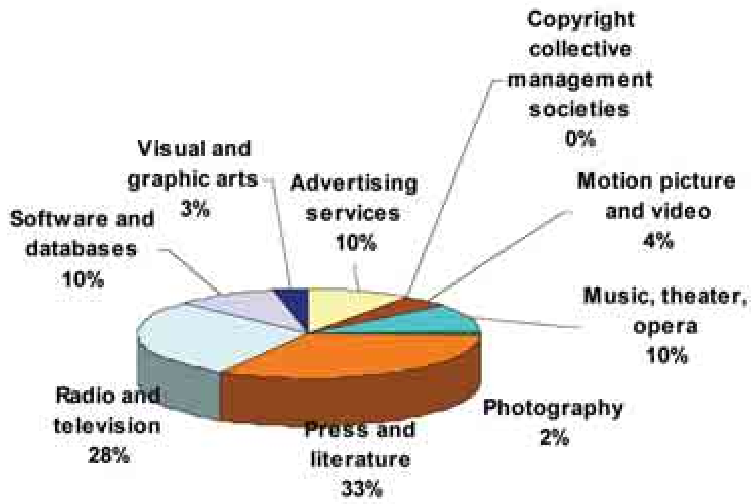
Table 5.2. Core Industries. 2003 Sectorial Structure Contribution with respect to Total Core CBI

Sector	Number Employed % of total	Value Added % of total
Advertising	12	9.6
Copyright Collecting Societies	0.4	0.1
Graphic and Visual Arts	4.7	3.2
Motion Picture and Video	8.2	4.4
Music, Theater and Opera	11.2	10
Photography	4.9	1.7
Press and Literature	35.8	32.8
Radio and Television	9.8	28.4
Software and Databases	13	9.8

Source: INEGI.

In terms of value added, the most important sector is again press and literature (32.8 percent), followed by radio and television (28.4 percent), and music, theater and opera (10 percent) (see Chart 5.1).

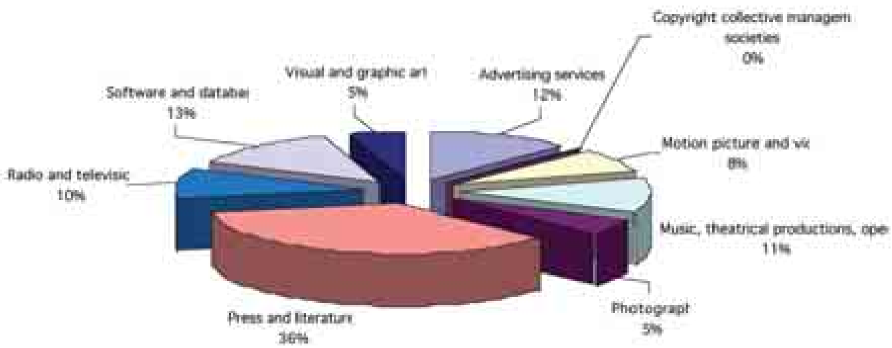
Chart 5.1. **Core Industries: 2003 Sectorial Structure**
Contribution of the Value Added with respect to Total



Source: INEGI

Employment generation in 2003, as shown in Chart 5.2, was led by the press and literature sector, with a 35.8 percent contribution to employment in total core copyright-based industries, followed by software and databases (13 percent) and advertising services (12 percent).

Chart 5.2. **Core Industries: 2003 Sectorial Structure**
Contribution of Employment by Sector with respect to Total



Source: INEGI

It is important to consider these structures, since a high contribution in terms of employment does not necessarily mean a greater value added. This is the case of the software and databases sector which, despite contributing to the growth of employment for these industries, in terms of value added contributed less than that reported for 1998.

The behavior of core industries responds to different historical, regulatory and economic situations that will be briefly reviewed so that they may serve as the framework for a better understanding of the results obtained in estimating the economic contribution of the CBI in Chapter IV.

5.1. Press and literature

Mexico is one of the three Latin American countries with the most vigorous publishing industries in the region in terms of production and distribution. In the Mexican case, its focus has been on elementary school textbooks with the government playing a leading role in production.

The industry's growth is marked by consumer preferences. According to a study conducted by the Organization of American States (OAS),[30] these preferences have focused on entertainment, mostly fiction, current events, sports, esotericism, traveling and self-help.

As regards the industry's structure, the small publishing companies have been replaced by large conglomerates and new distribution schemes through the Internet have replaced the traditional bookstores.

In economic terms, the press and literature industry is undoubtedly the most important within the core CBI. In 2003, with 198,467 employees, it represented 35.84 percent of the total CBI industrial labor force and generated 32.84 percent of the total value added, with 17,414,690.38 pesos.

Additionally, the sector's importance as regards its foreign trade activity compared to other CBI is worth mentioning; its reported imports and exports for 2003 of US$501.07 million and US$183.97 million respectively represented 91.77 percent and 83.61 percent of the total imports and exports of core industries, in the same period. Also worth noting is the increase in imports and reduction in exports for 2003 when compared to 1998 figures.

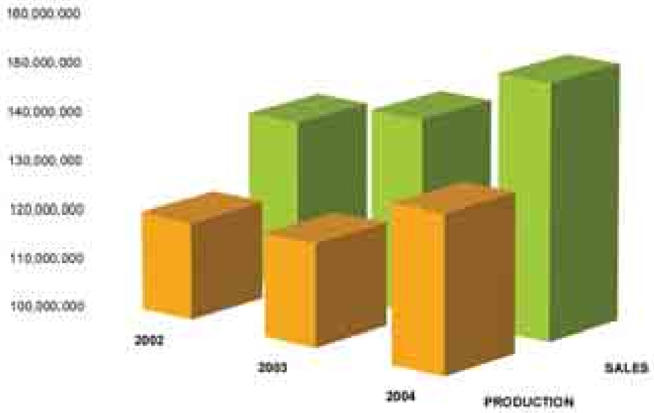
Table 5.3. Press and Literature: 1998-2003 Economic Indicators

Source: INEGI

[30] OAS. *Cultural Industries in the Latin American Economy: Current Status and Outlook in the Context of Globalization.*

Although a decrease in value added occurred during the period 1998-2003, the past two years in the Mexican publishing industry have been of relative stability. The National Chamber of Mexican Publishing Industry (CANIEM) reports in its 2004 Book Publishing Activity[31] a total of 216 book publishers operating within the private publishing sector in that year, four less than in 2002. Additionally, during the same period, a 10.35 percent increase in the number of copies produced was reported, as well as a 13.35 percent rise in sales. Chart 5.4 shows the growth trend during the period 2002 to 2004.

Chart 5.4. Volume of Production and Publishing Sales

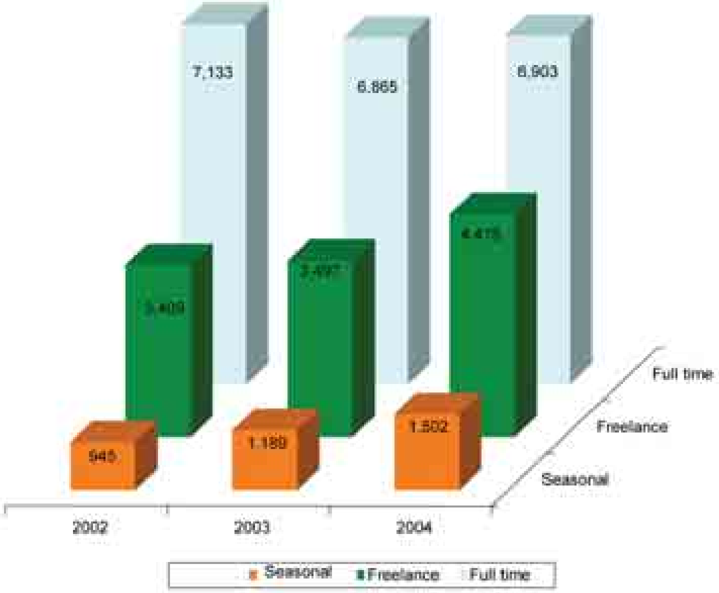


Fuente: CANIEM

The number employed increased by 58.7 percent from 2002 to 2004, with a total workforce of 16,566 in 2004. Of these, 55.8 percent were full-time employees, 34.5 percent were freelance and 9.6 percent, seasonal. As shown by the figures, despite the positive increase reported, the structure has changed, with full-time employment decreasing and freelance employment increasing (see Chart 5.5).

[31] CANIEM. *Actividad Editorial Libros 2004.*

Chart 5.5. Employment in the Private Sector Number Employed by Type of Job



Source: CANIEM

As regards periodicals, CANIEM reported a total of 462 publishers in 2004, with 1,132 titles published giving a total of 606,742,933 copies.[32] In this segment, *Editorial Televisa,* a subsidiary of *Grupo Televisa,* is the leader in terms of publications and distribution in the Mexican market, as well as in the Spanish-speaking market worldwide. The company reports an annual circulation of 137 million magazines with more than 50 titles distributed in 18 countries, which makes it the largest publishing company in the Spanish-speaking world.[33]

It is worth mentioning that during the last three years, the number of titles has shown a downward trend, while the circulation of titles published has increased.

According to industry leaders, despite the stability, the sector is facing important challenges for its growth. On the one hand, Mexico is a country where reading is not popular; estimates of half a book per capita per year are constantly quoted and compared to higher international averages.

In order to tackle this situation, the government launched a reading promotion program in May 2002 known as *Towards a Country of Readers (Hacia un país de lectores).* This program envisaged the remodeling of school and public libraries, the creation of a new National Library and the production of more than 30 million books for classroom libraries. The permanence of the program, in conjunction with educational policies for the promotion of reading practices must be one of many strategies for the consolidation of the sector.

Another fundamental growth deterrent, and which does not appear to be changing, is the competition that the private publishing industry faces from the state publishing industry. The government's participation in this sector is estimated at 70 percent of production in Mexico, while the private sector accounts for the remaining 30 percent. "In Mexico, unlike elsewhere in the world, the textbooks provided free-of-charge for the six-year elementary education program are published by the state. In other countries, it is private

[32] CANIEM. *Actividad Editorial: Publicaciones Periódicas 2004-2005.* March 2006.
[33] Information reported by Televisa on its web site: *http://www.televisa.com.mx.*

publishers who print these books and then sell them to the government."[34] In the past few years, government acquisitions in the publishing sector have increased but the purchasing price has been severely reduced, which implies a sharp drop in the revenues of the sector's industries.

In the case of the state publishing industry, 180 million copies are produced by the Free Textbook Commission *(Comisión de Libros de Texto Gratuitos)* with the remaining 20 million produced by different public institutions, such as the *Fondo de Cultura Económica* (Fund for Economic Culture), the *Universidad Nacional Autónoma de México* (the National Autonomous University of Mexico), the *Consejo Nacional para la Cultura y las Artes (National Council for Culture and Arts)* and state governments and universities.[35]

This state participation and the corresponding fragility of the private publishing sector has been acknowledged by the government which has in the past offered preferential fiscal treatment to counterbalance the situation. For decades the industry obtained significant fiscal benefits to compensate for the negative effects that state competition represented to its growth: a zero rate on value added tax had been the rule with a 100 percent exemption from income tax. However, in 1993 the tax authorities decided to withdraw the first 50 percent exemption and in the last reform of 2001, a gradual elimination of the remaining 50 percent exemption was announced, with the benefit to disappear completely in 2006. As a result, the industry has seen its margins reduced while still facing strong state competition.

Other initiatives to strengthen the industry have been taking place in recent years. For example in the last legislative period, the *Ley de Fomento para la Lectura y el Libro* (The Act for the Promotion of Reading and Books) was passed establishing a single price for books. This Act laid down that publishers and book importers should determine a single retail selling price for works less than three years old, published or imported. However, in the last days of the LXIX legislature, the act was vetoed by the President.

Leaders in the sector were hoping that with this Act, together with the creation of the *Consejo Nacional de Fomento para el Libro y la Lectura* (The National Council for the Promotion of Books and Reading) aimed at generating a higher number of readers, it would be strengthened. The Presidential veto on the Single Price Act introduced further uncertainties to a sector already plagued by challenges.

Last but not least, the situation of the industry is affected by piracy and photocopying; it has been estimated that: "Mexico occupies the third position worldwide in photocopying, production and commercialization of counterfeit publishing products," which represents "an annual economic loss of 1,250, 000 pesos for bookstores and 950 million pesos for publishing companies."[36]

In order to reduce the negative impact of this phenomenon, the *Centro Mexicano de Protección y Fomento de los Derechos de Autor* (CEMPRO) (Mexican Center for Protection and Promotion of Copyright), a copyright collective management society, was established in 1998 to protect and collectively manage reproduction rights of authors and publishers.

According to CEMPRO, the photocopy market in Mexico is valued at around 52,800 million copies per year, with an estimated value of 26,400 million pesos, of which approximately 25 percent can be attributed to the student sector. The loss to authors in terms of unrecovered royalties due to students photocopying published works is estimated by CEMPRO at approximately 500 million pesos causing a reduction in annual sales amounting to around 6,000,000 pesos.[37]

[34] Ayala, Diego. *Falta de lectores: debilidad de la CANIEM, en Revista Impresión Digital*, March 2005.
[35] *ibid*.
[36] *Una década perdida para la industria editorial en México, in Público*, February 26, 2003, p. 44.
[37] CeMPRO. Press Dossier February 2006.

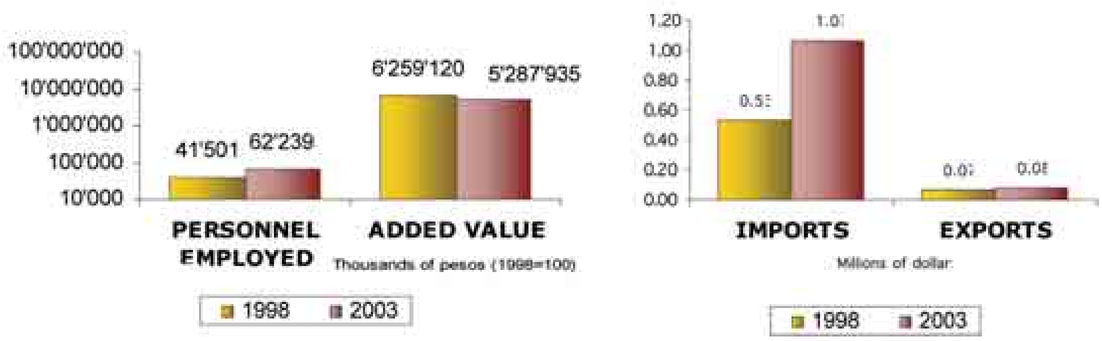
In summary, the private publishing sector in Mexico faces a series of challenges that limit its growth in the immediate future. On the one hand, the more attractive textbook market is controlled by the state both in producing the textbooks required at the elementary level and by exerting a monopolistic control on prices of textbooks bought by the private sector for secondary level education. On the other hand, a strengthening of demand for other published goods depends on income and culture. An improvement in the country's economic situation might lead in the coming years to small increases in demand but the cultural change sought by the policies to promote reading will take much longer. Time is something the industry might not have if we consider the increase in imports during the period reviewed and the change in the employment structure of the sector.

5.2. Music, theater and opera

In the composition of this sector, the great diversity of participating economic stakeholders is remarkable: from composers, choreographers and singers to promoters and ticket agencies, including the music sector and artistic and literary performers.

The music, theater and opera sector makes up an outstanding contribution to the entertainment industry, which has marked an important level of growth in the past years in Mexico. This sector reported a total of 11,730 premises and 62,236 employees in 2003. These figures represent 12.07 percent and 11.23 percent with respect to all core CBI. As to value added, this sector reported a total of 8,388,669 pesos, representing 10 percent of the core CBI total in real terms (see Chart 5.6).

Chart 5.6. Music, Theater and Opera: 1998–2003 Economic Indicators de IPDA básicas



Source: INEGI,BANCOMEXT

As regards demand, the figures presented in Table 5.3 reflect the behavior of the population in terms of entertainment, as shown by the *Encuesta Nacional de Ingreso y Gasto en los Hogares 2004* (National Household Income and Expenditure Survey) which reported that Mexican families spend around 75,166,000 pesos quarterly on entertainment.

According to INEGI's cultural statistics, attendance at shows increased from 17,541,733 in 2001 to 19,505,344 in 2004.[38] Trend analysis per type of show reveals that sports events are the most popular, above cultural events, but already showing a negative trend. More relevant to our study was the growth in audiences for music, theater and dance shows during the period 2001-2004, in this order.

[38] INEGI. *Estadísticas de Cultura* 2004.

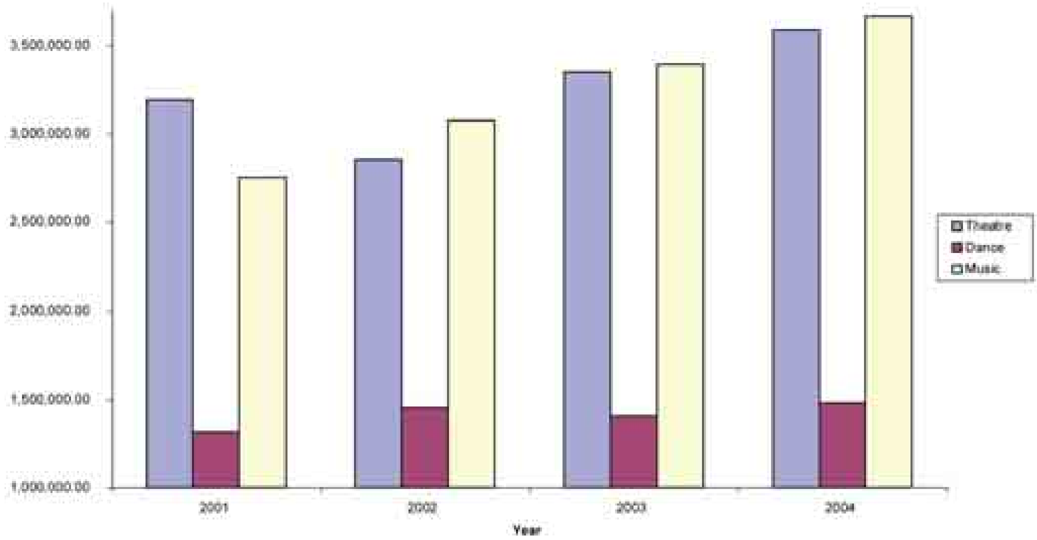
Table 5.3. **Attendance by Type of Show**
Percentage Distribution

Year	Total Attendees	Theater	Dance	Music	Sports	Entertainment
2001	17,541,733	18.2	7.5	15.7	41.5	6.7
2002	18,410,046	15.5	7.9	16.7	43.3	4.7
2003	20,687,388	16.2	6.8	16.4	42.7	9.6
2004	19,505,344	18.4	7.6	18.8	39.2	7.4

Source: INEGI. Cultural Statistics

This can be attributed to diverse factors: greater economic stability enabling families to spend a growing amount of their income on entertainment; a wider offer of world class music and dance events as well as an increase in cultural festivals throughout the country and new collaborative schemes between partner countries for the staging of innovative projects. This, in conjunction with a vast young public demanding more entertainment options compared to their predecessors, is responsible for the growth in this sector.

Chart 5.7. **Attendance at Cultural Shows 2001–2004**
Number of Attendees



Source: INEGI

A logical consequence of the growth in the number of attendees is the expansion in the number of venues available in urban areas. Between 2001 and 2004, the number of venues for entertainment purposes rose 25 percent with approximately half offering cultural events.

Table 5.4. **Public Venues by Type. Percentage Distribution**

Year	Venues	Theater	Sports	Bullfighting	Leisure [a]
2001	502	55.6	28.7	7.2	8.6
2002	541	54.9	29.2	7.8	8.1
2003	561	55.6	28.7	7.3	8.4
2004	628	52.9	31.8	7.5	7.8
a/ The recreational premises correspond to all those shows offered sporadically, such as: equestrian events (*charreada*), Mexican style cowboy festivals (*jaripeos*) and some circus performances.					

Source: INEGI. Cultural Statistics

For the reader to better understand the structure of this sector, it is important to mention that, in Mexico, private entertainment is mainly generated by one corporation, the Interamerican Entertainment Corporation (CIE) founded in 1995. It has become the foundation of the showbusiness industry in Mexico, with more than 13,000 employees at home and abroad. CIE can boast theaters, ticket reservation systems and artists' agencies among its assets. In recent years CIE has partnered Televisa (one of the two leading private television companies in Mexico)[39] allowing for more control of the industry both locally and regionally.

The Mexican music sector has well-known artists, recognized both nationally and internationally, and covers a broad range of genres. In addition to this, there is a strong presence of international music, especially from the US.

In terms of recorded music, the *Asociación Mexicana de Productores de Fonogramas* (Mexican Association of Phonogram Producers) reports that by the end of 2005,[40] the Mexican Phonogram Industry had marketed around 67 million units, equivalent to 4,474 million pesos. Unit sales increased 19 percent compared to 2004 as a result of the initiative of record companies in launching higher quality productions at lower prices. However, the volume of records sold shows a negative trend, with a 28 percent drop between 2000 and 2005 in terms of value. This reflects the pernicious effect that piracy has on the industry and which has caused a reduction in the development of new artists, as well as the introduction of new products.

As a reflection of this drop in sales, according to figures reported by AMPROFON, the record production companies reduced direct employment by 68 percent during the period and more than 7,000 original music points of sale were eliminated.

A survey conducted by AMPROFON in late 2005 reported that Mexico was one of the countries with the highest piracy rates in music, with approximately 130 million records reproduced illegally. This has had an impact on sales equivalent to a loss of US$377 million and almost US$100 million in terms of tax evasion as reported by the Association. Emphasis should be placed on the fact that 65 percent of all records marketed in 2005 were pirated products in a market of 207 million consumers, 61 percent of whom purchased pirated products.

The music, theater and opera sector, which is mainly led by the music component, experienced a reduction in value added during the period 1998-2003 that can be attributed mainly to piracy which has weakened the local industry. However, also relevant is the increase in imports reported during the period, which raises questions about local costs of production, the strength of the local industry and its future. Productivity is

[39] Lazcano, Norma. *CIE segundo acto en Revista Expansión. www.expansión.com.mx*
[40] AMPROFON. *Puntos Relevantes del Mercado Discográfico Mexicano 2005 at www.amprofon.com.mx*

also an issue, as in spite of the reduction in value added, employment levels have increased during the period of observation. Last but not least, there is the question of law enforcement. Mexico is a country with a more-than-adequate legal framework for protecting copyright, but its law enforcement system invalidates this if it is unable to protect basic rights.

5.3. Motion picture and video

In Mexico the motion picture industry is faced with important challenges. This is particularly true since the structural changes experienced by the industry during the 1980s.

The Mexican film sector, which during its "Golden Years" reported significant growth and prestige worldwide, later underwent a drastic contraction process due to excessive government control both in the areas of production and distribution.

"The era of prosperity that coincided with the so-called "Golden Era" (1925-1955) started to decline at the end of the 1950s as a result of a series of adverse factors: the first being the contraction of the domestic market by the penetration of foreign products; the second being the arrival of television. The third and last factor, which had the most serious repercussions, was the gradual loss of Spanish-speaking markets, with a consequent drop in foreign income."[41]

The experience left the Mexican film industry with a serious reduction in production levels and low costs above quality were promoted. Naturally, audiences reacted to this by changing their consumption habits in favor of foreign productions.

At the beginning of the 1990s, after more than 30 years of industrial recession, the state-owned screening company COTSA was sold, *Estudios Churubusco* underwent a significant reduction in size and the distributing companies *Continental de Películas, Nuevas Distribuidoras de Películas y Películas Mexicanas,* as well as *Publicidad Cuauhtémoc, Corporación Nacional Cinematográfica* (CONACINE), CONACITE production companies and *Banco Cinematográfico* went into liquidation as part of a global rationalization of government activities that sought to limit its role to that of stewardship. Thus, IMCINE was created to incorporate both the state distribution and financing roles.

These structural changes, added to low levels of investment in the sector and reduced demand, resulted in the fall of the nation's cinematographic production. In response to this, the authorities and the cinematographic community took a series of steps to support the reactivation of the industry.

In 1992, both the cinematographic community and the government decided to end ticket price controls which had been in effect since the early 1950s and submitted to Congress the *Ley Federal de Cinematografía* (Federal Cinematography Act), which was approved on December 29, 1992. Throughout this year, 189 film production companies closed as well as most movie theaters.

Two years later, the construction of the first theater complexes by Cinemark started in Aguascalientes and Monterrey. In that same period, *Cinemex* opened its first complex in Mexico City. Simultaneously, *Organización Ramirez* opened its first multiplex under the name of *Cinépolis.*

[41] Fernández Violante, Marcela, *Agonía y Resurrección del Cine Mexicano* presentation made during the FIU Conference on World Cinema, Miami, January 2002.

In 1997, the federal government granted 135 million pesos to the *Fondo de Producción Cinematográfica* (Fund for Cinematography Production, FOPROCINE), a funding body for film production seeking to respond to the needs of the movie-making community by establishing an environment favorable for the reactivation of the Mexican movie industry. FOPROCINE started funding festival-type films with a more cultural and formal focus showing a less immediate return on investment but having a higher cultural impact. For funding projects with more commercial potential, the FIDECINE was constituted.

Additionally, a new *Ley de Cinematografía de 1998* (1998 Cinematography Act) was passed that established a 10 percent mandatory screen allocation for local films allowing in theory the possibility for national films to be shown within six months of being registered.

In summary, during the 1990s, the motion picture industry experienced a liberalization process that facilitated the entry of new companies dedicated to film screening; new complexes emerged in the main Mexican cities leading to greater competition among participating companies within the industry. Table 5.5 and Chart 5.8 clearly reflect this new era of growth in the industry in terms of access to the movies.

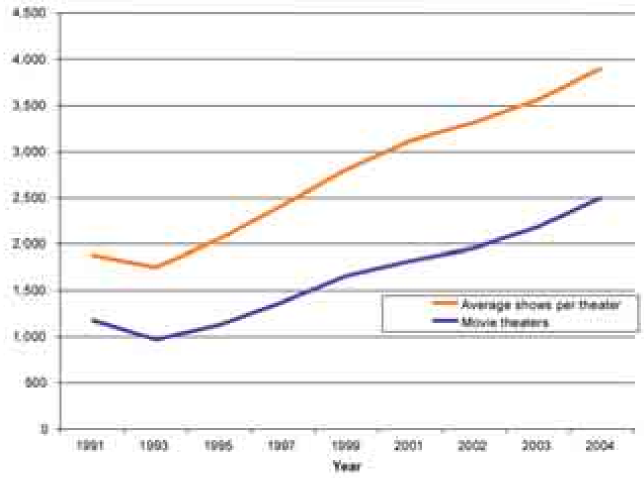
As regards demand, Chart 5.9 shows the initial enthusiasm of moviegoers when the new complexes opened. This then decreased as a result of the fall in household income after the 1994 recession.

Table 5.5. Movie Theaters, Screenings and Tickets Sold. 1991-2004

Year	Movie Theaters a/	Screenings (Average per Theater)	Tickets sold by Theater (Thousands)
1991	1,177	706	96
1993	967	778	76
1995	1,126	921	62
1997	1,378	1,040	58
1999	1,659	1,143	54
2001	1,817	1,296	54
2002	1,951	1,355	54
2003	2,178	1,384	45
2004	2,500	1,396	49

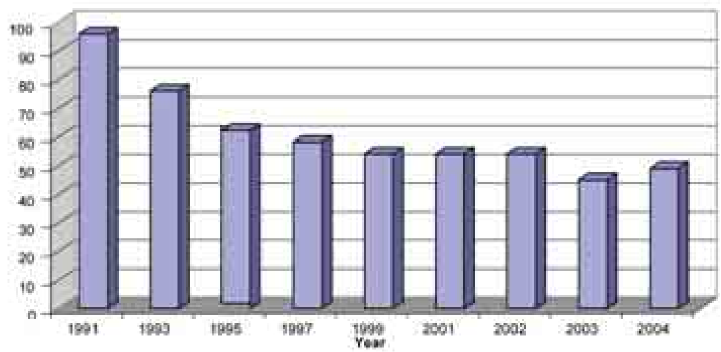
a/ This figures are related only to the premises reporting data
Source: INEGI. Estadísticas de Cultura

Chart 5.8. Movie Theaters and Screenings per Theater



Source: INEGI

Table 5.9. Tickets sold per Theater Thousands of Tickets



Source: INEGI

However, the period of growth of movie theaters and complexes was not matched by growth in film production. From 1990 to 2002, there were only 151 state-financed full-length motion pictures, with productions costs and lack of investment the main reasons for the reduced number of local productions. Technological innovations such as the possibility of using digital video for filmmakers, who have found that this format lowers costs, are being slowly introduced but the lack of funding is still the constant in the sector. As shown in Table 5.6, the national film industry share is still very limited despite the various promotion initiatives, with the US film industry dominating Mexican movie theaters.

Table 5.5. Movie Theaters, Films Screened and Percentage Distribution of Films by Country of Origin, for Selected States: 2002, 2003 and 2004

Federal State	MovieTheaters a/	Films Screened	Percentage Distribution by Country of Origin			
			US	Mexico	Other Countries b/	Co-production
2002						
United States of Mexico	**1,951**	**64,975**	**82.3**	**8.7**	**7.3**	**1.7**
Coahuila	75	2,376	90.6	6.7	2.2	0.5
Chihuahua	38	1,079	79.5	9.5	9.5	1.5
Distrito Federal	454	14,950	70	13.5	12.6	3.9
Jalisco	112	2,978	78.5	9.7	9.7	2.1
México	152	4,737	79	10.3	9	1.7
Nuevo León	175	6,696	92	3.1	3.5	1.4
Tamaulipas	160	4,403	91.6	6	2.2	0.2
Veracruz	106	3,391	87.1	8.1	4.6	0.2
2003 c/						
United States of Mexico	**2,178**	**73,144**	**81.7**	**8**	**8.4**	**1.9**
Coahuila	107	3,723	89.5	7.8	2.3	0.4
Chihuahua	37	1,228	85.3	7.4	6.3	1
Distrito Federal	446	15,192	68.6	11.7	15.5	4.2
Jalisco	111	3,160	74.1	8.7	13.9	3.3
México	213	6,350	75.5	9.7	12.4	2.4
Nuevo León	177	7,097	93.5	2.8	3.1	0.6
Tamaulipas	153	4,672	92.3	5.7	1.8	0.2
Veracruz	150	5,047	91.8	5	2.9	0.3
2004						
United States of Mexico	**2,500**	**82,050**	**81.2**	**7.4**	**9.1**	**2.3**
Coahuila	111	3,527	90.3	5.6	3	1.1
Chihuahua	133	4,601	89.7	7.3	2.6	0.4
Distrito Federal	459	15,029	64.9	11.3	17.5	6.3
Jalisco	186	4,099	73.1	9.2	14.2	3.5
México	213	6,446	74.1	9.4	13.1	3.4
Nuevo León	264	10,303	91.9	4.1	3.5	0.5
Tamaulipas	152	3,988	90.7	5.2	3.9	0.2
Veracruz	136	4,871	90.4	5.2	4	0.4

a/ The figures refer only to premises that report data.

b/ Includes Germany, Argentina, Brazil, Spain, India, the UK, Italy, Japan, Russia and Sweden, among others.

For this year, the States of Chihuahua, Durango and the Federal District excluded cinematographic premises belonging to GABAL, c/ S.A. de C.V.

Source: INEGI

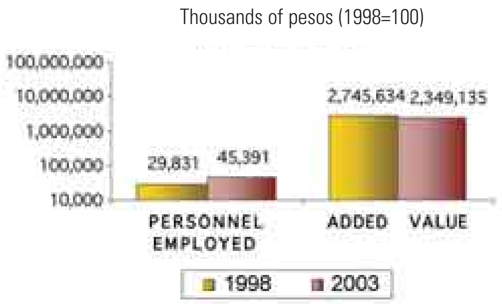
For video production, the new complexes started to attract the middle classes who had stopped attending movie theaters during the 1980s. In contrast, the more popular movie theaters which had operated during the 1970s and 1980s closed as they were unable to compete with the new multiplexes.

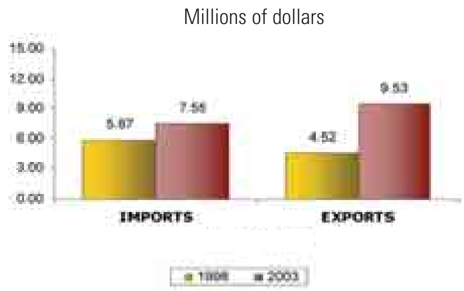
This local factor added to the global phenomenon of bringing entertainment to the home supported the growth of the home video market. A survey by the OAS[42] reported a 43.5 percent household penetration of videos in 1997, with 1.7 million VCRs reported in these households. Given the high costs of film production, the more traditional filmmakers chose the video alternative to continue producing sexy soap operas, thrillers and a few political critiques.

By the end of 2003 the film and video industry reported a total of 45,391 employees and a value added of 3,726,619 pesos, which represented 8.1 percent and 4.43 percent of CBI totals respectively. With regard to its contribution to the foreign trade of the core industries, this sector reported US$7.55 million in imports and US$9.53 million in exports, representing 1.34 percent and 4.33 percent respectively.

However, if we compare the value added figure to that for 1998, we find that in real terms, the industry contracted during the period. This is the result of many factors which together have diminished the sector's opportunities:

Chart 5.10. Film and Video: Economic Indicators 1998-2003





Source: INEGI, BANCOMEXT

Investment in the sector is almost non-existent due to a high risk–low return perception by investors.

- The lack of risk capital limits local production and producers have scarce resources available for marketing, which is necessary to compete with foreign productions.
- The limited perspective at the box office drives movie complexes and theaters to reduce screening opportunities for local productions.
- Due to the lack of employment opportunities, directors, screenwriters and other film professionals tend to look for opportunities abroad or in other fields such as marketing and television.

[42] OAS, *Cultural Industries in the Latin American Economy: Current Status and Outlook in the Context of Globalization.*

In addition to this, and as part of the general challenge faced by the CBI in Mexico, the piracy phenomenon has become a real threat to the industry. According to a survey commissioned by the Motion Picture Association of America,[43] piracy in Mexico accounts for an estimated 62 percent loss of potential sales, ranking Mexico as the country with the highest rate of loss in terms of revenue generated by cinematographic companies affiliated to MPAA.

5.4. Radio and television

The first radio transmissions in Mexico date back to the early 20th century. In 1930, Emilio Azcárraga Viduarreta founded *XEW*, which became the basis for a national network chain to begin the process that would make radio the communication medium *par excellence* in our country at that time.

In the 1940s, large chains offering national coverage appeared and, together with radio-soaps, they attained maximum audience rating levels. By the end of the decade, the first news broadcasts were established. In 1946, the first experimental television studio was opened and in 1950, the first commercial television transmissions began with Channel 4, which was licensed to Rómulo O'Farril. Within a year, Channel 2 started operations and Channel 5 merged with Channel 4 to constitute the *Telesistema Mexicano Company.* From then on, the launch of broadcasting companies commenced rapidly to ensure nationwide coverage.

Between 1959 and 1973, more TV channels appeared and in 1963, color television transmission began with the arrival of the first microwave live international transmissions. It was in this year that *Telesistema Mexicano* and *Televisión Independiente* merged to form *Televisa*, which grouped Channels 2, 4, 5 and 8.

In 1985 Imevisión was created and operated Channels 13 and 7, as well as regional channels: 22 in Mexico City, 8 in Monterrey, 2 in Chihuahua and 11 in Ciudad Juárez. At the beginning of the 1990s, Channels 13 and 7 were privatized and became the *Televisión Azteca* network, and Channel 22 remained a public television channel whose cultural contents are coordinated by CONACULTA.

During this process, the growth of radio broadcasting was maintained and from the 1980s the diversification of content based on types of audiences began.

As regards cable television, *Cablevision,* a subsidiary of *Televisa,* was founded in 1969 offering cable television services in Mexico City; its growth was modest but steady up to the 1980s, when it started to gain in importance.

In 1989, a new subscription television system emerged: microwave pay television or Multipoint Multi-Channel Distribution System. *MVS Multivisión* started operating this system and was followed by *Teleglobo*, which operates licenses in Monterrey and Guadalajara. Finally, satellite television was launched in 1996 with *DirecTV* and *Sky,* also part of the Televisa group which now controls the satellite television market.

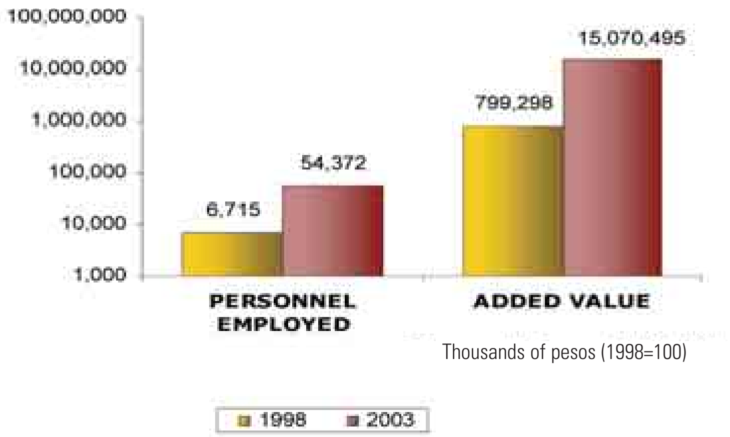
[43] MPAA. *Worldwide Study of Losses to the Film Industry and International Economies due to Piracy: Piracy Profiles 2005.*

This process of emergence and consolidation of the radio and television industries has resulted, according to the Ministry of Communications and Transport, in 1,471 radio stations operating in 2003, where the main radio broadcasting groups are: *Radiorama* with 190 stations, *Grupo Acir* with 190, *Radiocima* with 92, *Organización Impulsora de Radio* with 89, and *Sociedad Mexicana de Radio* with 77.

In the case of free television, Mexico reported 721 television channels in 2003 with a total of 19.5 million households owning at least one television set.

This industry has shown important growth during the study period. In terms of employment, it went from 6,715 in 1998 to 54,372 employees in 2003, an increase that represents almost a 12 percent contribution to the total. Likewise, the value added generated by this industry was 15,070,495 pesos in 2003, which positioned the sector in second place, with 28.42 percent of the total value added generated by core CBI (see Chart 5.11).

Chart 5.11. Radio and Television: 1998 -2003 Economic Indicators

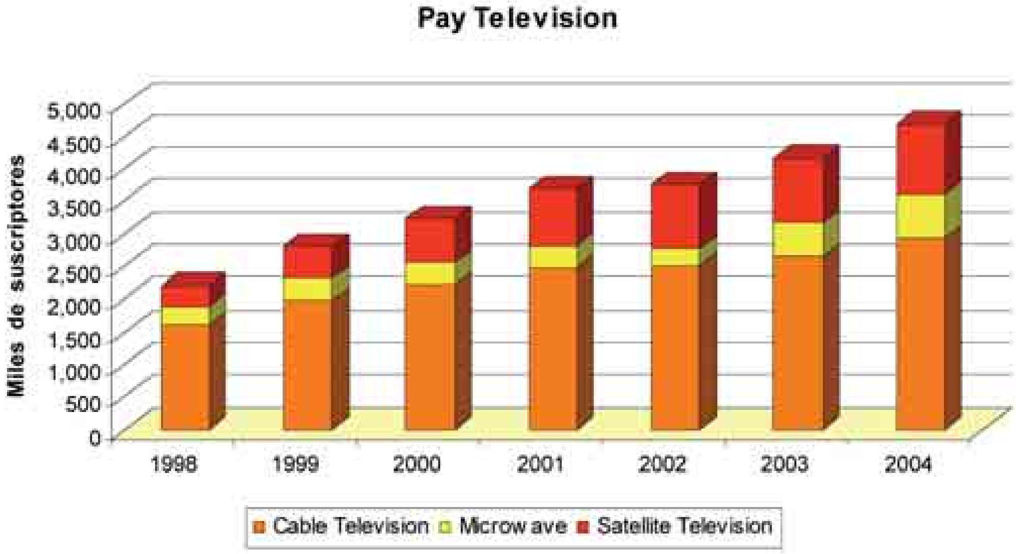


Source: INEGI

In terms of pay television, in 1998 there were 2,213,000 subscribers, according to the Ministry of Communications and Transport, and after an annual average growth of 35 percent, by the year 2004 the number of users increased to 4,687,000 in Mexico.[44]

[44] SCT. *Anuario Estadístico 2004.*

Chart 5.12. Number of Restricted TV Users 1998- 2004. Thousands of Subscribers



Source: SCT. Anuario Estadístico 2004

As for content, a survey conducted in 2000 by the media industry in Spanish-speaking countries revealed that five companies accounted for 90 percent of movies, video and television exports. *Televisa*, the largest Mexican media firm in Mexico, was among them, generating 50 percent of the total exports.

However, the region is still an importer of audiovisual products, with a trade deficit estimated at US$22.7 million in 1997. The main product in the region is the soap opera, which represents 80 percent of all television exports. This genre has led to important regional alliances in the areas of co-production, exchange of actors, technicians, directors and scriptwriters.

In summary, the radio and television sector is one of the sectors reporting greater growth within CBI. It has managed to integrate a series of media services that are highly attractive to the population, especially television which is the main source of entertainment and information for the average Mexican.

The sector is also highly concentrated in just a few industrial groups. In the case of television, two groups *(Televisa and Grupo Azteca)* control the local market which greatly increases their negotiating power with suppliers, creators and the government.

5.5. Software and databases

The software industry in Mexico, according to experts, is characterized by the prevalence of family or informal management structures with a reduced number of professional employees. In addition, sector dispersion persists, so at present the exact number of companies dedicated to the development of products and information systems services is not precisely reported.

Mexico moved into the IT world later than its counterparts in the OECD, mainly due to limited resources by firms and governmental institutions as well as a limited communications network and no capacity as regards human capital for the development of hardware and software. Therefore, the origins of the software industry were marked by the need to create support and promotion policies, as well as to develop human resources. With this in mind, the *Asociación Nacional de la Industria de Programas de Cómputo* (ANIPCO) (National Association of Software Industry) was founded to consolidate the software sector, along with other associations involved in IT development countrywide.

However, during the first few years, government participation in the development of the sector was limited to such an extent that during the period 1992-1999 the relative expenditure in software barely reached 0.1 percent and no clear government support was awarded for the development of this sector.

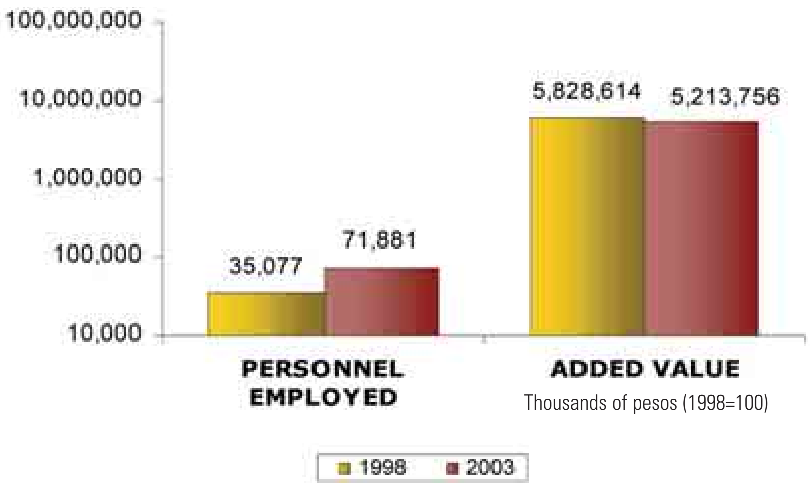
Since 2000, the government with the support of the industry, decided to launch the Software Industry Development Program with the purpose of channeling efforts for the consolidation of the sector through the creation of world class firms and the training and education of high quality employees.

"The software industry in Mexico is estimated at around 300 firms of which 90 percent fall into the small firm category and only 20 percent of the total is legally constituted. As regards capital origin they can either be subsidiaries of multinationals, wholly Mexican, or a combination of both. In general the sector lacks a formal structure with improvised marketing and contracting schemes. In addition, they tend to provide a limited set of services to very diverse sectors."[45]

The software and database industry shows continuous growth in importance within the CBI, and in their economic contribution during the study period. In 2003, this industry employed 71,881 workers that represented almost 13 percent of the CBI total employment. Likewise, their contribution in the generation of value added amounted to 8,270,994 pesos, representing 9.83 percent of the total generated in the same year. Nevertheless, despite the consistent growth in employment, the industry's value added reported an 11 percent drop in real terms when compared to that of 1998. These figures reflect an important reduction in productivity, but also highlight the challenge that the industry faces if it wishes to be competitive at the international level.

[45] Peñaloza Baez, Marcela, *La Industria del software: una oportunidad para México en www.enterate-unam.mx.*

Chart 5.13. Software and Databases: 1998 – 2003 Economic Indicators



Source: INEGI

Finally, a set of long-term goals for the year 2013 have been established for the sector, among which the most relevant are:

- To reach an annual software production of US$5,000.000.
- To match the rest of the world's average expenditure in information technology.
- To transform Mexico into the leader in software development for the Latin American and the Spanish-speaking worlds.

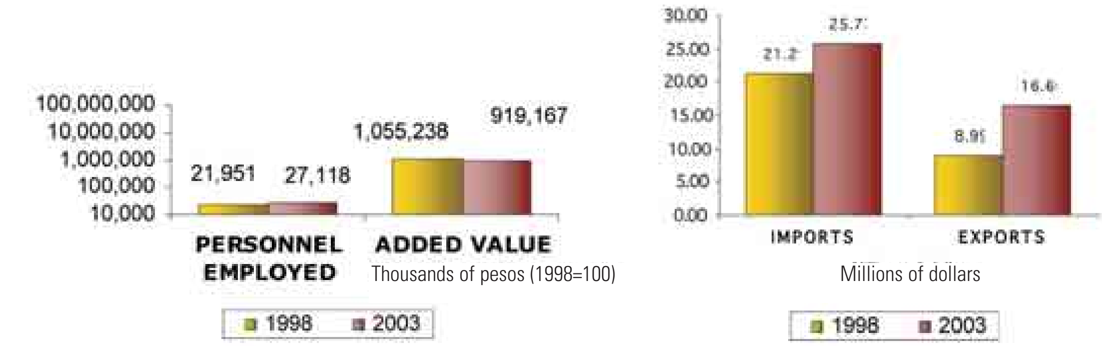
The achievement of these goals requires Mexico to provide support in the areas of: export promotion; improvement of educational schemes for the training of human resources in software development; the promotion of legislative changes to support the industry and the development of the domestic market, as well as the development of more effective and efficient communication networks with countrywide coverage.

5.6. Photography, graphic and visual arts

The photography sector stands out for the youth of the discipline, as well as for a very recent acceptance of deserving copyright protection. Its newness, added to its structure which integrates more independent workers than formal businesses, explains the limited statistical reports available for the sector. Its economic contribution within core CBI is quite modest, with 27,118 employees, representing 4.89 percent of the total employed, and 1,458,148 pesos in value added; that is 1.73 percent of the value added generated by core CBI in 2003.

On the other hand, based on the high import component of this sector's productive chain in matters of foreign trade, the photographic industry occupies second place in importance, with US$25.77 million in imports for 2003 compared to US$16.6 million in exports, representing a 4.72 percent of imports and 7.54 percent of exports, respectively. These figures generated a trade deficit of US$9.17 million for the photographic sector.

Chart 5.14. Photography: Economic Indicators 1998 – 2003

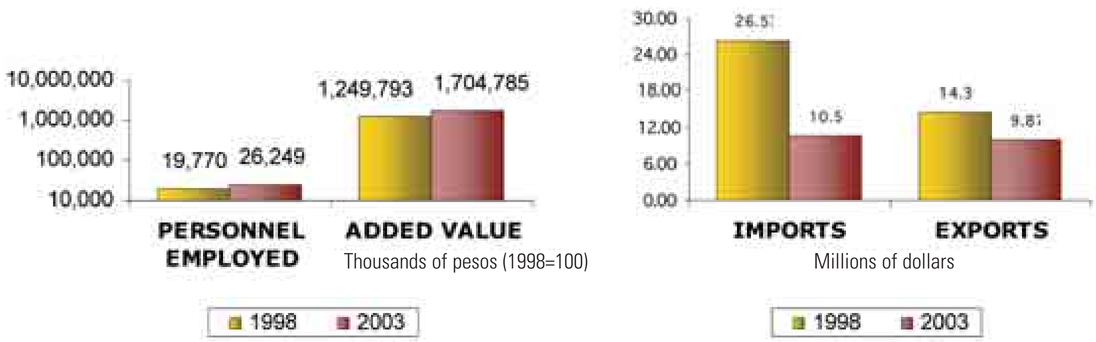


Source: INEGI, BANCOMEXT

The challenges faced by this sector may be summed up as the broadening and opening of exhibition, creation and promotion spaces[46] and the development of educational campaigns regarding the value of photography as an artistic creation and therefore, subject to copyright. It is a perception that the industry's greatest challenge lies in the public attaching real value to it and understanding the protection it warrants.

Graphic and visual arts constitute an industry whose economic contribution with respect to core CBI is relatively small. Its 26,249 employees and 1,704,785 pesos represented 4.7 percent and 3.21 percent of the corresponding totals in 2003. As to trade balance, its performance showed a drop; its US$10.57 million in imports and US$9.87 million in exports represented only 1.94 percent and 4.49 percent respectively.

Chart 5.15. Graphic and Visual Arts: Economic Indicators 1998-2003



Source: INEGI, BANCOMEXT

If we take into consideration the valuable cultural Mexican tradition in the visual and graphic arts sector, we can expect to maintain the positive growth trend for the industry with programs for proper promotion and support that go beyond the conservation of cultural heritage and move towards an industrial promotion strategy focused on export market potential.

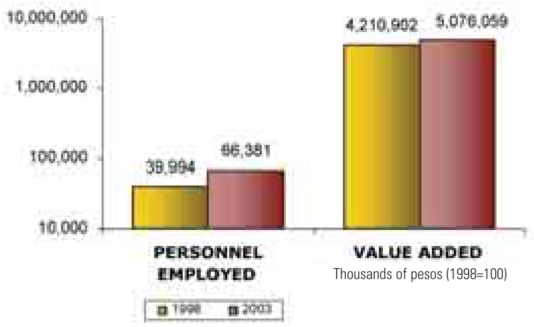
[46] *www.fotoperiodismo.org.mx.*

5.7. Advertising services

Mexico has more than 300 advertising agencies which comprise both large multinational companies offering a broad range of advertising services, public relations and marketing at international level and small companies, tending to specialize in niche markets or products.

According to experts, the Mexican advertising industry has great potential, based on the diversification of its services and the utilization of new promotion technologies. During 2003, this industry generated 66,381 new jobs and 5,076,059 pesos in value added, figures that represent 11.98 percent and 9.57 percent of the total value generated by the CBI in that year.

Chart 5.16. Advertising: Economic Indicators 1998 – 2003



Source: INEGI

In terms of investment, the industry has concentrated on television. According to the *Cámara de la Industria de la Radio y la Televisión* (Chamber for the Radio and Television Industry), television received 70.9 percent of private advertising investment in 2004 compared to 12.3 percent allotted to radio and 6.3 percent to print media.

Table 5.7. Investment in Advertising. 2003 – 2004
Millions of Pesos

Media	2003		2004	
	Advertising Investment per Outlet	% of Total	Advertising Investment per Outlet	% of Total
Television	18.570.45	70%	18.982.74	70.9%
Radio	3.183.50	12%	3.293.20	12.3%
Press	1.857.04	7%	1.686.76	6.3%
Journals/Magazines	1.326.46	5%	1.070.96	4.0%
Outdoor events	795.88	3%	990.63	3.7%
Movies	530.58	2%	508.70	1.9%
Internet	265.29	1%	240.97	0.9%
Total investment	**26,529,20**		**26.529.22**	

Source: CICOM-PRICE WATERHOUSE COOPERS

However, Mexico's level of investment is still very low (0.46 percent of GDP) when compared to other countries like Chile (0.8 percent), Spain (0.5 percent) or Brazil (1.52 percent).

Table 5.8. 2004 Advertising Investments: International Comparison
Millions of US$ and Percentage of GDP

Country	Advertising Investment (Millions of US$)	% of GDP
US	156,389	1.39
Canada	5,573	0.69
Brazil	7,265	1.52
Spain	5,298	0.75
Chile	607	0.8
Mexico	2,600	0.46

Source: AMAP

Recently, the *Asociación Mexicana de Agencias de Publicidad* (Mexican Association of Advertising Agencies) established a quality standard for those agencies, based on the concept of self-regulation.

The demand for advertising agencies has risen significantly in the past two years, but it is facing two important challenges: diversification in areas that may offer greater effectiveness for the investment made and a greater utilization of information technology for higher impact.

5.8. Copyright collecting societies

The emergence of Mexican copyright collecting societies as such occurred in 1997. These were previously known as authorial societies and were the result of the new Copyright Act. Within this framework, the copyright collection society is defined as a legal not-for-profit entity constituted under the protection of the law with the purpose of protecting authors and rights holders both national and foreign, and collecting and delivering the amounts that could be obtained in their favor as a result of copyright or any related rights.

In Mexico, compliance with the provisions and requirements established by the law is essential for an association to receive an authorization to operate as a collecting society. This society's accounts may be examined at any time by the *Instituto Nacional de Derechos de Autor* (National Copyright Institute), the public body responsible for monitoring developments.

At present, there are 13 collecting societies in Mexico, which is the country with the largest number of entities of this type worldwide (see Table 5.9). They are characterized by great diversity in members, managerial strength and management and negotiating capacity.

Among the foremost are SACM, SOGEM and ANDI, both for their negotiating capacity with entrepreneurial and governmental bodies and for the high profile of their membership. However, there are others whose main collection purpose is simply not met, due to their small size, lack of resources to enforce payment and lack of public awareness about copyright legislation.

There is no official disaggregated data available to measure their economic participation and the data reported in the economic census generates negative values for the value added variable given the non-profit nature of collecting societies and other associations integrated into the class reported.

Table 5.9. Copyright Collecting Societies 2006

Sociedad de autores y compositores de Música (SACM), S.G.C. de I.P.
Sociedad General de Escritores de México (SOGEM), S.G.C. de I.P.
Sociedad Mexicana de coreógrafos (SOMEC), S.G.C. de I.P.
Sociedad Mexicana de Autores de las Artes Plásticas (SOMMAP), S.G.C. de I.P.
Sociedad Mexicana de Directores, Realizadores de Obras Audiovisuales S.G.C. de I.P.
Centro Mexicano de Protección y Fomento de los Derechos de Autor (Cempro) S.G.C. de I.P.
EJE "Ejecutantes" S.G.C. de I.P.
Sociedad de autores de Obras Visuales Imagen del Tercer Milenio S.G.C. de I.P.
Sociedad Mexicana de Productores de Fonogramas, Videogramas y Multimedia (SOMEXFON), S.G.C. de I.P.
Sociedad Mexicana de Autores de Obras Fotográficas (SMAOF), S.G.C de I.P.
Unión Iberoamericana de Humoristas Gráficos (UNIHG), S.G.C. de I.P.
Sociedad Mexicana de Ejecutantes de Música (SOMEN), S.G.C. de I.P.
Asociación Nacional de Interpretes (ANDI)

Source: INDAUTOR

In general, all these societies face an important challenge in collecting payments. This is due to a variety of factors, among which the following may be highlighted:

- Lack of awareness on the part of citizens of the legislation and payment obligation to these societies. The overall weakness of the Mexican legal framework in this matter leads to a lack of knowledge by companies and individuals of the obligations they have to fulfill in regard to copyright. This lack of awareness derives from costs not being incorporated when making investment decisions.
- Legal weakness in imposing compliance of these obligations, as well as weaknesses within the collecting societies *vis à vis* the companies committed to pay for these rights. In general, collection societies deal with powerful companies and professional groups with whom it is very difficult to negotiate, to legally challenge or from whom to demand payment of royalties.
- Fragmentation of this universe of collection societies, resulting in diminished performance and managerial capacity.
- Reluctance to pay copyright fees by the users of works, who take advantage of the chaos caused by the multiplicity of collection societies as a defense. This multiplicity generated by Mexican legislation leads, on the one hand, to a diverse set of copyright collectors faced by any one firm or business, and on the other, to a wide range of rates for the use of the same work. This situation creates a highly uncertain business environment, in view of which the entrepreneur seeks to protect himself by not paying.

This state of affairs has led to a proposal for changes to the legislation in order to allow the creation of a one-stop window for tariff payment, as well as to set fixed rates. These legislative initiatives have not yet obtained sufficient support for their approval, but several instances express themselves in their favor in order to strengthen the copyright legal framework as well as reduce payment evasion.

The strengthening of copyright collecting societies constitutes an essential element for the development of copyright-based industries, but it should be achieved through general public awareness and information campaigns, as well as through the strengthening of legal structures and compliance of stakeholders.

Summary

The objective of the present chapter is to present a brief overview of some of the core copyright-based industries. It is not our aim to review exhaustively the history and present situation of each of the sectors, but simply to give the reader further insights into the Mexican copyright-based industries so as to understand the challenges and opportunities faced in their development and consolidation.

Copyright-based industries cover a great diversity of sectors and activities whose development has resulted in the rich cultural traditions and the great creativity of its population. Some sectors have enjoyed government support while others have been left to develop on their own, either through strong foreign participation or through the efforts of authors and creators committed to their work.

The consolidation process of copyright in Mexico represents an opportunity to strengthen the core industries which have a significant potential for growth, particularly in those sectors that have the support of government and the capacity to export.

In general, we can conclude that core copyright industries are limited in their growth potential due to some or all of the following circumstances:

- Investors have traditionally considered these industries as part of the non-profit cultural sector and therefore find them unattractive.
- Cultural activity has been considered a government prerogative, which has made some CBI less commercially-oriented and this has therefore confirmed investors' perceptions.
- The employment structure favors freelance and seasonal employees and therefore leaves most professionals without a social security net during their working life. This reduces creative capacity as more time must be spent in survival than in production.
- Most sectors have seen a rise in imports and a reduction of local content which can be explained by the higher cost structures of the Mexican economy and the preference of consumers for imported goods. Especially relevant is the fact that technological innovations have been introduced into these industries through imports.
- Copyright-based industries are particularly sensitive to overall economic conditions. A zero or slow growth rate in the Mexican economy as experienced during the 2000-2006 administration weakens CBI.
- Piracy represents one of the greatest problems for these industries. The lack of a formal judicial law enforcement program and the alleged ignorance of consumers is fertile ground for the growth of an informal market that aggressively competes with the formal sector and is justified by the general public as a social redistribution of income.

In the next chapter we will set out the opportunities and challenges faced by the Mexican copyright-based industries and offer a set of recommendations for the strengthening of what we consider one of the core sectors in the Mexican economy, not only because of its economic potential but also as a manifestation of the cultural wealth of the country.

Chapter VI. Conclusions and Recommendations

This survey represents a comprehensive, systematic and methodical study which aims to identify and estimate the importance of copyright-based industries within the Mexican economy. The general findings of this report support the conclusions made by other country studies on the importance of strengthening the legal framework for copyright-protection to protect and promote the creation of protected works and in that way foster an adequate environment for the consolidation of these industries (consolidation in the sense of creating conditions that would attract private and public investment, generate quality employment and the promotion of exports).

The present study is the first to compare the performance of Mexican copyright-based industries in two different years (1998 and 2003) and it has therefore allowed us to evaluate how the CBI are affected by the general economic situation; i.e. the CBI are extremely sensitive to economic growth and changes in income. This is shown by the fall in economic contribution of the CBI from 5.15 percent (VA/GDP) in 1998 to 4.77 percent in 2003 which can in part be explained by the low or almost zero growth of the economy.

Another factor that should be taken into account when analyzing this fall in contribution is how government policies during the Fox administration weakened their performance by fostering the growth of the informal sector through the promotion of self-employment alternatives to formal employment, by following a cultural policy that not only reduced government subsidies and general support to the cultural sector but also reinforced the traditional idea of culture as a quaint but non-profit-making activity.

As regards employment, Mexican copyright-based industries are an important employment generator but greater attention must be given to the training of workers in order for them to be able to improve the productivity of the CBI and enable them to adapt and profit from technological innovations.
As long as these industries continue to promote freelance and temporary employment versus permanent employment, human capital will continue to become a scarce resource due to the drain of CBI professionals, either to other countries or other industries, due to the lack of a social security safety net. This is a situation that affects the Mexican economy in general but has a greater effect on the CBI given the nature of these industries.

Finally, as regards the importance of the CBI in foreign trade, Mexico is highly dependent on imports especially since the signing of NAFTA which introduced foreign competition with more efficient cost-structures and saw the disappearance of small and medium-sized enterprises. In the last ten years, industrial sector participation has reported continuous shrinkage as it is unable to compete with foreign companies. This has also led to a change in structure of the economy from predominantly industrial to a service-based economy.

In general, the authors agree on the potential of copyright-based industries as an important pillar in the future growth of the Mexican economy. Cultural richness, the creativity of its population and international interest in Mexico's cultural heritage based on the years of regional leadership of our country mark a competitive advantage that can support this idea. However, this potential will disappear if action on several fronts is not taken:

- As mentioned earlier, copyright-based industries require an adequate legal environment if they are to prosper. Mexico has a strong legal framework as regards copyright protection, but its enforcement system is extremely weak. The authorities must strengthen the rule of law and ensure that creators are effectively protected by it. Achieving this is the first step in the consolidation of copyright-based industries.

- An effective enforcement system must fight piracy on all fronts. While piracy continues to be seen benevolently by consumers and political groups, no effective copyright protection will be achieved. The fight against piracy must on the one hand be achieved judicially and on the other, public awareness campaigns must be permanently in place to educate the population on the importance of respecting the law and how piracy affects everyone.
- The present survey has attempted to measure the economic contribution of copyright-based industries in Mexico. However, the limited availability of full statistical information makes any estimation only a first step to accurately measuring the economic contribution of these industries. In the case of Mexico, satellite accounts have recently been created for the tourism and housing sectors. If we wish to accurately measure the participation of copyright-based industries, a satellite account of that sector must be created. This will not only allow for correct estimating but also support decision-making as regards sector-promotion policies.
- Government, the private sector and academia should promote an environment that embraces technological innovation and also benefits from it. Policies that increase communication network coverage and education to build human capacity in IT, communication and the knowledge economy will help economic growth in general and the CBI specifically.
- Copyright-based industries cover such diverse activities that it is impossible to make overall recommendations regarding public policies apart from those already mentioned. Undoubtedly, Mexico cannot be competitive in all of them, but with proper statistical information, priorities could easily be set and policies targeted more accurately at those areas where the greatest economic benefits could be achieved.

Mexico is now in transition with a new presidential administration coming into office in December 2007. It is hoped that some of these recommendations will be considered and that upcoming surveys will be able to take the present findings a step further with deeper and more accurate research that can better explain the economic relationships and capacities of copyright-based industries and help consolidate them in favor of greater economic growth and development thus helping to improve the living conditions of the Mexican population.

References

A Market for ideas, The Economist [online]. October 2005.
http://www.economist.com/printedition/displaystory.cfm?story_id=5014990.

ACUERDO por el que se da a conocer la resolución respecto a los proyectos de giros industriales que se indican, published in *Diario Oficial de la Federación,* July 12, 2000.

ALAVEZ, José Manuel. *Entérate de qué es la CANIE.* [online] México: IMCP, 2006.
http://portal.imcp.org.mx/content/view/824/200/.

ANÁLISIS de implicaciones y beneficios de los esquemas fiscales: Informe ejecutivo [online]. Mexico: PriceWaterhouseCoopers/ CANIEM. *http://www.caniem.com/docs/estadistica/pcw-industriaeditorial.pdf.*

ARANDA, Juan and MONTAÑO, Leticia, *44 años de lucha. Memoria.* México: ANDI, 2001.

AYALA, Diego, Falta de lectores: *debilidad de la CANIEM. Revista Impresión Digital.* March, 2005.

BANCOMEXT. *World Trade Atlas-México. Banco de Comercio Exterior.*

BARBER, Ricardo and BARBER, Carlos, *La evolución de la industria de los videojuegos.* [online] México: IMCP, 2006. Available on *http://portal.imcp.org.mx/content/view/830/200/.*

BSA and IDC, *Tercer estudio anual mundial de piratería de software.* BSA (Business Software Alliance), Washington: May 2006.

CABALLERO LEAL, José Luís, *Derecho de autor en la nueva era digital, la industria del libro, de la música y del audiovisual: tendencias, creative commons.* In: *Jornadas de derecho de autor* (1º: 2005: Ciudad de México, México). México: WIPO, INDAUTOR. 2005.

CABALLERO LEAL, José Luís, *Breve comentario a la reforma realizada en julio de 2003 a la ley federal del derecho de autor en México. Conservatorianos* [online]. March-April 2004, no. 8.
http://www.conservatorianos.com.mx/web/Conservatorianos%208%20para%20web/caballero8.pdf.

CANIEM, *Actividad Editorial Libros.* CANIEM: México, 2004.

CANIEM, *Actividad editorial. Publicaciones periódicas* 2004-2005, México, March 2006.

CENTRO Mexicano de Protección y Fomento de los Derechos de Autor, Sociedades de Gestión Colectiva. [online]. 2002-2005. *http://www.cempro.com.mx.*

CeMPRO, *Dossier de prensa.* February 2006. [online]. *http://www.cempro.com.mx.*

CISNEROS BELTRÁN, Juan Manuel, *Los derechos de autor y los medios informativos: un elemento esencial para el crecimiento económico de México.*

Constitución Federal de los Estados Unidos Mexicanos 1824. [online]
http://www.juridicas.unam.mx.

COPYRIGHT. UNESCO/Culture, [online] *http://portal.unesco.org.*

DEL CORRAL, Milagros*, Información, educación, cultura y derecho de autor: en busca del equilibrio. Seminario Internacional sobre Derecho de Autor y Acceso a la Cultura.* (1°: 2005: Madrid). UNESCO, 2005. *http://www.ifrro.org/upload/documents/agmseminar2005Milagros%20del%20Corral.pdf.*

DOMÍNGUEZ, Roberto and MAROTO, Carlos, *La democratización de México y la nueva economía digital: una oportunidad histórica.* AMITI: México. [online] *http://www.lacoctelera.com/myfiles/clasedetecnologia/La%20democratizacion%20de%20Mexico%20y%20la%20nueva%20economia%20digital.pdf#search=%22maroto%20la%20democratizacion%22.*

EMERY, Miguel Ángel, *Derechos de los productores de fonogramas y la piratería. En: Seminario sobre delitos en materia de derechos de autor y derechos conexos.* (1°: 2005: México). WIPO, IMPI y IJF, 2005. [online]. *http://www.ompi.int/edocs/mdocs/lac/es/ompi_da_mex_2_05/ompi_da_mex_2_05_1.pdf.*

ENCUESTA nacional de prácticas y consumo culturale México: CONACULTA, 2006. ISBN: 970-35-0703-4.

ESCOBAR, Leopoldo, *Régimen fiscal de la industria del entretenimiento* [online]. México: IMCP, May 10, 2006, *http://portal.imcp.org.mx/content/view/828/198/.*

FERNÁNDEZ V., Marcela, *Agonía y resurrección del cine mexicano. In: The Current Role of Government in the National Film Industry* [online] (1°: 2002: Miami, EU). Miami, EU: Motion Picture Association. 2002. [online] *http://www.mpaa.org/mpa-al/FIU_Violante.htm.*

FOTOPERIODISMO, [online] *www.fotoperiodismo.org.*

GARCÍA, María Isabel, FERNÁNDEZ, Yolanda, ZOFÍO, José Luis, *The Economic Dimension of the Culture and Leisure Industry in Spain:* National, Sectoral and Regional Analysis. Journal of Cultural Economics (27): 9-30, 2003.

GETINO, Octavio, *The Audiovisual Market in Latin America: from Image-Identity to a Latin American Audiovisual Arena.* Media Development [online]. May-August 1997, ISSN: 0143-5558. *http://www.wacc.org.uk/wacc/publications/media_development/archive/1997_2/the_audiovisual_market_in_latin_america_from_image_identity_to_a_latin_american_audiovisual_arena.*

GLICKMAN, Dan, *World Study of Losses to the Film Industry & International Economies due to Piracy: Pirate Profiles.* MPAA [online]. May 2006. [online] *http://www.mpaa.org/press_releases/2006_05_03leksumm.pdf.*

GUÍZAR LÓPEZ, Víctor Manuel, *Industrias culturales y derecho de autor: oportunidades y desafíos.* En: *Jornadas de derecho de autor* (1°: 2005: Ciudad de México, México). México: WIPO, INDAUTOR. 2005.

HARTLEY, John, *Creative industries.* Oxford, UK, Blackwell Publishing, 2005.

HAW, Dora Luz and CÁRDENAS, Guillermo, *Aprueban precio fijo en libros. Reforma:* México, D.F., April 27, 2006. p.10.

HESMONDHALGH, David, *The Cultural Industries,* SAGE, UK 2005.

HERNÁNDEZ, Laura and LÓPEZ, Clara, *Piratería, el lado oscuro de la tecnología. Entérate* [online]. May 2006. *http://www.enterate.unam.mx/Articulos/2006/mayo/pirateria.htm.*

INEGI XV *Censo Industrial. Censos Económicos* 1999. *Instituto Nacional de Estadística, Geografía e Informática.* [online]
http://www.inegi.gob.mx/est/contenidos/espanol/proyectos/censos/ce1999/prodis.asp.

INEG,. XVI *Censo Industrial. Censos Económicos* 2004. *Instituto Nacional de Estadística, Geografía e Informática.*

INDAUTOR, *Antecedentes del derecho de autor* [online]. México: INDAUTOR/SEP.
http://www.sep.gob.mx/wb2/sep/sep_1516_antecedentes_del_der.

INSTITUTO Mexicano de Cinematografía, *Informe de labores 2005.* 2005.

INTERNATIONAL Business Strategies, *Advertising in Mexico.* IBS, May 2005,
www.internationalbusinessstrategies.com.

KRAMER, Mark and KANIA, John, *Changing the Game: Leading Corporation Switch from Defense to Offense in Solving Global Problems.* Stanford Social Innovation Review [online]. Landhorne: Primavera 2006,
http://www.ssireview.org/pdf/2006SP_feature_Kramer_Kania.pdf.

La Propiedad Intelectual y la Piratería: (una razón o cerrazón) la ausencia de respeto. En: Cuarto Aniversario de la Biblioteca nacional de Ciencia y Tecnología, Ing. Víctor Bravo Ahuja (4°: 2003: México) Mesa redonda 1. México: IPN/*Coordinación General de Bibliotecas y Servicios de Información.* 2003. [online],
http://azul.bnct.ipn.mx/iv_aniv/mesa_red1.html.

LEO, Kah Mun, *The Contribution of Copyright-Based Industries in Singapore* [et al], Singapore: NUS Consulting/IPA, 2002 in *National Studies on Assessing the Economic Contribution of the Copyright-Based Industries,* WIPO, Geneva, ISBN 92-805-15553-5.

LEZCANO, Norma, CIE segundo acto: *A 15 años de reinventar el entretenimiento en México, CIE desafía la amenaza de la tecnología en el hogar y la fuerte presión de los mercados. Promete resultados, ¿le creerán? Revista Expansión* [online]. México, October 26,2005,
http://www.expansion.com.mx/login.asp?url=nivel2.asp?cve=927_27&xsl=print.xsl&y=1.

LUTTEROTH, Jorge, *2002 y 2003, años difíciles en la industria de medios y entretenimiento* [online]. México: *IMCP, 2006 http://portal.imcp.org.mx/content/view/830/200/.*

MAROTO, Carlos and ZAVALA, Jorge, *La industria del software en México.* México D.F.: IMITI. 2002.

MASTRINI, Guillermo and BECERRA, Martín, *Approach to the Latin American Television Model.* [online]. 2002,
http://www.portalcomunicacion.com/bcn2002/n_eng/programme/prog_ind/asp4.asp?id_pre=568.

MATUTE, Pedro, *El cine digital, Razón y Palabra* [online]. February-March 2006, no. 49, ISSN: 1605-4806,
http://www.cem.itesm.mx/dacs/publicaciones/logos/anteriores/n49/bienal/Mesa%204/PedroMatute.pdf.

MINISTRY of Culture of the Republic of Latvia. *The Economic Contribution of Copyright Based Industries in Latvia:* 2000. Riga, Latvia: SIA, 2005, in *National Studies on Assessing the Economic Contribution of the Copyright-Based Industries,* WIPO, Geneva, ISBN 92-805-15553-5.

MONETA, Carlos Juan, *Cultural industries in the Latin American Economy: Current Status and Outlook in the Context of Globalization.* [online]. Buenos Aires, Argentina: OAS, 2000, Latin American cultural industries: current status and outlook,
http://www.oas.org/main/main.asp?sLang=S&sLink=http://www.oas.org/oaspage/searchform.asp.

MONROY, Rebeca, *La fotografía mexicana de ayer y hoy. México en el tiempo* [online]. July-August 1999, no. 31,
http://www.mexicodesconocido.com.mx/espanol/cultura_y_sociedad/arte/detalle.cfm?idcat=3&idsec=14&idsub=55&idpag=2281.

OCEJO, Ana Gabriela, *La industria de entretenimiento en la BMV.* [online] México: IMCP, 2004,
http://portal.imcp.org.mx/content/view/910/200/.

PACHECO, Humberto, *La relevancia de los activos intangibles en la Industria del Entretenimiento* [online]. México: IMCP, 2006, *http://portal.imcp.org.mx/content/view/826/199/.*

PANETHIERE, Darrell, *The Persistence of Piracy: the Consequences for Creativity, for Culture, and for Sustainable Development* [online]. UNESCO, April 2006,
http://portal.unesco.org/culture/admin/file_download.php/piracy_e.pdf?URL_ID=30647&filename=11444010025piracy_e.pdf&filetype=application%2Fpdf&filesize=329484&name=piracy_e.pdf&location=user-S/.

PIEDRAS, Ernesto, *¿Cuánto vale la cultura? Contribución económica de las industrias protegidas por el derecho de autor en México.* CONACULTA, SOGEM, SACM, CNIEM, México, 2004. ISBN 968 7903 79 1.

PENYIGEY, Krisztina and MUNKÁCSI, Péter, *The Economic Contribution of Copyright-Based Industries in Hungary,* Hungarian Patent Office, 2005. in *National Studies on Assessing the Economic Contribution of the Copyright-Based Industries,* WIPO, Geneva, ISBN 92-805-15553-5.

PEÑALOZA BAEZ, Marcela, *La industria del software: una oportunidad para México.* January 2002,
http://www.enterate.unam.mx/Articulos/enero/software.htm.

PONENCIA de IIPA, *Fomento de la producción, la aplicación de las leyes pertinentes y el acceso al mercado en las Américas de los productos con derechos de autor reservados. En: Seminario A: Estrategia Comercial-Definición de Obstáculos* (1°: 1996: Cartagena, Colombia). Colombia: IIPA, 1996. [online],
http://www.iipa.com/rbi/1996_Mar18to21b_ftaa_cartagena.html.

PUNTOS relevantes del mercado discográfico mexicano 2005. [online] México: AMPROFON,
http://www.amprofon.com.mx/MediosPuntos1.htm.

REVISTA Mexicana del derecho de autor. México D.F. 5 (19). 2006.

REVISTA Mexicana del derecho de autor. México D.F. 6 (20). 2006.

SÁNCHEZ, Enrique, *La televisión y el sector audiovisual mexicano: breve examen de flujos asimétricos.* Revista Universidad de Guadalajara [online]. Autumn 2000, no. 20, *http://www.cge.udg.mx/revistaudg/rug20/entrada20.html.*

SECRETARIA de Comunicaciones y Transportes, Anuario estadístico 2004. SCT: México, 2004. [online] *http://portal.sct.gob.mx/SctPortal/appmanager/Portal/Sct?_nfpb=true&_pageLabel=P24118.*

SIWEK, Stephen E., *Copyright Industries in the U.S. Economy: The 2004 Report.* Economists Incorporated, Washington, DC, 2004 in *National Studies on Assessing the Economic Contribution of the Copyright-Based industries,* WIPO, Geneva, ISBN 92-805-15553-5.

TELEVISA MÉXICO, *www.televisa.com.mx.*

TÉLLEZ-GIRÓN, Ricardo, *El laberinto sonoro. Elementos* [online], December-February 2001-2002. no. 44, ISSN 0187-9073, *http://www.elementos.buap.mx/num44/pdf/47.pdf.*

UK Trade & Investment's Export Marketing Research Scheme, *Publishing Market Profile:* México. UK: The Publishers Association, 2006, ISBN: 0-85386-296-6.

UNESCO, *Culture, Trade and Globalization.* [online] *http://www.unesco.org/culture/industries/trade/*

UNESCO, Institute for Statistics. *International Flows of Selected Cultural Goods and Services*, 1994-2003: *Defining and Capturing the Flows of Global Cultural trade.* Montreal, Canada, UNESCO, 2005.

WALL Communication Incorporated, *The Economic Contribution of Copyright-Based Industries to the Canadian Economy.* Canada: Canadian Heritage, 2004. in *National Studies on Assessing the Economic Contribution of the Copyright-Based Industries,* WIPO, Geneva, ISBN 92-805-15553-5.

WIPO, *Guide on Surveying the Economic Contribution of the Copyright-Based Industries.* Geneva: WIPO, 2003. ISBN 92-805-1225-7.

APPENDIX 1. Core Copyright Industries in Mexico

Tabla 1: **CORE, 1998**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL OCUPADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
ARTES VISUALES Y GRÁFICAS	**5,983**	**19,770**	**472,108**	**2,317,779**	**1,249,793**	**-64,409**	**63,776**	**-633**
CLASE 435312 COMERCIO AL POR MAYOR DE ARTÍCULOS Y ACCESORIOS PARA DISEÑO Y PINTURA ARTÍSTICA	391	1,617	74,470	411,481	288,011	11,860	31,222	42,917
CLASE 465213 COMERCIO AL POR MENOR DE ARTÍCULOS [illegible] ARTE	840	1,880	19,674	197,573	115,374	1,700	15,299	17,305
CLASE 541340 SERVICIOS DE DIBUJO	100	800	28,850	124,944	88,747	-120,580	960	-120,220
CLASE 541430 DISEÑO GRÁFICO	2,289	8,073	177,794	1,120,038	509,816	38,708	11,417	47,125
CLASE 541490 DISEÑO DE MODAS Y OTROS DISEÑOS ESPECIALIZADOS	229	718	12,887	57,246	25,508	2,133	767	3,870
CLASE 611611 ESCUELAS DE ARTE PERTENECIENTES AL SECTOR PRIVADO	1,412	4,807	147,854	316,499	208,973	2,069	2,978	5,099
SUBRAMA 71151 ARTISTAS Y TÉCNICOS INDEPENDIENTES	624	1,920	10,461	102,274	46,227	2,276	1,808	4,011
SOFTWARE Y BASES DE DATOS	**13,281**	**35,077**	**3,009,258**	**12,016,425**	**8,828,614**	**514,475**	**3,208,159**	**5,724,634**
CLASE 511210 EDICIÓN DE SOFTWARE, EXCEPTO A TRAVÉS DE INTERNET	238	3,397	187,206	1,216,141	846,031	24,844	4,444	75,288
CLASE 518210 PROCESAMIENTO ELECTRÓNICO DE INFORMACIÓN, HOSPEDAJE DE PÁGINAS WEB Y OTROS SERVICIOS RELACIONADOS	-	-	-	-	-	-	-	-
CLASE 541510 SERVICIOS DE CONSULTORÍA EN COMPUTACIÓN	1,102	13,588	1,755,264	6,791,388	4,828,276	440,308	3,109,674	5,609,880
SUBRAMA 71312 [illegible] DE JUEGOS ELECTRÓNICOS	11,740	17,100	79,008	712,426	244,402	42,440	32,217	74,657
CLASE 511190 EDICIÓN DE OTROS MATERIALES NO INTEGRADA CON LA IMPRESIÓN, EXCEPTO A TRAVÉS DE INTERNET	142	800	30,045	395,038	90,971	9,615	1,200	10,124
CLASE 511140 EDICIÓN DE DIRECTORIOS Y DE LISTAS DE CORREO NO INTEGRADA CON LA IMPRESIÓN, EXCEPTO A TRAVÉS DE INTERNET	8	111	3,009	25,790	15,594	215	615	860
CLASE 516110 CREACIÓN Y DIFUSIÓN DE CONTENIDO EXCLUSIVAMENTE A TRAVÉS DE INTERNET	-	-	-	-	-	-	-	-
FOTOGRAFÍA	**9,766**	**21,851**	**275,342**	**2,529,536**	**1,059,238**	**63,894**	**194,220**	**258,114**
CLASE 541920 SERVICIOS DE FOTOGRAFÍA	7,166	12,895	74,332	727,738	309,000	13,469	12,094	25,523
SUBRAMA 81291 SERVICIOS DE REVELADO DE FOTOGRAFÍAS	2,597	8,996	201,010	1,801,807	746,183	50,425	182,166	232,596
CLASE 519120 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO	-	-	-	-	-	-	-	-
MÚSICA, PRODUCCIONES TEATRALES Y ÓPERAS	**9,897**	**41,301**	**1,258,513**	**11,105,708**	**6,259,138**	**409,886**	**356,037**	**765,623**
CLASE 334610 FABRICACIÓN Y REPRODUCCIÓN DE MEDIOS MAGNÉTICOS Y ÓPTICOS	34	3,866	209,327	1,079,981	620,040	98,817	-6,848	92,089
CLASE 433311 COMERCIO AL POR MAYOR DE DISCOS Y CASETES	188	2,407	175,846	1,453,570	843,778	25,408	51,427	76,833
CLASE 465211 COMERCIO AL POR MENOR DE DISCOS Y CASETES	4,300	10,266	152,281	807,341	644,421	30,649	71,407	102,056
CLASE 512210 PRODUCTORAS DISCOGRÁFICAS	9	55	1,376	7,776	1,866	408	2	410
CLASE 512220 PRODUCCIÓN Y DISTRIBUCIÓN DE DISCOS Y CINTAS MAGNETOFÓNICAS	30	1,613	303,681	2,295,342	1,542,880	42,164	19,483	61,647
CLASE 512230 EDITORAS DE MÚSICA	18	336	32,425	203,737	67,914	878	28	706
CLASE 512240 GRABACIÓN DE DISCOS Y CINTAS MAGNETOFÓNICAS	71	387	8,689	45,073	16,754	1,982	191	2,173
CLASE 512290 OTROS SERVICIOS DE GRABACIÓN DEL SONIDO	49	271	7,997	57,527	25,343	498	1,648	2,146
CLASE 561590 OTROS SERVICIOS DE RESERVACIONES	403	1,722	91,888	2,237,699	1,568,072	137,761	232,148	369,057
SUBRAMA 71111 COMPAÑÍAS DE TEATRO	73	414	5,642	97,468	34,883	875	612	1,287
SUBRAMA 71112 COMPAÑÍAS DE DANZA	51	304	8,359	71,178	41,283	66	29	96
SUBRAMA 71113 CANTANTES Y GRUPOS MUSICALES	2,911	10,695	44,932	716,212	447,387	9,645	4,219	13,863
SUBRAMA 71119 OTRAS COMPAÑÍAS Y GRUPOS DE ESPECTÁCULOS ARTÍSTICOS	35	232	2,527	81,568	22,467	169	108	277
SUBRAMA 71131 PROMOTORES CON INSTALACIONES PARA LA PRESENTACIÓN DE ESPECTÁCULOS ARTÍSTICOS, DEPORTIVOS Y SIMILARES	500	3,460	261,338	1,022,985	245,755	86,965	2,133	89,098
SUBRAMA 71132 PROMOTORES DE ESPECTÁCULOS ARTÍSTICOS, DEPORTIVOS Y SIMILARES QUE NO CUENTAN CON INSTALACIONES PARA PRESENTARLOS	137	773	28,146	414,346	65,846	3,456	232	3,688
SUBRAMA 71141 AGENTES Y REPRESENTANTES DE ARTISTAS, DEPORTISTAS Y SIMILARES	169	116	17,320	402,403	194,031	3,346	-20,660	-17,314
PELÍCULAS Y VIDEOS	**11,896**	**29,831**	**713,651**	**7,781,161**	**3,745,634**	**310,394**	**380,948**	**691,332**
CLASE 512111 PRODUCCIÓN DE PELÍCULAS CINEMATOGRÁFICAS Y VIDEOS	97	407	20,249	191,808	94,090	1,903	10,100	12,003
CLASE 512112 PRODUCCIÓN DE VIDEOCLIPS, COMERCIALES Y OTROS MATERIALES AUDIOVISUALES	275	1,537	86,798	1,521,297	852,598	22,780	2,198	24,978
CLASE 512120 DISTRIBUCIÓN DE PELÍCULAS CINEMATOGRÁFICAS, VIDEOS Y OTROS MATERIALES AUDIOVISUALES	24	274	47,426	984,141	592,869	4,598	1,282	5,876
CLASE 512130 EXHIBICIÓN DE PELÍCULAS CINEMATOGRÁFICAS, VIDEOS Y OTROS MATERIALES AUDIOVISUALES	787	6,160	373,279	3,206,298	1,555,295	210,867	37,942	248,826
CLASE 512190 SERVICIOS DE POSTPRODUCCIÓN Y OTROS SERVICIOS PARA LA INDUSTRIA FÍLMICA Y DEL VIDEO	28	583	48,570	208,791	75,154	9,637	-175	9,462
SUBRAMA 53223 ALQUILER DE VIDEOCASETES Y DISCOS	10,735	16,871	135,330	1,656,875	460,848	60,379	325,913	390,292
CLASE 519121 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO	-	-	-	-	-	-	-	-
PRENSA Y LITERATURA	**30,044**	**181,271**	**7,643,215**	**41,865,867**	**18,460,633**	**2,007,957**	**1,292,761**	**3,300,718**
CLASE 323111 IMPRESIÓN DE LIBROS, PERIÓDICOS Y REVISTAS	949	13,978	752,964	4,002,259	1,547,607	649,067	89,677	738,744
CLASE 323119 IMPRESIÓN DE FORMAS CONTINUAS Y OTROS IMPRESOS	13,180	75,275	3,209,282	14,281,283	6,286,257	770,958	146,447	892,356

Source: INEGI

APPENDIX 1. Core Copyright Industries in Mexico

Tabla 1: **CORE, 1998**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
CLASE 323120 INDUSTRIAS CONEXAS A LA IMPRESIÓN	1,322	9,460	115,764	757,138	461,018	40,190	8,246	95,425
CLASE 433420 COMERCIO AL POR MAYOR DE LIBROS	349	4,141	167,887	664,040	411,192	30,537	140,281	170,302
CLASE 433430 COMERCIO AL POR MAYOR DE REVISTAS Y PERIÓDICOS	249	2,070	102,230	466,869	355,843	4,210	39,598	33,808
CLASE 465312 COMERCIO AL POR MENOR DE LIBROS	10,588	18,715	195,195	1,103,527	817,197	20,757	252,770	253,333
CLASE 465313 COMERCIO AL POR MENOR DE PERIÓDICOS Y REVISTAS	7,892	12,045	127,489	624,302	466,791	5,888	24,670	30,655
CLASE 511111 EDICIÓN DE PERIÓDICOS NO INTEGRADA CON LA IMPRESIÓN, EXCEPTO A TRAVÉS DE INTERNET	177	2,011	128,747	669,697	227,900	9,710	392	8,114
CLASE 511121 EDICIÓN DE REVISTAS Y OTRAS PUBLICACIONES PERIÓDICAS NO INTEGRADA CON LA IMPRESIÓN, EXCEPTO A TRAVÉS DE INTERNET	186	1,298	98,844	915,402	228,175	8,011	10,598	18,379
CLASE 511112 EDICIÓN DE PERIÓDICOS INTEGRADA CON LA IMPRESIÓN	402	22,207	1,409,102	7,769,021	3,356,607	169,991	10,237	118,212
CLASE 511122 EDICIÓN DE REVISTAS Y OTRAS PUBLICACIONES PERIÓDICAS INTEGRADA CON LA IMPRESIÓN	177	3,844	136,897	2,373,110	1,080,380	34,729	8,340	41,074
CLASE 511131 EDICIÓN DE LIBROS NO INTEGRADA CON LA IMPRESIÓN, EXCEPTO A TRAVÉS DE INTERNET	87	1,262	100,591	948,419	392,424	15,794	14,070	77,808
CLASE 511132 EDICIÓN DE LIBROS INTEGRADA CON LA IMPRESIÓN	140	5,406	352,694	4,326,065	2,319,007	43,409	406,308	451,873
CLASE 511142 EDICIÓN DE DIRECTORIOS Y DE LISTAS DE CORREO INTEGRADA CON LA IMPRESIÓN	19	199	4,135	21,152	9,325	255	480	872
CLASE 511192 EDICIÓN DE OTROS MATERIALES INTEGRADA CON LA IMPRESIÓN	196	6,880	383,017	2,374,018	1,282,594	75,460	61,061	163,043
CLASE 519110 AGENCIAS NOTICIOSAS	-	-	-	-	-	-	-	-
CLASE 519121 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO	-	-	-	-	-	-	-	-
CLASE 541930 SERVICIOS DE TRADUCCIÓN E INTERPRETACIÓN	38	174	3,471	27,896	14,488	432	227	708
CLASE 561413 SERVICIOS DE PREPARACIÓN DE DOCUMENTOS	370	704	3,804	21,764	13,007	1,296	346	1,604
RADIO Y TELEVISIÓN	**335**	**6,713**	**3,037,864**	**5,243,890**	**799,298**	**166,898**	**554,657**	**661,255**
CLASE 512112 PRODUCCIÓN DE PROGRAMAS PARA LA TELEVISIÓN	59	5,726	1,060,338	4,449,487	879,789	154,057	553,214	658,773
CLASE 515110 TRANSMISIÓN DE PROGRAMAS DE RADIO, EXCEPTO A TRAVÉS DE INTERNET	-	-	-	-	-	-	-	-
CLASE 515120 TRANSMISIÓN DE PROGRAMAS DE TELEVISIÓN, EXCEPTO A TRAVÉS DE INTERNET	-	-	-	-	-	-	-	-
CLASE 515210 PRODUCCIÓN DE PROGRAMACIÓN DE CANALES PARA SISTEMAS DE TELEVISIÓN POR CABLE O SATELITALES, EXCEPTO A TRAVÉS DE INTERNET	-	-	-	-	-	-	-	-
CLASE 517510 DISTRIBUCIÓN POR SUSCRIPCIÓN DE PROGRAMAS DE TELEVISIÓN, EXCEPTO A TRAVÉS DE INTERNET	-	-	-	-	-	-	-	-
CLASE 561490 OTROS SERVICIOS DE APOYO SECRETARIAL Y SIMILARES	286	987	46,835	208,490	223,520	1,841	643	2,594
CLASE 519110 AGENCIAS NOTICIOSAS	-	-	-	-	-	-	-	-
PUBLICIDAD	**5,842**	**39,894**	**2,434,893**	**11,886,719**	**4,319,862**	**648,334**	**58,891**	**703,825**
CLASE 339950 FABRICACIÓN DE ANUNCIOS	974	6,745	165,146	784,822	308,779	10,440	8,441	27,883
CLASE 433213 COMERCIO AL POR MAYOR POR MEDIOS MASIVOS DE COMUNICACIÓN Y OTROS MEDIOS	97	1,728	119,123	1,098,209	283,730	10,047	7,968	23,943
CLASE 541810 AGENCIAS DE PUBLICIDAD	1,122	13,966	1,287,900	4,307,736	1,732,491	71,014	17,868	89,419
CLASE 541830 AGENCIAS DE COMPRA DE MEDIOS A PETICIÓN DEL CLIENTE	241	3,076	372,527	2,236,239	816,877	23,882	4,080	28,875
CLASE 541840 AGENCIAS DE REPRESENTACIÓN DE MEDIOS	147	1,776	111,580	1,168,479	235,581	34,750	517	55,293
CLASE 541850 AGENCIAS DE ANUNCIOS PUBLICITARIOS	739	3,840	104,283	1,009,640	404,807	368,096	5,746	172,460
CLASE 541860 AGENCIAS DE PUBLICIDAD QUE OPERAN POR CORREO DIRECTO	79	551	37,296	387,012	46,807	79,004	660	80,851
CLASE 541870 DISTRIBUCIÓN DE MATERIAL PUBLICITARIO	98	423	16,695	180,058	119,108	660	300	3,803
CLASE 541890 OTROS SERVICIOS DE PUBLICIDAD	2,356	8,791	166,807	712,289	395,212	10,274	10,028	22,504
SOCIEDADES DE GESTIÓN COLECTIVA								
SUBRAMA 81314 FEDERACIONES Y OTRAS ASOCIACIONES REGULATORIAS DE ACTIVIDADES RECREATIVAS	-	-	-	-	-	-	-	-
TOTAL IPDA BÁSICAS	**91,045**	**376,210**	**16,863,829**	**94,743,084**	**40,606,231**	**3,095,819**	**5,108,849**	**13,104,768**
TOTAL NACIONAL	**2,804,084**	**13,827,025**	**521,830,929**	**3,719,258,580**	**1,643,337,301**	**283,866,701**	**4,849,830**	**357,716,821**
PARTICIPACIÓN IPDA/TOTAL NACIONAL (%)	3.25%	2.72%	3.23%	2.55%	2.47%	1.37%	107.35%	3.83%

Source: INEGI

APPENDIX 1. Core Copyright Industries in Mexico

Tabla 2: **CORE, 2003**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
ARTES VISUALES Y GRÁFICAS	**4,153**	**26,249**	**887,203**	**5,049,176**	**2,704,435**	**181,441**	**72,835**	**234,376**
CLASE 435312 COMERCIO AL POR MAYOR DE ARTÍCULOS Y ACCESORIOS PARA DISEÑO Y PINTURA ARTÍSTICA	370	3,840	161,333	716,167	467,314	10,590	46,848	75,236
CLASE 465213 COMERCIO AL POR MENOR DE ARTE, JOYERÍA Y LIBROS DE ARTE	837	1,524	28,779	145,778	90,308	3,079	3,146	5,233
CLASE 541440 SERVICIOS DE DIBUJO	386	1,322	32,073	150,568	98,227	8,142	990	5,537
CLASE 541430 DISEÑO GRÁFICO	2,037	11,776	435,488	2,391,336	1,241,944	87,311	7,830	105,244
CLASE 541490 DISEÑO DE MODAS Y OTROS DISEÑOS ESPECIALIZADOS	398	2,019	103,098	1,328,140	399,509	16,049	8,210	22,051
CLASE 611612 ESCUELAS DE ARTE PERTENECIENTES AL SECTOR PRIVADO	1,426	5,417	85,108	310,087	176,037	9,896	932	5,628
SUBRAMA 711512 ARTISTAS Y TÉCNICOS INDEPENDIENTES	509	1,251	10,360	158,066	51,414	1,383	175	2,450
SOFTWARE Y BASES DE DATOS	**14,878**	**71,881**	**3,674,818**	**18,151,234**	**8,270,894**	**882,721**	**31,021**	**1,813,742**
CLASE 511210 EDICIÓN DE SOFTWARE, EXCEPTO A TRAVÉS DE INTERNET	106	2,194	86,600	715,842	448,736	30,087	6,711	76,768
CLASE 518210 PROCESAMIENTO ELECTRÓNICO DE INFORMACIÓN, HOSPEDAJE DE PÁGINAS WEB Y OTROS SERVICIOS RELACIONADOS	229	16,610	1,240,486	3,573,893	1,880,582	423,009	1,386	624,355
CLASE 541510 SERVICIOS DE CONSULTORÍA EN COMPUTACIÓN	1,660	20,485	2,118,028	12,144,281	5,225,840	280,823	19,488	409,011
SUBRAMA 713120 CASAS DE JUEGOS ELECTRÓNICOS	12,801	31,275	105,339	1,305,175	669,247	131,081	3,905	236,884
CLASE 511191 EDICIÓN DE OTROS MATERIALES NO INTEGRADA CON LA IMPRESIÓN, EXCEPTO A TRAVÉS DE INTERNET	66	238	6,235	76,075	16,826	784	750	1,577
CLASE 511141 EDICIÓN DE DIRECTORIOS Y DE LISTAS DE CORREO NO INTEGRADA CON LA IMPRESIÓN, EXCEPTO A TRAVÉS DE INTERNET	10	449	9,127	80,316	31,302	1,073	-10	3,000
CLASE 516110 CREACIÓN Y DIFUSIÓN DE CONTENIDO EXCLUSIVAMENTE A TRAVÉS DE INTERNET	6	276	21,352	275,861	106,267	8,167	-110	6,087
FOTOGRAFÍA	**11,010**	**27,218**	**507,643**	**3,699,303**	**1,458,148**	**129,643**	**11,228**	**143,001**
CLASE 541920 SERVICIOS DE FOTOGRAFÍA	6,192	13,105	146,464	1,166,330	397,774	30,675	4,467	38,240
SUBRAMA 812910 SERVICIOS DE REVELADO DE FOTOGRAFÍAS	4,803	13,961	360,179	2,432,919	920,462	98,471	6,871	102,845
CLASE 519121 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO	15	52	510	380	48	9	0	16
MÚSICA, PRODUCCIONES TEATRALES Y OPERAS	**11,750**	**63,239**	**1,885,218**	**17,317,304**	**6,388,669**	**316,113**	**123,680**	**339,799**
CLASE 334610 FABRICACIÓN Y REPRODUCCIÓN DE MEDIOS MAGNÉTICOS Y ÓPTICOS	38	5,077	880,940	3,591,475	1,754,946	64,228	4,038	56,350
CLASE 435311 COMERCIO AL POR MAYOR DE DISCOS Y CASETES	193	1,802	89,608	1,700,083	831,487	5,389	22,981	27,837
CLASE 465212 COMERCIO AL POR MENOR DE DISCOS Y CASETES	7,457	15,606	171,182	1,529,836	1,028,224	30,046	28,135	66,754
CLASE 512210 PRODUCTORAS DISCOGRÁFICAS	12	98	3,624	40,986	23,501	1,825	-20	1,000
CLASE 512220 PRODUCCIÓN Y DISTRIBUCIÓN DE DISCOS Y CINTAS MAGNETOFÓNICAS	32	1,017	109,133	1,349,868	872,418	5,786	33,022	36,236
CLASE 512230 EDITORAS DE MÚSICA	81	461	73,362	335,728	191,730	4,468	46	4,366
CLASE 512240 GRABACIÓN DE DISCOS Y CINTAS MAGNETOFÓNICAS	90	367	13,054	89,849	40,540	4,405	1,501	5,506
CLASE 512290 OTROS SERVICIOS DE GRABACIÓN DEL SONIDO	84	438	13,881	96,307	40,219	2,030	128	2,996
CLASE 561590 OTROS SERVICIOS DE RESERVACIONES	485	6,087	146,105	4,988,156	1,380,645	27,880	13,300	41,603
SUBRAMA 711111 COMPAÑÍAS DE TEATRO	41	230	3,971	67,498	20,030	1,562	1	1,549
SUBRAMA 711121 COMPAÑÍAS DE DANZA	110	487	10,549	71,178	52,144	4,992	17	4,900
SUBRAMA 711131 CANTANTES Y GRUPOS MUSICALES	2,436	11,000	146,798	715,212	403,035	16,080	333	19,402
SUBRAMA 711191 OTRAS COMPAÑÍAS Y GRUPOS DE ESPECTÁCULOS ARTÍSTICOS	163	942	11,784	81,098	31,392	991	176	1,030
SUBRAMA 711311 PROMOTORES CON INSTALACIONES PARA LA PRESENTACIÓN DE ESPECTÁCULOS ARTÍSTICOS, DEPORTIVOS Y SIMILARES	398	6,136	941,946	2,298,714	1,259,265	25,437	30,806	73,536
SUBRAMA 711312 PROMOTORES DE ESPECTÁCULOS ARTÍSTICOS, DEPORTIVOS Y SIMILARES QUE NO CUENTAN CON INSTALACIONES PARA PRESENTARLOS	163	2,391	44,979	900,127	391,136	3,600	-22	3,836
SUBRAMA 711410 AGENTES Y REPRESENTANTES DE ARTISTAS, DEPORTISTAS Y SIMILARES	98	750	19,120	335,475	94,099	14,772	6,641	6,233
PELÍCULAS Y VIDEOS	**15,093**	**48,391**	**890,048**	**12,411,492**	**3,728,619**	**328,844**	**-65,875**	**183,880**
CLASE 512111 PRODUCCIÓN DE PELÍCULAS CINEMATOGRÁFICAS Y VIDEOS	41	354	15,640	150,047	80,744	7,138	991	3,530
CLASE 512112 PRODUCCIÓN DE VIDEOCLIPS, COMERCIALES Y OTROS MATERIALES AUDIOVISUALES	277	3,219	108,019	1,886,138	491,309	43,008	-782	42,325
CLASE 512120 DISTRIBUCIÓN DE PELÍCULAS CINEMATOGRÁFICAS, VIDEOS Y OTROS MATERIALES AUDIOVISUALES	33	455	98,698	1,638,330	826,031	2,884	47,333	94,856
CLASE 512130 EXHIBICIÓN DE PELÍCULAS CINEMATOGRÁFICAS, VIDEOS Y OTROS MATERIALES AUDIOVISUALES	526	11,586	146,419	5,262,460	996,340	99,152	13,195	115,237
CLASE 512190 SERVICIOS DE POSTPRODUCCIÓN Y OTROS SERVICIOS PARA LA INDUSTRIA FÍLMICA Y DEL VIDEO	30	1,049	34,144	179,814	98,074	1,559	398	3,550
SUBRAMA 532230 ALQUILER DE VIDEOCASETES Y DISCOS	14,181	28,675	213,611	2,065,500	1,187,383	154,419	29,000	103,772
CLASE 519121 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO	15	52	510	380	48	9	0	16
PRENSA Y LITERATURA	**38,788**	**188,647**	**10,554,494**	**54,717,384**	**27,829,300**	**1,471,784**	**784,815**	**3,235,799**
CLASE 323111 IMPRESIÓN DE LIBROS, PERIÓDICOS Y REVISTAS	806	22,502	1,361,466	7,770,014	3,464,339	197,223	92,501	280,244
CLASE 323119 IMPRESIÓN DE FORMAS CONTINUAS Y OTROS IMPRESOS	13,119	77,734	3,803,405	16,457,383	7,941,346	854,269	271,885	996,251

Source: INEGI

APPENDIX 1. Core Copyright Industries in Mexico

Tabla 2: **CORE, 2003**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
CLASE 323120 INDUSTRIAS CONEXAS A LA IMPRESION	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	33,683
CLASE 433420 COMERCIO AL POR MAYOR DE LIBROS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	73,264
CLASE 433430 COMERCIO AL POR MAYOR DE REVISTAS Y PERIODICOS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	45,253
CLASE 465312 COMERCIO AL POR MENOR DE LIBROS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLASE 465313 COMERCIO AL POR MENOR DE PERIODICOS Y REVISTAS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLASE 511111 EDICION DE PERIODICOS NO INTEGRADA CON LA IMPRESION, EXCEPTO A TRAVES DE INTERNET	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	4,879
CLASE 511121 EDICION DE REVISTAS Y OTRAS PUBLICACIONES PERIODICAS NO INTEGRADA CON LA IMPRESION, EXCEPTO A TRAVES DE INTERNET	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	12,252
CLASE 511112 EDICION DE PERIODICOS INTEGRADA CON LA IMPRESION	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLASE 511122 EDICION DE REVISTAS Y OTRAS PUBLICACIONES PERIODICAS INTEGRADA CON LA IMPRESION	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	20,443
CLASE 511131 EDICION DE LIBROS NO INTEGRADA CON LA IMPRESION, EXCEPTO A TRAVES DE INTERNET	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	25,051
CLASE 511132 EDICION DE LIBROS INTEGRADA CON LA IMPRESION	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	72,264
CLASE 511142 EDICION DE DIRECTORIOS Y DE LISTAS DE CORREO INTEGRADA CON LA IMPRESION	5	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	[illegible]
CLASE 511192 EDICION DE OTROS MATERIALES INTEGRADA CON LA IMPRESION	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	12,431
CLASE 519110 AGENCIAS NOTICIOSAS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLASE 519121 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	[illegible]
CLASE 541930 SERVICIOS DE TRADUCCION E INTERPRETACION	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	518
CLASE 561410 SERVICIOS DE PREPARACION DE DOCUMENTOS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	4,120
RADIO Y TELEVISION	**3,066**	**54,273**	**3,503,779**	**41,218,440**	**23,037,017**	**1,888,814**	**63,491**	**1,052,800**
CLASE 512111 PRODUCCION DE PROGRAMAS PARA LA TELEVISION	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	751,279
CLASE 515110 TRANSMISION DE PROGRAMAS DE RADIO, EXCEPTO A TRAVES DE INTERNET	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLASE 515120 TRANSMISION DE PROGRAMAS DE TELEVISION, EXCEPTO A TRAVES DE INTERNET	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLASE 515210 PRODUCCION DE PROGRAMACION DE CANALES PARA SISTEMAS DE TELEVISION POR CABLE O SATELITALES, EXCEPTO A TRAVES DE INTERNET	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLASE 517510 DISTRIBUCION POR SUSCRIPCION DE PROGRAMAS DE TELEVISION, EXCEPTO A TRAVES DE INTERNET	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
CLASE 561490 OTROS SERVICIOS DE APOYO SECRETARIAL Y SIMILARES	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	8,778
CLASE 519110 AGENCIAS NOTICIOSAS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
PUBLICIDAD	**4,235**	**60,201**	**3,000,442**	**18,155,887**	**8,053,354**	**314,793**	**28,329**	**359,882**
CLASE 339950 FABRICACION DE ANUNCIOS	607	9,046	274,267	2,252,178	728,404	67,738	22,294	90,832
CLASE 437210 COMERCIO AL POR MAYOR POR MEDIOS MASIVOS DE COMUNICACION Y OTROS MEDIOS	19	3,779	3,641	965,810	162,449	4,305	49	4,851
CLASE 541810 AGENCIAS DE PUBLICIDAD	1,263	25,231	1,550,651	8,890,150	3,535,710	73,846	8,632	50,159
CLASE 541830 AGENCIAS DE COMPRA DE MEDIOS A PETICION DEL CLIENTE	112	3,842	34,255	898,221	178,607	2,436	-3,325	116
CLASE 541840 AGENCIAS DE REPRESENTACION DE MEDIOS	232	5,240	462,722	4,328,270	1,764,011	110,847	3	110,849
CLASE 541850 AGENCIAS DE ANUNCIOS PUBLICITARIOS	509	3,394	99,820	1,283,813	357,332	8,400	2,775	11,230
CLASE 541860 AGENCIAS DE PUBLICIDAD QUE OPERAN POR CORREO DIRECTO	47	874	63,213	117,612	54,750	1,268	574	1,842
CLASE 541870 DISTRIBUCION DE MATERIAL PUBLICITARIO	72	4,085	167,071	480,185	308,198	5,077	270	1,347
CLASE 541890 OTROS SERVICIOS DE PUBLICIDAD	3,193	12,201	367,002	1,934,013	889,644	59,486	9,081	59,347
SOCIEDADES DE GESTIÓN COLECTIVA	**108**	**1,840**	**164,049**	**405,248**	**-14,206**	**2,891**	**-16**	**3,855**
SUBRAMA 813114 FEDERACIONES Y OTRAS ASOCIACIONES REGULADORAS DE ACTIVIDADES RECREATIVAS	108	1,840	164,049	405,248	-14,206	2,891	-16	3,855
TOTAL INDS.BÁSICAS	**97,186**	**654,218**	**12,793,750**	**173,030,842**	**84,135,840**	**5,402,223**	**1,071,224**	**6,473,537**
TOTAL NACIONAL CENSO INDUSTRIAL	**3,005,157**	**16,239,536**	**838,643,615**	**6,308,268,832**	**3,209,275,859**	**308,082,231**	**74,844,824**	**342,527,046**

Source: INEGI

APPENDIX 2. Interdependent Copyright Industries in Mexico

Tabla 1: **INTERDEPENDENT 1998**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
INTERDEPENDIENTE: COMPUTADORAS Y EQUIPO	**6,433**	**134,539**	**6,372,535**	**96,496,569**	**29,857,649**	**2,894,269**	**3,039,529**	**5,803,898**
CLASE 384101 FABRICACIÓN DE COMPUTADORAS Y EQUIPO PERIFÉRICO	150	41,860	2,210,071	48,665,227	6,888,637	2,070,921	1,463,115	3,334,036
CLASE 489411 COMERCIO AL POR MAYOR DE EQUIPO Y ACCESORIOS DE COMPUTO	1,223	21,671	1,536,763	31,049,430	16,263,069	358,136	1,058,543	1,416,082
CLASE 489211 COMERCIO AL POR MENOR DE COMPUTADORAS Y SUS ACCESORIOS	4,382	22,242	690,293	4,343,074	3,017,825	128,753	385,857	514,710
SUBRAMA 53242 ALQUILER DE EQUIPO DE COMPUTO Y DE OTRAS MAQUINAS Y MOBILIARIO DE OFICINA	561	2,424	53,553	560,396	331,225	62,898	7,530	70,428
CLASE 382101 FABRICACIÓN DE APARATOS TELEFÓNICOS	80	27,990	1,608,056	4,916,651	2,658,099	216,246	122,211	338,459
CLASE 383201 FABRICACIÓN DE OTROS EQUIPOS DE COMUNICACIÓN	27	8,352	472,619	951,290	697,893	17,410	2,173	19,583
INTERDEPENDIENTE: ELECTRÓNICOS	**760**	**168,060**	**8,496,485**	**26,488,630**	**14,850,279**	**1,736,087**	**306,209**	**2,042,796**
CLASE 383010 FABRICACIÓN DE EQUIPO DE AUDIO Y DE VIDEO	34	43,065	2,216,885	8,170,751	4,371,253	687,628	78,750	766,384
CLASE 384401 FABRICACIÓN DE COMPONENTES ELECTRÓNICOS	352	88,239	4,238,205	12,523,028	6,624,658	606,632	267,364	873,996
SUBRAMA 53221 ALQUILER DE APARATOS ELÉCTRICOS Y ELECTRÓNICOS PARA EL HOGAR	327	1,308	29,663	334,876	72,596	141,170	28,947	170,117
CLASE 383201 FABRICACIÓN DE EQUIPO DE TRANSMISIÓN Y RECEPCIÓN DE SEÑALES DE RADIO, TELEVISIÓN Y CABLE	53	35,454	1,611,832	5,459,975	2,521,773	301,157	-68,858	232,299
INTERDEPENDIENTES: FOTOCOPIADORAS	**6,032**	**17,282**	**455,734**	**4,212,711**	**1,252,103**	**399,226**	**113,942**	**513,168**
CLASE 383107 FABRICACIÓN DE MAQUINAS FOTOCOPIADORAS	3	2,182	243,861	2,919,620	726,238	11,369	55,764	67,133
CLASE 561430 SERVICIOS DE FOTOCOPIADO, FAX Y AFINES	6,029	15,100	211,873	1,293,091	525,865	387,857	58,178	446,035
INTERDEPENDIENTES: FOTOGRAFÍA Y CINE	**1,402**	**14,066**	**1,301,328**	**8,165,775**	**5,047,760**	**435,013**	**1,128,086**	**1,563,609**
CLASE 333311 FABRICACIÓN DE APARATOS FOTOGRÁFICOS	3	1,339	89,203	1,203,389	522,801	111,361	57,580	168,941
CLASE 489511 COMERCIO AL POR MAYOR DE EQUIPO DE TELECOMUNICACIONES, FOTOGRAFÍA Y CINEMATOGRAFÍA	503	9,012	1,100,802	7,296,031	4,063,297	296,576	1,036,348	1,332,924
CLASE 465213 COMERCIO AL POR MENOR DE EQUIPO Y MATERIAL FOTOGRÁFICO	896	3,715	111,323	666,355	361,662	27,056	34,688	61,744
INTERDEPENDIENTES: MATERIAL DE GRABACIÓN	**85**	**3,771**	**330,630**	**5,113,090**	**1,751,253**	**254,738**	**25,543**	**280,280**
CLASE 325992 FABRICACIÓN DE PELÍCULAS, PLACAS Y PAPEL FOTOSENSIBLE PARA FOTOGRAFÍA	24	1,694	138,902	3,443,836	1,200,025	204,999	-24,358	180,641
CLASE 325910 FABRICACIÓN DE TINTAS PARA IMPRESIÓN	61	2,077	191,728	1,669,254	551,228	49,739	49,900	99,639
INTERDEPENDIENTES: INSTRUMENTOS MUSICALES	**1,202**	**4,962**	**137,948**	**700,280**	**441,625**	**29,206**	**86,636**	**115,842**
CLASE 339991 FABRICACIÓN Y ENSAMBLE DE INSTRUMENTOS MUSICALES	432	2,621	86,203	198,209	118,883	5,318	423	5,741
CLASE 465215 COMERCIO AL POR MENOR DE INSTRUMENTOS MUSICALES	770	2,341	51,745	502,071	322,742	23,888	86,213	110,111
INTERDEPENDIENTE: PAPEL	**64,613**	**183,843**	**6,153,094**	**56,055,135**	**20,226,810**	**3,482,227**	**1,889,464**	**4,361,691**
CLASE 322110 FABRICACIÓN DE CELULOSA	361	25,613	2,081,062	23,245,097	6,666,847	1,068,107	476,611	1,544,718
CLASE 322121 FABRICACIÓN DE PAPEL EN PLANTAS INTEGRADAS	-	-	-	-	-	-	-	-
CLASE 322122 FABRICACIÓN DE PAPEL A PARTIR DE CELULOSA	66	20,961	1,813,493	19,385,606	5,754,699	914,455	430,363	1,344,818
CLASE 322132 FABRICACIÓN DE CARTÓN Y CARTONCILLO A PARTIR DE CELULOSA	173	4,652	297,560	2,860,001	909,146	153,652	46,248	199,900
CLASE 322299 FABRICACIÓN DE OTROS PRODUCTOS DE PAPEL Y CARTÓN	1,333	6,375	141,268	1,267,455	397,859	55,183	50,498	105,681
CLASE 333293 FABRICACIÓN DE MAQUINARIA Y EQUIPO PARA LA IMPRESIÓN	31	299	12,927	49,040	24,259	3,809	542	4,351
CLASE 339940 FABRICACIÓN DE ARTÍCULOS Y ACCESORIOS PARA ESCRITURA, PINTURA, DIBUJO Y ACTIVIDADES DE OFICINA	324	14,083	765,844	3,404,628	1,631,158	112,507	117,403	229,910
CLASE 433410 COMERCIO AL POR MAYOR DE ARTÍCULOS DE PAPELERÍA	1,110	12,044	415,528	2,208,057	1,559,621	47,851	289,968	337,819
CLASE 465311 COMERCIO AL POR MENOR DE ARTÍCULOS DE PAPELERÍA	61,213	104,646	526,509	5,041,309	2,777,388	103,026	467,261	570,287
CLASE 322230 FABRICACIÓN DE PRODUCTOS DE PAPELERÍA	79	4,650	168,296	842,373	306,231	23,637	20,570	44,207
TOTAL INTERDEPENDIENTES	**80,542**	**526,239**	**23,466,774**	**182,222,369**	**74,067,178**	**8,101,366**	**6,599,818**	**14,701,284**

Source: INEGI

APPENDIX 2. Interdependent Copyright Industries in Mexico

Tabla 2: **INTERDEPENDENT 2003**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
INTERDEPENDIENTE: COMPUTADORAS Y EQUIPO	**8,831**	**117,309**	**7,660,839**	**64,260,782**	**28,791,427**	**843,866**	**361,833**	**935,596**
CLASE [illegible] FABRICACIÓN DE COMPUTADORAS Y EQUIPO PERIFÉRICO	95	41,063	3,621,875	33,633,266	8,581,135	495,654	-236,200	259,254
CLASE [illegible] COMERCIO AL POR MAYOR DE EQUIPO Y ACCESORIOS DE CÓMPUTO	854	17,256	1,427,842	16,219,030	12,593,096	11,878	222,788	214,436
CLASE [illegible] COMERCIO AL POR MENOR DE COMPUTADORAS Y SUS ACCESORIOS	6,206	26,819	1,063,280	3,091,929	3,073,831	93,080	285,141	381,127
SUBRAMA [illegible] ALQUILER DE EQUIPO DE CÓMPUTO Y DE OTRAS MÁQUINAS Y MOBILIARIO DE OFICINA	1,066	4,235	67,458	467,758	330,182	30,834	3,695	22,529
CLASE [illegible] FABRICACIÓN DE OTROS EQUIPOS DE COMUNICACIÓN	36	9,896	935,873	4,339,604	1,994,052	14,108	4,231	18,294
CLASE [illegible] FABRICACIÓN DE APARATOS TELEFÓNICOS	26	10,050	618,507	3,008,883	1,221,444	12,746	-10,852	-148
INTERDEPENDIENTE: ELECTRÓNICOS	**660**	**177,379**	**13,069,160**	**97,437,746**	**31,733,578**	**391,947**	**175,833**	**563,773**
CLASE [illegible] FABRICACIÓN DE EQUIPO DE AUDIO Y DE VIDEO	72	54,779	3,525,116	23,821,238	13,543,852	147,135	823	147,843
CLASE [illegible] FABRICACIÓN DE COMPONENTES ELECTRÓNICOS	372	103,360	8,591,832	28,684,060	17,164,443	209,535	86,641	296,226
SUBRAMA [illegible] ALQUILER DE APARATOS ELÉCTRICOS Y ELECTRÓNICOS PARA EL HOGAR	202	477	4,080	25,685	20,892	2,287	70	2,026
CLASE [illegible] FABRICACIÓN DE EQUIPO DE TRANSMISIÓN Y RECEPCIÓN DE SEÑALES DE RADIO, TELEVISIÓN Y CABLE	36	18,767	977,271	4,890,081	2,003,291	33,593	84,233	117,277
INTERDEPENDIENTES: FOTOCOPIADORAS	**23,801**	**50,000**	**333,000**	**4,065,201**	**3,279,618**	**387,857**	**37,061**	**415,818**
CLASE [illegible] FABRICACIÓN DE MÁQUINAS FOTOCOPIADORAS	7	3,259	13,467	957,887	461,202	0	0	0
CLASE [illegible] SERVICIOS DE FOTOCOPIADO, FAX Y AFINES	23,798	46,842	319,890	4,274,355	1,808,416	387,857	37,061	415,819
INTERDEPENDIENTES: FOTOGRAFÍA Y CINE	**1,433**	**15,876**	**1,323,914**	**8,669,133**	**6,355,647**	**237,730**	**148,313**	**376,093**
CLASE [illegible] FABRICACIÓN DE APARATOS FOTOGRÁFICOS	6	2,571	373,810	3,311,688	3,328,202	157,537	20,734	168,261
CLASE [illegible] COMERCIO AL POR MAYOR DE EQUIPO DE TELECOMUNICACIONES, FOTOGRAFÍA Y CINEMATOGRAFÍA	467	7,996	902,556	4,519,236	3,456,837	49,091	53,887	101,978
CLASE 465211 COMERCIO AL POR MENOR DE EQUIPO Y MATERIAL FOTOGRÁFICO	959	5,313	139,629	594,209	520,318	22,132	84,072	106,206
INTERDEPENDIENTES: MATERIAL DE GRABACIÓN	**80**	**4,022**	**604,796**	**8,400,907**	**1,918,837**	**-20,944**	**211,353**	**171,407**
CLASE 325992 FABRICACIÓN DE PELÍCULAS, PLACAS Y PAPEL FOTOSENSIBLE PARA FOTOGRAFÍA	25	1,868	283,459	3,259,683	1,217,259	-36,189	193,057	136,868
CLASE 325910 FABRICACIÓN DE TINTAS PARA IMPRESIÓN	55	2,254	321,337	2,203,225	698,826	14,245	18,286	34,539
INTERDEPENDIENTES: INSTRUMENTOS MUSICALES	**2,020**	**7,740**	**308,183**	**1,379,288**	**916,723**	**14,209**	**83,379**	**76,648**
CLASE 339991 FABRICACIÓN Y ENSAMBLE DE INSTRUMENTOS MUSICALES	379	2,189	128,008	378,278	255,264	2,698	3,051	3,107
CLASE 465312 COMERCIO AL POR MENOR DE INSTRUMENTOS MUSICALES	1,641	5,551	150,284	1,021,980	668,259	12,313	51,328	73,541
INTERDEPENDIENTE: PAPEL	**82,179**	**213,469**	**5,815,260**	**61,209,137**	**26,051,849**	**1,289,819**	**853,661**	**2,913,260**
CLASE 322110 FABRICACIÓN DE CELULOSA	4	38	1,800	14,024	3,845	0	0	0
CLASE 322121 FABRICACIÓN DE PAPEL EN PLANTAS INTEGRADAS	6	38	1,614	190	-501	0	0	0
CLASE 322122 FABRICACIÓN DE PAPEL A PARTIR DE CELULOSA	79	15,849	1,713,018	27,683,699	8,000,259	993,931	183,303	1,179,434
CLASE 322132 FABRICACIÓN DE CARTÓN Y CARTONCILLO A PARTIR DE CELULOSA	46	4,372	295,809	3,647,861	957,370	125,078	68,206	193,278
CLASE 322299 FABRICACIÓN DE OTROS PRODUCTOS DE PAPEL Y CARTÓN	1,254	7,130	395,234	1,877,262	836,289	60,297	24,249	80,841
CLASE 333293 FABRICACIÓN DE MAQUINARIA Y EQUIPO PARA LA IMPRESIÓN	38	230	11,304	41,584	31,607	381	917	1,298
CLASE 339940 FABRICACIÓN DE ARTÍCULOS Y ACCESORIOS PARA ESCRITURA, PINTURA, DIBUJO Y ACTIVIDADES DE OFICINA	267	15,350	1,257,665	4,888,631	2,346,776	8,887	61,237	69,894
CLASE 435910 COMERCIO AL POR MAYOR DE ARTÍCULOS DE PAPELERÍA	891	13,742	845,877	5,453,297	3,277,884	61,753	134,857	164,744
CLASE 465311 COMERCIO AL POR MENOR DE ARTÍCULOS DE PAPELERÍA	79,214	134,633	1,273,201	7,391,633	5,289,175	403,139	402,801	804,842
CLASE 322230 FABRICACIÓN DE PRODUCTOS DE PAPELERÍA	157	5,256	324,278	3,009,812	1,653,836	28,132	16,061	45,129
TOTAL INTERDEPENDIENTES	**119,014**	**593,849**	**31,398,844**	**313,038,250**	**91,634,879**	**3,335,841**	**1,735,889**	**5,071,837**

Source: INEGI

APPENDIX 3. Partial Copyright Industries in Mexico

Tabla 1: **PARTIAL 1998**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES (MILES DE PESOS CORRIENTES)	PRODUCCIÓN BRUTA TOTAL (MILES DE PESOS CORRIENTES)	VALOR AGREGADO CENSAL BRUTO (MILES DE PESOS CORRIENTES)	FORMACIÓN BRUTA DE CAPITAL FIJO (MILES DE PESOS CORRIENTES)	VARIACIÓN TOTAL DE EXISTENCIAS (MILES DE PESOS CORRIENTES)	CAPITAL (MILES DE PESOS CORRIENTES)
PARCIALES: ARQUITECTURA	**60,357**	**208,231**	**4,327,632**	**35,879,286**	**18,711,587**	**967,512**	**2,238,273**	**3,205,785**
SUBRAMA 23829 OTRAS INSTALACIONES Y EQUIPAMIENTO EN CONSTRUCCIONES								0
CLASE 332320 FABRICACIÓN DE PRODUCTOS DE HERRERÍA	36,584	80,005	774,867	7,139,021	2,768,021	88,756	94,644	183,360
CLASE 434211 COMERCIO AL POR MAYOR DE CEMENTO, TABIQUE Y GRAVA	16,811	79,253	1,608,410	12,857,815	8,816,596	388,350	1,808,801	2,196,151
CLASE 434219 COMERCIO AL POR MAYOR DE OTROS MATERIALES PARA LA CONSTRUCCIÓN, EXCEPTO DE MADERA	1,291	8,439	260,152	2,017,347	1,493,888	49,184	264,926	314,110
CLASE 541310 SERVICIOS DE ARQUITECTURA	4,404	26,461	978,244	6,860,415	3,579,794	153,612	52,898	206,510
CLASE 541320 SERVICIOS DE ARQUITECTURA DE PAISAJE Y URBANISMO	132	782	27,320	131,777	93,715	24,484	2,643	27,127
CLASE 541330 SERVICIOS DE INGENIERÍA	459	5,351	319,509	3,383,458	1,873,228	91,352	8,445	99,797
CLASE 541350 SERVICIOS DE INSPECCIÓN DE EDIFICIOS	108	1,157	58,452	290,463	117,866	6,664	-702	5,962
CLASE 541360 SERVICIOS DE LEVANTAMIENTO GEOFÍSICO	62	4,095	242,581	2,631,406	1,014,834	159,474	7,564	167,038
CLASE 541370 SERVICIOS DE ELABORACIÓN DE MAPAS	144	1,100	29,154	138,840	73,288	2,254	30	2,284
CLASE 541420 DISEÑO INDUSTRIAL	104	888	28,943	229,844	80,161	2,422	924	3,346
ARTÍCULOS DEL HOGAR	**37,785**	**234,710**	**7,035,254**	**71,408,827**	**28,439,994**	**3,595,861**	**4,124,005**	**7,715,866**
CLASE 313240 FABRICACIÓN DE TELAS DE PUNTO	203	7,089	280,057	3,377,101	931,225	137,075	164,889	301,964
CLASE 321920 FABRICACIÓN DE PRODUCTOS PARA EMBALAJE Y ENVASES DE MADERA	1,358	10,915	208,978	1,872,538	582,515	30,473	29,104	59,577
CLASE 327111 FABRICACIÓN DE ARTÍCULOS DE ALFARERÍA, PORCELANA Y LOZA	8,436	29,120	257,375	1,494,287	595,202	-71,909	33,041	-38,868
CLASE 327212 FABRICACIÓN DE ESPEJOS	33	786	35,999	236,380	93,395	33,791	6,074	39,865
CLASE 327215 FABRICACIÓN DE ARTÍCULOS DE VIDRIO DE USO DOMÉSTICO	331	11,867	502,266	2,118,756	980,483	197,783	54,317	252,100
CLASE 327219 FABRICACIÓN DE OTROS PRODUCTOS DE VIDRIO	511	5,219	199,069	861,980	371,363	9,976	10,762	20,738
CLASE 331220 FABRICACIÓN DE OTROS PRODUCTOS DE HIERRO Y ACERO DE MATERIAL COMPRADO	70	14,244	1,891,701	35,037,487	8,893,246	1,507,447	961,364	2,468,811
CLASE 332212 FABRICACIÓN DE UTENSILIOS DE COCINA METÁLICOS	180	9,548	570,285	3,335,875	1,294,368	423,008	-20,539	402,469
CLASE 462210 COMERCIO AL POR MENOR EN TIENDAS DEPARTAMENTALES	695	68,551	2,755,329	11,615,352	7,299,269	969,827	959,370	1,929,197
CLASE 466112 COMERCIO AL POR MENOR DE ENSERES ELECTRODOMÉSTICOS MENORES Y APARATOS DE LÍNEA BLANCA	9,206	37,556	940,571	7,911,757	5,371,174	117,543	1,050,866	1,168,409
CLASE 466113 COMERCIO AL POR MENOR DE CRISTALERÍA, LOZA Y UTENSILIOS DE COCINA	8,951	16,915	149,090	1,464,434	1,020,281	29,134	179,084	208,218
CLASE 466319 COMERCIO AL POR MENOR DE OTROS ARTÍCULOS PARA LA DECORACIÓN DE INTERIORES	5,345	11,253	107,758	676,838	477,823	11,398	58,135	69,533
SUBRAMA 53229 ALQUILER DE OTROS ARTÍCULOS PARA EL HOGAR	4,176	11,547	138,776	1,487,792	530,750	200,315	637,538	837,853
JOYERÍA Y MONEDAS	**12,050**	**43,728**	**940,476**	**5,751,827**	**3,230,088**	**117,057**	**655,110**	**772,167**
CLASE 339911 ACUÑACIÓN E IMPRESIÓN DE MONEDAS	7	718	150,069	554,376	122,687	14,996	2,178	17,174
CLASE 339912 ORFEBRERÍA Y JOYERÍA DE METALES Y PIEDRAS PRECIOSOS	2,087	9,818	195,571	1,172,266	476,782	25,272	39,224	64,496
CLASE 339913 JOYERÍA DE METALES Y PIEDRAS NO PRECIOSOS Y DE OTROS MATERIALES	491	4,095	82,555	336,149	163,421	6,174	8,481	14,655
CLASE 339914 METALISTERÍA DE METALES NO PRECIOSOS	683	4,434	118,733	615,079	348,100	7,655	22,766	30,421
CLASE 433220 COMERCIO AL POR MAYOR DE ARTÍCULOS DE JOYERÍA Y OTROS ACCESORIOS DE VESTIR	918	3,865	116,257	1,197,582	887,207	14,003	323,077	337,080
CLASE 465112 COMERCIO AL POR MENOR DE ARTÍCULOS DE JOYERÍA Y RELOJES	8,764	19,797	271,203	1,876,385	1,232,791	48,957	259,384	308,341
OTRAS ARTESANÍAS	**14,500**	**26,173**	**198,466**	**1,373,719**	**949,710**	**22,593**	**102,383**	**134,976**
CLASE 465914 COMERCIO AL POR MENOR DE ARTESANÍAS	14,500	26,173	198,466	1,373,719	949,710	22,593	102,383	134,976
JUGUETES Y JUEGOS	**10,849**	**66,703**	**1,587,309**	**8,299,166**	**5,077,880**	**163,999**	**659,044**	**843,042**
CLASE 336992 FABRICACIÓN DE BICICLETAS Y TRICICLOS	101	5,835	225,836	1,496,808	576,280	42,797	18,395	61,192
CLASE 339920 FABRICACIÓN DE ARTÍCULOS DEPORTIVOS	1,001	13,198	397,480	1,603,624	773,218	32,611	18,843	51,454
CLASE 339930 FABRICACIÓN DE JUGUETES	1,278	16,598	529,320	2,241,265	1,008,256	65,664	184,512	250,176
CLASE 433112 COMERCIO AL POR MAYOR DE JUGUETES	352	2,927	96,300	1,666,383	1,110,302	7,869	83,649	91,518

APPENDIX 3. Partial Copyright Industries in Mexico

Tabla 1: **PARTIAL 1998**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
CLASE 433313 COMERCIO AL POR MAYOR DE ARTÍCULOS Y APARATOS DEPORTIVOS	152	943	36,761	388,762	150,311	4,215	4,094	8,309
CLASE 465212 COMERCIO AL POR MENOR DE JUGUETES Y BICICLETAS	10,380	18,713	160,109	1,103,321	617,157	20,737	232,776	253,513
CLASE 465214 COMERCIO AL POR MENOR DE ARTÍCULOS Y APARATOS DEPORTIVOS	3,577	6,481	141,383	900,003	576,456	10,100	116,775	126,881
MUEBLES	**44,554**	**221,723**	**5,126,774**	**36,244,210**	**17,951,633**	**818,503**	**2,064,879**	**2,883,382**
CLASE 337110 FABRICACIÓN DE COCINAS								0
CLASE 337120 FABRICACIÓN DE MUEBLES, EXCEPTO COCINAS Y MUEBLES DE OFICINA Y ESTANTERÍA	26,130	160,400	3,544,598	21,078,115	7,984,812	591,806	599,566	1,191,262
CLASE 337210 FABRICACIÓN DE MUEBLES DE OFICINA Y ESTANTERÍA								0
CLASE 435412 COMERCIO AL POR MAYOR DE MOBILIARIO Y EQUIPO DE OFICINA	1,535	12,477	680,594	8,154,792	5,536,000	83,998	656,490	740,488
CLASE 541410 DISEÑO Y DECORACIÓN DE INTERIORES	575	1,778	26,288	227,426	78,167	19,502	3,773	23,275
CLASE 466111 COMERCIO AL POR MENOR DE MUEBLES PARA EL HOGAR	14,314	46,999	875,334	6,783,877	4,350,694	123,307	805,050	928,357
MUSEOS	**224**	**2,387**	**86,975**	**314,306**	**142,138**	**38,033**	**4,892**	**42,925**
SUBRAMA 71211 MUSEOS	224	2,387	86,975	314,306	142,138	38,033	4,892	42,925
SUBRAMA 71212 SITIOS HISTÓRICOS								0
TAPETES Y TAPICES	**4,202**	**32,686**	**957,182**	**7,463,927**	**2,724,848**	**329,630**	**331,187**	**660,817**
CLASE 314110 TEJIDO Y CONFECCIÓN DE ALFOMBRAS Y TAPETES	1,028	5,613	193,654	2,036,675	699,010	75,553	86,249	161,802
CLASE 314120 CONFECCIÓN DE CORTINAS, BLANCOS Y SIMILARES	1,279	17,400	534,612	4,222,435	1,317,729	236,707	151,773	388,480
CLASE 337920 FABRICACIÓN DE PERSIANAS Y CORTINEROS	133	2,559	85,933	447,238	302,706	4,921	12,049	16,970
CLASE 466311 COMERCIO AL POR MENOR DE ALFOMBRAS, CORTINAS, TAPICES Y SIMILARES	1,625	6,313	121,438	719,730	486,050	12,186	81,201	93,387
CLASE 314999 FABRICACIÓN DE BANDERAS Y OTROS PRODUCTOS CONFECCIONADOS	37	700	21,345	38,849	28,353	263	65	178
VESTIDO, TEXTILES Y CALZADO	**209,672**	**991,861**	**18,677,209**	**97,292,821**	**46,247,618**	**5,110,308**	**4,582,463**	**9,692,771**
CLASE 313320 RECUBRIMIENTO DE TELAS	123	2,711	130,451	1,002,204	284,757	32,254	29,947	62,301
CLASE 314912 CONFECCIÓN DE PRODUCTOS DE TEXTILES RECUBIERTOS Y DE MATERIALES SUCEDÁNEOS	376	3,744	100,074	841,234	250,622	4,785	9,954	14,739
CLASE 315210 CONFECCIÓN DE ROPA DE CUERO, PIEL Y MATERIALES SUCEDÁNEOS	338	1,576	30,655	286,270	165,877	1,180	8,711	9,891
CLASE 315221 CONFECCIÓN EN SERIE DE ROPA INTERIOR Y DE DORMIR	816	55,566	1,602,287	5,971,091	2,350,754	145,225	147,018	292,243
CLASE 315222 CONFECCIÓN EN SERIE DE CAMISAS	932	30,918	745,548	2,551,288	1,171,244	92,355	32,950	125,305
CLASE 315223 CONFECCIÓN EN SERIE DE UNIFORMES	2,376	40,859	1,141,355	4,671,006	2,082,932	97,321	125,369	222,690
CLASE 315224 CONFECCIÓN EN SERIE DE ROPA ESPECIAL	1,300	2,532	10,407	88,049	34,779	1,189	6,311	7,500
CLASE 315225 CONFECCIÓN DE ROPA SOBRE MEDIDA	7,716	284,558	6,294,413	28,833,507	11,792,572	1,187,508		1,187,508
CLASE 315229 CONFECCIÓN DE OTRA ROPA DE MATERIALES TEXTILES	10,542	27,266	299,539	1,497,437	790,624	47,181		47,181
CLASE 315991 FABRICACIÓN DE SOMBREROS Y GORRAS	1,281	5,096	63,513	326,433	129,504	8,165	14,587	22,752
CLASE 315999 CONFECCIÓN DE OTROS ACCESORIOS DE VESTIR	252	2,708	66,520	300,404	121,656	11,321	17,593	28,914
CLASE 316211 FABRICACIÓN DE CALZADO CON CORTE DE PIEL Y CUERO	6,207	87,439	2,130,550	12,050,408	3,023,740	234,129	328,870	562,999
CLASE 316212 FABRICACIÓN DE CALZADO CON CORTE DE TELA	437	13,842	368,447	1,677,493	585,484	41,000	41,678	82,678
CLASE 316213 FABRICACIÓN DE CALZADO DE PLÁSTICO	157	3,570	102,327	627,109	223,586	36,463	-244	36,219
CLASE 316214 FABRICACIÓN DE CALZADO DE HULE	163	1,507	32,480	201,532	76,601	3,230	4,283	7,513
CLASE 316219 FABRICACIÓN DE HUARACHES Y CALZADO DE OTRO TIPO DE MATERIALES	1,202	4,821	93,084	526,008	200,032	9,110	9,093	18,203
CLASE 316991 FABRICACIÓN DE BOLSOS DE MANO, MALETAS Y SIMILARES	1,026	13,038	322,023	1,125,898	569,050	42,524	35,675	78,199
CLASE 316992 FABRICACIÓN DE ARTÍCULOS DE TALABARTERÍA	1,411	15,614	493,420	3,198,580	840,107	44,012	65,958	110,070
CLASE 432112 COMERCIO AL POR MAYOR DE BLANCOS	188	1,028	33,645	343,575	259,618	5,597	62,169	67,766
CLASE 432119 COMERCIO AL POR MAYOR DE OTROS PRODUCTOS TEXTILES	722	2,790	68,990	524,506	411,703	15,108	66,691	81,799
CLASE 432120 COMERCIO AL POR MAYOR DE ROPA	1,885	9,594	260,446	2,535,427	1,727,895	47,418	298,312	345,730
CLASE 432130 COMERCIO AL POR MAYOR DE CALZADO	1,339	5,971	160,415	1,656,413	1,145,314	35,132	178,502	213,634
CLASE 463111 COMERCIO AL POR MENOR DE TELAS	4,142	21,473	454,070	1,987,325	1,518,104	16,093	338,541	354,634
CLASE 463112 COMERCIO AL POR MENOR DE BLANCOS	2,054	4,539	52,226	506,607	374,422	9,253	76,180	85,433

APPENDIX 3. Partial Copyright Industries in Mexico

Tabla 1: **PARTIAL 1998**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
CLASE 463113 COMERCIO AL POR MENOR DE ARTICULOS DE MERCERIA Y BONETERIA	15,786	26,488	142,806	974,552	765,183	15,329	148,659	163,988
CLASE 463211 COMERCIO AL POR MENOR DE ROPA, EXCEPTO DE CUERO Y PIEL	92,610	170,202	1,433,118	11,250,631	7,517,306	2,009,213	1,532,688	4,140,899
CLASE 463212 COMERCIO AL POR MENOR DE ACCESORIOS DE VESTIR	5,302	8,804	41,299	307,264	230,339	6,817	29,263	38,080
CLASE 463213 COMERCIO AL POR MENOR DE ROPA DE CUERO Y PIEL Y DE OTROS ARTICULOS DE ESTOS MATERIALES	5,564	9,825	93,852	656,464	466,000	14,738	82,898	97,636
CLASE 463215 COMERCIO AL POR MENOR DE SOMBREROS	2,018	3,113	15,167	119,958	91,631	1,331	25,384	10,815
CLASE 463310 COMERCIO AL POR MENOR DE CALZADO	30,906	79,724	768,351	5,685,125	4,093,740	100,805	771,766	872,571
CLASE 315110 TEJIDO DE CALCETINES Y MEDIAS	369	18,208	646,244	3,281,348	1,048,433	103,949	17,102	121,051
CLASE 315192 TEJIDO DE ROPA EXTERIOR DE PUNTO	1,494	24,827	480,713	2,826,461	1,009,789	88,573	84,257	172,830
TOTAL PARCIALES	**401,193**	**1,827,302**	**39,837,277**	**265,087,899**	**124,571,496**	**11,183,496**	**14,762,236**	**25,946,733**

APPENDIX 3. Partial Copyright Industries in Mexico

Tabla 2: **PARTIAL 2003**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
PARCIALES: ARQUITECTURA	**59,883**	**241,772**	**8,244,105**	**59,543,613**	**31,843,190**	**1,610,044**	**1,574,434**	**3,184,468**
SUBRAMA 23829 OTRAS INSTALACIONES Y EQUIPAMIENTO EN CONSTRUCCIONES	118	1,025	41,900	2,334,810	863,217	2,814	5,140	7,954
CLASE 332320 FABRICACIÓN DE PRODUCTOS DE HERRERÍA	39,656	93,098	1,648,811	11,437,366	4,241,542	185,773	158,582	344,355
CLASE 434211 COMERCIO AL POR MAYOR DE CEMENTO, TABIQUE Y GRAVA	13,493	88,476	3,443,655	32,274,005	14,770,286	484,467	1,290,363	1,774,830
CLASE 434219 COMERCIO AL POR MAYOR DE OTROS MATERIALES PARA LA CONSTRUCCIÓN, EXCEPTO DE MADERA	2,158	12,745	452,263	2,714,876	2,051,435	61,344	98,019	159,363
CLASE 541310 SERVICIOS DE ARQUITECTURA	2,046	13,567	521,773	3,973,738	1,860,444	79,370	16,512	95,882
CLASE 541320 SERVICIOS DE ARQUITECTURA DE PAISAJE Y URBANISMO	75	1,048	51,251	305,242	157,881	14,823	41	14,864
CLASE 541330 SERVICIOS DE INGENIERÍA	2,058	21,823	1,582,834	8,617,471	5,760,939	144,115	20,252	164,367
CLASE 541350 SERVICIOS DE INSPECCIÓN DE EDIFICIOS	54	905	29,784	190,729	98,207	2,196	170	2,366
CLASE 541360 SERVICIOS DE LEVANTAMIENTO GEOFÍSICO	72	7,759	215,983	6,506,469	3,490,179	621,140	-14,638	606,502
CLASE 541370 SERVICIOS DE ELABORACIÓN DE MAPAS	131	1,446	64,210	283,837	155,584	15,834	-63	15,771
CLASE 541420 DISEÑO INDUSTRIAL	131	1,880	192,740	556,749	367,404	8,168	46	8,214
ARTÍCULOS DEL HOGAR	**40,537**	**314,585**	**13,018,002**	**99,840,714**	**43,557,510**	**2,072,906**	**2,588,171**	**4,661,077**
CLASE 313240 FABRICACIÓN DE TELAS DE PUNTO	116	15,490	875,099	4,865,008	1,469,720	94,829	-14,807	80,022
CLASE 321920 FABRICACIÓN DE PRODUCTOS PARA EMBALAJE Y ENVASES DE MADERA	985	8,618	357,238	2,285,796	945,853	47,443	65,944	113,387
CLASE 327111 FABRICACIÓN DE ARTÍCULOS DE ALFARERÍA, PORCELANA Y LOZA	7,226	22,327	232,600	1,300,108	624,670	-19,702	8,898	-10,804
CLASE 327212 FABRICACIÓN DE ESPEJOS	18	1,113	75,562	408,780	171,008	6,911	8,421	15,332
CLASE 327215 FABRICACIÓN DE ARTÍCULOS DE VIDRIO DE USO DOMÉSTICO	296	7,856	799,530	3,702,827	1,878,570	34,990	2,125	37,115
CLASE 327219 FABRICACIÓN DE OTROS PRODUCTOS DE VIDRIO	463	4,892	211,101	778,212	397,277	26,634	11,258	37,892
CLASE 331220 FABRICACIÓN DE OTROS PRODUCTOS DE HIERRO Y ACERO DE MATERIAL COMPRADO	118	13,823	1,835,588	33,273,319	9,027,097	1,020,837	414,998	1,435,835
CLASE 332212 FABRICACIÓN DE UTENSILIOS DE COCINA METÁLICOS	346	8,587	341,276	3,283,278	717,289	16,759	4,593	21,352
CLASE 462210 COMERCIO AL POR MENOR EN TIENDAS DEPARTAMENTALES	1,273	120,844	6,079,080	35,770,723	16,339,848	1,018,284	1,184,107	2,202,391
CLASE 466112 COMERCIO AL POR MENOR DE ENSERES ELECTRODOMÉSTICOS MENORES Y APARATOS DE LÍNEA BLANCA	15,363	60,841	1,521,954	13,017,689	9,232,315	285,674	580,495	294,811
CLASE 466113 COMERCIO AL POR MENOR DE CRISTALERÍA, LOZA Y UTENSILIOS DE COCINA	8,278	31,230	379,176	1,894,436	1,363,336	26,692	92,835	119,527
CLASE 466319 COMERCIO AL POR MENOR DE OTROS ARTÍCULOS PARA LA DECORACIÓN DE INTERIORES	3,967	14,095	232,740	1,057,392	745,341	22,126	26,886	49,012
SUBRAMA 53229 ALQUILER DE OTROS ARTÍCULOS PARA EL HOGAR	5,149	14,155	158,082	1,007,061	526,894	62,977	2,617	65,594
JOYERÍA Y MONEDAS	**17,714**	**57,900**	**1,033,867**	**8,797,636**	**5,381,246**	**156,025**	**224,982**	**381,007**
CLASE 339911 ACUÑACIÓN E IMPRESIÓN DE MONEDAS	4	749	218,805	650,529	324,894	10,343	-5,206	5,137
CLASE 339912 ORFEBRERÍA Y JOYERÍA DE METALES Y PIEDRAS PRECIOSOS	2,293	14,009	408,657	3,211,551	1,063,107	15,746	47,646	63,393
CLASE 339913 JOYERÍA DE METALES Y PIEDRAS NO PRECIOSOS Y DE OTROS MATERIALES	954	3,526	76,550	312,303	157,772	2,799	1,385	4,184
CLASE 339914 METALISTERÍA DE METALES NO PRECIOSOS	240	2,123	81,579	247,216	126,436	17,497	9,162	26,659
CLASE 433220 COMERCIO AL POR MAYOR DE ARTÍCULOS DE JOYERÍA Y OTROS ACCESORIOS DE VESTIR	679	3,718	153,449	1,402,465	1,090,258	10,876	57,585	68,461
CLASE 465112 COMERCIO AL POR MENOR DE ARTÍCULOS DE JOYERÍA Y RELOJES	13,745	33,685	593,831	3,723,181	2,328,799	68,664	114,407	183,071
OTRAS ARTESANÍAS	**14,099**	**29,746**	**247,423**	**1,358,345**	**1,107,816**	**22,727**	**62,238**	**84,965**
CLASE 465914 COMERCIO AL POR MENOR DE ARTESANÍAS	14,099	29,746	247,423	1,358,345	1,107,816	22,727	62,238	84,965
JUGUETES Y JUEGOS	**16,811**	**67,437**	**3,093,188**	**11,148,883**	**6,291,590**	**193,031**	**276,277**	**469,308**
CLASE 336992 FABRICACIÓN DE BICICLETAS Y TRICICLOS	60	3,534	234,239	1,802,422	718,273	-45,245	27,700	-17,545
CLASE 339920 FABRICACIÓN DE ARTÍCULOS DEPORTIVOS	1,079	11,262	547,793	1,294,555	770,492	28,780	19,947	48,727
CLASE 339930 FABRICACIÓN DE JUGUETES	564	12,731	666,155	3,099,501	1,255,628	130,694	13,164	143,858
CLASE 433312 COMERCIO AL POR MAYOR DE JUGUETES	381	3,835	84,816	1,303,939	836,314	23,176	59,323	82,499

APPENDIX 3. Partial Copyright Industries in Mexico

Tabla 2: **PARTIAL 2003**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
CLASE 433313 COMERCIO AL POR MAYOR DE ARTÍCULOS Y APARATOS DEPORTIVOS	137	1,100	36,727	323,804	208,608	1,335	5,055	6,300
CLASE 465212 COMERCIO AL POR MENOR DE JUGUETES Y BICICLETAS	9,798	20,450	216,234	1,471,502	1,030,374	31,672	87,467	119,139
CLASE 465254 COMERCIO AL POR MENOR DE ARTÍCULOS Y APARATOS DEPORTIVOS	4,701	13,435	307,320	1,862,666	1,358,901	21,019	63,621	85,240
MUEBLES	**39,594**	**222,236**	**7,439,628**	**39,766,479**	**20,053,593**	**784,632**	**836,043**	**1,620,674**
CLASE 337110 FABRICACIÓN DE COCINAS	1,300	8,680	337,600	1,859,840	771,891	62,211	6,236	68,447
CLASE 337120 FABRICACIÓN DE MUEBLES, EXCEPTO COCINAS Y MUEBLES DE OFICINA Y ESTANTERÍA	10,255	110,820	3,752,719	19,403,109	8,162,186	370,973	362,121	733,094
CLASE 337210 FABRICACIÓN DE MUEBLES DE OFICINA Y ESTANTERÍA	930	15,784	711,643	3,980,620	1,578,008	53,320	2,417	55,737
CLASE 435412 COMERCIO AL POR MAYOR DE MOBILIARIO Y EQUIPO DE OFICINA	1,270	12,690	506,414	2,575,100	1,776,087	86,068	110,039	196,107
CLASE 541410 DISEÑO Y DECORACIÓN DE INTERIORES	614	2,046	46,445	450,328	160,439	2,519	2,675	5,194
CLASE 466111 COMERCIO AL POR MENOR DE MUEBLES PARA EL HOGAR	16,447	72,207	3,002,801	11,406,648	7,608,082	209,541	352,554	562,095
MUSEOS	**148**	**2,118**	**158,695**	**468,729**	**182,622**	**21,107**	**393**	**21,500**
SUBRAMA 71211 MUSEOS	116	1,823	148,139	443,002	167,027	20,962	377	21,339
SUBRAMA 71212 SITIOS HISTÓRICOS	32	295	10,556	25,727	15,595	145	16	161
TAPETES Y TAPICES	**7,054**	**45,235**	**1,752,456**	**10,604,140**	**5,061,047**	**225,960**	**158,681**	**384,641**
CLASE 314110 TEJIDO Y CONFECCIÓN DE ALFOMBRAS Y TAPETES	3,652	7,064	124,504	774,349	304,700	18,414	4,742	23,156
CLASE 314120 CONFECCIÓN DE CORTINAS, BLANCOS Y SIMILARES	818	22,783	1,053,465	6,912,480	2,717,327	141,580	102,758	244,338
CLASE 337920 FABRICACIÓN DE PERSIANAS Y CORTINEROS	135	4,691	240,574	1,454,565	994,300	41,125	5,124	46,249
CLASE 466311 COMERCIO AL POR MENOR DE ALFOMBRAS, CORTINAS, TAPICES Y SIMILARES	2,353	9,055	248,472	1,217,087	870,239	24,348	45,167	69,515
CLASE 314999 FABRICACIÓN DE BANDERAS Y OTROS PRODUCTOS CONFECCIONADOS	96	1,655	85,441	245,659	174,481	493	890	1,383
VESTIDO, TEXTILES Y CALZADO	**213,891**	**1,008,474**	**28,840,498**	**138,460,448**	**71,410,680**	**2,625,973**	**2,517,013**	**5,142,986**
CLASE 313320 RECUBRIMIENTO DE TELAS	51	3,083	162,328	1,572,888	299,544	19,520	34,813	54,333
CLASE 314912 CONFECCIÓN DE PRODUCTOS DE TEXTILES RECUBIERTOS Y DE MATERIALES SUCEDÁNEOS	302	5,121	332,230	1,003,059	656,427	59,929	9,213	69,142
CLASE 315210 CONFECCIÓN DE ROPA DE CUERO, PIEL Y MATERIALES SUCEDÁNEOS	291	2,000	56,936	343,960	154,113	35,638	12,009	47,647
CLASE 315221 CONFECCIÓN EN SERIE DE ROPA INTERIOR Y DE DORMIR	426	44,913	2,003,430	6,902,578	4,156,709	49,339	116,898	166,237
CLASE 315222 CONFECCIÓN EN SERIE DE CAMISAS	625	20,832	782,112	2,340,168	1,198,615	42,453	15,782	58,235
CLASE 315223 CONFECCIÓN EN SERIE DE UNIFORMES	1,886	39,723	1,597,245	6,806,559	3,766,457	82,051	96,503	178,554
CLASE 315224 CONFECCIÓN EN SERIE DE ROPA ESPECIAL	646	2,507	46,355	205,872	100,797	9,018	2,078	11,096
CLASE 315225 CONFECCIÓN DE ROPA SOBRE MEDIDA	7,806	13,762	128,361	799,815	372,940	19,037	4,909	23,946
CLASE 315229 CONFECCIÓN DE OTRA ROPA DE MATERIALES TEXTILES	6,963	276,821	9,773,892	46,114,604	21,215,129	649,428	306,904	956,332
CLASE 315991 FABRICACIÓN DE SOMBREROS Y GORRAS	1,256	4,774	107,021	381,319	192,990	3,651	3,149	6,800
CLASE 315999 CONFECCIÓN DE OTROS ACCESORIOS DE VESTIR	353	2,758	73,793	553,140	256,584	7,513	4,454	11,967
CLASE 316211 FABRICACIÓN DE CALZADO CON CORTE DE PIEL Y CUERO	3,309	73,262	3,010,159	14,749,843	5,476,804	282,004	131,268	413,272
CLASE 316212 FABRICACIÓN DE CALZADO CON CORTE DE TELA	105	8,640	385,554	1,626,184	565,838	91,257	7,307	96,634
CLASE 316213 FABRICACIÓN DE CALZADO DE PLÁSTICO	190	3,066	132,649	862,410	250,146	25,869	8,072	34,841
CLASE 316214 FABRICACIÓN DE CALZADO DE HULE	109	2,210	86,538	307,398	114,164	6,030	7,558	13,588
CLASE 316219 FABRICACIÓN DE HUARACHES Y CALZADO DE OTRO TIPO DE MATERIALES	1,018	5,625	128,718	530,249	234,635	10,598	7,208	17,806
CLASE 316991 FABRICACIÓN DE BOLSOS DE MANO, MALETAS Y SIMILARES	558	4,417	146,404	749,872	343,143	6,158	9,350	15,508
CLASE 316992 FABRICACIÓN DE ARTÍCULOS DE TALABARTERÍA	1,125	7,667	281,788	1,644,092	634,382	26,870	28,019	54,889
CLASE 432112 COMERCIO AL POR MAYOR DE BLANCOS	119	982	33,843	267,967	167,717	4,676	25,100	29,776
CLASE 432119 COMERCIO AL POR MAYOR DE OTROS PRODUCTOS TEXTILES	563	3,359	136,481	726,910	483,440	9,497	-5,646	3,851
CLASE 432120 COMERCIO AL POR MAYOR DE ROPA	992	8,956	320,037	2,773,717	1,826,979	46,765	-41,300	5,465
CLASE 432130 COMERCIO AL POR MAYOR DE CALZADO	904	9,000	331,022	3,425,074	2,351,185	28,073	117,092	145,165
CLASE 463111 COMERCIO AL POR MENOR DE TELAS	4,110	38,966	811,643	3,827,925	1,954,918	21,037	168,734	189,771
CLASE 463112 COMERCIO AL POR MENOR DE BLANCOS	2,854	6,943	92,200	675,309	465,708	7,816	30,325	38,141

APPENDIX 3. Partial Copyright Industries in Mexico

Tabla 2: PARTIAL 2003
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
CLASE 463113 COMERCIO AL POR MENOR DE ARTICULOS DE MERCERIA Y BONETERIA	14,146	29,847	211,837	1,243,758	561,748	29,077	40,857	78,334
CLASE 463211 COMERCIO AL POR MENOR DE ROPA, EXCEPTO DE CUERO Y PIEL	106,816	231,528	2,706,671	20,283,527	13,083,404	729,804	762,012	1,491,818
CLASE 463212 COMERCIO AL POR MENOR DE ACCESORIOS DE VESTIR	5,407	10,824	115,041	733,380	520,023	14,857	34,045	48,902
CLASE 463213 COMERCIO AL POR MENOR DE ROPA DE CUERO Y PIEL Y DE OTROS ARTICULOS DE ESTOS MATERIALES	5,765	12,210	187,330	1,132,110	753,294	28,639	45,320	73,959
CLASE 463215 COMERCIO AL POR MENOR DE SOMBREROS	1,838	3,311	19,598	164,879	126,873	1,721	6,412	8,133
CLASE 463310 COMERCIO AL POR MENOR DE CALZADO	39,307	96,775	1,382,828	8,346,055	5,923,117	190,989	430,084	621,073
CLASE 315110 TEJIDO DE CALCETINES Y MEDIAS	189	10,769	540,286	2,955,101	1,280,374	45,398	19,971	65,369
CLASE 315192 TEJIDO DE ROPA EXTERIOR DE PUNTO	2,072	21,023	676,226	3,329,203	1,479,636	41,279	68,523	109,802
TOTAL PARCIALES	**410,533**	**1,089,887**	**61,335,863**	**361,029,976**	**184,789,294**	**7,711,405**	**8,038,221**	**15,749,626**

Source: INEGI

APPENDIX 4. Non-dedicated Support Copyright-Based Industries in Mexico

Tabla 1: **NON-DEDICATED, 1998**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
VENTAS AL MAYOREO Y MENUDEO	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	63,212
[illegible]								0
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	375,101
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	303,551
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	312,959
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	102,743
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	123,870
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	58,307
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	26,177
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	79,467
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	77,481
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	167,923
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	105,793
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	61,894
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	285,359
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	262,640
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,814,739
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	114,590
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	29,888
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	3,097
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	17,212
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	22,627
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	112,438
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2,228
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	339,050
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	58,814
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	31,830
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	13,048
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	453,448
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	15,089
TRANSPORTE EN GENERAL	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2,093,474
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	-108,007
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2,207,372
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]		276,477
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	3,124
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	28,224

Source: INEGI

APPENDIX 4. Non-dedicated Support Copyright-Based Industries in Mexico

Tabla 1: **NON-DEDICATED, 1998**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	2,210,033
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	92,268
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	28,584
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	1,362,975
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	1,461,233
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	883,432
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	83,623
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	47,157
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	14,260
[illegible]	-	-	-	-	-	-	-	-
[illegible]	[illegible]	[illegible]	[illegible]	0	[illegible]	[illegible]	0	244,005
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	18,288
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	15,227
[illegible]	3	[illegible]	272	[illegible]	[illegible]	[illegible]	0	0
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	238,490
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	107,733
[illegible]	-	-	-	-	-	-	-	-
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	67,326
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	123,949
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	833
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	4,549
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	31,884
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	746,550
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	189,409
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0	8,812
TELEFONIA E INTERNET								
[illegible]	-	-	-	-	-	-	-	-
[illegible]	-	-	-	-	-	-	-	-
[illegible]	-	-	-	-	-	-	-	-
[illegible]	-	-	-	-	-	-	-	-
[illegible]	-	-	-	-	-	-	-	-
TOTAL NO DEDICADAS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Source: INEGI

APPENDIX 4. Non-dedicated Support Copyright-Based Industries in Mexico

Tabla 2: **NON-DEDICATED, 2003**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
VENTAS AL MAYOREO Y MENUDEO	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	154,911
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	328,325
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,356,953
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	598,011
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	361,626
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	370,758
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	635,587
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	132,038
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	49,705
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	68,723
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	136,116
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	530,985
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	196,411
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	135,459
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	263,219
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2,627,536
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	3,480,244
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,202,059
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	175,143
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	20,269
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	132,103
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	43,782
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	340,281
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	33,737
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2,298,892
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	205,947
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	134,337
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	221,003
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	812,374
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	6,505
TRANSPORTE EN GENERAL	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	396,346
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,090,276
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,010,349
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	911,786
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	5,800
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	19,549

APPENDIX 4. Non-dedicated Support Copyright-Based Industries in Mexico

Tabla 2: **NON-DEDICATED, 2003**
(Thousands of pesos in nominal terms)

ENTIDAD FEDERATIVA, SECTOR, SUBSECTOR, RAMA Y SUBRAMA DE ACTIVIDAD	UNIDADES ECONÓMICAS	TOTAL DE PERSONAL EMPLEADO	TOTAL DE REMUNERACIONES	PRODUCCIÓN BRUTA TOTAL	VALOR AGREGADO CENSAL BRUTO	FORMACIÓN BRUTA DE CAPITAL FIJO	VARIACIÓN TOTAL DE EXISTENCIAS	CAPITAL
			(MILES DE PESOS CORRIENTES)					
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,683,478
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	13,793
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	70,569
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,214,606
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	2,105,268
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,291,217
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	204,525
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,366
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	20,167
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,357,734
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	182,872
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	91,880
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	5
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	1,617,008
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	6,290
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	389,372
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	181,804
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	156,069
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	67,485
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	61,029
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	300,494
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	273,736
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	43,863
TELEFONIA E INTERNET	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
TOTAL NO DEDICADAS	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

APPENDIX 5. List of Classes and Sub-Classes by Sector

CORE COPYRIGHT BASED INDUSTRIES
ARTES VISUALES Y GRÁFICAS
CLASE 435312 COMERCIO AL POR MAYOR DE ARTICULOS Y ACCESORIOS PARA DISEÑO Y PINTURA ARTISTICA
CLASE 466313 COMERCIO AL POR MENOR DE ANTIG_EDADES Y OBRAS DE ARTE
CLASE 541340 SERVICIOS DE DIBUJO
CLASE 541430 DISEÑO GRAFICO
CLASE 541490 DISEÑO DE MODAS Y OTROS DISEÑOS ESPECIALIZADOS
CLASE 611611 ESCUELAS DE ARTE PERTENECIENTES AL SECTOR PRIVADO
SUBRAMA 71151 ARTISTAS Y TECNICOS INDEPENDIENTES
SOFTWARE Y BASES DE DATOS
CLASE 511210 EDICION DE SOFTWARE, EXCEPTO A TRAVES DE INTERNET
CLASE 518210 PROCESAMIENTO ELECTRONICO DE INFORMACION, HOSPEDAJE DE PAGINAS WEB Y OTROS SERVICIOS RELACIONADOS
CLASE 541510 SERVICIOS DE CONSULTORIA EN COMPUTACION
SUBRAMA 71312 CASAS DE JUEGOS ELECTRONICOS
CLASE 511191 EDICION DE OTROS MATERIALES NO INTEGRADA CON LA IMPRESION, EXCEPTO A TRAVES DE INTERNET
CLASE 511141 EDICION DE DIRECTORIOS Y DE LISTAS DE CORREO NO INTEGRADA CON LA IMPRESION, EXCEPTO A TRAVES DE INTERNET
CLASE 516110 CREACION Y DIFUSION DE CONTENIDO EXCLUSIVAMENTE A TRAVES DE INTERNET
FOTOGRAFÍA
CLASE 541920 SERVICIOS DE FOTOGRAFIA
SUBRAMA 81291 SERVICIOS DE REVELADO DE FOTOGRAFIAS
CLASE 519121 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO
MÚSICA, PRODUCCIONES TEATRALES Y OPERAS
CLASE 334610 FABRICACION Y REPRODUCCION DE MEDIOS MAGNETICOS Y OPTICOS
CLASE 433311 COMERCIO AL POR MAYOR DE DISCOS Y CASETES
CLASE 465211 COMERCIO AL POR MENOR DE DISCOS Y CASETES
CLASE 512210 PRODUCTORAS DISCOGRAFICAS
CLASE 512220 PRODUCCION Y DISTRIBUCION DE DISCOS Y CINTAS MAGNETOFONICAS
CLASE 512230 EDITORAS DE MUSICA
CLASE 512240 GRABACION DE DISCOS Y CINTAS MAGNETOFONICAS
CLASE 512290 OTROS SERVICIOS DE GRABACION DEL SONIDO
CLASE 561590 OTROS SERVICIOS DE RESERVACIONES
SUBRAMA 71111 COMPAÑIAS DE TEATRO
SUBRAMA 71112 COMPAÑIAS DE DANZA
SUBRAMA 71113 CANTANTES Y GRUPOS MUSICALES
SUBRAMA 71119 OTRAS COMPAÑIAS Y GRUPOS DE ESPECTACULOS ARTISTICOS
SUBRAMA 71131 PROMOTORES CON INSTALACIONES PARA LA PRESENTACION DE ESPECTACULOS ARTISTICOS, DEPORTIVOS Y SIMILARES
SUBRAMA 71132 PROMOTORES DE ESPECTACULOS ARTISTICOS, DEPORTIVOS Y SIMILARES QUE NO CUENTAN CON INSTALACIONES PARA PRESENTARLOS
SUBRAMA 71141 AGENTES Y REPRESENTANTES DE ARTISTAS, DEPORTISTAS Y SIMILARES

APPENDIX 5. List of Classes and Sub-Classes by Sector

CORE COPYRIGHT BASED INDUSTRIES
PELÍCULAS Y VIDEOS
CLASE 512111 PRODUCCION DE PELICULAS CINEMATOGRAFICAS Y VIDEOS
CLASE 512113 PRODUCCION DE VIDEOCLIPS, COMERCIALES Y OTROS MATERIALES AUDIOVISUALES
CLASE 512120 DISTRIBUCION DE PELICULAS CINEMATOGRAFICAS, VIDEOS Y OTROS MATERIALES AUDIOVISUALES
CLASE 512130 EXHIBICION DE PELICULAS CINEMATOGRAFICAS, VIDEOS Y OTROS MATERIALES AUDIOVISUALES
CLASE 512190 SERVICIOS DE POSTPRODUCCION Y OTROS SERVICIOS PARA LA INDUSTRIA FILMICA Y DEL VIDEO
SUBRAMA 53223 ALQUILER DE VIDEOCASETES Y DISCOS
CLASE 519121 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO
PRENSA Y LITERATURA
CLASE 323111 IMPRESION DE LIBROS, PERIODICOS Y REVISTAS
CLASE 323119 IMPRESION DE FORMAS CONTINUAS Y OTROS IMPRESOS
CLASE 323120 INDUSTRIAS CONEXAS A LA IMPRESION
CLASE 433420 COMERCIO AL POR MAYOR DE LIBROS
CLASE 433430 COMERCIO AL POR MAYOR DE REVISTAS Y PERIODICOS
CLASE 465312 COMERCIO AL POR MENOR DE LIBROS
CLASE 465313 COMERCIO AL POR MENOR DE PERIODICOS Y REVISTAS
CLASE 511111 EDICION DE PERIODICOS NO INTEGRADA CON LA IMPRESION, EXCEPTO A TRAVES DE INTERNET
CLASE 511121 EDICION DE REVISTAS Y OTRAS PUBLICACIONES PERIODICAS NO INTEGRADA CON LA IMPRESION, EXCEPTO A TRAVES DE INTERNET
CLASE 511112 EDICION DE PERIODICOS INTEGRADA CON LA IMPRESION
CLASE 511122 EDICION DE REVISTAS Y OTRAS PUBLICACIONES PERIODICAS INTEGRADA CON LA IMPRESION
CLASE 511131 EDICION DE LIBROS NO INTEGRADA CON LA IMPRESION, EXCEPTO A TRAVES DE INTERNET
CLASE 511132 EDICION DE LIBROS INTEGRADA CON LA IMPRESION
CLASE 511142 EDICION DE DIRECTORIOS Y DE LISTAS DE CORREO INTEGRADA CON LA IMPRESION
CLASE 511192 EDICION DE OTROS MATERIALES INTEGRADA CON LA IMPRESION
CLASE 519110 AGENCIAS NOTICIOSAS
CLASE 519121 BIBLIOTECAS Y ARCHIVOS DEL SECTOR PRIVADO
CLASE 541930 SERVICIOS DE TRADUCCION E INTERPRETACION
CLASE 561410 SERVICIOS DE PREPARACION DE DOCUMENTOS
RADIOS Y TELEVISIÓN
CLASE 512112 PRODUCCION DE PROGRAMAS PARA LA TELEVISION
CLASE 515110 TRANSMISIÓN DE PROGRAMAS DE RADIO, EXCEPTO A TRAVES DE INTERNET
CLASE 515120 TRANSMISION DE PROGRAMAS DE TELEVISION, EXCEPTO A TRAVES DE INTERNET
CLASE 515210 PRODUCCION DE PROGRAMACION DE CANALES PARA SISTEMAS DE TELEVISION POR CABLE O SATELITALES, EXCEPTO A TRAVES DE INTERNET
CLASE 517510 DISTRIBUCION POR SUSCRIPCION DE PROGRAMAS DE TELEVISION, EXCEPTO A TRAVES DE INTERNET
CLASE 561490 OTROS SERVICIOS DE APOYO SECRETARIAL Y SIMILARES
CLASE 519110 AGENCIAS NOTICIOSAS
PUBLICIDAD
CLASE 339950 FABRICACION DE ANUNCIOS
CLASE 437210 COMERCIO AL POR MAYOR POR MEDIOS MASIVOS DE COMUNICACION Y OTROS MEDIOS
CLASE 541810 AGENCIAS DE PUBLICIDAD
CLASE 541830 AGENCIAS DE COMPRA DE MEDIOS A PETICION DEL CLIENTE
CLASE 541840 AGENCIAS DE REPRESENTACION DE MEDIOS
CLASE 541850 AGENCIAS DE ANUNCIOS PUBLICITARIOS
CLASE 541860 AGENCIAS DE PUBLICIDAD QUE OPERAN POR CORREO DIRECTO
CLASE 541870 DISTRIBUCION DE MATERIAL PUBLICITARIO
CLASE 541890 OTROS SERVICIOS DE PUBLICIDAD
SOCIEDADES DE GESTIÓN COLECTIVA
SUBRAMA 81314 FEDERACIONES Y OTRAS ASOCIACIONES REGULATORIAS DE ACTIVIDADES RECREATIVAS

APPENDIX 5. List of Classes and Sub-Classes by Sector

NON –CORE COPYRIGHT-BASED INDUSTRIES
INTERDEPENDIENTES
INTERDEPENDIENTE: COMPUTADORAS Y EQUIPO
CLASE 334110 FABRICACIÓN DE COMPUTADORAS Y EQUIPO PERIFÉRICO
CLASE 435411 COMERCIO AL POR MAYOR DE EQUIPO Y ACCESORIOS DE COMPUTO
CLASE 466211 COMERCIO AL POR MENOR DE COMPUTADORAS Y SUS ACCESORIOS
SUBRAMA 53242 ALQUILER DE EQUIPO DE COMPUTO Y DE OTRAS MAQUINAS Y MOBILIARIO DE OFICINA
CLASE 334290 FABRICACION DE OTROS EQUIPOS DE COMUNICACION
CLASE 334210 FABRICACION DE APARATOS TELEFÒNICOS
INTERDEPENDIENTE: ELECTRÓNICOS
CLASE 334310 FABRICACIÓN DE EQUIPO DE AUDIO Y DE VIDEO
CLASE 334410 FABRICACIÓN DE COMPONENTES ELECTRONICOS
SUBRAMA 53221 ALQUILER DE APARATOS ELECTRICOS Y ELECTRONICOS PARA EL HOGAR
CLASE 334220 FABRICACION DE EQUIPO DE TRANSMISION Y RECEPCION DE SEÑALES DE RADIO, TELEVISION Y CABLE
INTERDEPENDIENTES: FOTOCOPIADORAS
CLASE 333312 FABRICACION DE MAQUINAS FOTOCOPIADORAS
CLASE 561430 SERVICIOS DE FOTOCOPIADO, FAX Y AFINES
INTERDEPENDIENTES: FOTOGRAFÍA Y CINE
CLASE 333311 FABRICACION DE APARATOS FOTOGRÁFICOS
CLASE 435311 COMERCIO AL POR MAYOR DE EQUIPO DE TELECOMUNICACIONES, FOTOGRAFÍA Y CINEMATOGRAFÍA
CLASE 465213 COMERCIO AL POR MENOR DE EQUIPO Y MATERIAL FOTOGRÁFICO
INTERDEPENDIENTES: MATERIAL DE GRABACIÓN
CLASE 325992 FABRICACION DE PELICULAS, PLACAS Y PAPEL FOTOSENSIBLE PARA FOTOGRAFÍA
CLASE 325910 FABRICACIÓN DE TINTAS PARA IMPRESIÓN
INTERDEPENDIENTES: INSTRUMENTOS MUSICALES
CLASE 339991 FABRICACIÓN Y ENSAMBLE DE INSTRUMENTOS MUSICALES
CLASE 465215 COMERCIO AL POR MENOR DE INSTRUMENTOS MUSICALES
INTERDEPENDIENTE: PAPEL
CLASE 322110 FABRICACIÓN DE CELULOSA
CLASE 322121 FABRICACIÓN DE PAPEL EN PLANTAS INTEGRADAS
CLASE 322122 FABRICACIÓN DE PAPEL A PARTIR DE CELULOSA
CLASE 322132 FABRICACIÓN DE CARTÓN Y CARTONCILLO A PARTIR DE CELULOSA
CLASE 322299 FABRICACIÓN DE OTROS PRODUCTOS DE PAPEL Y CARTÓN
CLASE 333293 FABRICACIÓN DE MAQUINARIA Y EQUIPO PARA LA IMPRESIÓN
CLASE 339940 FABRICACIÓN DE ARTÍCULOS Y ACCESORIOS PARA ESCRITURA, PINTURA, DIBUJO Y ACTIVIDADES DE OFICINA
CLASE 433410 COMERCIO AL POR MAYOR DE ARTÍCULOS DE PAPELERÍA
CLASE 465311 COMERCIO AL POR MENOR DE ARTÍCULOS DE PAPELERÍA
CLASE 322230 FABRICACIÓN DE PRODUCTOS DE PAPELERÍA

APPENDIX 5. List of Classes and Sub-Classes by Sector

NON-CORE COPYRIGHT-BASED INDUSTRIES
INDUSTRIAS PARCIALES
MUEBLES
CLASE 337110 FABRICACION DE COCINAS
CLASE 337120 FABRICACION DE MUEBLES, EXCEPTO COCINAS Y MUEBLES DE OFICINA Y ESTANTERIA
CLASE 337210 FABRICACION DE MUEBLES DE OFICINA Y ESTANTERIA
CLASE 435412 COMERCIO AL POR MAYOR DE MOBILIARIO Y EQUIPO DE OFICINA
CLASE 541410 DISEÑO Y DECORACION DE INTERIORES
CLASE 466111 COMERCIO AL POR MENOR DE MUEBLES PARA EL HOGAR
MUSEOS
SUBRAMA 71211 MUSEOS
SUBRAMA 71212 SITIOS HISTORICOS
TAPETES Y TAPICES
CLASE 314110 TEJIDO Y CONFECCION DE ALFOMBRAS Y TAPETES
CLASE 314120 CONFECCION DE CORTINAS, BLANCOS Y SIMILARES
CLASE 337920 FABRICACION DE PERSIANAS Y CORTINEROS
CLASE 466311 COMERCIO AL POR MENOR DE ALFOMBRAS, CORTINAS, TAPICES Y SIMILARES
CLASE 314999 FABRICACION DE BANDERAS Y OTROS PRODUCTOS CONFECCIONADOS
VESTIDO, TEXTILES Y CALZADO
CLASE 313320 RECUBRIMIENTO DE TELAS
CLASE 314912 CONFECCION DE PRODUCTOS DE TEXTILES RECUBIERTOS Y DE MATERIALES SUCEDANEOS
CLASE 315210 CONFECCION DE ROPA DE CUERO, PIEL Y MATERIALES SUCEDANEOS
CLASE 315221 CONFECCION EN SERIE DE ROPA INTERIOR Y DE DORMIR
CLASE 315222 CONFECCION EN SERIE DE CAMISAS
CLASE 315223 CONFECCION EN SERIE DE UNIFORMES
CLASE 315224 CONFECCION EN SERIE DE ROPA ESPECIAL
CLASE 315225 CONFECCION DE ROPA SOBRE MEDIDA
CLASE 315229 CONFECCION DE OTRA ROPA DE MATERIALES TEXTILES
CLASE 315991 FABRICACION DE SOMBREROS Y GORRAS
CLASE 315999 CONFECCION DE OTROS ACCESORIOS DE VESTIR
CLASE 316211 FABRICACION DE CALZADO CON CORTE DE PIEL Y CUERO
CLASE 316212 FABRICACION DE CALZADO CON CORTE DE TELA
CLASE 316213 FABRICACION DE CALZADO DE PLASTICO
CLASE 316214 FABRICACION DE CALZADO DE HULE
CLASE 316219 FABRICACION DE HUARACHES Y CALZADO DE OTRO TIPO DE MATERIALES
CLASE 316991 FABRICACION DE BOLSOS DE MANO, MALETAS Y SIMILARES
CLASE 316992 FABRICACION DE ARTICULOS DE TALABARTERIA
CLASE 432112 COMERCIO AL POR MAYOR DE BLANCOS
CLASE 432119 COMERCIO AL POR MAYOR DE OTROS PRODUCTOS TEXTILES
CLASE 432120 COMERCIO AL POR MAYOR DE ROPA
CLASE 432130 COMERCIO AL POR MAYOR DE CALZADO
CLASE 463111 COMERCIO AL POR MENOR DE TELAS
CLASE 463112 COMERCIO AL POR MENOR DE BLANCOS
CLASE 463113 COMERCIO AL POR MENOR DE ARTICULOS DE MERCERIA Y BONETERIA
CLASE 463211 COMERCIO AL POR MENOR DE ROPA, EXCEPTO DE CUERO Y PIEL
CLASE 463212 COMERCIO AL POR MENOR DE ACCESORIOS DE VESTIR
CLASE 463213 COMERCIO AL POR MENOR DE ROPA DE CUERO Y PIEL Y DE OTROS ARTICULOS DE ESTOS MATERIALES
CLASE 463215 COMERCIO AL POR MENOR DE SOMBREROS
CLASE 463310 COMERCIO AL POR MENOR DE CALZADO
CLASE 315110 TEJIDO DE CALCETINES Y MEDIAS
CLASE 315192 TEJIDO DE ROPA EXTERIOR DE PUNTO

APPENDIX 5. List of Classes and Sub-Classes by Sector

NON-CORE COPYRIGHT BASED INDUSTRIES
INDUSTRIAS NO DEDICADAS
VENTAS AL MAYOREO Y MENUDEO
CLASE 432111 COMERCIO AL POR MAYOR DE FIBRAS, HILOS Y TELAS
CLASE 433510 COMERCIO AL POR MAYOR DE ELECTRODOMESTICOS MENORES Y APARATOS DE LINEA BLANCA
CLASE 434221 COMERCIO AL POR MAYOR DE MATERIALES METALICOS
CLASE 434222 COMERCIO AL POR MAYOR DE PRODUCTOS QUIMICOS PARA USO INDUSTRIAL
CLASE 434223 COMERCIO AL POR MAYOR DE ENVASES, PAPEL Y CARTON
CLASE 434224 COMERCIO AL POR MAYOR DE MADERA
CLASE 434225 COMERCIO AL POR MAYOR DE EQUIPO Y MATERIAL ELECTRICO
CLASE 434226 COMERCIO AL POR MAYOR DE PINTURA
CLASE 434227 COMERCIO AL POR MAYOR DE VIDRIOS Y ESPEJOS
CLASE 434229 COMERCIO AL POR MAYOR DE OTRAS MATERIAS PRIMAS PARA OTRAS INDUSTRIAS
CLASE 435210 COMERCIO AL POR MAYOR DE MAQUINARIA Y EQUIPO PARA LA CONSTRUCCION Y LA MINERIA
CLASE 435220 COMERCIO AL POR MAYOR DE MAQUINARIA Y EQUIPO PARA LA INDUSTRIA MANUFACTURERA
CLASE 435313 COMERCIO AL POR MAYOR DE MOBILIARIO, EQUIPO E INSTRUMENTAL MEDICO Y DE LABORATORIO
CLASE 435319 COMERCIO AL POR MAYOR DE MAQUINARIA Y EQUIPO PARA OTROS SERVICIOS Y PARA ACTIVIDADES COMERCIALES
CLASE 435419 COMERCIO AL POR MAYOR DE OTRA MAQUINARIA Y EQUIPO DE USO GENERAL
CLASE 461110 COMERCIO AL POR MENOR EN TIENDAS DE ABARROTES, ULTRAMARINOS Y MISCELANEAS
CLASE 462111 COMERCIO AL POR MENOR EN SUPERMERCADOS
CLASE 462112 COMERCIO AL POR MENOR EN MINISUPERS
CLASE 465912 COMERCIO AL POR MENOR DE REGALOS
CLASE 465913 COMERCIO AL POR MENOR DE ARTICULOS RELIGIOSOS
CLASE 465915 COMERCIO AL POR MENOR EN TIENDAS IMPORTADORAS
CLASE 465919 COMERCIO AL POR MENOR DE OTROS ARTICULOS DE USO PERSONAL
CLASE 466212 COMERCIO AL POR MENOR DE TELEFONOS Y OTROS APARATOS DE COMUNICACION
CLASE 466314 COMERCIO AL POR MENOR DE LAMPARAS ORNAMENTALES Y CANDILES
CLASE 467111 COMERCIO AL POR MENOR EN FERRETERIAS Y TLAPALERIAS
CLASE 467112 COMERCIO AL POR MENOR DE PINTURA
CLASE 467113 COMERCIO AL POR MENOR DE VIDRIOS Y ESPEJOS
CLASE 467115 COMERCIO AL POR MENOR DE MATERIALES PARA LA AUTOCONSTRUCCION
CLASE 468412 COMERCIO AL POR MENOR DE GAS EN CILINDROS Y PARA TANQUES ESTACIONARIOS
CLASE 469210 COMERCIO AL POR MENOR POR MEDIOS MASIVOS DE COMUNICACION Y OTROS MEDIOS

APPENDIX 5. List of Classes and Sub-Classes by Sector

NON-CORE COPYRIGHT BASED INDUSTRIES
INDUSTRIAS NO DEDICADAS
TRANSPORTE EN GENERAL
SUBRAMA 48111 TRANSPORTE AEREO REGULAR
SUBRAMA 48121 TRANSPORTE AEREO NO REGULAR
SUBRAMA 48211 TRANSPORTE POR FERROCARRIL
SUBRAMA 48311 TRANSPORTE MARITIMO
SUBRAMA 48321 TRANSPORTE POR AGUAS INTERIORES
SUBRAMA 48411 AUTOTRANSPORTE LOCAL DE CARGA GENERAL
SUBRAMA 48412 AUTOTRANSPORTE FORANEO DE CARGA GENERAL
SUBRAMA 48421 SERVICIO DE MUDANZAS
SUBRAMA 48422 AUTOTRANSPORTE LOCAL DE CARGA ESPECIALIZADO, EXCEPTO MUDANZAS
SUBRAMA 48423 AUTOTRANSPORTE FORANEO DE CARGA ESPECIALIZADO, EXCEPTO MUDANZAS
SUBRAMA 48511 TRANSPORTE COLECTIVO DE PASAJEROS URBANO Y SUBURBANO
SUBRAMA 48521 TRANSPORTE DE PASAJEROS INTERURBANO Y RURAL
SUBRAMA 48541 TRANSPORTE ESCOLAR Y DE PERSONAL
SUBRAMA 48551 ALQUILER DE AUTOBUSES CON CHOFER
SUBRAMA 48599 OTRO TRANSPORTE TERRESTRE DE PASAJEROS
SUBRAMA 48621 TRANSPORTE DE GAS NATURAL POR DUCTOS
SUBRAMA 48691 TRANSPORTE POR DUCTOS DE PRODUCTOS REFINADOS DEL PETROLEO
SUBRAMA 48711 TRANSPORTE TURISTICO POR TIERRA
SUBRAMA 48721 TRANSPORTE TURISTICO POR AGUA
SUBRAMA 48799 OTRO TRANSPORTE TURISTICO
SUBRAMA 48811 OPERACIONES AEROPORTUARIAS
SUBRAMA 48819 OTROS SERVICIOS RELACIONADOS CON EL TRANSPORTE AEREO
SUBRAMA 48821 SERVICIOS RELACIONADOS CON EL TRANSPORTE POR FERROCARRIL
SUBRAMA 48831 ADMINISTRACION DE PUERTOS Y MUELLES
SUBRAMA 48832 SERVICIOS DE CARGA Y DESCARGA PARA EL TRANSPORTE POR AGUA
SUBRAMA 48833 SERVICIOS PARA LA NAVEGACION POR AGUA
SUBRAMA 48839 OTROS SERVICIOS RELACIONADOS CON EL TRANSPORTE POR AGUA
SUBRAMA 48841 REMOLQUE DE VEHICULOS DE MOTOR
SUBRAMA 48849 OTROS SERVICIOS RELACIONADOS CON EL TRANSPORTE POR CARRETERA
SUBRAMA 48851 SERVICIOS DE INTERMEDIACION PARA EL TRANSPORTE DE CARGA
SUBRAMA 48899 OTROS SERVICIOS RELACIONADOS CON EL TRANSPORTE
TELEFONIA E INTERNET
CLASE 517111 TELEFONIA TRADICIONAL
CLASE 517119 TELEGRAFIA Y OTRAS TELECOMUNICACIONES ALAMBRICAS
CLASE 517211 TELEFONIA CELULAR
CLASE 517219 OTRAS TELECOMUNICACIONES INALAMBRICAS, EXCEPTO LOS SERVICIOS DE SATELITES
CLASE 518110 PROVEEDORES DE ACCESO A INTERNET Y SERVICIOS DE BUSQUEDA EN LA RED

APPENDIX 6. Selection of NAICS Classes and Subdivisions

<table>
<tr><th>Industry</th><th>Subgroups</th><th>ISIC Rev.3.1.code</th><th>Description</th><th>NAICS: Code and description</th></tr>
<tr><td rowspan="10">Press and Literature</td><td>Authors, writers, translators</td><td>9214
7499</td><td>Dramatic art, music and other arts activities
Other business activities n.e.c. (for translation and interpretation)</td><td rowspan="10">Class 323111 Printing of books, newspapers and magazines
Class 323119 Printing periodicals and other publishing
Class 323120 Allied industries to printing
Class 433420 Wholesale of books
Class 433430 Wholesale of magazines and newspapers
Class 465312 Retail of books
Class 465313 Retail of magazines and newspapers
Class 511111 Edition of newspapers not integrated with printing
Class 511121 Edition of magazines and other periodicals not integrated with printing
Class 511112 Edition of newspapers integrated with printing
Class 511122 Edition of magazines and other periodicals integrated with printing
Class 511131 Edition of books not integrated with printing
Class 511132 Edition of books integrated with printing
Class 511142 Edition of directories integrated with printing
Class 511192 Edition of other materials integrated with printing
Class 519110 News agencies
Class 519121 Private libraries and files
Class 541930 Translation and interpretation services
Class 561410 Document preparation services</td></tr>
<tr><td>Newspapers</td><td>2212</td><td>Publishing of newspapers, journals and periodicals</td></tr>
<tr><td>News agencies</td><td>9220</td><td>News agency activities</td></tr>
<tr><td>Magazines</td><td>2212</td><td>Publishing of newspapers, journals and periodicals</td></tr>
<tr><td>Book publishing</td><td>2211</td><td>Publishing of books, brochures and other publications</td></tr>
<tr><td>Cards and maps, directories and other published material</td><td>2219</td><td>Other publishing</td></tr>
<tr><td>Pre-press, printing and post-press of books, magazines, newspapers, advertising materials</td><td>2221 2222</td><td>Printing.
Service activities related to printing</td></tr>
<tr><td>Press and literature retail and wholesale (bookstores, newsstands, etc.)</td><td>5139
5239</td><td>Wholesale of other household goods
Other retail sale</td></tr>
<tr><td>Libraries</td><td>9231</td><td>Library and archive activities</td></tr>
</table>

APPENDIX 6. Selection of NAICS Classes and Subdivisions

Industry	Subgroups	ISIC Rev.3.1.code	Description	NAICS: Code and description
Music, Theater, Opera	Composers, arrangers, choreographers, directors, performers and others	9214 9219 9249	Dramatic arts, music and other arts activities Other entertainment activities n.e.c. Other recreational activities	Class 334610 Production and reproduction of magnetic and optical media Class 433311 Wholesale of discs and cassettes Class 465211 Retail of discs and cassettes Class 512210 Record companies Class 512220 Production and distribution of discs and tapes Class 512230 Music publishers Class 512240 Sound recording studios Class 512290 Other sound recording industries Class 561590 Other reservation services Subdivision 71111 Theater companies Subdivision 71112 Dance companies Subdivision 71113 Singers Subdivision 71119 Other artistic show companies Subdivision 71131 Promoters with infrastructure for presentations Subdivision 71132 Promoters without infrastructure for presentation Subdivision 71141 Managers
	Printing and publication of music	2213	Music publishing	
	Production of recorded music	2230	Reproduction of recorded media	
	Recorded music wholesale and retail (sales and rental)	5233 7130 5139	Retail sale of household appliances, articles and equipment Renting of personal and household good n.e.c. Wholesale of other household goods	
	Artistic and literary creation and interpretation	9214	Dramatic arts, music and other arts activities	
	Staging and related agencies (reservations, tickets, etc.)	9214	Dramatic arts, music and other arts activities	
Motion Picture and Video	Writers, directors, actors, etc.	9214	Dramatic arts, music and other arts activities	Class 512111 Motion picture and video production Class 512113 Videoclips, and other audiovisuals production Class 512120 Motion picture and video distribution Class 512130 Motion picture projection Class 512190 Postproduction services Class 519121 Private libraries and files Subdivision 53223 Rent of videocassettes and discs
	Motion picture and video production and distribution	9211	Motion picture and video production and distribution	
	Motion picture exhibition	9212	Motion picture projection	
	Video rentals and sales, video on demand	7130 9211	Renting of persona and household goods n.e.c. Motion picture and video production and distribution	
	Allied services	2230	Reproduction of recorded media	
Radio and Television	National radio and television broadcasting companies	9213	Radio and television activities	Class 512112 Television show production Class 515110 Radio broadcasting, except through Internet Class 515120 Television broadcasting, except through Internet Class 515210 Cable and satellite channel programming production, except through Internet Class 517510 Paid television shows distribution, except through Internet Class 561490 Support services Class 519110 News agencies
	Other radio and television broadcasters	9213	Radio and television activities	
	Independent producers	7499	Other business activities n.e.c.	
	Cable TV (systems and channels)	6420	Telecommunications	
	Satellite television	6420	Telecommunications	
	Allied services	9213	Radio and television activities	

APPENDIX 6. Selection of NAICS Classes and Subdivisions

Industry	Subgroups	ISIC Rev.3.1.code	Description	NAICS: Code and description
Photography	Studios and commercial photography	7494	Photographic activities	Class 541920 Photographic services Subdivision 81291 Picture developing services Class 519121 Private libraries and files
	Photographic agencies and libraries	2222 7499 9231	Service activities related to printing. Other business activities n.e.c. Library and archive activities	
Software Databases	Programming, development and design, manufacturing	7221 7229	Software publishing. Other software consultancy and supply	Class 511210 Software publishing Class 518210 Information electronic processing and other services Class 541510 Computer consulting services Subdivision 71312 Video game companies Class 511191 Publishing of other materials not integrated with printing Class 511141 Directory publishing not integrated with printing, except through internet Class 516110 Creation and distribution of contents exclusively through Internet
	Wholesale and retail prepackaged software (business programs, video games, educational programs, etc.)	5151	Wholesale of computers, computer peripheral equipment and software	
	Database processing and publishing	7240 7230	Database activities and on-line distribution of electronic content. Data processing	

APPENDIX 6. Selection of NAICS Classes and Subdivisions

Industry	Subgroups	ISIC Rev.3.1.code	Description	NAICS: Code and description
Visual and Graphic Arts	Artists	9214	Activities by authors, composers, and other independent artists n.e.c.	Class 435312 Wholesale of artistic painting and design articles and accessories Class 466313 Retail of antiques and art pieces of art Class 541340 Drawing services Class 541430 Graphic design Class 541490 Fashion and other specialized designs Class 611611 Private art schools Subdivision 71151 Independent artists and technicians
	Art galleries, wholesale and retail	9214	Dramatic arts, music and other arts activities	
	Picture framing and other allied services	7494	Photographic activities	
	Graphic design.	9214 7499	Dramatic arts, music and other arts activities. Other business activities n.e.c.	
Advertising	Agencies, buying services	7430	Advertising	Class 339950 Advertisement manufacturing Class 437210 Wholesale through mass media Class 541810 Advertising agency Class 541830 Media shopping agencies Class 541840 Media representation agencies Class 541850 Advertisement agencies Class 541860 Advertising agencies who work by direct mail Class 541870 Advertisement material distribution Class 541890 Other advertising services
C.C.S.	Copyright collecting societies	9112	Activities of professional organizations	Subdivision 81314 Organizations who care about the control of recreational activities