An in-depth study of the Mexican business climate for Dutch Creative Industries

Sector Report
Creative Industries
Mexico
2013
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Introduction Sector Report

This sector report will be conducted between March and October 2013 and provides an in-depth study of the Mexican business climate for Dutch Creative Industries. It assesses which sectors within the Creative Industries offer business opportunities for Dutch companies in Mexico and identifies possibilities for successful collaborations between Dutch and Mexican Creative Industries. This sector report will also determine niches in those disciplines where the Dutch Creative Industries excels and the Mexican Creative Industries is up to now lesser developed, as to create new business opportunities and markets for the Dutch Creative Industries. Furthermore, this sector report seeks to determine which specific regions in Mexico offer a prosperous business climate for Dutch Creative Industries. The Mexican Creative Industries is a very young sector that shows rapid development and great potential. With the Creative Industries accounting for 4.77 percent of the national GDP, the Mexican government acknowledges the opportunities of the Creative Industries and has appointed the Creative Industries as the fifth strategic industry and a focal point of development.¹

The report initiates with a description of the profile of Creative Industries and a general overview of Mexico’s business climate. In order to serve both a Mexican and a Dutch audience, the report is then divided in two main parts; the Dutch Creative Industries and the Mexican Creative Industries. These parts are largely symmetrical in structure; they shortly discuss facts and figures of the Creative Industry in both countries, showcase their main industries and best practices and list educational institutes specialized in the field of Creative Industries. The report concludes with an overview of the overlap and niches in the Creative Industries sector in both countries and provides an outlook for focal points of business opportunities.

¹ ProMéxico, Unidad de Inteligencia de Negocios, “CCD: Datos de Interés"
Profile Creative Industries

Creative Industries is a term that originated in the 1990s. As to what the Creative Industries comprises different ideas have been put forward. No clear-cut definition exists and much debate surrounds this term. Differences in the definition of Creative Industries and associated terms such as Creative Economy, Cultural Economics and Cultural Industries are often difficult to define. Underneath is a core description of the three terms to distinguish in which points they overlap and in which points they differ.

Cultural Industries:

This term appeared in post-war period as a radical critique of mass entertainment by members of the Frankfurt school led by Theodor Adorno and Max Horkheimer, followed subsequently by writers such as Herbert Marcuse. At that time, “culture industry” was a concept intended to shock; culture and industry were argued to be opposites and the term was used in polemics against the limitations of modern cultural life. It continued to be used as an expression of contempt for the popular newspapers, movies, magazines and music that distracted the masses.

In the present day, there remain different interpretations of culture as an industry. For some, the notion of “cultural industries” evokes dichotomies such as elite versus mass culture, high versus popular culture, and fine arts versus commercial entertainment. More generally, however, the proposition that the cultural industries are simply those industries that produce cultural goods and services, typically defined along the lines outlined above, has gained greater acceptance.

UNESCO for example, views the cultural industries as those industries that “combine the creation, production and commercialization of contents which are intangible and cultural in nature. These contents are typically protected by copyright and they can take the form of goods or services”. An important aspect of the cultural industries, according to UNESCO, is that they are “central in promoting and maintaining cultural diversity and in ensuring democratic access to culture”. This two-fold nature – combining the cultural and the economic- gives the cultural industries a distinctive profile.  

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2 UNCTAD/UNDP, *Creative Economy Report* 2010, p. 5
3 UNCTAD/UNDP, p. 5
Cultural Economics

Many politicians and academics, particularly in Europe and Latin America, use the concept of “cultural economics” or the term “economy of culture” when dealing with the economic aspects of cultural policy. Moreover, many artists and intellectuals feel uncomfortable with the emphasis given to market aspects in the debate on the creative industries and hence the creative economy.

“Cultural economics” is the application of economic analysis to all of the creative and performing arts, the heritage and cultural industries, whether publicly or privately owned. It is concerned with the economic organization of the cultural sector and with the behavior of producers, consumers and governments in this sector.

The subject includes a range of approaches, mainstream and radical, neoclassical, welfare economics, public policy and institutional economics. While the theoretical and economic analysis in this report takes into account the principles of cultural economics as a discipline, the purpose is to better understand the dynamics of creativity and its overall interactions with the world economy, including its multidisciplinary dimension in which cultural policies interact with technological and trade policies.

Creative Industries

Usage of the term “creative industries” varies among countries. It is of relatively recent origin, emerging in Australia in 1994 with the launching of the report, Creative Nation. It gained wider exposure in 1997, when policymakers at the United Kingdom’s Department of Culture, Media and Sport set up the Creative Industries Task Force. It is noteworthy that the designation “creative industries” that has developed since then has broadened the scope of cultural industries beyond the arts and has marked a shift in approach to potential commercial activities that until recently were regarded purely or predominantly in non-economic terms (see figure 2).

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4 UNCTAD/UNDP, p. 5, note 8
5 UNCTAD/UNDP, p. 5-6
6 UNCTAD/UNDP, p. 6
UNCTAD classification of Creative Industries

A number of different models have been put forward in recent years as a means of providing a systematic understanding of the structural characteristics of the Creative Industries. This sector report adopts the “UNCTAD classification of Creative Industries”.

The UNCTAD classification of Creative Industries is divided into four broad groups: heritage, arts, media and functional creations (p. 7). These groups are subdivided into nine groups, as presented in figure 1.

What makes this model more compatible for this sector report than the other models is that it stresses the importance and possibilities of cross-overs between different sectors. Also, the UNCTAD classification of Creative Industries encompasses all fields of development for the Dutch Creative Industries appointed by the Dutch government. Furthermore, the Mexican government in the Cultural Plan 2007-2012 also makes use of this model (see page 35).

According to this classification, the creative industries are comprised of four groups, each divided into different subgroups:

1. Heritage: Traditional Cultural Expression and Cultural Sites
2. Arts: Performing arts and Visual arts
3. Media: Audiovisuals and Publishing and printed media
4. Functional creations: Design, Creative services and New Media

A complete overview of the subgroups can be found in figure 2.

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7 UNCTAD/UNDP, p. 7
Fig. 1: UNCTAD Definition of Creative Industries

Fig. 2: The UNCTAD Classification of the Creative Industries
Creative goods and services

The UNCTAD report measures the generated value of the Creative Industries in export and import of creative goods and services. A multiple of definitions of creative goods and services exist, and they by no means are mutually exclusive. The UNCTAD provides the following characteristics for creative goods and services:

- “their production requires some input of human creativity;”
- “they are vehicles for symbolic messages to those who consume them, i.e., they are more than simply utilitarian insofar as they additionally serve some larger, communicative purpose; and”
- “they contain, at least potentially, some intellectual property that is attributable to the individual or group producing the good or service”

Another characteristic for cultural goods according to UNCTAD is that they possess cultural value apart from the commercial value they may contain. This cultural value might not always be fully measurable in monetary terms. The Creative Economy Report provides the following definition:

“...cultural activities of various sorts and the goods and services they produce are valued –both by those who make them and by those who consume them – for social and cultural reasons that are likely to complement or transcend a purely economic valuation.”

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8 UNCTAD/UNDP, p. 4
9 UNCTAD/UNDP, p. 5
Why Mexico?

General overview of Mexico’s business climate

Mexico – The Netherlands

Mexico is a big player in international trade. In 2011, Mexican exports grew over 17% compared to 2010 and more than 110% compared to the year 2000. The Netherlands is the third biggest investor in Mexico. Almost all Dutch multinationals have a branch in Mexico; they are present in sectors such as energy, commodities and technology. Also, Dutch SME’s are finding their way into the Mexican market. More than 300 Dutch companies have a financial interest in Mexico based enterprises.

The EU and Mexico have a free trade area. This agreement has led to a growth of the trade- and investment relations. There are also examples of cooperation between The Netherlands and Mexico in the field of education and science. The Netherlands has a Nuffic-Neso office in Mexico-City. This office has been appointed the task of stimulating cooperation in the field of education and university exchanges between Mexico and the Netherlands. Furthermore, Mexico is a priority country for Dutch public diplomacy, where special attention is paid to fashion and architecture.

Mexico’s economy

Mexico’s economy is an open economy, with a strong focus on the liberalization of international trade and attracting investment flows. One of the key factors in achieving this is a strong privatization of government-owned companies. Mexico has also signed 12 free trade agreements with 44 nations, making the country one of the largest networks of free trade agreements in the world. These agreements provide access to over one billion potential consumers, representing 62.2 percent of global GDP. Mexico far exceeds Brazil, the United States and China when it comes to the number of countries with which free trade conditions are in force. Not only do these agreements facilitate trade and grant access to major markets, it also enables the country to focus on emerging economies.¹¹

Mexico – Brazil

If we compare the two biggest Latin-American economies, Mexico and Brazil, it becomes clear that Brazil’s rapid economic growth is stagnating and Mexico’s economy is expanding at a steady clip. An article in the Dutch paper “Financieel Dagblad” calls Brazil “the star that disappoints” and Mexico “the underperformer that suddenly shines.

A crucial difference between the two countries lies in the mix of monetary and fiscal policies. Mexico and Brazil both implemented anti-crisis fiscal packages in 2009. But Mexico withdrew the stimulus promptly as its economy recovered, and has pursued a tighter fiscal policy than Brazil in the years since. The implementation of a tighter fiscal policy is very desirable for the additional scope that it creates for monetary policy. Mexico has been able to keep interest rates much lower – the basic policy rate is 4 %, compared to 8 % in Brazil (which is unusually low for the country) while maintaining a lower inflation rate as well.\(^\text{12}\)

Both Mexico and Brazil are dependent on inflows of other thriving countries, but Mexico’s lower interest rates have better insulated it from the resulting threat of upward exchange-rate pressure. Brazil’s exchange rate has risen considerably in the last three years, whereas Mexico’s has remained basically flat. Also, Mexico’s competitive exchange rate is a key reason why it has become an export powerhouse, with the manufacturing sector accounting for 80 % of merchandise export.\(^\text{13}\)

Labor costs

In the field of labor costs, Mexico is very competitive. The country offers significant savings compared to other investment choices in the Americas, Europe or Asia (see fig. 3). Jobs were lost to China in the first half of the 2000’s, but in recent years – as Chinese wages rose quickly – the advantages of producing in Mexico reasserted themselves. Mexico has profited from the rise of just-in-time production in the US, which puts a premium on proximity and ready access to imported inputs.

\(^\text{12}\) [http://www.tradingeconomics.com/mexico/interest-rate](http://www.tradingeconomics.com/mexico/interest-rate)
Large global consultancy firms such as Boston Consulting Group, AT Kearney and Alix Partners have recognized the advantages offered by Mexico to productive investment. In particular, Alix Partners rates Mexico as the best place for manufacturing investment, above China, India and Brazil.\(^\text{14}\)

### Ease of operation

Also, Mexico scores extremely high when it comes to the ease of operation of opening or closing a business. In Mexico, an investor only requires 6 procedures and 9 days to open a business, and 10 procedures and 69 days to obtain a building permit. These numbers are notably lower than those seen in Russia, China or Brazil (see fig. 4).\(^\text{15}\)

<table>
<thead>
<tr>
<th></th>
<th>Number of procedures required to open a business</th>
<th>Days required to open a business</th>
<th>Number of procedures required to obtain a building permit</th>
<th>Days required to obtain a building permit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexico</td>
<td>6</td>
<td>9</td>
<td>10</td>
<td>69</td>
</tr>
<tr>
<td>Taiwan</td>
<td>9</td>
<td>10</td>
<td>11</td>
<td>70</td>
</tr>
<tr>
<td>Brazil</td>
<td>11</td>
<td>10</td>
<td>17</td>
<td>90</td>
</tr>
<tr>
<td>Korea</td>
<td>18</td>
<td>16</td>
<td>18</td>
<td>70</td>
</tr>
<tr>
<td>United States</td>
<td>36</td>
<td>35</td>
<td>36</td>
<td>69</td>
</tr>
<tr>
<td>Canada</td>
<td>35</td>
<td>35</td>
<td>35</td>
<td>69</td>
</tr>
<tr>
<td>Germany</td>
<td>34</td>
<td>35</td>
<td>35</td>
<td>69</td>
</tr>
</tbody>
</table>

\(^{14}\) [http://mim.promexico.gob.mx/wb/mim/costos_de_mano_de_obra]  
\(^{15}\) [http://mim.promexico.gob.mx/wb/mim/facilidad_de_operacion]
Mexico | 6 | 9 | 10 | 69  
---|---|---|---|---
Russia | 8 | 18 | 42 | 344  
China | 13 | 33 | 28 | 270  
Brazil | 13 | 119 | 17 | 469  

Fig. 4: Table Ease of Operation. Source: The World Bank: Doing Business 2013

In addition, in Mexico only 1.8 years are required in order to close a business, with a recovery rate of 67.3%. These factors are also significantly better than those seen in Russia, China or Brazil.\(^{16}\)

**Trade agreements**

Mexico is the second largest economy in Latin America, the 13\(^{th}\) largest in the world in nominal terms and the 11\(^{th}\) by purchasing power parity.\(^{17}\) Moreover, Mexico’s geographical location and the implementation of NAFTA provide an excellent platform for selling from Mexico to the largest market in the world. Estimates for 2015 indicate the size of the regional market will reach $21,083 billion, a figure that will represent 25.5% of future global GDP. Since NAFTA came into effect, the North American economy has more than doubled in size. The combined gross domestic product (GDP) for Canada, the United States, and Mexico surpassed US$17 trillion in 2008, up from US$7.6 trillion in 1993. Also, Mexico has become one of the largest recipients of foreign direct investment among emerging markets, and received US$156 billion from its NAFTA partners between 1993 and 2008.\(^{18}\)

Mexico also signed a total of 28 Investment Promotion and Reciprocal Protection Agreements (IPPs), in 1999 Mexico signed the agreement with The Netherlands. The IPPA forms part of the strategy of the Mexican government to grant Mexican and foreign investors a legal framework that strengthens protections for foreign investment in Mexico, as well as for the Mexican investment abroad.

**Geographical location**

\(^{16}\) [http://mim.promexico.gob.mx/wb/mim/facilidad_de_operacion](http://mim.promexico.gob.mx/wb/mim/facilidad_de_operacion)


\(^{18}\) [http://www.naftanow.org/results/default_en.asp](http://www.naftanow.org/results/default_en.asp)
Another advantage offered by the country is the proximity to the main centers of world consumption. This is significant as it allows firms to respond more quickly to changes in demand and thus a reduction in inventory costs. Figure 5 shows the number of days required to transport a container by sea from Mexico and other competitor countries to major centers of distribution and consumption.\textsuperscript{19}

<table>
<thead>
<tr>
<th>Destination City</th>
<th>Germany</th>
<th>Brazil</th>
<th>China</th>
<th>Colombia</th>
<th>Korea</th>
<th>USA</th>
<th>India</th>
<th>Mexico</th>
<th>Poland</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>9.8</td>
<td>13.1</td>
<td>28.7</td>
<td>6.5</td>
<td>14.6</td>
<td>-</td>
<td>26.4</td>
<td>5.4</td>
<td>10.5</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>22.2</td>
<td>19.9</td>
<td>15.9</td>
<td>8.4</td>
<td>27.7</td>
<td>-</td>
<td>25.8</td>
<td>3.7</td>
<td>23.1</td>
</tr>
<tr>
<td>Rotterdam</td>
<td>0.8</td>
<td>14.5</td>
<td>28.9</td>
<td>14.4</td>
<td>29.9</td>
<td>9.8</td>
<td>21.9</td>
<td>14.0</td>
<td>1.7</td>
</tr>
<tr>
<td>Yokohama</td>
<td>31.7</td>
<td>31.9</td>
<td>2.8</td>
<td>21.5</td>
<td>2.3</td>
<td>13.4</td>
<td>12.6</td>
<td>16.9</td>
<td>32.6</td>
</tr>
<tr>
<td>Shanghai</td>
<td>29.6</td>
<td>30.1</td>
<td>-</td>
<td>23.5</td>
<td>1.3</td>
<td>15.9</td>
<td>10.5</td>
<td>19.4</td>
<td>30.5</td>
</tr>
</tbody>
</table>

Fig. 5: Number of days by sea to major centers of distribution and consumption. Source: Sea Raters 2013

**Facts and Figures**

- Goldman Sachs estimates that Mexico will be the 5\textsuperscript{th} largest economy by 2050
- According to Accenture, Mexico will be one of the Big Six in 2025
- According to HSBC Mexico will be the 8\textsuperscript{th} largest economy in the world by 2050
- The index of Technological Sophistication of Mexican export products (3.25) is the highest in Latin America and above India and Brazil. (OECD)
- According to the IMD World Competitiveness Yearbook, Mexico offers a higher quality of labor force and talent than Russia, India, China and Brazil.\textsuperscript{1}

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**Dutch Creative Industries**

**Facts & Figures**

\textsuperscript{19} [http://mim.promexico.gob.mx/wb/mim/costos_de_transporte](http://mim.promexico.gob.mx/wb/mim/costos_de_transporte)
The Dutch government has appointed nine ‘topsectoren’, which are those parts of the Dutch economy that are the most competitive on a world-wide level and in which Dutch companies excel and outperform foreign companies. One of the ‘topsectoren’ is the Creative Industries. The Dutch government aims to further fortify this sector, so that the Dutch-based companies can improve their performance on an international stage. The Creative Industries have been appointed the “game changer” that the Netherlands needs to keep innovating.\(^{20}\)

With a yearly growth-rate of 6 per cent, the Creative Industries has for many years been one of the fastest growing sectors of the Dutch economy. In the Netherlands, there are 43.000 companies active in the field of the Creative Industries, with a total number of 172.000 employees. The yearly turnover for the Creative Industries is € 7,1 billion, which accounts for more than 2 per cent of the total GDP.\(^{21}\)

The process of creative innovation is what lies at the heart of all activities of this topsector. Examples of sectors that are considered part of the Creative Industries are: architecture, fashion, gaming and design.\(^{22}\) Through combining knowledge, creativity and entrepreneurship, the topsector Creative Industries aims for the Netherlands in 2020 to be the number one creative economy of Europe.

The sector also seeks to build on the Creative Industries’ power of innovation and flexibility in stimulating cross-overs with other topsectoren. One example of a successful cross-over is serious gaming; games which combine the purpose of pure entertainment with a secondary ‘serious’ purpose. The ‘serious’ adjective generally refers to the purpose of training or educating its users. Examples are games that promote a healthier lifestyle or simulation games. Other cases of cross-overs are smart-solutions for energy-efficient architecture or design that contributes to the success of high tech invention.

Multiple definitions for the Creative Industries circulated around the international circuit, most of them encompassing a very broad sphere of activity. In addition to architecture and design, this also includes film, (dance) music, photography, (serious) gaming, fashion, media, the performing arts and advertising. The Ministry of Economic Affairs and the Creative Industry Top Team are inclined to use a broad definition. In December 2012 the lower chamber of the Dutch Parliament approved a motion to include the music industry in the top sectors policy.\(^{23}\)

\(^{20}\) http://creative-council.nl/
\(^{21}\) Creatieve Industrie in Topvorm, Advies Topteam Creatieve Industrie, June 2011, p. 1
\(^{22}\) See: http://www.top-sectoren.nl/creatieveindustrie
\(^{23}\) http://www.stimuleringsfonds.nl/beleidsplan/en/#top_sectors_policy%3A_createive_industry
The Dutch Creative Industries has grown to an extent that in order to keep developing, internationalization is necessary. Start-ups, growing companies and icons have won a multitude of cross-sectorial international orders. The Netherlands is Europe’s experimental garden for both Dutch companies as well as European companies. New creative products and services are being developed and tested. International (creative) companies and top talent are happy to settle there. The Netherlands with its top of the bill digital infrastructure is the ‘digital gateway to Europe’: one of the most important junctions in the European digital economy.\(^2\)

Internationalization for the Dutch Creative Industry is a must, not a choice. Creative companies that have the ambition to grow and innovate soon encounter the limits of the Dutch markets. Real opportunities of growth lie abroad. Furthermore, the small margins within the Creative Industries make it necessary to internationalize in order to spread risks. The Creative Industries is part of the sectors that profits the most of the international opportunities of digital technology. Many creative products and services, for example architecture and games, are designed for the international market from the outset. Every notable supply chain is characterized by an international scheme.

But in the process of globalization, where networking takes up a central place, it is not only important that Dutch companies profit abroad. International companies and employees that settle in The Netherlands are at least as important. They contribute to a competitive business climate, contribute directly to employment and have a strong spill-over effect on the Dutch trade and industry. Competition for companies, productions and top talent is increasing and countries are forced to closely examine their competitive sectors. The Netherlands does not have a large market at its disposal. However, in the role of test bed for new products and services The Netherlands can compete for a pole position.

The preconditions have already largely been met. The Netherlands is compact, shows a great diversity in population and activities, has a highly developed ICT infrastructure (Digital Gateway) and international reach and knows curious consumers with purchasing power.

**Initiatives and Funding**

An important initiative of the Dutch “Topsector Creatieve Industrie” is CLICKNL, the knowledge- and innovation-network for the Dutch Creative Industries. CLICK stands for Creativity, Learning, Innovation, Co-creation, Knowledge. The focus of CLICKNL is to meet the need for a better cooperation between the

Creative Industry and knowledge institutions. In order for the Netherlands to become the most Creative Industry of Europe in 2020, we should learn how to translate knowledge to innovation. The business community and knowledge institutions should be able to find each other and profit from each other. CLICK fits in with the diversity, flexibility and bottom-up network-structure. It is an innovation-network that develops and executes knowledge- and innovation-agendas for the Creative Industries. This way CLICKNL is able to prioritize fields of research and questions. The factor that connects these networks is a shared ambition to engage in grand challenges, to establish cross-overs between creative disciplines and other topsectoren and to share thematic expertise (creative competences). CLICKNL employs existing fiscal and financial instruments and regulations to facilitate cooperation between the different parties. The MIT (MKB-innovatiestimulering topsectoren) reserved a total of € 2 million for SME’s for 2013 active in the Creative Industries. This budget will be divided in Research and Development projects (€ 1 million), knowledge vouchers (€ 850.000), network activities (€ 100.000) and innovation-brokers providing management consulting (€ 50.000).25

The Dutch Design Fashion Architecture (DutchDFA) program is a four year strategic program funded by the Ministry of Education, Culture and Science, the Ministry of Foreign Affairs and the Ministry of Economic Affairs. Their aim is to strengthen the international position of Dutch design, fashion and architecture, by building long-lasting international partnerships, while addressing complex issues and challenges the world is faced with through design. Activities took place from 2009-2012 in the four focus countries India, China, Germany and Turkey.26

According to the 2012 Dutch DFA year report, opportunities for creative entrepreneurs are increasingly found outside the Netherlands and Europe, in distant regions of the world with fast-growing economies.27 Globalization in conjunction with sustainable development is the greatest challenge of our time. To achieve the necessary economic and ecological balance, lasting international collaboration and knowledge exchange is a requirement. The creativity, expertise and innovative drive of Dutch designers place them in a position to make an essential contribution to this. It is precisely where urgent local demand and specific Dutch expertise intersect that real gains can be achieved, both socially and economically, and especially in the long term.28

The DutchDFA program increasingly concentrated on these ‘matches’ and aimed to refine them further. For a follow-up program, the selection of themes is as relevant as the selection of regions. These

26 http://www.dutchdfa.com/about
27 DutchDFA, Year Report 2012, p. 5
28 DutchDFA p. 6-7
themes turn out to be fairly universal for the Netherlands: building with water; integrated, long-term urban planning; social housing; combining craftsmanship with contemporary concepts, markets, and technologies; clear visual communication by graphic designers, a knowledge center for sustainable denim production; humane application of high tech in healthcare, agriculture, public space, and so on.

The Dutch design field has also changed drastically since the launch of DutchDFA. New organizations for the creative industry are waiting in the wings as heirs to the program: The New Institute, the Dutch Creative Industries Federation and the Creative Industries Fund NL. For a follow up program (2013-2016), the ministries of Culture and Foreign Affairs are providing a total budget of 8 million euros to the Creative Industries Fund NL.

The political assessment of the Creative Industry coincides with a course change in culture policy, which places priority on the fostering of cultural entrepreneurship and the reduction of dependence on grants. The Creative Industry’s launch as a top economic sector creates the expectation that it can play an example-setting role in the cultural sector, thanks to its obvious links with society and the economy.29

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29 http://www.stimuleringsfonds.nl/beleidsplan/en/#top_sectors_policy%3Acreative_industry
Fig. 6: Structural overview of the position of the Dutch Creative Industries

The positioning of the Creative Industries Fund at the interface of culture, society and the economy is carried through in the mandate issued by the Ministry of Education, Culture and Science, the Ministry of Foreign Affairs and the Ministry of Economic Affairs to set up a program aimed at strengthening the foreign market position of Dutch designers working in the disciplines of architecture, design, fashion, gaming and e-culture. According to the ministries involved, a joint international approach represents added value in a sector composed for the most part of freelancers with limited capital. The Ministry of Education, Culture and Science and the Ministry of Foreign Affairs will each set aside €1 million annually for the implementation of this program. The Ministry of Economic Affairs will contribute €400,000 for the period 2013-2016 and will make its battery of export instruments available.\(^{30}\)

30 \url{http://www.stimuleringsfonds.nl/beleidsplan/en/#international_culture_policy%3A_design_sector_internationalization_programme%22}
Main Industries

Architecture

The Netherlands is a country of designers; in fact the country itself is for the most part a man-made design. Topographical and social circumstances in the Netherlands, such as the presence of large areas of water, the focus on sustainability and the lack of living space, have led to innovative architectural solutions.

The most famous Dutch architect, Rem Koolhaas - founder of the Office for Metropolitan Architecture (OMA) - has received commissions for prestigious projects abroad, such as designing the new building for the Chinese state broadcaster CCTV in Beijing. Large Dutch architecture and engineering firms dominate the international market for architecture services. Part of this success is due to the high level of education and training in the Netherlands, including at the technical universities Delft and Eindhoven.

The Dutch architecture industry has the reputation of being the most innovative industry in the world and is influenced by the lack of space, the regard for sustainability, the increasing influence of users and innovative problem-solving in the area of water.

Dutch house-building is highly rated for its flexibility and creativity. The Netherlands has a number of architects and firms that specialize in housing, such as Mecanoo, Claus & Kaan and Atelier KempeThill. There are others whose expertise lies in stand-alone buildings that function as ‘business cards’, including the OMA (the Kunsthal), NeutelingsRiedink (Netherlands Institute for Sound and Vision) and Meyer & van Schooten (ING head office). ³¹

³¹ http://www.hollandtrade.com/sector-information/creative-industries/architecture/
Fashion

The Dutch fashion sector can be characterized as:

- conceptual
- open-minded
- pragmatic
- process-oriented
- innovative

The vast majority of turnover in the Dutch fashion branch is generated by two types of fashion suppliers: brand suppliers and private label suppliers. Brands may further be differentiated as being either Dutch brands (such as G-Star and McGregor) or foreign brands with a sales office or regional headquarters in the Netherlands (for example, Nike EMEA in Hilversum employs 1,449 people). A key organization dedicated to supporting fashion designers is the Dutch Fashion Foundation (DFF). DFF represents the interests of top talents among Dutch fashion designers, at home and abroad. Since 2007, DFF has organized the annual Mercedes-Benz Dutch Fashion Awards ceremony in Amsterdam and The Hague. In other countries, DFF organizes projects under the name Dutch Touch; in Paris, New York, Rome, Milan and elsewhere. Over the coming five years, DFF predicts that, for up-and-coming, higher end Dutch

Facts & Figures

- There were some 13,100 architects registered in the Netherlands in 2010. This group included architects, interior architects, urban planners and landscape architects.
- Statistics Netherlands classifies architects together with engineering firms. Designers of infrastructure, such as bridges and tunnels, are generally civil engineers however there are also architects in the Netherlands who design such infrastructural objects. Engineering firms which also provide architectural services are Arcadis, Haskoning and DHV.
- Almost every company in the Dutch architecture sector is a small or medium-sized enterprise.
- The Royal Institute of Dutch Architects (BNA) is the only trade organization for architects. In 2010, it had 2,976 members, most of whom (71 percent) were self-employed architects. BNA members generated 3 percent of their turnover abroad.
- Around 10 percent of BNA members are internationally active, with most commissions in Belgium/Luxemburg (24 percent).
fashion, significant growth opportunities exist in the major fashion locations such as Milan, London, Paris and Hong Kong.

The Netherlands has several internationally successful fashion designers and fashion brands. Examples include Viktor & Rolf, Spijkers en Spijkers, G-Star, Sandwich and Gsus. For their recent campaign, G-star has teamed-up with Dutch top photographer Anton Corbijn for their worldwide advertising campaigns.

Since the mid-1990s, Dutch couturiers and ready-to-wear brands have been met with growing enthusiasm in international markets. Also, increasing numbers of young Dutch fashion designers are showing their creation on international catwalks. The Netherlands itself is becoming an international stage for the fashion industry, with initiatives such as the Arnhem Mode Biennale, the Amsterdam International Fashion Week, Streetlab and the Dutch Fashion Awards.

It proves difficult to obtain an accurate, up-to-date overview of turnover in the fashion sector. This is because specific statistical data pertaining to the fashion (design) sector are unavailable, or not readily accessible. Statistics Netherlands (CBS) reports that, in 2009, a total of 4,670 designers were employed in various design fields, including fashion, interior design, furniture design and graphic design. MODINT, with around 800 members, is the largest textile and fashion industry organization in the Netherlands. Around half of its members operate internationally. The fashion industry, with 595 members, is the largest branch within MODINT. This group is mainly comprised of fashion suppliers (brands and private labels) and very few independent fashion designers. Total turnover for those companies affiliated with MODINT, is 9 billion euros, of which, 45 per cent is derived from export (2010). Some 25 percent of this export goes to Germany.\(^\text{32}\)

**Gaming**

The gaming market is booming. In 2009 the worldwide turnover of the gaming industry was more than 66 billion US dollars. This is 20 billion US dollars more than the movie industry. Dutch gaming companies have increased significantly too and excel in the fields of serious and casual gaming. The core activity of most Dutch gaming firms is the development of games (30% of the respondents), followed by advergaming/game portals (20%) and publishing & development (17%). Important Dutch casual gaming companies are Spil Games and Zylom. An important serious gaming company is RANj, this company is

specialized in training, advertisement and health games and has among others won the European Innovative Games Awards 2008.

The number of people employed in the Dutch gaming industry has nearly doubled in the past five years. In 2004, the estimated number of employees in the Dutch gaming industry was 1,200, in 2010 this number reached 2,300. The Dutch gaming companies are young and dynamic. The majority of companies have between 10 and 20 employees and the number of people employed changes over time. The main reason for the change of employees is that gaming companies often make use of hiring temporary developers.

Since 2004 the Dutch gaming market has grown with an average of 19.4 percent a year. This means that in 2009 the market had a size of €931.6 million, an increase of 18.9 percent compared to 2008. The fastest growing market is that of games hardware (24.9% a year), while the market for games also showed rapid growth (15.9% a year).

After the market for console games (46 percent of the total spending on video games), the market for online games is the second-largest in the Netherlands at 36 percent of the total video game spending. In 2009 there were 1,8 million subscribers to online video games in the Netherlands, a 40.6 percent increase compared to 2007. By 2014 this number is expected to reach 3 million.

The Dutch government supports gaming enterprises in attracting funding and provides guarantees for security and business loans and microfinance facilities. They also provide support for venture capital funds that invest in technology.  

Design

'Dutch Design' is known for its quirky, out-of-the-box thinking, application of new technologies, highly-distinctive forms and far-reaching involvement with the (experience of) end users.

The design sector in the Netherlands maintains a highly-respected status within Dutch culture and falls under the umbrella of the greater creative industry. Premsela, Platform for Design and Fashion, is the Dutch sector institute for design and fashion. Premsela concentrates its efforts on improving the cultural design climate in the Netherlands and strives to stimulate opportunities for the growth of Dutch design from a cultural viewpoint.

The Netherlands excels in product design, where an individual designer’s vision is often the key focus. Examples are the design of Marcel Wanders and the work of collaborative initiatives such as Droog

http://www.hollandtrade.com/sector-information/creative-industries/gaming/?bstnum=4912
Design. High-quality design services are provided by BNO (Beroepsorganisatie Nederlandse Ontwerpers). Design management is also highly developed in the Netherlands, examples of these products include interior products, designs for public spaces, design for museums and exhibitions and communications design (such as for government public information campaigns).  

**Advertising**

The Netherlands has a strong advertising industry. The *Lions d’Or* are the most prestigious awards within the advertising industry. In 2003 Dutch companies won six lions. In 2004, The Netherlands won a total of ten lions, putting the country in third place, after the US and the UK, despite the Dutch language barrier. Amsterdam forms the heart of the Dutch advertising industry, with an increasingly international character. An internationally successful advertising agency is *180 Communications*, with clients such as Asics, PlayStation, Western Union and DHL.

About €4 billion are spent on the media advertisement yearly and another €800 million is spent on sponsorship and product placement, while a similar sum is spent on direct marketing. Thus the total advertisement cost equals €5.6 billion. Advertising agencies form the second largest part of the Dutch Creative Industries. In 2004, the Dutch advertising industry employed more than 46,000 people, 30,000 of whom worked at advertising agencies. Between 1996 and 2004, employment in this sector grew twice as fast as in the rest of the economy: 35% compared to 17%. However, since 2002, the relative importance of the advertising industry has declined.

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34 [http://www.hollandtrade.com/sector-information/creative-industries/design/?bstnum=4911](http://www.hollandtrade.com/sector-information/creative-industries/design/?bstnum=4911)
36 Mulder, Jose and Poort, Joost. *Het economisch belang van reclame*, Amsterdam, January 2006, p. iii
37 Mulder, Jose and Poort, Joost. *Het economisch belang van reclame*, Amsterdam, January 2006, p. iii
(Dance) Music

In the past years the Dutch music industry has become a very strong export product. That is the reason why the Dutch government has approved a motion to add Dutch pop and dance music to its Creative Industries focal points. Dutch (dance)music is one of the niche priority sectors of the Dutch economy. The export of Dutch popular music shows significant growth; in 2011 the sector grew 23 percent compared to 2010. The generated value of Dutch music-export contributed more than € 100 million to the Dutch economy in 2011. Electronic music accounts for approximately 70 percent of this number.\(^{38}\) The Netherlands ranks among the most successful dance countries, with artists such as DJ Hardwell (voted number one in the DJ Mag top-100 2013), Tiësto, Armin van Buuren, Chuckie, Afrojack and Dash Berlin.\(^{39}\) Other popular and successful music genres are classical music and punk-metal-rock music. In 2011, there were more than 725 Dutch musical acts active abroad.

Also on a national level, the Electronic Dance Music industry generates a significant financial flow and counts as an important economic market. In 2011, Dutch dance events attracted over 1.5 million visitors, generating a turnover of approximately € 46 million.\(^{40}\) The most important stakeholders in the electronic dance music industry are DJ’s, VJ’s, producers and (management) agencies. The total size of financial flows that these four parties generated in 2012 was estimated at € 245,1 million.\(^{41}\) The total size of financial flows for all Electronic Dance Music activities in 2012 was € 586,9 million.\(^{42}\)


\(^{39}\) See also: [http://www.volkskrant.nl/vk/nl/2844/Archief/archief/article/detail/3332213/2012/10/16/House-gemaakt.dhtml](http://www.volkskrant.nl/vk/nl/2844/Archief/archief/article/detail/3332213/2012/10/16/House-gemaakt.dhtml)

\(^{40}\) Evar Advisory Services. *Dance-onomics, the economic importance of EDM for the Netherlands*, October 2012, p. 9

\(^{41}\) Evar Advisory Services. *Dance-onomics, the economic importance of EDM for the Netherlands*, October 2012, p. 10

\(^{42}\) Evar Advisory Services. *Dance-onomics, the economic importance of EDM for the Netherlands*, October 2012, p. 13
New media

Since the mid-1990s The Netherlands has an excellent reputation as a center of innovation for the new media. The added benefit of a favorable funding climate has made it a hub for international cooperation. Key players on the Dutch new media scene are often better known abroad than at home. This is due to the Dutch model of supporting a range of medium-sized organizations, rather than the more visible large onestop-shop institutions.

Room for experiment could be seen as a key factor for the flourishing new media sector. Important players are institutions such as Waag Society, V2, the Studio for Electro-Instrumental Music (STEIM), the interaction design of Mediamatic and the cross media production of Submarine. These examples all attract practitioners and theorists from all over the world because they offer the breathing space that is often unavailable in the commercial new media sector. Many of the new generation of new media start up small business, where they combine commercial projects with artistic ones.

A lot has changed since the mid-1990s. Back then, the internet was the realm of a small group of enthusiasts, whereas now the entire arts sector is pervaded by digital media and gained a more commercial character. New media are the back bone of the creative industries and the sector is faced with a new challenge: they have to ensure that the cultural and social aspects of new media remain in the picture, that there is still room to experiment with new technologies in alternative ways, bringing in expertise from a variety of disciplines.43

Audiovisual Art is a discipline within the New Media sector that gained rapid popularity. Although audiovisual art is a broad concept, the main concept can be defined as the exploration of kinetic abstract art and music set in relation to each other. Audiovisual artists do not only transfer sound on images or images on sounds, but they consider the two media as a whole. The result of their creations can be shown through the medium of video, but also through performances or installations.

This niche of the creative sector is not as big commercially as for example the earlier mentioned parts of the Creative Industries, as Audiovisual Arts leans more towards the cultural sector. It is a very clear example of the overlap of the creative industries and the cultural sector, as well as an overlay between technology and art.

In The Netherlands, there is a great deal of expertise in this discipline, as there are various educations completely dedicated to this particular area of knowledge. Furthermore, there is a huge interest for

43 http://www.sica.nl/content/nl-holland%E2%80%99s-new-media-model
Audiovisual Arts in the Netherlands, which is illustrated in the large number of events that are organized every year in The Netherlands focused especially on audiovisual arts.

A number of audiovisual arts events organized every year in The Netherlands:

- **Today’s Art Festival**, The Hague.
  
  Today’s Art Festival is organized in 2013 for the 9th time in a row, in 2010 170 artists participated and 16500 visitors were counted.\(^{44}\)

- **Playground Digital Arts Festival**, Eindhoven.

- **Freemote Festival**, Utrecht.

- **Dutch Electronic Art Festival (DEAF)** organized every two years by V2 in Rotterdam.

- **Transnatural Festival**, Amsterdam.

- **STRP Biennale**, Eindhoven.

- **FIBER Festival**, Amsterdam
  
  This festival was attended by almost 1000 people and included also a performance of a Mexican artist.


- **Bring Your Own Beamer**, multiple cities in The Netherlands.

- **E-pulse Festival**, Breda.

- **Gogbot Festival**, Enschede.

- **Impakt Festival**, Utrecht.

Additionally, there is a great number of events in the Netherlands that have incorporated audiovisual arts in their program such as Museum-Night, which (just taking into consideration The Hague) has been visited by more than 10.000 people. Moreover, in the Netherlands there are about 14 specialized educational programs that focus on audiovisual production.\(^{45}\)

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\(^{44}\) [http://todaysart.org/files/2012/05/TodaysCV_metLogo.pdf](http://todaysart.org/files/2012/05/TodaysCV_metLogo.pdf)

Dutch Creative Industries in Mexico

The Dutch Creative Industries in Mexico are in a start-up phase and the Mexican market is starting to attract more Dutch companies doing business in the creative sector.
Examples of Dutch expertise entering the market:

Fernando Donis – Architect – Worked for Rem Koolhaas, designed the CCTV building in Beijing

VBAT office – Dutch branding company for major companies such as Heineken, Sol, Amstel.

Steven Zwerink – Digital Nomad – Startup bus

Ivan Keur – Orange Juizze, BEA Weapons – Artist Management, Event Management, Branding

Project: Archis – Centre Periphery – Architecture Project

ID&T – Sensation White Mexico (2014) – Electronic dance event

PICNIC Mexico in cooperation with CO_ - PICNIC Mexico 2014 – Creativity platform with a focus on Social Innovation

DashBerlin – Music is Life World Tour – México

DJ Tiësto – Mexico Tour 2013

DJ Armin van Buuren – Mexico Tour 2013 – A state of Trance 600

Paul van der Voort – DAFdf – Arquitectura y Urbanismo

Kees van Rooij – Landscape Architect

G-Star RAW – Denim and Fashion company

Scotch & Soda – Amsterdam Couture – Fashion company

OFFF Festival – Attendance of two Dutch Audiovisual Artists

DJ Hardwell – I am Hardwell Tour – México
Dutch Educational Institutes specialized in Creative Industries

Universities:

- Tilburg University: Faculty of Economics and Business Administration; Faculty of Social and Behavioral Sciences; subject: Regional Development, City Marketing
- Erasmus University Rotterdam; Faculty of History and Arts, Cultural Economics and cultural Entrepreneurship
- Free University of Amsterdam; Department of Spatial Economics, Planning, Institutions and Transforming Spaces
- State University Utrecht; Institute for Historical, Cultural Studies and Literature – HLCS
- University Maastricht; Maastricht Economic Research Institute on Innovation and Technology – MERIT

HBO:

- Utrecht School of the Arts, Utrecht; Faculty of Art and Economics
- INHOLLAND University of Professional Education, Amsterdam/The Hague/Haarlem; Entertainment Management, Leisure Management
- Fontys University of Applied Sciences, Tilburg
- NHTV Breda University of Applied Sciences
- AVANS Hogeschool, Breda/Den Bosch; Economy and Management Sector
- Hogeschool Arnhem and Nijmegen/ARTeZ Institute of the Arts: Arnhems Centre for Creative Economy and Innovation.
Mexican Creative Industries

Facts and Figures

Throughout this chapter, clear facts and figures will demonstrate that Mexico is Latin America’s leader in the Creative Industries and takes up the 18th place on world-level according to the Creative Economy report issued in 2010 by the United Nations, the UNDP and the UNCTAD. Mexico’s cultural infrastructure is highly developed and “has received international awards for the quality and capacity of its venues”.46 The country features a total of 1,209 museums, as well as 1,782 cultural centers and over 45,000 archeological sites that enjoy legal protection. With 31 UNESCO World Heritage sites all over the country, Mexico has the greatest number of UNESCO Sites on the American Continent.

Furthermore, the country hosts a large number of cultural festivals. Amongst them is the most important cultural and artistic festival in Latin America; the Festival Internacional Cervantino in Guanajuato. It is a 19 day-long event that covers a wide spectrum of artistic disciplines, as for example dance, theatre and music. In 2012 the festival hosted a total of 135 artistic groups from 26 countries and it received over half a million visitors.47

One other artistic discipline in which Mexico excels is Mexican cinema. According to the Global Entertainment and Media Outlook 2009-2013 issued by PricewaterhouseCoopers, the Mexican Film Entertainment market is the largest in Latin America, leaving the continent’s other two major economies, Brazil and Argentina, behind.48

Contemporary film directors as Alejandro Gonzáles Iñárritu (Babel, Amores Perros, 21 Grams), Alfonso Cuarón (Y tu mamá también, Children of Men, Harry Potter and the Prisoner of Azkaban) and Guillermo del Toro (director Pan’s Labyrinth, producer Kung Fu Panda 2 & 3) all contribute to the international reputation the country enjoys today.

Mexico hosts as much as ten film festivals on a yearly base, with the Guadalajara International Film Festival and the Guanajuato International Film Festival being important contributors.

46 www.mim.promexico.gob.mx/wb/mim/infraestructura_cultural

47 http://eleconomista.com.mx/entretenimiento/2012/10/21/festival-internacional-cervantino-rompe-record

48 PricewaterhouseCoopers, Global Entertainment and Media Outlook 2009-2013
These, and many other examples, facts and figures that will be provided throughout this chapter show that Mexico has its cultural infrastructure well in place and proves to be a country for the Dutch Creative Industries to successfully enter the market.

A trend for countries with higher economic development is that they tend to concentrate more effort in the area of Creative Industries. With Mexico’s economy expanding rapidly, the government recognizes the importance of investing in its Creative Industries. In Mexico, the Creative Industries employed more people than many of the traditional sectors of economy. The Creative Industries are good for a 4.77 per cent of the GDP. ProMéxico, the government institution that is part of the trade and investment department at the Ministry of Economy is responsible for promoting the attraction of foreign investment and the export of goods and services. They rated the Creative Industries as the fifth most important strategic industry after aerospace, agriculture, food and the automotive industries.

The UNCTAD Report compares the import and export data for the years 2002 and 2008. The world exports of Creative Industry goods and services show a powerful growth. In 2002, the world exports of all creative industry amounted to $267 billion, whereas this number reached $592 billion in 2008.

The shares in global markets for the Creative Industries during the period 2002-2008 grew at an annual rate of 14 per cent, despite the 12 percent decline in global commerce in 2008. International trade in the Creative Industries continued to expand, undeterred by the broader economic crisis. The United Nations Development Program concludes that trade of creative goods and services is increasingly associated with our current lifestyle and is therefor more resilient to the economic crisis. Creative industries have proven to be one of the world’s most dynamic sectors, contributing to cultural, social and economic development.

The export of creative goods makes up the largest part of world trade of Creative Industries. In 2002 the export of creative goods was $205 billion, in 2008 this number had almost doubled to $407 billion. This represents an average annual growth rate of 11.5 per cent. In Latin America, imports of creative goods showed an even vaster growth in this period. The import almost tripled from $ 6.3 billion to 16 billion. Both the Netherlands and Mexico are listed among the top 20 of exporters of creative

49 UNCTAD/UNDP, p. 52
50 UNCTAD/UNDP, p. 180
52 UNCTAD/UNDP, p. 126-127
53 UNCTAD/UNDP, p. 127
54 UNCTAD, p. 136
55 UNCTAD, p. 130
goods worldwide. The Netherlands takes up the 8\textsuperscript{th} place on the list, Mexico the 18\textsuperscript{th}. It is notable that Mexico is the only Latin American country that made the top 20.

Mexico also rates number 5 in the top 10 exporters of creative goods of developing countries. Again, it is the only Latin American country to have made the top 10 and it surpasses other major Latin American exporters such as Brazil, Colombia and Argentina.

The creative services account for a smaller part of world trade of Creative Industries, however, this sector did exceed the creative goods in terms of growth rate. The export of creative services rose from $62 billion in 2002 to $185 billion in 2008, with an average annual growth rate of 17 per cent (see fig. 7).

Within the regions of the developing countries, Asia and China in particular are leading the growth of creative industry products. Latin America is the second region for growth on the list.\textsuperscript{57}

The UNCTAD report rates Mexico as a developing country, the developing countries constitute 43 per cent of the export of creative goods in 2008, for the creative services this was 11 per cent.

The sectors with best penetration in global markets are arts-related goods.\textsuperscript{58} In 2002 the export for creative goods accounted for $76 billion, in 2008 the export value reached $176 billion.

\textsuperscript{56} UNCTAD, p. 127
\textsuperscript{57} UNCTAD, p. 137
\textsuperscript{58} UNCTAD, p. 128
Figure 8 shows the exports of creative goods from developing countries for the years 2002 and 2008, the exports are divided in 7 separate economic groups. As we see, every single group shows a vast growth.

Fig. 8: Creative goods: Exports of developing economies, sorted by economic group

Mexico is a country of services. The GDP for the services sector (in millions of pesos) in 2011 was 8,596,886. This means a market share of 59.9 percent. The services industries ProMéxico aims to develop are Creative Industries and IT. Renewable energies and energy efficiency and Life Sciences are also priority industries, but these industries are a combination of the manufactures and services sector.

Mexico has world-class audiovisual production facilities, such as the Baja Studios, the largest water set in the world. The Churubusco Studios are also located in Mexico, which have a renowned trajectory in the film industry.

Furthermore, Mexico has a huge pool of skilled talent with experience in audiovisual projects of that received international appraisal.

According to the Ministry of Public Education, every year close to 115 thousand students graduate from engineering and technology programs in Mexico. Mexico surpasses Germany, Canada,
United Kingdom and Brazil. According to the IMD World competitiveness Yearbook, Mexico offers a higher quality of labor force and talent than Russia, India, China and Brazil.\textsuperscript{59} Also, audiovisual production and development costs are very competitive; according to KPMG, Mexico is 37.7 percent more competitive in software design costs and 38.9 percent more competitive in digital entertainment costs, compared to the United States.\textsuperscript{60}

\textsuperscript{59} ANUIES/IMD, \textit{Competitiveness Yearbook}, 2012
\textsuperscript{60} \url{http://mim.promexico.gob.mx/wb/mim/ind_perfil_del_sector}
Programa Nacional de Cultura 2007-2012

As is the case with the Dutch government, the Mexican government stresses the importance of developing its Creative Industries. In the Programa Nacional de Cultura 2007-2012 a special chapter is dedicated to Cultural Industries. In this chapter the sectors of Cultural Industries that the Mexican government aims to fortify and in which Mexico excels are presented. These sectors are:

1. Cinema
2. Public Media (radio and television)
3. Television
4. Radio
5. Editorial Production
6. Popular Culture (artisans, tourist initiatives)
7. Design (fashion, jewelry, furniture, graphic design)

The program provides a diagnosis of the seven abovementioned sectors, as well as targets and strategies that support the sectors’ development.

The targets per sector are as follows:

Cultivate the cinematic production
- Strengthen the production sector of Mexican cinema and stimulate the country’s industrial cinematic activities
- Inform the national audience on the history of Mexican and worldwide quality cinema and the Mexican cinematic culture abroad as a means to stabilize and expand cultural and commercial circuits for the exhibition of quality national cinema. Municipal and state authorities shall aid in facilitating the space in order to reach this target.

Development of cinematographic institutes
- Reach a competitive level for the Estudios Churubusco that they require in order to enter the market in the main business areas.

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Cultivate television production
- Set up and support new cultural television projects through Canal 22. These projects shall stimulate the development of new audiovisual languages and of which the content shall touch upon a diversity of national and cultural themes.
- Set up national and international presence to make Canal 22 an attractive option for the largest number of viewers in Mexican and international households. Improve their financial sources.

Radio production
- Cultivate the quality and creativity of Radio Educación

Cultivate editorial production
- Facilitate access to literature; meticulously and effectively determine the editions and costs.
- Enrichment of the archives of the Red Nacional de Bibliotecas Públicas and the lecture halls.
- A higher distribution of literary works in libraries and fairs.

Editorial distribution
- Increase the number of exhibition and sale points with the emphasis on quality and equity for all parties involved. Ensure that the cultural sector’s marketer improves this commercialization and distribution process.

Popular Culture
- Stimulate the development of popular cultural products (here referring to design, elaboration and commercialization) in an environment that respects the cultural processes involved.

Design
- Emphasize design as being a cultural and artistic expression of unique value.
- Stimulate creativity and design in all its forms and appearances
- Adopt a strategy of expanding design as an element of creative and economic development and a generator of employment.

Facilities for cultivation
- Establish policies that stimulate the fortification of the Cultural Industries and the creation of cultural companies.

Policies for the music industry
- Contribute to the protection of author rights within the music industry.

Digital politics in the service of culture
- Use new digital media in the service of the Cultural Industries in order to regulate and transmit its products.
Juridical framework for the cultural industries

- Incorporate a juridical framework for the cultural industries, take measures and provide conditions that support the sector’s development.
Main Industries

Design

Design is the economic group that accounts for the largest share of exports from Latin America. The definition of design is debatable. The Industrial Design Society of America defines “design” as “the creation and development of concepts and specifications that optimize the functions, and value the appearance of products and systems for the mutual benefit of users and manufacturers”.\(^{62}\) The UNCTAD provides another definition of design:

“... design fits into the “functional creations” category of the UNCTAD definition of creative industries. It is the result of creativity expressed as a knowledge-based economic activity, which produces goods or services with creative content, cultural and economic value and market objectives. As such, the design industry is part of the creative economy given that it cuts across the artisan, manufacturing and services components of the value chain, interacting with technology and qualifying for Intellectual Property Rights.”\(^{63}\) The UNCTAD analysis classifies only goods as design, industrial design is not covered and architectural services are treated under “functional creative services”. The products classified as design are: trade data for architecture (original drawings for architectural plans), interior objects, jewelry, toys, glassware and fashion accessories.\(^{64}\) Mexico is number 9 in the top 10 exporters of design among developing economies in 2008.

In 2012, CENTRO University in collaboration with ProMéxico created a Mexican Design Directory. The aim of this directory is to function as a tool to spread and promote the exportable supply of Mexican designers on both a national and international level. The directory serves as a direct link for persons and companies that need services or products of Mexican designers. This will generate and concretize projects (cultural- as well as commercial projects) in the most flexible and efficient manner. The directory seeks to be an enduring project with updates through the years. It is a great initiative that adds value to projects that have been initiated by both ProMéxico and CENTRO in order to stimulate the development, economic growth and acknowledgement of the Mexican design sector. With the Mexican government actively stimulating its design sector on an international level and a rise in Mexican educational institutes offering design related education, this would be the right time for the widely

\(^{62}\) For further information, consult the websites of the Industrial Designers Association of America, the American Institute of Graphic Arts and the Design Council, London (UNCTAD/UNDP, p. 156)
\(^{63}\) UNCTAD/UNDP, p. 156
\(^{64}\) UNCTAD/UNDP, p. 156
acclaimed Dutch Design sector to step in and establish cooperation on a B2B, G2G and K2K level. One collective project is the Destination Mexico New International Design at the MoMA (Museum of Modern Art) Design Store. ProMéxico supported this project as a promoter, CENTRO as a cultural partner. This is a project that combines a government, knowledge and business collaboration on in international level.

(Dance) Music

Music is one of the central creative industries, with great cultural and economic value in all societies. Everywhere in the world, music is the universal idiom to give expression to our feelings and aspirations. Sharing a musical experience, whether domestically or internationally, is an act that goes beyond established boundaries and transcends existing divides. For centuries, composers, singers and musicians have been carrying their local musical traditions across geographical borders, contributing to the fusion of music styles among many cultures even if the lyrics remain an expression of cultural diversity mirroring local realities. Music is an essential instrument of intercultural dialogue. The music sector can be classified under audiovisuals, new media and performing arts, depending on the specific musical discipline. Mexico is Latin America’s leading music exporter and rates 4 on the top 10 exporters of performing arts among developing countries.

Mexico has seen a market growth of 17 % since 2008. Furthermore, Latin America was the fastest growing region of the year 2012. There is a trend of market decline in physical music consumption (cd’s, dvd’s, LP’s, cassettes etc.). The main reason for the decay of physical music purchases is the introduction of file sharing (peer-to-peer), more than a decade ago. The shift from physical to digital consumption has been a continuous process, with global digital revenues growing by 9.2 % in 2009 to US$ 4.3 billion, compared to US $ 3.9 billion in 2008.

Despite the decline in physical music consumption, the overall sales of recorded music in Mexico grew in 2009. The Mexican market even experienced the so-called “Holy Grail”, where the growth in

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65 http://www.moma.org/explore/inside_out/2012/04/20/discovering-contemporary-mexican-design
66 UNCTAD/UNDP, p. 143
67 http://www.ifpi.org/content/section_news/20130408.html
digital sales offset the decline in physical sales.\textsuperscript{69} The launch of digital stores like iTunes Mexico and Mixup Digital, as well as the increase in streaming activity contributed to a 35.6 \% growth in digital sales.

Another market that saw a strong growth in 2009 is the performance rights revenues. Growth was particularly strong in Latin America & the Caribbean, where revenues increased by 23.2 \%. Mexico’s 2009 revenues had more than doubled compared to the 2008 revenues (see fig. 9).\textsuperscript{70}

<table>
<thead>
<tr>
<th>Mexico’s Recording Industry 2010, World Ranking</th>
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<tbody>
<tr>
<td>Physical Sales</td>
</tr>
<tr>
<td>Digital Sales</td>
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<tr>
<td>Performance Rights</td>
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<td>Total market</td>
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Fig. 9: Mexico’s Recording Industry 2010, World Ranking

Special attention should be paid to the music sector Dance. Mexico is an upcoming dance country, with dance music gaining rapid popularity. With an estimated export value of € 70 million, the Dutch dance sector shows great economic potential and is able to pay service to the Mexican demand.\textsuperscript{71} There are excellent opportunities for Dutch Dance artists to enter the Mexican market. Already, more than 50 bookings for Dutch Dance artists are planned for 2013 (see appendix 1). The top 100 DJ chart 2013, composed by DJ Mag, features 6 Dutch Dance artists in the top 10. The world’s number one DJ for the year 2013 is the Dutch DJ Hardwell.\textsuperscript{72} With Dutch DJ’s dominating the chart, it shows that there is great demand for Dutch dance-artists.

Another growing scene in Mexico is the festival scene. In 2013 the fourth edition of the two-day Corona Capital Festival took place, where more than 60 bands performed (The XX, M.I.A., The Arctic Monkeys among others). The festival attracted a total of 160.000 visitors.\textsuperscript{73} Another important yearly festival that takes place in Mexico-City is the Vive Latino rock and alternative music festival, with bands such as Blur, Underworld and the Yeah, Yeah, Yeahs. This four-day festival attracted more than 200.000

\textsuperscript{69} Through Scribd: \url{http://www.scribd.com/doc/128354467/Recording-Industry-in-Numbers-2010}
\textsuperscript{70} Document: IFPI Recording Industry in Numbers 2010; The definite source of global music market information, IFPI 2010, p. 6, 72-73
\textsuperscript{71} IFPI, Recording Industry in Numbers 2010, p. 6, 72-73
\textsuperscript{72} http://fd.nl/economie-politiek/columns/farid-tabarki/687281-1310/dance
\textsuperscript{73} http://www.djmag.com/top100
\textsuperscript{73} http://www.zocalo.com.mx/seccion/articulo/el-exito-del-corona-capital-1381798472,
visitors in 2013.\textsuperscript{74} It is clear that a high demand of international festivals and bands exists in Mexico. The Netherlands is a country with a high density of music-, theater-, and cultural festivals. In 2013 The Netherlands hosted a total of 698 festivals that individually attracted more than 3000 visitors. The country even has the highest density of dance-festivals worldwide.\textsuperscript{75} There is room for cooperation between Mexico and The Netherlands when it comes to music-festivals and for dance-festivals. The Netherlands can fulfill the Mexican demand. The first Dutch Dance festival to travel to Mexico is Sensation White, which will take place in 2014.

\textbf{New Media}

Following the UNCTAD definition of New Media, this sector plays two complementary roles:

- “It is a creative product itself, expressed through digital forms of creative content such as software, cartoons and interactive products like video games.”

- “It is an enabler of connectivity used as a tool for marketing and distribution of other creative products such as music, films, books and news or creative services such as advertising and architectural services.”\textsuperscript{76}

Through this definition we may conclude that the New Media sector perfectly supports the Dutch “Topsectoren Beleid” in the sense that it is a discipline with great potential for cross-overs with other disciplines in the Creative Industries. The New Media sector is booming in all parts of the world, opening new venues for collaborative creations, particularly in the areas of multiplayer games, videos, cartoons & multimedia content.\textsuperscript{77}

Video games are a very dynamic group. On the global market, exports more than tripled over the period 2002-2008, from 8 to 27 million (for detailed on exports by major countries, see tables 1.2.A and 1.2.B in

\textsuperscript{74} \url{http://www.novedadesdetabasco.com.mx/noticia/102018/el-vive-latino-2013-reunio-a-mas-de-200-mil-personas/}
\textsuperscript{75} \url{http://fd.nl/economie-politiek/columns/farid-tabarki/687281-1310/dance}
\textsuperscript{76} UNCTAD/UNDP p. 158
\textsuperscript{77} UNCTAD/UNDP p. 158
the annex of the UNCTAD report). Mexico is the only country not in Asia to make the top-ten list of exporters among developing countries.\textsuperscript{78}

The PricewaterhouseCoopers \textit{Global entertainment and media outlook 2012-2016} predicts a growth rate of 8.9 per cent to 2016 for the Mexican entertainment and media sector.\textsuperscript{79} The Mexican consumer spending growth for 2012-2016 is estimated at 6.3 per cent for video games and 4.2 per cent for the sector music. Mexico’s video game market is extremely competitive; therefor this specific new media discipline deserves to be discussed separately (see page 45).

Another upcoming discipline within the New Media sector is Audiovisual Art. Mexico is also very advanced when it comes to this field of expertise, even though it started to gain popularity only a few years ago. Video mapping for example, which is a projection technology used to turn objects, often irregularly shaped, into a display surface for video projection, has been used in many occasions at public celebrations and festivals.\textsuperscript{80}

Audiovisual arts events organized every year in Mexico:

\begin{itemize}
  \item \textit{MUTEK}, Mexico City
  \item \textit{Festival Drawing [a] Live}, Mexico City and Oaxaca
  \item \textit{Croma Fest}, Mexico City
  \item \textit{OFFF Festival} in Mexico City. For the edition of 2013, two Dutch organizations were invited to participate namely, FIBER and Soundlings, which is a wonderful example of the opportunities for cooperation between Mexico and The Netherlands
  \item \textit{Ambulart}, Mexico City
  \item \textit{Proyecta}, Oaxaca
\end{itemize}

Even though Visual Arts is a less lucrative sector than for example dance music, there is still a great potential for extensive knowledge exchange and cooperation on festivals and events for the both countries. This niche of Creative Industries and Culture should not be ignored, since there is an enormous amount of knowledge available in both countries, which can easily be translated into

\begin{footnotesize}
\begin{thebibliography}{9}
\item UNCTAD/UNDP p. 159
\item PricewaterhouseCoopers, \textit{Global entertainment and media outlook 2012-2016}, slide 8, accessed through: \url{http://www.pwc.com/mx/es/prensa/archivo/2012-10-mexico-outlook.pdf}
\item \url{http://www.visualvibes.nl/videomapping}
\end{thebibliography}
\end{footnotesize}
business, i.e. audiovisual projections on festivals. Furthermore, there is a large audience for Audiovisual Arts here in Mexico, which allows for creating a significant awareness of Dutch expertise and artists in this field and vice versa. Given that the Mexican Creative Industries sector is on the rise and quickly developing, it is sensible to nourish the sector from the bottom up to stimulate the knowledge available which will ultimately flow into business and Audiovisual Arts would function as a perfect starting point.

Creative Services: Architecture

Ever since Pre-Hispanic times, when the Mayans and the Aztecs built several of the most important and well-known structures known to human kind, Mexico has shown a great deal of expertise in the field of architecture. And likewise nowadays, visitors to Mexico City are often surprised by its variety of architectural styles, from 16th century churches to art-deco architecture and ultra-modern skyscrapers built over the past decade. One needs only to glance at the Soumaya Museum or the Calakmul building in which the Embassy of the Kingdom of the Netherlands is seated, to grasp the vividness and the diversity the architectural sector in this country has to offer.

The creative services sector in Mexico, in which architecture is included, is growing faster than more conventional sectors. Exports of creative services tripled in value from $62 billion in 2002 to $185 billion in 2008. Architecture and advertising services were the sectors with the greatest dynamism. Imports of creative services increased from $72.3 billion in 2002 to $168 billion in 2008. Architectural and design services ranked first, with imports increasing from $ 21.3 billion to $63.3 billion, representing 37.5 per cent of the total imports of creative services. Furthermore, Mexico is the only Latin American country featured in the top 100 largest architecture firms in the world, namely on number 20 (see fig. 10). The knowledge institutions that have most prestigious architectural faculties in Mexico are Ibero University and UNAM University.

An interesting aspect for the Mexican architecture sector in particular is the contradiction with the Netherlands when it comes to conservativeness. In Mexico, architects can be almost limitlessly

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81 [http://images.businessweek.com/ss/10/01/0125_mexico_city_hottest_buildings/8.html](http://images.businessweek.com/ss/10/01/0125_mexico_city_hottest_buildings/8.html)

82 UNCTAD/UNDP, p. 161


84 [http://www.mexicomaxico.org/Voto/RankUniv.htm](http://www.mexicomaxico.org/Voto/RankUniv.htm)
creative, whereas in the Netherlands one has to comply with strict regulations on monumental buildings as well as regulations considering a uniform street view.

The architectural market in Mexico puts great emphasis on innovation and creativity; two concepts in which Dutch architects stand out.

The Mexican architect Fernando Donis, whose head office is located in Rotterdam and who has been connected to the Delft Technological University, explained that research is one of the most important aspects of architecture. Mr. Donis emphasized that Dutch architectural research is listed amongst the best of the world, not in the least because Delft University’s architectural faculty is listed as the 6st best of the world.85

This, among other things, causes the Dutch to be one of the pioneers for architectural research worldwide, with a specific quality of being breaking the paradigms of architecture, which is very much in demand in Mexico.

Furthermore, while Europe’s construction sector is hit extremely hard by the recession, many new architectural projects are planned for Mexico City and the state of Yucatan will close this year with a record investment in its infrastructure86.

Another opportunity for the Dutch to set a permanent foot onto the Mexican architecture market is to focus on Urban Design. Giving the fact that the Mexican capital has a population of approximately 20 million people, living and commuting in Mexico City gets more difficult every day.87 Mexico City is tormented by many traffic issues, which need resolving. Also, there is a large demand for decent design of public spaces such as playground and parks in Mexico City. And as nowadays, Dutch cities are thriving on self-initiated rejuvenations of urban space, this is an interesting niche of the architectural sector to explore.88

85 http://www.obrasweb.mx/arquitectura/2013/07/11/el-top-10-de-universidades-de-arquitectura-e-ingenieria
87 http://www.worldatlas.com/citypops.htm#.UmlUitKxfY5g
88 Arts Holland Magazine, October 2013, p. 42
WHERE THE WORLD'S 100 LARGEST ARCHITECTURE FIRMS ARE LOCATED
(AND HOW MUCH MONEY THEY MAKE)

All numbers and figures have been taken from BUILDING DESIGN's "World Architecture '100'" list (for 2013) of the world's largest architecture firms. Those countries in black represent the locations with the highest number of employees (employed by these 100 firms).

* This figure represents the company areas, the only wa 100 firm in China. In actual fact, however, Aecom is based both in China and the UK; however, we only counted their numbers for China, and not as part of the UK total.

Fig. 10: Location of the World’s Largest Architecture Firms
Videogames & Serious Gaming

In terms of videogames, PwC states that the industry experienced an average annual growth rate of 17.1 per cent from 2004 to 2011. In 2011, Mexico’s domestic market reached 814 million dollars, ranking the country among the top 15 videogames markets in the world and leading in Latin America. 89

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89 PricewaterhouseCoopers, Global entertainment and Media Outlook: 2009-2013
The multimedia industry is one of the most promising industries worldwide and is expected to play a key role in global growth during the following years. The industry not only generates an economic impulse, it also enables to transfer culture and promote technological development. Within the multimedia industry, the video game software sector constitutes a key element, given that it is expected to grow four times faster than the media and entertainment markets altogether. As a result of this global growth, the video game sector has diversified, permeating other areas beyond entertainment, such as education and awareness campaigns (= serious gaming). Furthermore, the expansion of the video game industry has led to an increasing demand for skilled people, competitive costs and government support. This has, in turn, led to the arrival of new players who have transformed the market.

Mexico has emerged in this new wave of countries with potential to develop the video game industry. Today it is the most important market for video games in Latin America and one of the top 15 worldwide. And, even though most of the content produced by Mexico is consumed abroad, the country has been setting up the bases to develop a national industry, through the attraction of the most representative international companies and the promotion of domestic companies.”

The successful development of the video game industry in Mexico can be attributed to several factors, such as:
- Low costs in audiovisual production and development, surpassing countries like Canada, the UK or France.
- Competitive human capital that will steadily increase in the following years, as shown by the fact that more than 790,000 students are enrolled in engineering and technology-related programs and over 100,000 graduate from such programs each year.
- Increasing training and education in areas such as design and game programming by specialized universities.
- Port of entry to other Latin American markets, especially those with Spanish as their primary language. This means foreign companies interested in entering the Mexican market, may also have the opportunity to penetrate other Latin American markets.

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Mexico’s interactive media sector currently exhibits many of the characteristics common to a growing industry sector, where companies are more focused on the beginning of the value chain. And, even though the interactive media industry is often seen as one that is not limited by geography, in the case of Mexico, it has developed an excellent base on which to build.

Mexico has succeeded in developing a national industry, which is being driven by cluster-like sectors in the major centers, comprising companies that develop software for video games. For this reason, the Mexican government – both at federal and local levels- has promoted the generation of a world-class video game development industry in the country, managing multiple programs aimed at attracting foreign companies and propelling national developers.”

Mexico is also exploring the serious gaming niche. An example is: “ALFIL; A Crowd Simulation Serious Game for Massive Evacuation Training and Awareness”. This serious game is the result of a cooperation between the Universidad de Guadalajara (Mexico) and the Institut de Recherche en Informatique de Toulouse (France).

The purpose of the game is to create awareness and promote self-protection in the event of massive evacuations. The game provides distributed programming techniques to stimulate crowds of thousands of people. In the last decade, social-organizational phenomena such as human stampedes, marches and a general lack of self-protection have led to accidents and injuries in Mexico. The serious game simulates these phenomena so that they can be studied and anticipated onto. The second purpose of the game is to serve as a planning and training tool for first responders and massive event organizers.

Another Mexican serious game, though of a very different nature, is the game Bicentenario 2010: Los Héroes de México, developed by Neggi Studios. Neggi Studios combines history, fiction and design to create video games that have established their own niche in the market. The game’s topic is Mexico’s War of Independence. Players are stimulated to reenact key moments of the War of Independence, and through playing the game learn more about the country’s national history. In 2010, this was the first game for the iPad in Mexico and has been downloaded more than 25,000 times. After the success of the Bicentenario 2010 game, the company has developed two other games that teach gamers about their country’s history and culture in a playful way: the first revolved around the Day of

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92 http://www.igi-global.com/article/alfil-crowd-simulation-serious-game/69786
the Dead, the second is situated in the 1910 Mexican Revolution.\textsuperscript{93} With the high level of expertise both countries offer in the field of gaming and serious gaming, there are numerous opportunities for business to business cooperation and knowledge to knowledge exchange.

**Film Industry**

Mexico has the largest film market in Latin America and is ranked the 5\textsuperscript{th} country world-wide in terms of movie attendance. According to KPMG, digital entertainment production costs in Mexico are 40\% lower than in the United States. Most of the new Mexican films showcased at these festivals have been financed by a combination of private and government funds under a mechanism that has been stimulating the industry’s projectors since 2006.\textsuperscript{94}

Determined to expand in terms of both quantity and quality, Mexico produced 67 feature films in 2011, 58 of which were financed with government funds and nine with private capital. According to the Mexican Film Institute (IMCINE), 59 of these features premiered in Mexico, confirming that the number of Mexican productions and premieres has increased slowly but surely since tax incentives were introduced to consolidate the seventh art as an industry, based on a model that combines government and private sector financing. Under that model, the Mexican government allocates $ 70 million a year to movie projects. These funds are distributed through entities such as the Fund for Quality Film Productions (FOPROCINE) and the Film Investment and Stimulus Fund (FIDECINE). Additionally, Mexican law provides for the setting up of a private capital fund, managed and distributed by IMCINE via the EFICINE 226 incentive.

Created to support the production of fictional features, documentaries and animated films, Mexican production companies and individuals are eligible for FOPROCINE financing, although foreign filmmakers can apply (provided they have been residing in the country for at least two years and can prove they have been involved in the Mexican film industry during that time). FIDECINE has a focus on the production, postproduction, distribution and screening of fictional features and animated films and includes incentives for commercial showings and good track records at Mexican festivals.

\textsuperscript{93} ProMéxico, *Negocios*, “Creative Industries in Mexico: Matrix of the Spanish Digital Wave”, p. 36-37
and international festivals. For instance, directors whose films recoup 100 per cent of financial assistance received under the mechanism are granted an equivalent amount to make a second film.

These two funds operate via venture capital and credit lines: filmmakers may only apply for financial assistance from one at a time but both can be combined with EFICINE 226. Commonly referred to as simply “226”, this initiative was introduced in 2006 and allows taxpayers, both individuals and corporations, to participate in the production and postproduction of Mexican features and co-productions.

The investor receives a tax credit equivalent to the amount invested – up to a maximum of 20 million pesos – which can be used to offset income tax. A maximum of 500 million pesos is granted in tax credits every year. Since the mechanism came into effect, 408 companies have backed 207 film projects, including first features, documentaries and animated films.

Aside from the benefits that come with a successful festival tour, like the one on which Patricia Martínez de Velasco’s *Aquí entre nos* (2010) embarked, films like Luis Estrada’s *El infierno* (2010) have encouraged Mexican audiences to go see films made on their home turf.

“The 226 incentive has proven to be a good source of investment and has helped consolidate the Mexican industry. The number of films produced has increased in recent years,” says Andrea Stavenhagen, co-director of the “Industry” section of FICG.

In 2005, there were 279 new film releases in Mexico. In 2010, this number reached 313. The releases of Mexican films have risen sharply (see fig. 13). Also the level of cinema attendance shows a steady rise. In 2000 the number of attendance was 130 million, in 2010 this was 189 million.  

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**Fig. 13: New Film Releases in Mexico**

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Local Best Practices

Underneath three examples of best practices that are reputable names in the Mexican Creative Industries sector. The embassy is engaged in projects with all three best practices.

Cocolab is a network of collaborations between six companies specialized in different areas of multimedia technologies.

They offer a diverse range of creative services: concepts, artistic management, animation scenarios, 3D sketches and scenarios, musical compositions, character design, graphic design, set design and pyrotechnics. Cocolab applies these technologies in installations, pavilions and shows.

They have been granted important multimedia projects, for example the Mexico Bicentenary celebration and the closure ceremony of the G20 visit to Mexico, both commissioned by the Federal Government. Cocolab’s design is exhibited and used in various museums such as the Cincinnati Contemporary Arts Center and the National Palace in Mexico-City.

Cocolab is an amazing example of a creative company involved in cross-overs with other industries. They are engaged in social and environmental projects that stimulate the overall well-being of Mexican people and their society. For the government of Puebla, Cocolab was awarded the project “Proyecto Ambiental Atoyac. This is an ambitious project to clean the heavily polluted Atoyac River and incite people’s awareness of their environment. In order to achieve this, Cocolab’s strategy was to personify the river and let Atoyac tell his sad story through an animation video that was projected on the water. In visualising the sad fate of the river and making it tangible, the people of Puebla are more concerned about their environment and the condition of the river has improved significantly.

Cocolab is also the initiator of OFFF Mexico. OFFF is an entity in continuous transformation, alive and evolutionary. More than a decade ago, it was born as a post-digital culture festival; a meeting place to host contemporary creation through an in depth program of conferences, workshops and performances by the most relevant artists of our time. The OFFF festival is an international festival that originated in Barcelona and has travelled to New York, Lisbon, Paris and Mexico-City. After the successful first edition of OFFF Mexico in 2012, Cocolab is the organizer for the second edition of OFFF Mexico in August 2013.
PICNIC México is a platform for innovation and creativity which is organized by its local partner CO_. It functions as an incubator and accelerator for innovation of concepts, products, services and ideas. Through these activities, PICNIC is bringing up the large tendencies of our time and is exploring means to apply technology in a creative form with the aim to solve business, social and environmental challenges.

The theme for 2013-2014: Re-defining growth

Focus areas are: Technology, governance, sustainability, responsible tourism, education and rural and urban development

Target groups:
- Local and federal government
- Technology and media
- Service industries
- Creative industries
- Universities and researchers

PICNIC México is divided in six different events:

I. International Festival of Social Innovation, three-day festival in March 2014, Mexico-City
   - 3000 participants
   - 35 conferences
   - 20 workshops
   - 10 laboratories
   - 1 Hacker Camp

II. Innovation Market, a three day event in March 2014, Mexico-City
   - 100 innovation projects

III. PICNIC fair
   - Monterrey, Guadalajara, Oaxaca
   - One day in every city
   - July-November 2014
   - 600 participants in every city

IV. Social Impact Club
   - 4 annual reunions

V. CO_ Platform for digital collaboration
   - Collaboration tool for the people to convert themselves into co-creators with the shared property of the organization, which generates auto-organized participation and that maximizes the potential of research and projects, canalizing the common knowledge by optimizing connectivity.

VI. Accelerator for social innovation
   - Incubator for social innovation projects
OFFF was born as a post-digital culture festival more than a decade ago. It is a meeting place to host contemporary creation through an in depth program of conferences, workshops and performances by the most relevant artists of our time. These days, OFFF keeps being a reference event throughout the world. The festival is hosted in cities such as Barcelona, New York, Lisbon and Paris.

OFFF has produced an extensive international network of artists, developers, theorists and even more importantly, people who love art in all its multiple expressions: students, fans, professionals and the curious.

The OFFF network also includes a teaching center, the OFFF Atelier. This center has a continuous presence in the web 2.0 and consists of a permanent group of artists, organizers and producers ready to host OFFF events wherever they are in demand.

2012 was the first year OFF came to Mexico. Due to its overwhelming success, the event will take place again in August 2013, with an estimated presence of 3200 visitors. It will host 13 conferences, 8 workshops and an exhibition displaying the work of the most important digital designers of our time.

The festival attracts both professionals and students active in the Creative Industries sector. Examples of visitors are: animators, game designers, graphic designers, teachers, photographers, publishers, film directors and artists.

Conference speakers at OFFF 2013 are:

Pedro Reyes, Cocolab, Brosmind, Gilberto Esparza, Marta Cerdà, James Victore, Memo Akten, Serial Cut, Daito Manabe and Kyle Cooper.

Also, two Dutch keynote speakers are invited to the OFFF festival. Jarl Schulp, graphic designer and creative director of the FIBER foundation, will hold a short presentation on the festival, events and network. Tijs Ham, musician and sound artist with a background in visual arts, will organize a visual-reactive sound workshop. In his work he applies programming, live-electronics techniques and system design to explore and expand the possibilities of audible expression.
Important Cities and Regions

Top 5 FDI in 2011 by state:
1. Distrito Federal – 13,565.60
2. Nuevo Léon – 924.97
3. Chihuahua – 884.19
4. Estado de Mexico – 622.52
5. Baja California – 599.47

The Sector Arts, Entertainment and Recreation was good for $ 75.9 million in 2011.

According to ProMéxico, the top five strategic locations for the creative industries in 2013, in terms of Economic Units are:

1. Distrito Federal – 2,491
2. Mexico – 853
3. Jalisco – 821
4. Nuevo Leon - 708
5. Veracruz - 593

According to ProMéxico, the top five strategic locations for the Creative Industries in terms of foreign direct investment in million dollars in 2011 are:

1. Distrito Federal – 969.2
2. Nuevo Léon – 8.0
3. México – 4.8
4. Durango - 2.4
5. Chihuahua – 0.1

For general information on these locations, please view the Regional Comparative Study for Mexico.

96 http://mim.promexico.gob.mx/wb/mim/ind_top_de_entidades
97 Embassy of the Kingdom of the Netherlands Mexico. Regional Comparative Study, December 2012
Ciudad Creativa Digital

The Ciudad Creativa Digital (CCD) is an ambitious project to transform Guadalajara into the digital industry hub of Mexico. The aim of the Ciudad Creativa Digital is to provide a framework in which to develop and test changes and transformations that took place in the digital landscape and to attract talent with digital expertise. With the Creative Class working and living in Guadalajara they will benefit from multiple disciplines working in close proximity and the possibilities to partner and share ideas. In doing so, they generate a critical mass needed to sustain a thriving creative milieu. Also, the CCD will generate an increase in competitiveness and productivity as well as many job opportunities.

After a multi-month process of investigation supported by leading academics at the Massachusetts Institute of Technology (MIT), Guadalajara proved to be the perfect location for the CCD. Guadalajara is well connected to the whole of Mexico and the United States and has a newly built world-class infrastructure.

When it comes to knowledge, the city has a lot to offer; it is home to over twenty universities, providing courses in the fields of Engineering, Applied Sciences and the Arts.

Also, Guadalajara is home to a vibrant high-tech community and has been dubbed Mexico’s Silicon Valley. It is the capital of Jalisco, a national leader in the IT sector with more than 600 companies. Nearby Lake Chapala is home to over 25,000 expats and is already a magnet for the media industry.

The CCD will be constructed in the historical center of Guadalajara, in the area surrounding Parque Morelos and adjacent to the pedestrian axis connecting the city’s Cathedral with Hospicio Cabañas. The CCD will be housed in traditional courtyard buildings, providing these structures with a new purpose and thus weaving together traditional buildings with 21st century technology and activities. All existing buildings of historic value will be preserved and given a new purpose. These courtyard buildings will integrate living, working and leisure in a human-scaled urban environment that can be changed, added to and adapted over time. The CCD draws on the strengths of Guadalajara’s rich historical architecture and enhances it to achieve a new social and environmental sustainability.

The project’s process is divided in three phases:
- 1. Private development for creative industries on parcels already owned by the city and state government
- 2. Critical infrastructure improvements (pedestrian bridges and pedestrian streets)
- 3. Investment in public facilities, such as educational and cultural institutions. These investments should be sufficient to create a critical mass to change the image of the district and attract further investment.

Priority sectors for the CCD are animation, gaming and video post-production. Over time, an increase in adjacent media sectors is planned (advertising, music, media law etc.), in order to create a fully equipped media environment.

CCD facilities and institutions include:

- A digital creative educational institute
- A new incubator for start-up companies
- The Mexican Media Museum and Marketing center (MMMM)
- An outdoor theater

The Ciudad Creativa Digital is an ongoing project, ProMéxico is in charge of the project and will provide a 6-year plan (2012-2018).

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Yearly Events

Mexico offers a wide range of recurring cultural events, such as expo’s, trade fairs, festivals, a fashion week and conferences. Underneath is a list of the most important events.

January
- BPM Festival, Playa del Carmen

February
- Cromafest, Mexico

March
- Electro Beach, Puerto Vallarta
- SXSW, Austin
- Arquine, Mexico
- Antad Expo, Guadalajara
- FICG, Guadalajara
- PICNIC Mexico, Mexico

April
- Expo Zona Maco, Mexico
- Mercedez Benz Fashion Week, Mexico
- Dejando Huella, Queretaro
- Proyecta International Festival for Design and Digital Arts, Oaxaca
- Monterrey Game Conference, Monterrey
- StartUp Weekend Zacatecas, Zacatecas

May
- Expográfica, Guadalajara
July
- TAG DF, Mexico
- Guanajuato International Film Festival, Guanajuato

August
- OFFF Mexico, Mexico

September
- Festival Internacional de Artes Electrónicas y Video Transitio_MX 04, Mexico
- MUTEK, Mexico
- Designfest, Guadalajara

October
- Mexico Design Week, Mexico

November
- Bonus Creative Week, Mexico

Also, in 2013, the MoMA dedicated its “Destination: Design” program to Mexico this year. Thanks to the initiative of curator Ana Elena Mallet and the support of ProMéxico, the work of over 60 designers will be showcased and sold at MoMA stores.\(^99\)

\(^99\) [http://negocios.promexico.gob.mx/english/08-2012/lifestyleFigures/art01.html](http://negocios.promexico.gob.mx/english/08-2012/lifestyleFigures/art01.html)
**Mexican Educational Institutions specialized in Creative Industries**

*Universidad Nacional Autónoma México:*

*Instituto Technológico de Estudios Superiores de Monterrey:*
Architecture, Animation and Digital Art, Industrial Design

*Universidad de Monterrey:*
Architecture, Arts, Interior Design, Textile and Fashion Design, Industrial Design

*Centro de Estudios Superiores de Diseño de Monterrey:*
Animation, Architecture, Digital Arts, Graphic Design, Industrial Design, Interiors, Fashion

*Universidad del Valle de México:*

*Universidad Autónoma de Nuevo León:*
Design and Visual Communication, Image Design, Industrial Design

*Universidad Autónoma Metropolitana:*
Industrial Design, Design, Graphic Communication Design

*Universidad Iberoamericana:*
Architecture, Graphic Design, Fashion and Attire Design, Interactive Design, Textile Design

*Universidad Anáhuac:*
Architecture, Graphic Design, Industrial Design, Multimedia Design

Universidad De La Salle Bajío:

Universidad de la Salle Laguna:
Architecture, Graphic Design, Industrial Design

Universidad Autónoma de San Luis Potosí:
Architecture, Graphic Design, Industrial Design, Urban and Landscape Design, Administration and Construction of an Oeuvre, Conservacion y Restauracion de Bienes Culturales Muebles

Universidad Autónoma de Estado de México:
Architecture, Administration and Promotion of Urban Structures, Graphic Design, Industrial Design

Universidad Autónoma de Baja California:
Architecture, Graphic Design, Industrial Design

Universidad Politécnica de la Zona Metropolitana de Guadalajara:
Industrial Design

Facultad de Estudios Superiores Aragón:
Architecture, Industrial Design

Universidad Autónoma de Ciudad Juárez:
Conclusion: Dutch-Mexico Matches

The prospects for the Creative Industries are very bright. There are endless opportunities for Dutch-Mexican cooperation as well as interesting niches for the Dutch Creative Industries to enter the Mexican market and vice-versa. In the following figure the opportunities for both countries are visualized in a scheme.

The left circle represents the Mexican Creative Industries, the right the Dutch Creative Industries. In the center part of these two circles, the part that intersects, we find the sectors in which both countries have a strong position. These overlapping sectors offer great opportunities for cooperation and knowledge exchange. Although both countries have strong representations in these disciplines of the Creative Industries, this does not mean that the opportunities in these disciplines are saturated. The focal points within these disciplines are very different for both countries. A good example is the design discipline. Although both countries are renowned for their outstanding quality in design, they come from completely different traditions and have very different strengths and characteristics. For example, where The Netherlands is known for its application of new technologies, Mexico draws its inspiration more from its rich cultural traditions and heritage.
The outer sections of the circles show the sections in which the countries are lesser explored or developed. These disciplines represent the niches that have great opportunities for the other countries to enter the market and take up a leading position in the sector. As shown in the right circle, there are two niche-sectors in which the Dutch Creative Industries excel (fashion and advertisement) and in which they are able to obtain a pioneer position on the Mexican market. Since the market for the Creative Industries in Mexico is still a very open and in some disciplines, a lesser developed market, the chances and entries for companies and expertise in the Dutch Creative Industries are numerous.

The Embassy always aims to work within the structure of the golden triangle: business to business (b2b), government to government (g2g) and knowledge to knowledge (k2k). Apart from business opportunities for both countries, chances are also present in the government to government and the knowledge to knowledge structure. Since the beginning of the mapping of the Creative Sector in Mexico that initiated in March 2013, an impressive network has been built up in all sectors of the golden triangle. A government to government cooperation has been established with ProMéxico, with the aim to collaborate in the Ciudad Creativa Digital project. Furthermore, cooperation in the field of knowledge to knowledge has been achieved through a connection with the CENTRO University. In August 2013, Jarl Schulp, one of the keynote speakers for the OFFF Festival held a lecture on the Dutch Audiovisual scene at the CENTRO University. Through the NUFFIC-NESO office that is seated in Mexico City, there are many chances for future cooperation in knowledge exchange (lectures, symposia and student exchange programs). An example of a best practice in the business to business field is VBat, a Dutch branding company that opened their Mexico-office in the beginning of 2013. Through lining up with the Embassy they are now connected to various Mexican companies and brands, representing Dutch branding and design in Mexico.

For the Creative Industries sector, the Dutch Embassies of Mexico, the United States and Canada have joined forces and have set up the North-American network. This network makes optimal use of its geographical location and helps to broaden and extend the effect and radiance of Creative events. For the Dutch Embassy in Mexico, the entry into the North-American Network was a necessary step in order to attract more attention for the Mexican Creative Industries sector, which is still in a start-up phase. The United-States has a longer history and a larger network for the Creative Industries sector, it is very beneficial for Mexico to join in this network, which will enlarge the country’s reach and improve the transnational flow of Creative exchange.

For the other countries in the North-American Network Mexico can act as a fresh breeze in the Creative field. With its prospering Creative Industries sector, which develops at a rapid pace, this is a
great time for the United States and Canada to involve Mexico in their network and reap the benefits of Mexico’s Creative growth. The geographical proximity is also a great advantage. Events can be organized where the joining parties can call in at all three countries, combining tours and international programs.

In order to optimize the chances for the Creative Industries, cross-departmental cooperation is necessary at the Embassy. The Creative Industries sector is the sector that is most compatible for cooperation with other departments. With the implementation of a cross-departmental approach, the different departments can help and reinforce each other. For example, in the Life Sciences & Health sector there are possibilities for cooperation in mobile healthcare and the design of icons in hospitals. At the Press, Politics and Culture department, cooperation is possible in social events and projects, for example in the area of human rights or audiovisual and music projects.

This sector report concludes with the findings of the DutchCulture Institute (formerly known as SICA), which is the center for international cultural collaboration. Every year, DutchCulture measures the Dutch Cultural export worldwide and publishes a world map on the subject. For the year 2013, DutchCulture registered Mexico as being an "economy on the rise". One of the largest Dutch cultural events in Mexico was the Guanajuato Film Festival, where the Netherlands was the host country for 2012. The Guanajuato Film Festival and other cultural collaborations between the two countries made that Mexico occupied the 17th spot on the countries for Dutch Cultural export in 2012 (in 2011, Mexico occupied a 29th spot on the list). In 2012, 85 more Dutch Cultural activities were registered for Mexico, making it a total of 157 Dutch Cultural activities. This number means a 118.1 percent increase compared to 2011. Whereas China, a focus country of the DFA program 2009-2012, shows a decrease of 98 country visits (which is a decrease of 26.3 percent). In the future, for the Ministry of Foreign Affairs, a focus on the Creative Industries of Mexico would be a very sensible step to take.

The Creative Industries will remain to be an important focal sector for the Dutch government. In October 2013, the new 2-year contract for the Topsector Creative Industries was signed. The Creative Industries will receive a total amount of €21.2 million for 2014 and a total amount of €20.8 million for 2015. These numbers are a combination of public and private investments. For 2014 €5.7 million will be invested in research and innovation (in 2015, this number will reach €6.5 million). The complementary investments in 2014 will be €15.5 million and €14.34 million in 2015. The total amount of investments for the two years will thus be around €42 million. It is more than clear that the Dutch government

100 [http://sica.nl/content/dutchculture-nieuwsbericht-iedere-kunstdiscipline-eigen-favoriete-buitenlandse-bestemming](http://sica.nl/content/dutchculture-nieuwsbericht-iedere-kunstdiscipline-eigen-favoriete-buitenlandse-bestemming)

sees ample opportunities in developing its Creative Industries. As stated before, according to the 2012 Dutch DFA year report, opportunities for creative entrepreneurs are increasingly found outside the Netherlands and Europe, in distant regions of the world with fast-growing economies.\textsuperscript{102} Since the Dutch DFA acknowledges the importance of looking for opportunities for cooperation abroad, we may conclude that Mexico, with its upcoming economy and flourishing Creative Industries, would be a country for fruitful cooperation. Furthermore, Mexico is a place with many opportunities for Dutch entrepreneurs to enter the Mexican market, and with its many universities specialized in the Creative Industries, makes a great location for knowledge exchange.

\textsuperscript{102} DutchDFA, p. 5
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### Appendix 1

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