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# Detachment as a privilege: industry participation at TV programming and distribution marketplaces

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## ABSTRACT

While studies have described the role of international trade fairs in building new industries, few have analyzed the reverse: that of companies detaching from fairs, and the contexts in which such events disappear. We study the processes of attachment and detachment to trade fairs in the television programming and distribution industry, using two polar cases: a recently created trade fair in Africa, at the fringes of the globalized market; and a declining trade fair in eastern Europe, which had once been a hub for international trade. We use quantitative data to characterize the degree of internationalization of these two fairs, and focus with qualitative data on the organization of these events. We show that attachment occurs when a fair is new and unavoidable for industry actors; but in older marketplaces, already integrated in globalized markets, powerful actors can detach from the marketplace and re-embed their commercial interactions into personal networks.

What is the role of trade fairs and other industry-related marketplaces in today's globalized economy? Despite the development of communication technologies, international merchants still meet in trade fairs, conferences and conventions worldwide. In many industries, such events bring together associated stakeholders and allow them to network, while keeping a quick and accurate eye on market trends and evolutions (Bathelt and Glückler 2011; Bathelt and Schuldt 2008). Studies have particularly emphasized the effects of these trade events on market shapes and structures: Actors can influence regulations but also reproduce or influence hierarchies in the market (Lampel and Meyer 2008; Moeran and Pedersen 2011).

To what extent, however, are companies dependent on these events? While many studies have illustrated the role of trade fairs in building a new industry or in transferring knowledge (e.g. Aspers and Darr 2011) – in brief, what we refer to as a process of attachment to these marketplaces (Hennion 2017; Latour 1999; Cochoy 2017) – few have studied the reverse process: how companies detach from these events and how, and in what context, trade fairs disappear. In this article, we aim to focus on the dynamic processes of attachment and detachment to trade fairs and industry-related marketplaces. We define attachment to a marketplace as a dependence on this event for initiating and maintaining business relationships, and for gaining market knowledge and access. Detachment is the symmetric process, of becoming being less dependent on such events by switching to another attachment, or by reorganizing business activities using other

means (e.g. interpersonal networks). Our question is: What actors are able to forgo the use of globalized trade fairs, drawing from and relying on personal relationships instead? More precisely, we show that attachment occurs when trade marketplaces are new and unavoidable for the actors involved; but in older marketplaces, where businesses are less isolated and already integrated in globalized markets, powerful actors are able to detach from trade marketplaces and re-embed their commercial interactions within their own personal networks. We further show that, in order to study this dynamic of attachment/detachment, it is necessary to focus on corporate actors to explain how such detachment from a trade marketplace is a privilege of the most powerful.

We study here this double process of attachment/detachment, and the ways in which it shapes global trade, within the context of a specific industry: television programming and distribution. Television programming reaches around the globe, and copyrights for particular shows can be sold from a distributor to many TV stations. This industry is highly globalized, with many regional or peripheral players, and thus relies heavily on trade fairs. In the first section of our article, below, we describe and elaborate our hypothesis on how and why business actors attach or detach to trade marketplaces within their industry. We then proceed to describe our methodological approach, based on a database of trade fair attendees in the sector, as well as an ethnographic study of two events. We then describe the global television programming and distribution industry, and present the many related trade events which reveal the tempo of selling and buying television programming. In the fourth section we will focus on a trade fair organized in Africa, and describe how a process of attachment occurs in this peripheral region of the market. Finally, in the fifth section we will concentrate on another trade fair in Eastern Europe, showing how powerful actors are able to detach from the trade fair or even take control of it.

## **1. Attaching and detaching to trade events in globalized markets**

Festivals showcasing music or film, fairs promoting books or wine, industrial exhibitions, art biennials, and numerous other similar events are organized in various parts of the world and in various sectors and industries, helping to facilitate the structuring of globalized markets (Bathelt and Schuldt 2008; Bathelt, Malmberg, and Maskell 2004; Moeran and Pedersen 2011). These events are increasing in number, despite the development of new communication technologies. Such is the case for the television distribution industry that we are studying in this article, but also for film festivals, which have grown in number over the last four decades from about ten worldwide to more than 3,500 (Moeran and Pedersen 2011).

If the number of such marketplaces is increasing, it is because – despite the trend towards globalization and the development of technologies – international market actors need to meet face to face, for several reasons the literature has identified. First, these events enable the construction of transnational social ties and business partnerships between companies, what some have called “global pipelines” (Bathelt, Malmberg, and Maskell 2004; Bathelt and Schuldt 2008). The importance of personal relationships in business and the phenomenon of market embeddedness within social relationships has already been shown (Granovetter 1985; White 2002). Integrating a market in a context of globalization means above all creating relationships within this market, which is partly done by providing a common space for, and facilitating contact between, potential clients and providers. These temporary face-to-face meetings dynamically shape the global industry network (Panitz and Glueckler 2017). Second, many studies highlight the importance of

such trade events in terms of circulation and access to information in a specific market (Power and Jansson 2008; Bathelt, Malmberg, and Maskell 2004; Li 2014; Ramírez-Pasillas 2010; Bathelt and Glückler 2011). These events facilitate a process of learning among firms: participants can observe competitors (Skov 2006) and learn about products, market evolutions, pricing and valuation procedures, or industry fashions and trends. They thus represent spaces for collaboration between firms and their representatives, as well as the collective construction of knowledge (Brailly et al. 2016). Third, other authors draw attention to the importance of trade events with respect to the organization of industries: these spaces play a particularly important role in the cases of emerging industries or markets. Aspers and Darr (2011) show how the organization of a trade fair within the computing industry has contributed to the commercial development of new technologies. Other such studies highlight the role of trade events in the transformation, disruption and organization of many industries (Lampel and Meyer 2008; Moeran and Pedersen 2011; Anand and Watson 2004). At trade fairs and other trade events, power relations and politicking have real effects in terms of industry regulation and development of sector standards, which are of crucial importance particularly in the stage of market globalization that involves coordination among different regional markets (Favre and Brailly 2015).

These three mechanisms – embedding, learning, and organizing – constitute what we propose to call the process of attachment to a marketplace. Coming from actor network theory, the notion of attachment (Hennion 2017; Latour 1999) concerns the mediatory and relational chains between material devices and individuals. By redirecting the focus from individuals to the interaction between material devices and individuals, the idea of attachment has considerably influenced the way that sociologists study innovation (Latour and Woolgar 2013) and cultural tastes (Gomart and Hennion 1999). Applied to market studies (Callon, Méadel, and Rabeharisoa 2002; Cochoy 2017; Deville 2014; McFall 2009), this concept serves as a way to understand the concrete organization of markets and the ways in which market actors are dependent on specific market devices (in our case, on trade events). Attachment therefore represents much more than mere participation in a marketplace, and results not only from temporary geographical proximity; rather, it implies a close tie dependent on business relationships forged during a trade event, the information available on site and, above all, an agencement (arrangement, agency) to facilitate the conditions for exchange (Callon 2017).

As we have seen, much research has analyzed the functioning of trade fairs and other trade events, their role in various industries, and the reasons for which they attract corporate participation. Fewer studies have focused on the development and construction of trade fairs (see for example Aspers and Darr 2011; Favre and Brailly 2016), and even fewer than that concern the process of corporate detachment from such events. The dual processes of attachment and detachment have been studied primarily to understand the formation of market relationships (Le Velly and Goulet 2015) or the industrial innovation processes (of adding or removing technical assemblages, Goulet and Vinck 2015), suggesting that while attachment and detachment are distinct and symmetric processes, they are highly interrelated and should be studied together. Detachment may often refer to the process of switching from one attachment to another, or of cutting oneself off from possible competing associations (Le Velly and Goulet 2015). Detaching oneself from a trade event may therefore simply mean “not attending” or “attending another event.” Only one article, to our knowledge, concerns the disappearance of a trade fair – or at least the profound transformation of one – and it clearly shows this interdependence between the processes of attachment and detachment: Moeran and Pedersen (2011) describe how the existence of the Salon de peinture, a marketplace created in France in 1663 and which remained the most important event in the art sector until the end of the nineteenth century, was challenged by Impressionist painters – who rejected the conservatism of the prevailing, historical style. The Impressionists ultimately gained public recognition by organizing parallel exhibitions to those of the Salon. Once the hegemony of certain artistic genres was challenged by the development of alternative styles and methods, the Salon gradually became the place where these different modes of art were exhibited, and it ultimately participated in the Impressionist revolution of the nineteenth century.

In the case of trade events, the attachment process refers not only to the creation of business relationships, but also to a reliance on the knowledge available at such events, as well as on the organization of the events themselves. As soon as these mechanisms are no longer fulfilled by the events, certain actors can detach from them. Several trade fairs or industry marketplaces may cater to one and the same industry: these cyclical events are often coordinated, and companies may choose whether or not to participate in one or several competing trade fairs (Power and Jansson 2008), either by attaching themselves or by negotiating their participation (or lack thereof, as in the case of the Impressionists). Another option, which we can define as relational embeddedness (White 2012; Granovetter 1985), may be to simply access the corporate address book for the purpose of targeting clients – an option that requires a social network. Embeddedness designates the dependence of economic activity on various aspects of social life and especially on social networks. Actors can detach themselves from the collective organization to re-embed their activity in interpersonal relations, thus mitigating their dependence on trade-related events. This dynamic, described as “embeddedness and decoupling” by (Grossetti 2018), can take place as soon as an actor’s dependency on the trade event organization weakens, and the relational infrastructure allows it. In such cases the trade fair can no longer act as an intermediary in the formation of market relationships, as would the broker in the Burt theory on structural holes (Burt 2009), and interpersonal relationships (which can be maintain at a distance) are enough to keep the market functioning properly.

If we understand that this process of detachment can shape the structure of an industry, or influence the hierarchy of actors and values within a sector (as in the case of the Salon de peinture), several questions remain: First, what conditions permit such actors to detach from trade events – in order, say, to employ their own personal contacts, or to attach themselves to other events? Second, which actors have the capacity to do so?

## 2. Methodology

Our approach is that of a case study of two trade fairs in the television programming and distribution industry, one in Africa which has been operating since 2009, and another in Eastern Europe which has been running since 1991. As we will see in the following section, these two cases allow us to describe in detail the birth and death of trade fairs in a context of globalization, a cycle that we will describe in terms of processes of attachment and detachment between actors and these marketplaces. These two cases, which we will analyze using quantitative and qualitative data, can therefore be defined as two polar cases. Polar cases are useful for comparative case studies, because they can be employed to describe opposite ends of a continuum, to analyze oppositional social processes, and to stimulate theory development by examining contrasting patterns (Yin 2011; Mills, Durepos, and Wiebe 2010). For our research, the study of polar cases is a methodology perfectly adapted to understanding the opposite but symmetrical and interrelated processes of our study. Such an approach affords us an overview of the mechanisms of attachment and detachment to industry marketplaces and trade events.

We use several sources of data. First, we collected from various databases a list of participants at television programming and distribution trade fairs worldwide between 2010 and 2012, in order to map the global industry (18,892 unique companies, which were represented at up to 20 trade fairs), to characterize the two trade fairs under study, and to evaluate their degree of integration in the global television distribution market. Second, we carried out ethnographical research based on 62 semistructured interviews with buyers and sellers at the two trade fairs. Most of our questions were aimed at understanding the concrete work of these participants, and the tasks they were required to accomplish, while tracing the history of their companies’ participation in international trade fairs, their motivations for attending, and their difficulties in engaging in the

trade fairs under study. We also tried to identify their interdependencies and to understand the issues and debates which held sway in this milieu. Interviews were conducted face-to-face during the events, or by phone. Third, we observed the work carried out by the company responsible for organizing both trade fairs. We conducted several periods of observation within this company between 2010 and 2013, amounting to three months in total, while the company was fully engaged in the organization of the trade fairs; additionally, we held five interviews with the company's director between 2010 and 2014, in order to chart its history. Further, we conducted nine interviews with employees who held various responsibilities within the company: selling stalls, organizing meetings, providing logistics or market research, etc. Finally, we made observations during six trade fairs in Africa and Eastern Europe between 2010 and 2012. Observing the work of market organization, and interviewing key actors involved, were essential steps in shifting the focus from market actors to market agencing (Cochoy, Trompette, and Araujo 2016), making it possible to study the trade marketplace as an overall social construction.

### **3. A globalized market embedded in trade events and personal networks**

The value chain of a television programme includes several stages and involves a number of actors: producers, distributors, satellite operators, channel-package distributors, viewers, etc. For the sake of simplicity, we can distinguish three key stages: production, distribution, and broadcast. The trade events we study concern the distribution of, and the acquisition of broadcasting rights for, television programming. Such marketplaces bring together, on the one hand, programme sellers – i.e. those who hold broadcasting rights (audiovisual production companies, media groups and distribution intermediaries) – and, on the other hand, buyers of broadcasting rights (television networks, other kinds of broadcasters such as airlines or VOD platforms, and intermediaries who buy up copyrights in order to resell them in specific regions). When a transaction takes place, the buyer acquires the broadcasting rights for a programme for a defined zone, for a specific period and with a defined number of broadcasts. The industry is quite heterogeneous on the supply side: while a limited number of very large companies (the American “majors:” Disney, Time Warner, NBC Universal, Sony, Viacom and twenty-first Century Fox) dominate the global market, its fringes are composed of unique market segments populated by myriad smaller production and distribution companies (e.g. those specializing in animation, telenovelas, and other niche genres). Also involved are several very small companies, composed of a few employees (sometimes only the owner), who purchase catalogues of programmes in order to distribute their copyrights in different regions of the world.

Trade fairs are of paramount importance in the field of audiovisual distribution, where they serve as a meeting ground for all the various actors involved (Bielby and Harrington 2008; Havens 2006). These events, known as “markets,” are held regularly, and provide a kind of rhythm for the television industry. The most prominent of such trade fairs are MIPTV and MIPCOM, which take place every year in Cannes and which bring together nearly 15,000 people; as well as NATPE<sup>1</sup>, a trade fair in Miami which hosts approximately 4,000 participants annually. In the television programming industry, personalization of commercial relationships is the rule. Actors use trade fairs to initiate contracts and to collect information, in order to evaluate whether distributors' offerings can meet their scheduling needs (Lecler 2017); in addition, they regularly contact each other after trade fairs have occurred in order to negotiate contractual details. Trade markets, then, have the key role of initiating relationships between sellers and buyers.

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<sup>1</sup> Respectively: Marché international des programmes de television (International Market for Television Programs), Marché international des programmes de communication (International Market for Communication Programs) and National Association of Television Program Executives.

Figure 1 depicts a map of the twenty main trade fairs in the television programming and distribution industry from 2010 to 2012. Nodes represent each of these events. The bigger the node, the bigger the number of attendees at the event. If a company has attended to two trade fairs, we then consider that these two events are connected. Ties between trade fairs represent the rate of common attendees at both events, (i.e. the number of companies attending both events, divided by the total number of companies attending the smaller of the two events, with 18,892 companies in total).

A look at this global network of trade fairs reveals that all these events are connected, and that many companies attended several trade fairs during this period. Such regularized attendance involves the work of individual actors, and provides them with influence: they have to prepare logistics, communication and planning for each fair; to travel, and to invest several days at the event; to follow up with contacts afterwards, and then to prepare for the next. Most industry activity is concentrated at MIPTV and MIPCOM, the two major events that all main participants must attend in order to meet clients or providers. The periphery of the market is composed of specific niches – for example, animation (Kidscreen, MIP junior of MIFA), or film festivals (the branch at the top left of Figure 1– where only actors specific to those interests, such as film producers and specialized cinema networks, attend. MIP also has connections with other events on represented on the graph, namely regional trade fairs such as Promoshow East, Moscow Teleshov and Kiev Media Week in Eastern Europe, which are generalist events where a wide variety of distributors come to meet local television stations not represented at MIP or the NATPE. Further examples include the BCWW in Korea (an event geared specifically toward the Asian market), Promoshow Africa, or the NATPE (a means of accessing Latin American television stations). A final event, the Los Angeles Screenings, is unique in this industry. It is organized by the major American companies for the purpose of revealing their latest movies and series to their main clients – from every continent – during one week each spring. This event is certainly the most selective, and one of the most prestigious, in this milieu. A company’s attendance at these main global marketplaces signifies that it is in business with the most important actors of its sector, and that it is knowledgeable about how the “mainstream” global market is organized.

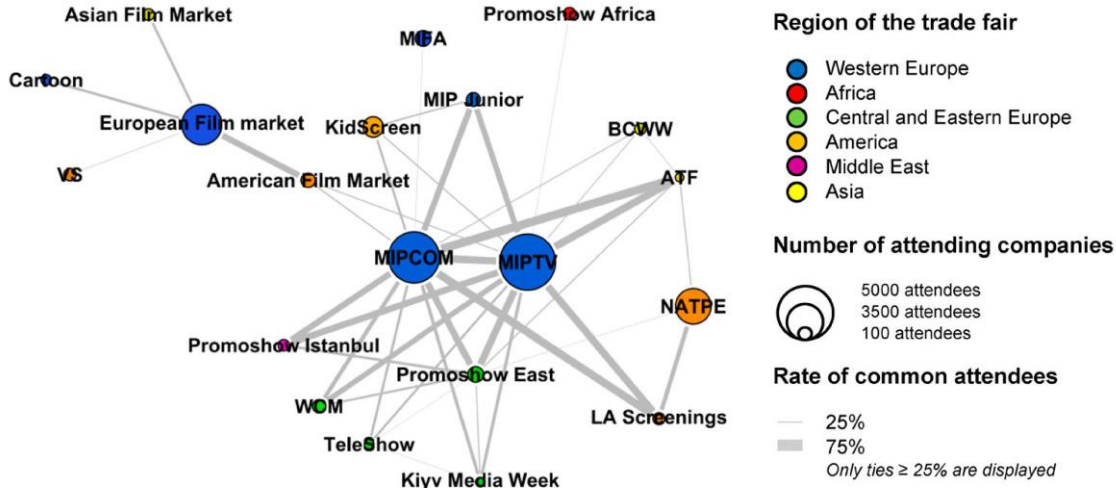


Figure 1. Global network of trade fairs in the television programming and distribution industry (2010–2012).

Let us now focus on the two specific trade fairs under study: Promoshow Africa and Promoshow East. The same company organizes both, which makes comparison between them in some ways easier: differences in the contexts of the two fairs are in some cases more readily identifiable.

However, the events themselves differ in three important ways, which make them not only polar cases, but also comparable ones:

- The two trade fairs do not have the same degree of integration in the global market. Promoshow Africa has existed since 2009 and is a relatively new marketplace compared to Promoshow East, which was organized in 1991 after the fall of the Iron Curtain. But a trade fair's level of integration into the global market can be concretely measured by the share of its participants who also take part in one of the major international events in the sector. While 43% of the 2011 Promoshow Africa attendees also joined one of the major trade fairs in the industry (Los Angeles Screenings, MIP or NATPE), 79% of the attendees of Promoshow East did so (see Figure 2). When we look closer, we see that very few African companies attended global events, whereas Eastern European ones did so in much greater numbers.
- While Promoshow Africa is the only trade marketplace where international sellers and African television stations can meet with each other, there are several alternative venues – other than Promoshow East – where international distributors and European network representatives are able to do business (for example, the Kiev Media Week, the Moscow Teleshov or even MIPTV and MIPCOM, which many actors from this region attend, as seen in Figure 1).
- The two events are not at the same stage of development: Promoshow Africa is getting bigger (attracting 320 participants in 2009, and 985 in 2012) while attendance at Promoshow East has declined since at least 2008, when 1800 participants registered.

These events are not selected solely for the reason that they were organized by the same company. They are concretely polar cases in the sense that they represent different stages of the development of a trade fair. The variations between the two events allow us to study how attachment occurs in a new market, and how detachment occurs in a shrinking one.



Figure 2. Percentages of 2011 attendees at Promoshow Africa and Promoshow East who also attended other global trade fairs in the television industry, in 2010 or 2011.

#### 4. Attachment to a marketplace: the case of the African trade fair

The first case is the African trade fair Promoshow Africa, where we observe how the attachment of actors from the sector works to integrate a local market into a globalized one. How does the process of marketplace attachment operate? Not only does the historical context of the African



market make Promoshow Africa one of the only arenas where world supply and African demand for television programming meet, but above all the trade fair produces a market agencement (Callon 2017; Cochoy, Trompette, and Araujo 2016) that serves the conditions for exchange. Three mechanisms attach the actors – both local and international – to this event: 1) there are no alternative marketplaces where international distributors and African television representatives can meet; 2) the organization of the trade fair provides a clear interface between buyers and sellers, and arranges meetings between them; 3) the trade fair organizes the behaviours of sellers and buyers in order to provide a structure for exchange. We describe in detail each of these mechanisms by focusing on the work of Market Maker (see Inset 1), the company which organized these events.

#### *4.1. A unique marketplace for television programming in Africa*

For a long period, Africa was on the periphery of the global market of television programming and distribution. African television emerged after decolonization, when there was a political drive (supported by the former colonial powers) which led to the birth of the first African television networks (Dioh 2009; Oluyinka 2009). Until the 1990s, the African audiovisual landscape was characterized by monopolies held by public networks, whose main programming consisted of news broadcasts. Little attention was paid to the remainder of the broadcast schedule. In this context, there were three means of acquiring programming, which are used to this day: 1) international public organizations from developed countries, which provide free programming to African networks; 2) “bartering deals,” a somewhat atypical form of exchange in which local distributors supply African networks with well-known series and films. These distributors purchase African broadcast rights from the major studios, and from Latin American telenovela producers, and sell commercial slots during programming directly to advertizers. The distributors subsequently provide all of this, free of charge (including broadcast rights and commercials), to African networks; 3) pirating, whereby networks air programmes without first obtaining broadcasting rights (illegally broadcasting a DVD, for example, or hijacking the signal from another network during live events, mainly football matches).

##### **Inset 1: The Company Market Maker**

The history of Promoshow is first and foremost that of its organizer, the company Market Maker (MM), and its chair. MM is a French company specialized in organizing trade fairs for the television programming and distribution market. When we conducted our study, the company had three offices, in Paris, Los Angeles and Dakar. At the head of the company is its founder and owner who, despite the fact that he often used the pronoun “we” during our interviews, is the only person to have been present at MM from the very beginning of the company all the way until the period of our observation. At that time, MM was made up of a cosmopolitan team of 15 employees, who were in charge of event organizing.

In the 1990s, when the monopolies were dismantled, local media groups seized the opportunity to invest in television. Since the 2000s, the African market has also witnessed the arrival of investments by foreign media groups, creating networks and local satellite or cable packages. Though it may have been inconceivable even ten or so years previously, competition between television networks has emerged. Attracting viewers has become a new challenge, leading networks to invest in new programming in order to diversify their range of offerings. This process of investment and diversification is tied to the progressive emergence of a fourth means of acquiring television programming: by direct purchase, as occurs in the global market. This was the context in which the Promoshow Africa trade fair was founded, with an objective to facilitate meetings between Sub-Saharan African broadcasters and programme distributors from all corners of the planet. Thus Promoshow Africa not only provides a space for African buyers and

international distributors to encounter one another, it also serves as a venue for different forms of exchanges, as well as for different ways of doing business, in the television programming and distribution industry. The trade fair has been organized since 2009, and is held twice a year at hotels located within various African cities: in Dakar (Senegal) in 2009 and 2010, in Nairobi (Kenya) in 2009 and 2010, in Accra (Ghana) in 2011 and in Johannesburg (South Africa) since 2012. The event is organized across several floors of each hotel, which have been subdivided to accommodate a variety of seller stalls. Sellers can reserve different types of booths according to the money they wish to spend, from a simple table displaying a company's name to an entirely private hotel suite with screens for viewing films. Major American distributors are less involved in this trade fair compared to the MIP or NATPE. Most of the time, those who attend do not deal directly with the African networks, preferring to sell their rights to local distributors, who will in turn negotiate bartering deals with local stations.

Of primary importance with respect to the process of attachment here is that this event is the only marketplace in the region designed to bring together international distributors and local television programmers. Other events have been organized in support of local film and television production – like Best of the Best TV in Nigeria (dedicated to Nigerian television production and created for buyers in the region, with forty sellers in 2009) or like the MICA in Burkina Faso (during FESPACO, a film festival for francophone Africa). These events mainly served to promote local productions, and were attended by very few international companies. Until 2009, the South African public network hosted another event, the Sitenghi, in Johannesburg, where content providers were invited to participate along with public networks from surrounding countries. But none of these trade events has reached the importance of Promoshow Africa; indeed, if one wants to do business in television programming or distribution in Africa at this stage, Promoshow is impossible to avoid.

#### *4.2. Organizing the marketplace*

The attachment process lies in the work of organizing the trade fair, which is foremost a question of shaping an organized space to give the impression of a natural order of things: that a measurable and classifiable supply of, and demand for, television programming exists and can be brought together in one place. If the international availability of television programming clearly existed before Promoshow, such was not the case on the demand side. The organizer of the trade fair thus articulates and constructs a demand which did not formally exist beforehand. Initially, it was therefore necessary to carry out a census of all public and private television networks in Africa. Several MM employees drew on public databases and relied on local intermediaries and institutions to put together a list of potential Promoshow buyers. It was further necessary to identify those individuals in charge of acquisitions within the various companies. In order to guarantee the first Promoshow was a success, MM provided a pass free to all buyers from public TV stations. Furthermore, in order to guarantee that a critical number of buyers would attend, MM also paid for travel and hotel accommodation in Dakar for all representatives of African public television networks.

A second stage of organizing the event concerned the definition of roles. When each participant enrolls, he or she has to choose a category, which corresponds to a price of admission and a type of service. Two main categories of enrolment are available: sellers (with stalls) and buyers. However, attendees are free to participate in a wide variety of activities within these categories: Sellers, for example, can sell content, or satellite capacity; or they can give programmes away for free, or negotiate the placement of 24/7 news channels on local platforms. The same diversity can be found in transactions of the buyers. Yet MM sets them into groups to give the impression of organized structure. Interactions must adhere to the fundamental rule of the trade fair: sellers must meet buyers with a view to concluding a sale. MM thereby seeks to simplify the roles played by various participants, and to contain all activities within these categories, even at the cost of

obscuring the diversity of transactions taking place at the event. The only common denominators pertaining to all sellers is that they have a stall, and that they are looking to meet buyers. Each participant is provided a pass, the colour of which distinguishes the two categories: blue for sellers, red for buyers.

The definition of these categories is a strategical issue. Many sellers seek to enrol as buyers, thus gaining entry for less money as well as the ability to visit the trade fair at their leisure. (A seller's badge might sell for ten times the price of a buyer's badge.) This phenomenon is deleterious to MM for two reasons: it constitutes a shortfall in revenue, and it blurs the lines of the marketplace which MM wants to designate as clearly as possible. Therefore, after Promoshow Africa 2009, during which employees of the trade fair noticed several cases of "fake" buyers displaying programming catalogs at the hotel bar, MM decided to restrict use of their database to prevent participants from consulting profiles of other users in their own category. Since then, buyers may only consult the profiles of sellers, and vice versa. This prevents those who come to the trade fair with the intent to sell from enrolling as buyers, in order to attend at a cheaper price.

The trade fair serves as an opportunity to meet other actors working within the same profession in a common place, and so it creates a social milieu for the industry. By talking with each other, participants gain access to knowledge about market trends and audience tastes, and about which programmes are successful and which are less so. These discussions provide attendees with a chance to gain access to commercial opportunities. Informal discussions about past contracts, breakdowns in negotiations, competitors or partners play a key role here. These opportunities circulate, for example, via recommendations. Such discussions also allow participants to identify potential clients or suppliers, to gain knowledge about their reliability, or to crosscheck information during negotiations.

But this process of embeddedness does not occur naturally; it is supervised. MM developed technical devices in order to facilitate meetings between sellers and buyers, but these devices also calibrate and rationalize interactions. When participants register, they fill in an online information form with their company information, as well as the types of programming they are seeking, or the programming that is available in their catalog (documentaries, telefilms, series, telenovelas, African content, etc.), and finally the type of broadcasting rights they are looking to sell or buy (DVD, Video On Demand, mobile, television). Participants then have the option to consult this database, via an online tool used for scheduling meetings. They can go through the list of expected participants, and, using a search engine, select potential customers or clients. It is thus possible to plan meetings prior to the trade fair, with the assistance of a scheduling application itself equipped with a messaging tool. Additionally, MM offers a "meeting agenda service" which provides hands-off scheduling assistance to enrolled participants: an MM employee handles coordination between all the enrolled parties who opt in.

*They aren't interested if we show them 100, 200 or 500 buyers. What they want is for us to sort through and find buyers who meet their expectations. "Of course, you have access to our database but we know that that is of no use to you. [...] What we are offering you, once we have collected some information about your company, is a list of 50, 60 or 70 participants who are buyers and who, as far as we are concerned, could well wish to work with you." (Director of MM)*

MM carries out this work manually, by cross-referencing requests made by sellers and buyers. Its employees contact all the participants by phone, help them to fill in their profile and, most importantly, determine the programming these participants are looking to buy or sell. The company then prepares the participants' schedules – using calibrated, 15-minute timeslots – paying due consideration to potential conflicts (such as having two buyers from the same country with successive appointments with a given seller, which may give the impression that the seller is fomenting competition between two buyers). In this process, neither the buyers nor the sellers need connect to the platform: the MM employees connect to each account, send the requests and confirm each appointment.

#### 4.3. "Agencing" behaviours

But the core of MM's work lies in what we could call behavior agencement. MM enacts out such work by establishing rules for the event, and by defining the way in which interactions take place there. The event organizer's aim is to establish predictable modes of behaviour for buyers and sellers at Promoshow, by informally defining what constitutes a "good buyer" and a "good seller." A "good buyer" purchases programming and respects the rules of the market by behaving diligently, respecting appointment times, paying for purchases and refraining from illegal broadcasting. Correspondingly, a "good seller" knows how to adapt his or her techniques to the African market.

During our study, sellers often stressed what they called the "eccentric side of the trade fair," pointing to the fact that buyers frequently failed to show up for appointments (or arrived very late), that they did not respond to e-mails, that payment processes tended to drag, or that some buyers "did not know how to purchase programs." MM wants to provide their clients with buyers who, despite having comparatively less wealth than those at MIPTV, nonetheless behave similarly to buyers who are seen at international trade fairs. This process, of molding and professionalizing buyers, is similar to the professionalization of clients described by Cochoy (2015).

Once they have arrived at Promoshow and obtained their passes, participants are guided to the Meeting Request stall. Here, they can collect their meeting schedules. But this stall mainly serves a "customer service" role, where attendees can request changes to their schedule or organize new appointments, obtain profile information about fellow participants, and – importantly – indicate (or complain about) the absences or tardiness of others. Two MM employees record all the requests and, in the latter cases, assign attendants to walk around the hotel holding a sign bearing the name of the person who has missed an appointment, and then to guide that person towards the seller's stall. If the wayward buyers cannot be found, employees of the trade fair will attempt to reach them on their cellphones. During the 2011 and 2012 fairs, incidents of tardiness were even recorded and displayed in real-time on screens placed throughout the passageways of the hotel.

Ultimately, the work of the trade fair goes beyond the event itself and carries on for several months afterwards. It often happens that following their appointments at the trade fair, buyers provide no further sign of life, despite that negotiations were initiated and several reminders sent. In such cases, MM offers a follow-up service, providing telephone reminders on behalf of sellers.

Generally, MM attempts to heed sellers' criticisms of African buyers. A "best buyer contest," for example, was held during the first two Promoshow fairs. A passport was distributed to each buyer, in which they recorded the names of the sellers with whom they had appointments. Once the appointment had been held, and if the timeslot had been respected, the seller would apply their stamp to the document. During a cocktail reception at the end of the trade fair, the passports were collected and an iPhone awarded to the buyers who had been most respectful of appointment times. Although this operation was not a storming success – several participants falsified their passports in order to obtain the prize – it nevertheless indicates MM's aspiration to teach buyers "good behavior" in terms of their conduct at the trade fair.

MM's strict emphasis on scheduling also works to distribute sources of demand among sellers as evenly as possible. Often, sellers will attempt to prolong their meetings with buyers for as long as possible (for example, extending appointments by adding lunch). They seek to sell buyers as much programming as possible, trying to extract their entire budget. It sometimes even happens that buyers only make a single deal over the course of the event, one which consumes all of their

allotted funds. MM's scheduling mechanism, including appointment reminders, acts therefore also as a means of spreading out sources of demand in order to satisfy all clients.

Promoshow is also interspersed with a number of conferences, several of which have the stated aim of helping buyers learn about how to acquire programming. During the events we participated in, several conferences – entitled “The Importance of Channel Identity,” or “Workshop for Broadcasters” – clearly spoke to this aim. During these conferences, acquisition-related advice and tips were delivered to the African network representatives. The sum total of this training was aimed at channelling behaviour in such a way as to adapt such buyers to the expectations of sellers.

Promoshow Africa clearly plays the role of integrating African actors from the television programming industry into the globalized market, through this process of attachment of international distributors and African networks to the marketplace. While such commitment to the trade fair allows the creation of transnational business relationships, it also does much more: it suggests a dependence on infrastructure to provide detailed knowledge of the market, as well as the organization of an industry still under construction. A distributor cannot just go to Africa to meet television networks, at least without considerable relational and financial resources. The fair provides sellers with the socio-technical agencement (Callon 2017; Cochoy, Trompette, and Araujo 2016) that serves as a framework for their deal making. That's where the attachment happens; without it, the market would not be able to survive.

## **5. Detachment as a privilege: the Eastern European trade fair**

In the case of Africa, we have seen an example of a growing marketplace controlled and framed by the organizer itself. Let us see now what happens in the context of a declining marketplace. In this context, the organizer is able to frame attendees' behaviour during and after the event, but companies invariably attempt to evade such control. This section will demonstrate thus, through the analysis of a second trade fair in Eastern Europe.

### *5.1. Rise and fall of Promoshow East*

The story of Promoshow East, which was first held in 1991 in Warsaw, is linked to the evolution of the political and economic environment in Eastern Europe. As emphasized by Stetka (2012), during the 1970s, more than 3,000 hours of content from capitalistic countries were broadcast every year within Eastern Europe (e.g. Mannix, Kojak, and French and German films). After the fall of the Berlin Wall, several American television series became highly popular (Dallas in Czechoslovakia, Dynasty in Poland). Nevertheless, a turning point came in the early 2000s, after the transition to capitalism, the development of satellite television, and the deregulation of the media sector (Havens, Imre, and Lustyik 2012). During the 2000s, Eastern Europe was still a new prospect for international distributors, especially the American majors. Until 2008, Promoshow East was growing rapidly; it was the only regional market then targeting Eastern European television networks. Around the mid-2000s, as a result of economic growth in Eastern Europe, international media groups were beginning to scout the area. At the same time, other marketplaces for television programming appeared in the region (Moscow Teleshov, World Content Market or Kyiv Media Week), while Eastern European TV stations increasingly attended MIPTV and MIPCOM. Such overall growth in the sector contributed, for a few years, to Promoshow's expansion, and the fair became a central marketplace in the industry. However, it also contributed to the event's subsequent decline, from 2009 to 2013.

In 2014, a US competitor (NATPE) ultimately acquired the Promoshow East trade fair. The event's overall decline can be explained in terms of detachment, on the part of several particularly powerful companies. The proliferation of trade fairs in Eastern Europe threatened Promoshow's hold on the market, making it easier for the most prominent distributors to attend other events. Such popular sellers are crucial for attracting popular buyers, who are crucial themselves for attracting other sellers, and so on, as in any two-sided market (Rochet and Tirole 2003). The existence of other trade fairs modifies socioeconomic interdependencies between the trade fair organizer and the attendees, having concrete implications for the organization of the event.

## 5.2. Detaching to the marketplace

Detachment is linked to the strategy, among the strongest actors, of escaping attachment mechanisms developed by the organizer, especially those of social control. In practice, this strategy was deployed on two fronts: before the trade fair, the major American distribution companies organized screenings on their own, and during the event, they scheduled meetings outside of the marketplace (in another hotel).

Promoshow East takes place in a hotel in the centre of Budapest, Hungary, with a spectacular view of the Danube. The event is organized in quite the same way as that in Africa: strict categorization of attendees (buyers, sellers, visitors), various booths in the lobby, luxury suites with television screens. More so than in Promoshow Africa, many of the events, conferences and cocktail parties surrounding Promoshow East were organized aside from the official event itself. In 2010, for example, a few limited-access events were held, the day before Promoshow, in a nearby hotel (100 metres away). One was dedicated to coproduction partnerships, and was addressed to Eastern European producers and distributors. And on the first floor of the same hotel, the American majors organized their own event, a series of private screenings. These events were not included in the official Promoshow programme, and only the wealthiest buyers were invited. Other, equally selective events were held during – but not necessarily in – the Promoshow trade fairs (breakfast conferences about advertising, local production meetings over coffee). Such events attract buyers to other, parallel events, and detach them from the main marketplace. Indeed, during the American screenings, the trade fair itself became empty of buyers, and the other sellers were left to sit at their stalls alone, checking emails or looking at their phones. The American majors detach themselves from the marketplace but detach also the buyers, bringing them physically to another place and of course closing deals with them, taking a large part of their acquisition budget. Because of their allure on other buyers and sellers, the American majors' participation in the trade fair is necessary to the survival of the event. The organizer could not really ban these offsite screenings, and so decided to let the American majors organize them.

*We have clients, important clients, like XXX, who organize undercover – well, no ... with us, but who don't announce it like others could – screenings. They pay one extra night's hotel accommodation to the buyers and the next day, 30, 40 buyers spent 25-30% of what they had in their pockets. There's nothing we can do about that, then; it's the market, we're not going to be the police. How does that translate in the field? This translates into pure and hard selling strategies: "We're going to take the money, as quickly as possible from the buyers' pockets." (Director of MM)*

Even if screenings are organized "undercover," they "are not going to be the police." Indeed, banning the offsite screenings would infer, in the best case, a more or less formal and competing event, both external to and during the trade fair. In the worst case, it could lead to a decision on the part of the majors not to attend Promoshow the following year. And if even a single major distributor did not attend, it also meant that many buyers would not attend as well. The behaviour of the majors can be seen as a poaching strategy, aimed at getting positioned in the marketplace before it even starts (Trompette 2007).

The 2011 edition of Promoshow East was a turning point. Most of the major American distributors decided to organize their meetings during the trade fair, but outside the official hotel, in a terrace of another prestigious hotel nearby. Many other sellers imitated the majors. We asked some of them why they preferred being there, rather than inside the marketplace. Their argument was simply that the secondary location was sunny and had a nice landscape, and that they still had pass access to the marketplace itself. We also discovered that many television programming executives from Russia and other countries simply did not pay for any badges. Not having registered for the trade fair, they simply met their suppliers (especially the majors) on the terrace of this offsite hotel, taking advantage of the concentration of distributors in Budapest during this period, and organizing their schedules directly. One of them even told us that she was invited by a major distributor to visit Budapest, but that she never registered to Promoshow itself. This is an example of embeddedness in interpersonal relationships. Distributors simply proposed to their clients that they come to Budapest to meet without actually participating in the collective dynamics of the trade fair.

This is a crucial difference between our two case studies: In Africa, the boundaries of the trade fair were clearly defined, and the amenities of the luxury hotel were well isolated from the exterior landscape of a western African capital. In Budapest, by contrast, the boundaries of the event had grown fuzzy, with individuals circulating from cafés and different hotels to the marketplace itself. This development is not minor, especially given that one of the most important advantages for any trade fair is this colocalization within the same place. Such an arrangement allows actors to meet each other by chance, while they move from one meeting to another. Participants rely on this serendipity, which is highly reduced if some meetings are organized in another place. In addition, the scheduled agendas organized at Promoshow, composed of 15 min slots, did not take into account travel time between two separate locations. As a consequence, many meetings were delayed or cancelled. We can describe this phenomenon in terms of free-riding strategy: major international distributors took advantage of the organization, framing and demand at Promoshow East but did not pay for the trade fair itself. Further, there is an asymmetry between powerful distributors and other, smaller sellers, for whom the rules – applied by MM when necessary – are clearly defined:

*Once, the worst thing I did, I fired a guy from a suite. He took a suite on the sixth floor, stashed away, and then I saw buyers going to the sixth floor. I went up and I pulled him out, physically. I closed his suite with the hotel guys, I told him you come with a check, 6,500 or 5,000. As the guy was in business, he was super embarrassed, he paid me right away. My role is also to be a police officer, because otherwise, at that moment I am no longer respected at all. The badge! The guy not only didn't respect the badge, but he had also moved into the hotel. (Director of MM)*

This free-riding behaviour is prohibited by MM, and so the organizer must assume a policing role. But in the following situation, in which a major company was involved, the sanction is somewhat different:

*Director of MM: For example, I had a scandal with XXX [an American major which held meetings in another hotel], not this year, but the year before, well, we caught them. [...]*

*– You found them?*

*Director of MM: We found them. We filed a complaint. I mean, we didn't file a complaint, but we wrote to the guy's manager, we made a letter the right way.*

*– And did they know about it?*

*Director of MM: Of course. They fought to the death. Because it's XXX, you can't ... it's still big companies, you know. You must be careful. So this time, it was tough. The guy told us, "Look, we have the right to do what we want." And at the end of the day, it's true.*

The social control exercised by the trade fair organizer is a "two-speed" system sanctioning only the weaker sellers. Powerful actors are free to do what they want even if their actions are forbidden for others. In doing so they capture the market demand, to the detriment of the rest. Indeed, buyers devoted most of their time and money during the event to these prestigious, renegade distributors. The majors' ability to escape from the control of the organizer was central to the detachment process we observed at the market. MM turned a blind eye to it, aware that too many controls would threaten the majors' participation the following years, and thus the survival of the fair itself. Indeed, since 2010, newer trade fairs also targeting Eastern Europe had been created. The majors' threat of defection was plausible. As a result, they could impose their will, even if doing so jeopardized the existence of the trade fair itself. One year after our study, Promoshow East folded; it was bought by the NATPE (National Associates of Television Program Executives, a television executives' union), who relocated it to Prague and reconfigured its participant selection process. Detachment could not be more complete.

The attachment process described in the African case above works not only because the trade fair makes it possible to create and maintain business relationships, but also because it allows access to exclusive knowledge, and provides a framework for creating the conditions of exchange (e.g. "training" buyers who do not always know how to behave, or providing support for relatively unknown supply and demand sides). This knowledge is provided via direct learning, or through the arrangement of meetings. In the eastern European case, actors already have this knowledge, and there is no additional value in providing such services. And if the fair is not able to provide such exclusive knowledge and market agencement, actors can avoid the fair. This is what is happening here: not only can the most powerful actors threaten to switch their allegiances to other global or other eastern European marketplaces (where they will be able to meet more or less the same buyers), they can also organize their sales by re-embedding their business into their personal networks, and simply use their phone directory to organize their activities.

## **6. Conclusion**

In this article, we illustrate the dynamic between the processes of attachment and detachment, using two cases of television programming and distribution trade fairs. The first event that we described was new, peripheral in the globalized market, and growing rapidly. Most importantly, there were no regional alternatives to this marketplace. In these conditions, we are able to clearly see the relevance of the concept of attachment, through the work of the marketplace organizer. Local television networks and international distributors depend on this trade fair because it clearly regulates and supervises the encounters between representatives of international supply and those of local demand. We assume that few actors would do much business in the African television programming or distribution sector without this marketplace. The fair makes supply and demand visible, and allows for the otherwise improbable meeting between global supply and African demand. Finally, it affords participants with access to exclusive and crucial information, as well as the organization of behaviours to make exchanges possible.

The second marketplace was older; its participants were already connected to the globalized market, and there were several alternative marketplaces which targeted buyers in the region. As this fair was no longer able to provide such exclusive knowledge and market organization, the attempts of its planner to attach buyers and sellers to the marketplace proved futile. Once the most powerful actors could play on the uncertainty of their attendance, the organizer was compelled to sit by as they disrespected the rules of the marketplace. The most powerful sellers



were able to detach themselves from the marketplace, and – as they emptied the trade fair in doing so – to detach the buyers as well. Interpersonal relations then took precedence. But detachment in this case is a privilege; the other sellers remain trapped and dependent on the marketplace.

In our view, this study contributes to the research in two ways. First, we show that the dual process of attachment and detachment is strongly linked to the issues of collective action and power structure. When we introduce the hierarchy of actors to the analysis, we then see that detachment (i.e. attachment to other fairs or re-embeddedness in commercial relationships) is a privilege reserved to only some of them. Only prestigious companies can use detachment from the marketplace as a strategy to attract buyers (and therefore to profit). This inequity raises an important point, that of the survival of the marketplace itself. For Dupuy and Thoenig (1986), the stability of a system (in our case, the marketplace) serves as a basis for the strategy of its actors, “a kind of minimum common goal implicitly targeted” (p.244). In our observations, the actors in Africa accepted this minimum goal – which is the condition of attachment to the marketplace. They need the marketplace in order to do business. But in Eastern Europe, the detachment of the major sellers directly jeopardized the survival of the marketplace. They took the advantage over the event organizer and the other sellers, and did not even require the marketplace to do business. By giving due consideration to actors, we move away from focusing solely on market devices and more toward an emphasizing market agencing (Cochoy, Trompette, and Araujo 2016), in order to address the topics of power and hierarchical structures within markets.

Second, in analyzing these processes of marketplace attachment and detachment, we better apprehend the course of market globalization. By considering this dual process as the result of work and activity on the part of certain actors, we seek to show that it is not simply a natural phenomenon which goes along with the development of industrial societies, and which is unconnected to individual actions. On the other hand, our approach also prevents us from having a purely constructivist vision: globalization cannot be decreed by international agreements, in the same way that “society cannot be changed by decree” (Crozier 1973). We have to focus on the way companies control marketplaces in order to understand the global market hierarchies involved.

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