

## **New Digital Technologies, Work Practices and Cultural Production in Ireland**

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*Abstract:* This paper offers the first extensive analysis of the extent of change, in both structure and labour market, occurring within the Irish media since the early 1980s. It chronicles change from a "sector" dominated by the public broadcaster and informed by universal, creative and service values to a multi-faceted "industry" defined and influenced by the processes of production and exchange. This evolution is sited within a broader discussion of Irish development policy and the opportunity posed by new digital technologies. Changes in broadcasting policy, and the structure and labour force of the new cultural industry are examined in depth.

### I POLICY SHIFTS

The last decade has witnessed a fundamental policy shift, both here and abroad, towards the media, the size of the conversion being branded, *inter alia*, by the adoption of a new nomenclature characterising its designation as an "industry" with corresponding economic and hence strategic significance. Thus, former references to the media and/or the arts are being displaced with references to the audio-visual and cultural industries (see McIntyre, 1996, p. 222, and Garnham, 1990, pp. 154-168).<sup>1</sup> In Ireland, this

\*I am grateful for comments on an earlier draft of this paper from Amanda Dunne (who also undertook the interviews and some background research), Nicholas Garnham, Brian O'Neill, James Wickham, and the anonymous referees. It goes without saying that all errors are my own.

1. The terminology used in this paper slips between the "broad cultural industries" and the more specific "media industries", nowadays referred to as the audio-visual industry (film, broadcasting, multimedia), and the newer content industries. The main emphasis especially in the latter two sections is on the audio-visual industry as a sub-set of the wider cultural industries.

policy change has been marked by several features. Given the troubled history of Irish late industrialisation, its geographic peripherality and the current trend towards design-intensive global production (see Lash and Urry, 1994, p. 123), information/knowledge and cultural production has increasingly been identified as playing *the* key role in the (re)generation of capital.<sup>2</sup> In this respect, RTÉ, the sole broadcaster and primary producer and trainer of all audio-visual products in Ireland in 1980, is today challenged for this position by a multifaceted audio-visual industry, increasingly locked into a global economy. There is also increasing evidence that the potential contribution of the cultural industries (film, TV, printing/publishing, music, theatre, dance, design, fine arts, museums, etc.), heretofore dismissed as the cultural icing on the economic cake, to the urban (city-state) economy may be greater than that of the financial sector. Planners have deliberately courted small cultural/design innovators recognising that the shift to post-fordist models of vertical disintegration and flexible specialisation particularly suit the audio-visual and image industries; the result has been the spear-heading of localised networks of small units at the forefront of urban and economic development. Dublin has followed the path of Glasgow, Barcelona and others

2. Within the last several years, almost two dozen government or consultant reports have been published identifying this significance: see *inter alia*: *Report on Indigenous Audiovisual Production Industry* (Coopers and Lybrand, 1992); *Sectoral Study on the Print and Paper Industry* (Colin McIver Associates for FÁS, 1994); *A Strategic Vision for the Irish Music Industry* (Simpson Xavier Howarth, 1994); *A Report on the Irish Popular Music Industry* (SKC, 1994); *The Employment and Economic Significance of the Cultural Industries in Ireland* (Coopers and Lybrand, 1994); *A Strategy for Success Based on Economic Realities: The Next Stage of Development for the Film Industry in Ireland* (INDECON, International Economic Development Consultants, 1995); *Active or passive? Broadcasting in the future tense* (Government Green Paper on Broadcasting, 1995); *Telecommunications Developments and Ireland. Maximising the Opportunity* (IBEC, 1995); *Training Needs Project: the Independent Film and Television Production Sector* (FAS for Statcom, 1995); *The Future of the Irish Book Publishing Industry* (Coopers and Lybrand, 1995); *Interim Report of Study of the Newspaper Industry* (Competition Authority, 1995); *Striking the Right Note. A Submission to the Government on the Development of the Irish Music Industry* (Music Industry Group, IBEC, 1995); *Market Opportunities in Ireland: Music/Books* (Marketing Partners in Dublin/Coopers and Lybrand, 1995); *Report of the Commission on the Newspaper Industry* (Government Publications, 1996); *Ireland's AudioVisual (Film and Television) Facilities Infrastructure* (Statcom/Film Makers Ireland, 1996); *Ireland: the digital age, the internet* (Forbairt, 1996); *Information Society for Ireland. Strategy for Action* (Report of Ireland's Information Society Steering Committee/Forfás, 1996); *The Economic Impact of Film Production in Ireland 1995* (IBEC, 1996); *Access All Areas. Irish Music. An International Industry*. (Forte Commission Report to the Minister for Arts, Culture and the Gaeltacht, 1997); *Clear Focus/Fócas Géar. The Government's Proposals for Broadcasting Legislation* (Department of Arts, Culture and the Gaeltacht, 1997). In addition, several responses to the Government Green Paper were published: *Broadcasting Policy in Ireland. Creating a Vibrant Audiovisual Production Sector* (IBEC, 1995), *Broadcasting, Poverty and Social Exclusion* (Combat Poverty Agency, 1995), and by the IRTC, RTE, and the RTÉ Group of Unions. Fianna Fáil, when in opposition, published a discussion document: *Planning for the Film and Television Industry* (1996).

as the “culture capital” of Europe (see discussion on the emergence of the “service city” in Moulaert and Scott, 1997).

One explanation for this historic clustering clearly lies at the feet of the former minister; Michael D. Higgins, an academic with an enthusiast penchant for the Arts, Culture and the Gaeltacht, was so truly the embodiment of his ministry that it is difficult to contemplate how any successor can fulfil the function. Undoubtedly the [his] watershed was reached with the publication of *The Employment and Economic Significance of the Cultural Industries in Ireland* (Coopers and Lybrand, 1994) which, under the tutelage of Temple Bar Properties, heaped praise upon the cultural industries’ contribution to wealth and job creation; an “event” of true inspiration, it assiduously confirmed Higgins’ agenda. Its kernel of brilliance was its ability to traverse that agenda while genuflecting to the single issue which marks the success of all government strategy: economic growth.<sup>3</sup>

That this aggregate of developments could proffer a model for “jump-starting” Irish economic growth is evidenced by the way government policy has carefully nurtured this now multi-faceted industry, with a vibrant independent audio-visual production and training sector as a key element of that strategy. In the main, this has been facilitated by providing appropriate inducements to the sector by way of tax breaks and other financial incentives. While the arguments have most often been based on the need and desire to provide diversity and competition in programme-making and distribution, the intention seeks to disengage the state from direct involvement in traditional “public sector” cultural activities through a policy of “managed privatisation”, and to redefine the role of “public broadcasting” in terms amenable to private interests. The “Preface” to the Statcom report *Training Needs to 2000* clearly indicated that the intention was to “remov[e] any remaining obstacles to the full development of the Irish film and audio-visual industries,” a view echoed in the recent Forfás report entitled *Information Society for Ireland. Strategy for Action* (1996, pp. 37, 53). Unfortunately, governments’ desire for economic growth (competition) and their public’s desire for “choice” — the resounding ideological victory of Thatcherism — may have been won at the expense of an almost universal undermining of post-war sureties of community and public service. In the Irish context, the government’s obvious successes at exploiting a media-rich global cultural industry policy may be at the peril of the public broadcaster, RTÉ.

This paper offers the first extensive analysis of the extent of change, in both structure and labour market, occurring within the Irish audio-visual sector since the early 1980s; indeed, the extent of this change is illustrated by

3. Cf. Forte (1997) which likewise justified its remit and that of its subject by proclaiming music’s contribution to the economy and job creation, pp. 21-26.

the transmogrification of that “sector” from one dominated, virtually exclusively by the public broadcaster and informed by universal, creative and service values to a multi-faceted “industry” defined and influenced by the processes of production and exchange, and the wider economic processes of society. The first part sites this evolution within a broader discussion of Irish development policy and the opportunity posed by cultural “high technology” design/image industries utilising new digital technologies to enlarge the room for manoeuvre by a nation state (e.g., Ireland); Section II charts changes in broadcasting and film policy, and examines changes within RTÉ, while Section III analyses more closely the structure and labour force of the audio-visual industry. As much of the focus of the recent Forfás document, *Information Society for Ireland. Strategy for Action*, is concentrated on the expected growth of new design/image production utilising new digital technologies, this paper offers a timely contribution to our understanding of the “information society” in Ireland.

## II THE ROLE OF CULTURAL PRODUCTION IN CAPITAL (RE)GENERATION IN IRELAND

Economic factors have played an important role in public policy towards communications in Ireland since radio broadcasting began in 1926. Early exclusion of commercial interests was encouraged by a conservative interpretation of “public service” overdetermined by economic realities; the most notable of the latter was the absence of a national bourgeoisie. The obvious difficulties of a small population (3.5m) and an underdeveloped economy forced government to, somewhat reluctantly, take a formidable role in radio and television, and to rely on a combination of licence fees and advertising revenues for funding. These tight financial margins, propelled also by demographics, necessitated increasingly heavy reliance on American and British programming, and prohibited any private commercial radio or television service operating until recently. Effectively, broadcasting policy mimicked economic policy generally; the state filling the vacuum, promoting, regulating, deregulating and, arguably, re-regulating sections of the economy in the absence of private capital for pragmatic but not ideological reasons.

Today, little has changed except the intensity of that project. Since the mid-1980s, a veritable feast of political and financial initiatives have sought to reconstruct the communications environment against a backdrop of increasing realisation that information distribution and cultural products can be a significant player in the reinvigoration of the national economy. The latest of these, the Forfás report, recites the view that by 2020, “80 per cent of business profits and market value will come from that part of the enterprise

that is built around ICTs [information and communication technologies]”:

As the Information Society takes shape, Ireland has a unique window of opportunity. By following the strategy set out in the following pages and adopting a leadership role, Ireland can carve out for itself a strong and sustainable position as a location of competitive advantage for information-based services ... Adopting a strategic and planned approach to the Information Society is crucial to future job creation and to the continued improvement in the standard of living of our people (Forfás, 1996, p. 5, and Chairman's Foreward).

As a “key user of technology”, it is not surprising that the electronic and print media, film, music, broadcasting, publishing, multimedia and telecommunications have become inexorably caught up in this debate on the regeneration of capital. Perhaps, more surprising is the extent to which social-democratic governments (and political parties) have been “unable or unwilling to ignore the new marketplace economic policy pressures. Indeed, they must appear to be leading the domestic recovery, particularly when they are in power” (Rowland and Tracey, 1990, p. 19).

This picture differs from that portrayed by two earlier accounts of the media industries in Ireland: Bell and Meehan (1985; 1988; 1989; and Bell, 1995) have argued, in various articles between 1985 and 1995, that domestic communications policy is “conditioned by the interests of multinational capital”. They suggest that the state acts primarily as a facilitator for “the penetration of multinational capital into areas of public consumption”, with the national bourgeoisie effectively becoming a comprador bourgeoisie. This view is rephrased by Hall who argues that the “geographical proximity to the UK together with the fortuitous overspill of British radio and television signals [has] influenced the development of broadcasting law in Ireland” (1993, p. 213). Both approaches draw heavily upon dependency theory, portraying Ireland as a hapless “colonised society” with an “imperfect” bourgeoisie buffeted by global priorities. While much of the evidence used in support of the above arguments is uncontentious, the overall thrust of the argument raises several questions.

A fundamental problem is the tendency to ignore or, at best, discount the role played by *internal* political and economic structures, and domestic political and class forces. It could be argued that policy changes towards the media have been more heavily influenced by domestic economic strategy, often a rather contradictory affair, and considerations of economic performance and job creation than suggested by these authors. This perspective proposes a much more nuanced approach to the complex relationship between

core and periphery, with the positing of a “third strand” — the semi-periphery — and suggests indigenous structural factors as contributing to a nation state’s ability to construct an economic strategy, a potentiality dismissed in some versions of dependency theory. The focus is less on exogenous factors and more on internal “political forces and policy possibilities” cognizant that “domestic political factors intervene between economic constraints, [technological change] and policy choice” in ways commensurate with a particular coalition of political forces’ ability to maintain power (Jacobsen, 1994, p.26). As Henderson argues, such an approach opens up the:

possibility of semi-peripheral units operating as “way stations” in the control structure of the world economy, and as such having a capacity themselves to exercise a modicum of organisational and technical control. ... Of particular significance in this regard, has been state policy (Henderson, 1989, p.15).

Thus, the construction of a national developmental strategy can not simply be read off as a vehicle to benefit “large multinationals”.

In an attempt to overcome the legacy of late industrialisation as portrayed in the Telesis report (1982) Irish policy makers, with arguable success identified and nurtured the electronics industry as a path away from peripherality. Most recently, strategic targeting of information and communications technologies, with a particular emphasis on information distribution and cultural content products, have been proffered as a model for “jump-starting” Irish economic growth, opening up the possibility of leap-frogging the historic and geographic limitations of the earlier industrial revolution. Using very formalistic and statist mechanisms, the strategy of successive governments has endeavoured to take advantage of rapid social structural changes to link high education/skill and creativity with new media (digital) technologies, thus constructing a platform from which to reclaim some economic autonomy (see Mjøset, 1992, pp. 46-47).

The most significant aspect of this approach is that it is unashamedly statist, albeit crucially different from previous such policies which emphasised state-ownership or control of key manufacturing sectors as *the* mechanism for industrialisation. Now the preference is to create a “competitive liberalised ... market” with “low taxes on profit” and to redefine cultural production in terms increasingly attractive to private interests — a policy of “managed privatisation” — but to do so in ways that are clearly engineered by state policy. Debate within the EU between liberals and *dirigiste*, between free-marketers and interventionists, has now been firmly tilted towards the latter (see Collins, 1994, Chpts. 5 and 6, and EU Media

website: [www.ispo.cec.be](http://www.ispo.cec.be)).<sup>4</sup> Thus, in line with EU and other nation-state policy initiatives, the Irish state has used an arsenal of structural, financial and cultural-ideological mechanisms (e.g., agencies, commissions, corporations, tax incentives, low-interest loans, national-identity, and even the Irish army!) to promote and support the growth of an independent, commercial production industry. When television is included, the state constitutes the “backbone” of the industry (Moran, 1996).

An example from within the wider cultural industries framework, is illustrated by the Temple Bar Properties initiative, announced in 1991. It incorporated a strategic plan aimed at the regeneration of a previously derelict and neglected urban space critically juxtaposed between two main commercial districts. An elaboration of a conceptual model already tested elsewhere, the schema sought to overlay a burgeoning but commercially ineffectual cluster of “counter cultural bohemianism” with “commercially safe chic” using a combination of “image” industries (film, music, art, design, drama, multimedia and photography) as the engine of urban and economic revival (An Taisce, 1996, p. 1; see also Corcoran, 1997). While it would be over-generous to designate the specific locale as the epitome of a “localised cultural industrial district”, its success is indicative of an overall strategic targeting and marketing of Ireland as the “information gateway” and Dublin as the “innovative city” (see Moulaert, Scott and Farcy, 1997, p. 100; see also *Review of Dublin City Development Plan*, 1991, pp. 36-37).<sup>5</sup> The Department of the Environment reported (March 1996) that within Temple Bar’s streets, “131 new businesses had opened, including 10 cultural centres, 39 restaurants and cafes, 8 pubs, 43 shops, 9 clubs and 3 hotels” with an expectation of 2,000 jobs by the end of 1996 (An Taisce, 1996, p. 11).

That such activity fits into a wider strategy can partially be gauged by the 1994 Coopers and Lybrand study, sponsored by Temple Bar Properties, which claimed that 20,000 full-time equivalent jobs, producing a net value return of £387m, had been created in the “cultural industries” sector. This figure has been expanded in the recent Forfás report, which, using the slightly broader conglomeration of the “content sector”, pointed to 30,000 people producing an

4. For example: Media 92, European Film Distribution Office (EFDO); Espace Video Européen (EVE); Broadcasting Across the Barriers of European Language (BABEL); European Organisation for an Audio-Visual Independent Market (EUROAIM); Support for Creative Independent Production Talent (SCRIPT); Association Européenne du Film d’Animation (CARTOON); the Media Investment Club (MIC); Les Entrepreneurs de l’Audiovisuel Européenne (EAVE); Media II, etc.

5. *The Information Society Ireland Report* (Forfás, 1996) seeks to transform Ireland’s cities into “info-cities” and Dublin into a “virtual city” (p. xiv).

output of £1b annually.<sup>6</sup> On this basis, the studies strongly agree that “the cultural industries are a significant employer relative to other industrial sectors”, or as Morley and Robbins (1997, p. 37) argue, “the arts and culture industries [have successfully] been drawn into the heart of ... [the] entrepreneurial initiative”.

### III RESHAPING IRISH MEDIA ORGANISATIONS AND PRODUCTION

That the audio-visual industries are at the centre of this debate about urban and economic regeneration is not new. Much has been written by others, including Castells (1983); Storper (1986 and 1989); Garnham (1990); Lash and Urry (1994); Morley and Robbins (1997); and Moulaert and Scott (1997) amongst others, regarding the extent of change experienced internationally by broadcasting and the film industry. Particularly noteworthy has been the reshaping of production organisation(s) away from corporate integration (the studio system and broadcasting corporations) towards vertical disintegration and flexible-specialisation at the local level. This has been a feature in Ireland also. The impact and experience of ideological, economic and technological change on the broadcasting and telecommunications environments has led to a fundamental reshaping of media production and organisations, strongly favouring a dismantling of the public broadcaster’s monopoly position, a deregulated market with multiple providers and distributors, and a pro-active determination to use the newly created independent production sector as a vehicle for new forms of economic and social organisation. This part of the paper looks briefly at the changes within the public broadcaster, and suggests that its restructuring has been a necessary catalyst.

The recent Forfás document casts a long shadow over the audio-visual sector. Its view that a deregulated information and communication industry holds the key to economic growth was signalled as early as SKC’s advice to Channel 4 and the BBC in the early 1980s, prior to its recommendations to RTÉ in 1985 (SKC, 1985). Whereas broadcasting corporations had previously combined production, editorial and distribution functions, the new view recommended externalisation of programme-making through active commissioning and purchasing of independent productions, and changes in heretofore restrictive work practices and conditions of employment. Under the Channel 4 model, broadcasters would cease to be producers and instead become publishers. These initiatives matched similar moves throughout the EU and the United States, and occurred against a background of profound

6. The content sector includes those companies/businesses that “aggregate music, audio-visual and information/data services ... using digital delivery technology and skills.”



change in the broadcasting marketplace and the pace of technological innovation, and was equally correspondent with Irish domestic economic and political demands. This disaggregated approach is now an explicit component of Irish government strategy, wrapped in the language of cultural diversity and artistic licence. Initially greeted both within and without RTÉ, the trade unions and the political left with anger, this shift towards commercialisation and privatisation is now accepted as ideologically non-contentious.

Domestically, a deepening fiscal crisis during in the 1970s and 1980s undermined hitherto unquestioned loyalty and subsidisation of a wide range of public services. The problems of a late developing economy, with weak distribution of resources and high levels of unemployment, led to popular discontent over high personal taxation and public expenditure. Heretofore RTÉ had been protected by a popularly endorsed strong public service remit, and had never faced a direct or real threat to its principle sources of revenue: the license fee or advertising. At a time of spiralling costs, and domestic and global competition, RTÉ found itself caught in the cross-fire (see Hazelkorn, 1995b).<sup>7</sup>

Politically, a series of legislative and policy initiatives marked a major policy shift, seeking to “emancipate” state-broadcasting and increase opportunities for private ownership and independent production.<sup>8</sup> When the Radio and Television Act, 1988, established the Independent Radio and Television Commission (IRTC) with authority to licence national, local and community radio stations, and a national television station, it was argued that it:

was not the function of the state to provide the new broadcasting services...[but] merely to provide the framework and opportunity to allow the public to decide what they wanted to see and hear ... (Hall, 1993, p. 183).

7. RTÉ's share of peak time viewing in multi-channel areas has declined to less than 50 per cent; it faces threats from the plethora of UK and satellite stations, and domestically from an aggressive UTV, TV3 (due in 1998), requirements to part-fund TnG, Radio Ireland (since 1997), and possible future competition for the licence fee from commercial and community radio. It was denied the right to levy increases in its licence fee between 1986 and 1996.

8. The following is a list of the key legislation effecting broadcasting in Ireland: Wireless Telegraphy Act 45, 1926; Broadcasting Authority Act 10, 1960; Broadcasting Authority (Amendment) Act 4, 1964; Broadcasting Authority (Amendment) Act 7, 1966; Broadcasting Authority (Offences) Act 35, 1968; Broadcasting Authority (Amendment) Act 2, 1971; Broadcasting Authority (Amendment) Act 1, 1973; Broadcasting Authority (Amendment) Act 33, 1974; Broadcasting Authority (Amendment) Act 37, 1976; Broadcasting and Wireless Telegraphy Bill, 1979; Radio and Television Act, 1988; Broadcasting Act, 1990; Broadcasting (Amendment) Act, 1992.

Controversially, the then Minister for Communications, Ray Burke TD, intervened on behalf of Century Radio, launched in September 1989 as the first commercial national radio station, forcing RTÉ to concede a more economical charge for Century's use of the national transmission network and to create an alternative news service (see McCann, 1990).<sup>9</sup> The requirement that RTÉ pay a percentage of the licence fee to the IRTC to fund the commercial sector was dropped amid a political furore although the equally controversial "cap" on the amount of revenue RTÉ was allowed to earn from advertising remained until 1993. The Broadcasting Authority (Amendment) Act, 1993, requires RTÉ to make specific amounts of money available for programmes commissioned from the independent production sector in each financial year, targeting 20 per cent or £12.5m of television expenditure by 1999. A "replacement" national radio station, Radio Ireland, began broadcasting in spring 1997.<sup>10</sup> Similar statist initiatives endeavoured to orchestrate an Irish film industry: concentrating primarily on constructing a favourable structural and financial climate, a favourable tax investment scheme (Section 35) was introduced, the Irish Film Board resurrected, and considerable (ministerial) effort directed at encouraging Hollywood films to locate in Ireland.

From inception, technology and technological change have been central to broadcasting (radio and television) and film. The introduction of FM radio broadcasts, the invention of transistor radio, and the move to colour television increased the consumption of media products in the 1970s. More recently, computerisation and digitalisation have swelled the possibility of media platforms, often enabling new audiences to be captured by simply reformulating existing media products onto new technologies:

The new technologies did not kill the motion picture theatre; rather they stimulated demand for more motion pictures, spread the risk of production financing, and enhanced the value of film libraries.... (Balio, 1996, pp. 23-24).

Home video, pay-TV, cable, satellite and now digital television have also stimulated demand and competition for more and more media product. New technologies have brought significant changes in media production tech-

9. In 1991, Century went into liquidation, claiming an "uneven playing pitch" had allowed RTÉ to receive dual funding and cross advertise while commercial stations were forced to rely on advertising alone.

10. It could be argued that given the difficulties of securing financial backing for TV3 and the turbulent early months of Radio Ireland (JNLR figures show only 1 per cent listenership during the first three months) government strategy has been less than successful, and an embarrassment for policy makers. I am grateful to Brian O'Neill for this point.

niques and practices, most notably smaller crews and simplified post-production generating substantial economies while substantially raising production standards.<sup>11</sup> Digital technologies have further altered or eliminated many traditional skills rendering them obsolete or less efficient. Their user-friendliness alongside their relative cheapness has meant that broadcasting need no longer be the preserve of large media organisations.

The aggregate of these developments featured highly in the now infamous SKC report on RTÉ, in which it criticised the station for failing to take advantage of new technologies, where such technologies would reduce manning levels and costs. As a result, a new management strategy was adopted: *Competing in the New Environment — Our Strategy for Survival* (1988) was RTÉ's response to the changed media environment:

We must produce and transmit more and better programmes at lower cost and with fewer staff. This is the essence of the challenge which we face and must overcome. If we fail to do so now we risk getting into a spiral of decline which will become impossible to halt and which would undoubtedly have disastrous consequences for RTÉ and RTÉ staff ...

Multiskilling must become the norm, and while preserving how [sic] essential production and operational core skills and maintaining programme quality and output standards, staff in general will need to cover a range of duties for which they are competent or for which they can, with limited effort, be trained and scheduled to work as a team ... reasonable flexibility within a team concept has to be the norm (1988, pp. 2, 6).

Remarkably similar in tone to the UK *Broadcasting in the '90s: Competition, Choice and Quality — The Government's Plans for Broadcasting* (Home Office, 1988, paras 10.2-10.4, p.41), RTÉ accepted the need for technological innovation and deployment of new media technologies, emphasising flexibility, efficiency and lower costs (see Table 1).

By the end of the 1980s, these changes were seen as insufficient to meet the challenges posed by other television broadcasters who had embraced new technology with low manning and cost structures. Like other large broadcasters, RTÉ sought to rapidly downsize and casualise. The most significant changes have been: a continuing decline in full-time employment; a move towards casualisation of employment through a shift towards short-term

11. It is arguable that production standards may begin to fall due to pressures forcing down the cost of programme-making, and the fact that the newer technologies require less specialised training.

Table 1: *Summary of Impact of Technological Change on Selective Departments in RTÉ, 1988-1994*

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*Engineering*

- changes in transmitter technology and specifically modular circuits through microelectronics;
- transmitters controlled now directly from studios;
- decline in the demand for engineers partially offset demand to service the growth of IT systems — a situation not repeatable in other areas.

*Radio*

- digital technology has led to self-editing, a technique suitable for people with little or no sound operating background.

*Digital switching*

- move from analogue to digital equipment means integrated circuits and touch screen VDUs are controllable from anywhere in the studio;
- capability to “go directly to the transmitter network”, thereby making it possible for a single presenter to control programme output on radio, without necessitating a sound operator to be present;
- transformation of that part of television studio operations which mixes sound and vision for final live broadcast, cues and announces programmes, and sends out the broadcast signal.

*Graphic design*

- revolutionised practice of producing artwork on paper and then filming it with a camera;
- integration of skills with other technical aspects of production, transmitting work from computer to video tape directly without involving a video tape operator;
- increased quality of work and speed of delivery has increased the demand with the result that staff increased in this section.

*Lighting*

- new saturated lighting rigs, which are quickly rigged and derigged, means that the operation can substantially be carried out at the flick of a switch.

*ENG/ EFP equipment*

- user-friendliness, lightweight and technical capability of video over film processing has virtually led to its replacement;
  - two-person crewing for news and current affairs.
  - equipment is more reliable than cinecameras; increased number of VTRs and cameras;
  - commitment to “in-house” repairs has led to increased numbers.
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Source: Hazelkorn, E., “Technology and Labour Restructuring in Public Broadcasting: the case of Ireland’s RTÉ”, *Irish Communications Review*, 1996, Vol. 6.

contracts lasting either for several months or a series' duration (see Table 2); slimmed-down production teams (including camera crews, but also the elimination of sound and video operators, etc.); and the contracting-in of programming and/or skills from independent production and facilities houses (see Hazelkorn, 1996). In the last year, RTÉ, following trends elsewhere, introduced the position of multi-skilled "technical operator".

Table 2: *RTÉ Labour Force, 1988 and 1994*

<i>Year</i>	<i>Employed</i>	<i>Non-permanent</i>	<i>Per cent Non-permanent</i>
1988	2,146	99	4.6
1994	1,973	330	16.7

*Source:* RTÉ.

#### IV THE SHIFT TO POST-FORDIST MODELS OF VERTICAL DISINTEGRATION AND FLEXIBLE SPECIALISATION IN IRISH CULTURAL PRODUCTION

Many of the changes experienced in RTÉ correspond to the normal developments within capitalist production whereby technology is introduced in order to reduce labour costs and secure competitive advantage and audiences. But in addition, they have signalled a profound transformation in audio-visual production to an industrial form similar to other mass production industries, and a shift from the all-encompassing broadcasting organisations to a multiplicity of independent production and facilities houses. This "democratisation" of media production has assuredly undermined the public broadcaster's "monopoly", and most importantly helped shift the balance between large media institutions and small independent audio-visual production/facilities companies in favour of the latter at a particular historic conjuncture. In so doing, they have laid the basis for jump-starting an independent commercial audio-visual industry, through a combination of fiscal and legislative restrictions on the state sector and incentives to the private sector.

As an industrial enterprise, the audio-visual industry is comprised of "three inter-dependent yet separate sectors: production, distribution, and exhibition" (Moran, 1996, p. 1). The emphasis in Ireland, since the 1930s, has been almost solely on the former, to the neglect of either of the other essential components or of the cultural value of the industry. Film was identified as possessing an, albeit "limited [means] ... of addressing problems of unemploy-

ment through encouraging foreign capital to invest in film in Ireland" (Rockett, 1994, pp. 126, 128). The establishment of Ardmore Studios by the state in 1958 was followed erratically by a succession of policies, each seeking to unblock structural or financial restrictions to the development of an indigenous audio-visual industry (see Hill, 1994 and McIntyre, 1994). Despite extolling its (potential) value to the economy and GDP/GNP, little research has actually been conducted on the nature and structure of that employment. Therefore, this section seeks to investigate the structure and working conditions of the independent audio-visual sector, proclaimed in official documentation as one of the target strands of the burgeoning content/cultural industry.

The independent audio-visual sector in Ireland is, with rare exceptions, relatively young; most companies owe their origin primarily to the job-shedding that followed the first wave of restructuring by RTÉ in the mid-1980s; thus many companies are staffed or headed-up by former RTÉ personnel. Typically varied, the industry is comprised of the production of film; television programmes; animation; corporate videos; advertisements; and multimedia products. It is divided between the public or state sector, RTÉ and more recently TnG, and the independent or commercial sector, providing product in the main to the state sector, and shortly to TV3. Technological convergence resulting from digitalisation, the strong symbiosis between television and film, and erratic work schedules and project contracts means that individual companies (and individuals) may span the full range of end-products, inter-linking with each other, thereby forming a matrix of small-sized enterprises. Two key reports (Coopers and Lybrand, 1994 and Statcom, 1994) on the structure and overall distribution of employment within the sector show that in 1994 there were approximately 3,500 people employed across the sector; given expansion in film production (IBEC, 1996) and the start-up of TnG (30 people on full-time contracts according to Údarás, 1996) these numbers have increased, although the precarious nature of much of the employment precludes an accurate picture<sup>12</sup> (see Table 3).

A deeper insight into the structure of the industry, can be gleaned from a snap-shot of four companies that follows:<sup>13</sup>

12. The data attempts to compute FTE equivalent for freelance workers on the assumption that freelance people are employed 50 per cent of the time.

13. Selective interviews were conducted during July 1997 with four companies (two well-established large companies and two recently established small companies: (i) Midas Productions; (ii) Emdee Productions; (iii) Vinegar Hill Productions; (iv) Horizon Line Productions, and two freelancers: Deirdre Noonan a cameraperson for 15 years and Peter Dorney a lighting cameraman for 10 years.

Table 3: *Employment in the Audio-Visual Industry, 1994*

	<i>Permanent No. of Persons</i>	<i>Freelance No. of Persons</i>	<i>FTE*</i>
<i>Live Action</i>			
Scriptwriters		65	33
Production companies (190)	390		
Crews — SIPTU		482	240
— Other Unions		104	52
— Equity Members		750	300
<i>State Television</i>			
RTE (TV programmes & facilities)	822		
<i>Animation</i>			
Production companies	350	100	50
<i>Services</i>			
Production services companies (30)	160		
<i>Post-Production</i>			
Facilities houses (25)	200		
<b>TOTAL</b>	<b>1,922</b>	<b>1,501</b>	<b>675</b>

\*FTE Full Time Equivalent Employment (each freelance counted as 50 per cent of a full-time job).

Source: Coopers and Lybrand, *The Employment and Economic Significance of the Cultural Industries in Ireland*, 1994, Section 6, pp. 14.

(i) *Midas Productions* grew out of Reelgood Studios which began in 1986 concentrating on the recording business; under the Midas banner, the company produces up to “sixty corporates, and on average twenty to twenty-five hours of television programming in addition to commercial and audio production”. Of its business 60 per cent comes from producing corporate videos. Twenty-two people are employed across the full spectrum from audio to event management:

a number of contract people ... come in for specialised events [on a project by project basis]... because it wouldn't pay us to employ them full time.

Recruitment is by word of mouth: “we just know where to get them, production managers tend to know where to get people.” When hiring, the emphasis is for people with skills specific to the required task, not a “freelance dogsbody”; in contrast, David Harvey who is managing director also

acts as the executive producer, editor and, unusually, presents Midas' premier programme, *Crimeline*, on RTÉ along with Marian Finnuccane (see Dunne, 1996). No training is provided. The company's "profit margin is good", with an annual turnover of between £1.2m and £1.3m. Harvey complains, however, that 85-90 per cent of costs are tied up in equipment and facilities hire; thus, uniquely Midas has:

adopted a policy ... of investing in post-production and production facilities ... [where we can get] a better margin once we've paid off our purchases.

Developments in digital television, particularly in the UK, and EU and international co-productions offer the best opportunities for Midas, and the independent sector in Ireland, to grow.

(ii) *Vinegar Hill Productions* has been in existence less than a year, and employs two people producing low to medium budget television documentaries for the domestic market; it aims to produce approximately four hours of product per year. Because the company works on a project-to-project basis, "not employing anybody else until [there] are actually projects", its often difficult to define the distinction between full-time and part-time work. Mike Collins acts as producer; writer; director; and production manager, although he also works freelance, occasionally as an editor; cameraman; sound recordist; teacher or journalist; his partner is likewise multi-skilled. Recruitment is based:

on people who we have most likely worked with in one way or another or who would be recommended by our peers, by other production companies ... I doubt if we would advertise.

The preference is to hire people with the specific skills required, e.g., cameras, ascams, lights, editing, etc., although, "in certain kinds of productions that are quite small scale you might expect people to nearly be willing to multiskill". Additional training on the job may be required. Given the company's operating budget, it is "unlikely that we would be able to offer this person a competitive wage." Thus, despite presently working on two commissions, RTÉ and TnG, with Irish Film Board backing, the company is walking an "incredibly narrow, very very thin tightrope in a windy climate".

(iii) *Emdee Productions*, is over ten years old and is probably Ireland's most successful company and biggest producer of television programmes; its most



profitable area of business, however, comes from commercials. It employs eight people and has a turn-over in excess of £2.5m. Despite making a small profit, Seamus O'Neill, the managing and financial director, claims that the profit margin is poor. "For every pound that I get, I have to spend approximately 79 pence on third-party costs ... [e.g.] camera, lighting, sound, post-production". Recruitment is:

by word of mouth, CV and personal experience; people we have met ...  
You need to be multi-faceted, talented and flexible; inflexible people will not survive in this industry.

Although the company has people "who work for us probably all of the time," it does hire additional people "to fulfill a precise, defined role ... whether its filming in the studio or outside"; if training is required it is done on the job:

I cannot afford to have full-time people on my books because I do not have work fifty-two weeks of the year ... and yet I have the capability of working fifty-two weeks of the year!

Salaries vary according to a person's skills:

The good ones are highly skilled and make an awful lot of money; [indeed] in certain categories, freelancers are overpaid, but that is market conditions and business in Ireland at the moment that these people can pick and choose and it is very difficult to get the crew you want.

Future growth is likely to come from internationally-traded media products that also satisfy the domestic market; "the advent of new channels means that the sales life of a programme will go on and on and on."

(iv) *Horizon Line Productions* has been in operation a little over a year, during which time it has produced six corporate videos; it has one RTÉ commissioned programme in production. It has no employees; "that is to say that I am not being paid from the company. I don't draw down a salary". Alan Fitzpatrick fulfils a number of key roles, including director; administrator; marketing; producer; and some technical roles, in addition to working as a CD Rom programmer. The company's turnover is £55,000 and makes a tiny profit. Staff are recruited on a job by job basis, primarily:

by word of mouth or people from other projects. I expect them to be specialised; its good if they are multiskilled but they are hired on the basis of their specialised knowledge not on the basis of their multiskilling. I can't afford to train people.

The company's future plans are linked to its ability to win commissions from RTÉ, the Irish Film Board or other sources; in this respect, it very much depends where RTÉ's current propensity for lifestyle and documentary programming crosses with that of Horizon Line Productions. The company has no experience of either TnG or European co-productions; the latter is particularly difficult as it tends to "discriminate in favour of companies with a track record."

While the Irish situation is a long way off from the UK, where the independent sector is fast approaching being the largest production base in the country, its growth does signal a dramatic transmogrification in the structure and nature of cultural production in Ireland and shares many of its neighbour's characteristics. As David Harvey said in interview: "its a very cut-throat industry; it has nothing to do with culture". Indeed, to call it an "industry" may be a misnomer both in terms of the definition offered above and in terms of size; 84 per cent employ ten or less people, and 69 per cent employ five or fewer people (Statcom, 1994, p. 16):

the vast majority of the independent production sector is a one or two person operation ... I think that the size of the industry has always made it a survivalist agenda for most people, with the smaller guys, in particular, too busy with day-to-day operations to pursue commissions or other funding (Harvey, Interview).

The irregularity of work and tight profit margins means that few people are employed on a permanent basis; indeed, almost half the people working in the sector are freelance, and while permanent employment increased by 18 per cent between 1991 and 1994, freelance employment grew by 58 per cent (Statcom, 1994, pp. 16-17).<sup>14</sup> The sporadic nature of employment and size of the companies hides the true distinction between categories of full-time and part-time, permanent and contract or freelance employment. Indeed, many freelancers may actually own a company, often in name only, according to work being available, a point made by several of the interviewees.<sup>15</sup> Despite

14. The UK experience is timely. Since 1988, more than 10,000 people have been made redundant by UK broadcasters and their regulators. Fewer jobs today are due almost entirely to casualisation and subcontracting engendered by policy decisions deliberately aimed at bolstering an independent sector. "Many elements of production and support services have disappeared into the murky world of the self-employed and the small company." The 1994 Skillset survey estimated that 54 per cent of the 28,000 production workforce were freelance or working on short-term contracts compared with 39 per cent in 1989. *The Television Industry Tracking Study. Second Interim Report* (BFI, 1997) estimates that freelance work now constitutes 60 per cent of the labour force (p. 1).

15. BFI (1997) classified employment into the following categories: freelance, independent staff, broadcaster staff, independent/freelance, and independent owner (p. 8).

the headline incomes some people in the industry are making, for the vast number of people, the irregularity of work means that one's annualised salary is substantially "less than some equation you might come up with based on one's weekly rate and working 40 weeks a year" (Collins, Interview).

A constant worry is that the phone won't ring, especially if it hasn't for a couple of days. A downfall is that it is very hard to get paid, particularly in Dublin; you are begging to get your money. The union used to be strong here but it isn't any more and that is part of it. ... Production companies are squeezed to the bone and its hard for them to make a profit.... My income fluctuates a lot. I work 104 days a year on average. I work two days a week, and I'm a woman so I'm always going to work less than a man (Noonan, Interview).

Men out-number women in production/management and in the operational/technical areas (lighting, camera, sound, etc.), while women out-number men in production support (e.g., administration, researcher, production assistants, secretarial, receptionist, programme director, etc.) (see Table 4). Employment patterns within RTÉ equally show a strongly segregated skill and grading structure. Indeed, the demarcation between "women's jobs" and "men's jobs" is as strongly marked as ever throughout the industry with little evidence of change (see Hazelkorn, 1995a).<sup>16</sup> One

Table 4: *Distribution of Male and Female Employees in Independent Film and Television Production Companies and Facilities Houses, 1995*

Group	Permanent			Contract				
	Males No.	%	Females No.	%	Total No.	Males No.	Females No.	Total No.
Production Management	82	77	24	23	106	9	5	14
Production Support	18	16	97	84	115	7	9	16
Operational	122	83	25	17	147	26	4	30
TOTAL	222	60	146	40	368	42	18	60

Source: Statcom, *The Independent Film & Television Production Sector in Ireland. Training Issues to 2000*, Dublin: FÁS, 1994, p. 6.

16. For example, the ability to hold a camera is often used against women on the basis of the person's height or camera's weight.

explanation for the significant recruitment of women into some grades, categorised as “pink collar” or “velvet” ghetto, is the declining status of that specific medium (e.g. radio *vis-à-vis* television, broadcasting *vis-à-vis* film).

Recruitment and promotion are usually on a basis of personal contact and the “old-boys” network:

Everybody that works in the independent sector has their network of people who they ring on a regular basis and they will trust to a greater or lesser degree. ... Word of mouth is absolutely crucial in the industry, reputation is everything (Collins, Interview).

I’m based on the end of a telephone! The mobile runs my life...They mightn’t want me for a month but if they don’t talk to me now they’ll go to the next number (Dorney, Interview).

Whereas union membership has previously been both essential or helpful for employment, this is no longer the case in Ireland; a union card is now considered only of limited use, and is not applicable for working in broadcasting. The difficulties of entry for newcomers may account for the large number of small, starter companies: if you can’t join, start your own!

Having a foot-in-the-door, however, is not the same as a discernible career structure; unlike other industries, educational certification is not a criteria for either employment or advancement. Indeed, attendants at a recent conference on Media Practice at Royal Holloway College, University of London, decried the situation where students from the multifarious media courses throughout the UK had no conceivable advantage over any other potential recruit (see Hazelkorn, 1997). Many in the industry are critical that aspiring recruits lack sufficient skill-training, albeit few of them had the requisite skills when they entered. Nevertheless, whatever one’s initial skill-level, there is little additional formal training except what one picks up on the job. Because video/broadcasting is less skilled and the technology more user-friendly, experience counts more heavily. Film, in contrast, is very hierarchical, with an element of mentoring helping people work their way up the skills ladder.

Broadcasting, however, is more likely to emphasise multi-skilling amongst those recruited, a trend likely to be strengthened due to competition forcing down the cost of production,<sup>17</sup> the arrival of digital television, and other

17. According to Andrea Wonfor, Joint Managing Director Granada Television and Chairperson, Royal Society’s Television Training Committee, programming costs for the new digital lifestyle stations has fallen to £3,500 per hour which is lower than the £5,000 per hour generally accepted as constituting low-budget (Royal Holloway College, University of London, July 5, 1997). See also Brown, 1997.

technological changes. While all interviewees stressed their desire to hire highly skilled specialists, there was a strong recognition that multi-skilled people were increasingly if not more desirable.

Multi-skilling is a very strong element of certain types of production. Certainly the BBC and Channel 4 seem to be going that direction with documentaries and magazine programmes being done by camera-directors which will be very worrying for freelance camera people. But at the end of the day, you still need a good camera person, and if you have the money, you always want to get a specialist to do certain jobs.

But this has to be traded off against the fact there is a new generation of people coming through in the last ten years that have learned their trade through multi-skilling. They have come through cheaper technologies or through television stations where there is a "Broadcast Operator" replacing [individual] camera; sound; vision mixers, etc. (Collins, Interview).

As the competition between broadcasters heats up, there will be increasing pressure on Irish production companies to follow the Granada lead and develop low-budget teams, with low shooting costs, and smaller crews staffed by young, multi-skilled recruits. Being multi-skilled helps keep costs down, a vital *sine-qua-non* of such work;<sup>18</sup> indeed, it is this combination of flexible work practices and multi-skilling, a low-cost base with a few overheads, contracting in both labour skills and equipment that enables it to undercut RTÉ.<sup>19</sup> As the national broadcaster faces into enhanced domestic competition from TV3 which intends operating as a "publisher" with an annual budget of only £6m (£10-12m initial capital costs) and a staff of 100, these characteristics are likely to remain if not intensify.

18. A survey of independent film and television production and facilities houses in Ireland found that "some crossover/overlap in job functions is a feature in over two-thirds of companies surveyed (68 per cent), and that three-quarters of these companies have a 'considerable' degree of job crossover/overlap. Further analysis indicates that the crossover is most frequently within jobs in the television production area, and between production and product support jobs. For example, a producer may also be responsible for direction, or it can be the case that research, production co-ordination and floor management may be combined." Statcom, 1994, p. 17; cf. BFI, 1997.

19. In 1994, RTÉ paid the independent sector approximately £22,000 per hour programming; this figure is the total value of commissions £5,527,902 divided by 258 total hours commissioned. Economies of scale with a series will affect these figures. These costs are also conditional on the type of programme produced; game and talk shows are particularly cheap to produce. Difficulties in comparisons with in-house costs are attributable to the fact that many of the cost factors involved can be treated as internal "public goods" and their pricing is entirely arbitrary. In the private sector, market prices always operate so that a price will always be arrived at. Regarding difficulties calculating productions costs, see Alvarado, 1996, pp. 64-66.

## V CONCLUSION

There is little disputing the significance of the Channel 4 model. As Steve McIntyre recites, its strategic importance flows from the shift from producer to publisher, its sponsorship of an independent commercial production sector "which became the nuclei of cultural industries", and its successful undermining of the large public broadcasters (McIntyre, 1996, p. 225). In Ireland, its effects have been almost as dramatic, not least because it coincided with a particular conjuncture of political and economic agendas, and technological innovation. Thus, the recent experiences of change throughout the Irish media industry are representative of change experienced elsewhere within what Storper refers to as the "electronic entertainment industrial complex." Technology over-determined by ideological and economic imperatives have engineered a revolution in the social and economic relations of production, involving deconcentration, decentralisation and "democratisation" of the audio-visual industry. The spasmodic nature of employment, the lack of security, poor pay and profit levels, inadequate training, and the lack of a clear career path, amongst others, however describe an industry with working conditions vastly different from its predecessor. The picture presented is one where "kitchen-table" operations, characterised by a new division of labour based on various forms of transactional relationships and a system of casualised or "sub-contracted labour", predominate (Chanan, 1980, p. 127). In place of large, vertically integrated production companies, a network of small, vertically disaggregated and disintegrated units, externalising and subcontracting work from each other, have grown up. Both individual companies and individuals working in the industry are increasingly encouraged towards flexible specialisation. The UK *Television Industry Tracking Study* (BFI, 1997, pp. 38-39) revealed that while people working in the industry rated creativity, achievement, and intellectual stimulation very high, two-thirds experienced stress prompted by pressure on time, unsociable working hours, and uncertainty.<sup>20</sup> The realisation that the cultural (audio-visual, design/image) industries could play a key role in the regeneration of national and urban economies followed in the wake of the "rather unquestioned celebration of the disintegration" (McIntyre, 1996, p. 226) of the monolithic media producer. Various policy initiatives since have endeavoured to build upon and encourage these developments which have

20. "Time or lack of it is probably the most stressful feature of our work. We are expected to work to very high standards in the minimal amount of time..."; "Working hours were very long and there was not the compensation for overtime". Only 4 per cent said that stress was always a spur to creative work.

spawned new working practices. At this still early stage, the “industry” emerging is arguably more “dependent” than “independent”.<sup>21</sup>

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21. Hence, most companies admitted to the heavy emphasis on corporate and advertising work as the main breadwinner. Cf. BFI (1997) which showed that just under 70 per cent of those questioned worked in network programming and just over a quarter in local programming during the last six months (p. 21).

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