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SECTORAL ACTIVITIES DEPARTMENT

Working Paper

The digital labour challenge: Work in the age of new media

by Aidan White

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Working papers are preliminary documents circulated to stimulate discussion and obtain comments

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Preface

This sectoral working paper outlines how technology has been the driver of change in the media and entertainment sector, in the habits of consumers, and in the labour market. SECTOR working papers are preliminary documents intended to stimulate discussion and critical comments.

The proliferation of new technologies has eliminated many traditional media and entertainment jobs, but there has been expanded consumption of media products worldwide and a growth in employment in new areas of media and entertainment. There have been significant changes in work organization – particularly in content creation. This has fuelled demands for flexible work and for people who can provide creative input across a range of media.

The report's author indicates that flexibility and fragmentation of work have led to an increase in precarious employment in media and entertainment workplaces. Workers in this environment are often unable to join trade unions, thus the scope for collective bargaining and social dialogue is more limited. There is uneven distribution of labour rights across the media and entertainment labour market. Problems of gender inequality and obstacles to equal representation of women working in media and entertainment persist, with little progress towards pay parity or better access to senior management jobs.

This report finds that changes in employment, contractual arrangements and job content mean that training must meet the needs of a new and evolving sector – not only providing skill sets that match the requirements of the industry, but also preparing new workers for entry into a transformed media and entertainment workplace.

Finally, the report highlights the need for more research on labour market conditions in media and entertainment. It concludes with recommendations on promoting social dialogue, creativity and respect for decent work in the media and entertainment sector.

The Sectoral Activities Department (SECTOR) promotes decent work by addressing social and labour issues in specific economic sectors, both at international and national levels. By tackling challenges and development issues of great importance for a particular sector, the International Labour Organization (ILO) assists governments, employers and workers to develop policies and programmes aimed at enhancing decent employment and improving working conditions at the sectoral level. SECTOR's integrated approach cross-cuts throughout the entire Decent Work Agenda, allowing the ILO to respond comprehensively to specific needs of sectors in relation to employment, social protection, labour rights and social dialogue issues.

This paper was written by Aidan White and edited by John Myers (SECTOR).

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Executive summary

The global information revolution is in full swing. From content creation to distribution and consumption, developments in the technologies over the past decade haves changed the way consumers throughout the world view and use media for news, information and entertainment and have transformed the working lives of people in the media industry.

The worldwide web, which is accessible to more than two billion people, has given freedom a lift, opening the door to a new and prolific era of information that can inform, inspire, and educate new generations.

This radical overhaul of global communications has broken apart traditional markets, and generated a new media and information economy. While it has broadened the horizons of the consumer and inspired exploration of new business opportunities, it has also cut jobs and reduced opportunities for decent work.

Although there has been much focus on the difficulties facing traditional media in many industrialized countries, the evidence shows that news media are not dying; they are changing and adapting. In some parts of the world, the print media have undergone a trauma of contraction; in others, print is a vibrantly growing sector; in all countries, traditional media are now adapting to multiple platforms for distribution.

In the media labour market, there has been a seismic shift in the skills and talents required of the workforce and in patterns of employment. In 2000, a tripartite international Symposium on information technologies organized by the ILO found that technology in newsrooms was levelling the playing field between fully employed staff and freelancers. [1] There were hopes for increasing career opportunities in media for women and high expectations from a booming “new media” jobs market.

Twelve years later, this report finds that restructuring of labour markets and a whirlwind of change in the workplace have created much uncertainty about the future.

Nevertheless, the new architecture of media and communications provides employers and workers with fresh opportunities – particularly to enhance respect for international labour standards, including those on freedom of association, collective bargaining, the employment relationship, home work, discrimination and rights of women workers.

The Internet has become the dominant feature of the sector and no media function without access to the web, whether for research, or for sale and distribution of traditional material.

Although poverty, skills shortages, a paucity of infrastructure and lack of connection to the fastest broadband have meant that some developing countries are still lagging behind the rest of the world in this area, fears of a “digital divide” have receded. Billions of people now have access to technology, particularly mobile telephony that creates new opportunities for media development.

This report outlines how technology has been the driver of change in the media economy, in the habits of consumers, and in the labour market. The proliferation of new

[1] See background document to the *Symposium on information technologies in the media and entertainment industries: Their impact on employment, working conditions and labour-management relations*, ILO, Geneva 2000.

technologies in many countries has eliminated many traditional media jobs. But in many regions – South Asia, East Asia and Brazil, in particular – the labour market has improved as increasing rates of literacy and rising standards of living have expanded consumption of media products.

Everywhere, there are significant changes in the structure of work – particularly in journalism and content creation. This has fuelled demands for flexibility of work and for people who can provide editorial and creative input across an increasingly integrated range of information platforms.

Flexibility and fragmentation of work has led to an increase in precarious employment. Employees are often unable to be represented by unions and this has weakened the scope for collective bargaining and social dialogue. There is uneven distribution of labour rights and access to decent work across the media labour market.

Problems of gender inequality and obstacles to equal representation of women working in media remain in place, with glacial progress towards parity in salaries and equality of access to jobs in senior management, both in traditional and new media sectors.

This report finds that changes in employment and contractual arrangements and in job content provide major challenges for training institutions. There is an urgent need to ensure that training meets the needs of a new and evolving sector – not only providing skill sets that match the requirements of the industry, but also preparing new workers for entry into a transformed media workplace.

Finally, the report highlights the need for more research and study of labour market conditions. It concludes with a number of conclusions and recommendations on how to promote a new industry discussion on the transformation of the media labour market, with the object of forging a new commitment to social dialogue and the creation of a media landscape that will nourish creativity and respect for decent work.

Background

Driver of change: The technology

The new media revolution began in the 1990s with the emergence of technology that made it possible to store, manipulate and transmit digital information in massive quantities.

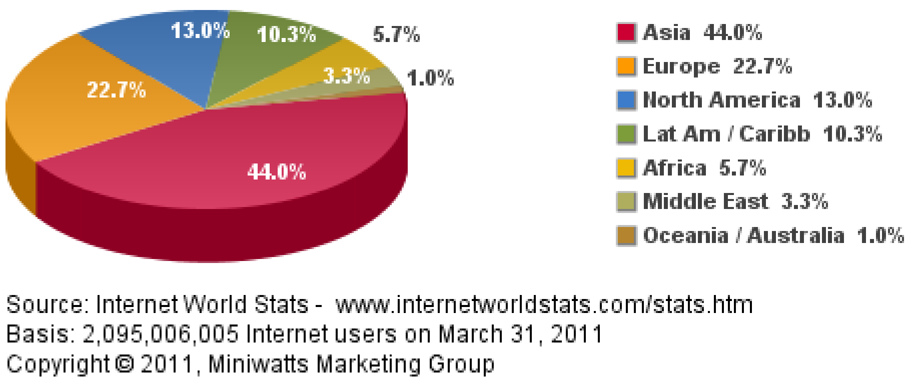
Further innovation and the development of new, increasingly sophisticated and accessible mobile technologies in the past ten years have created a kaleidoscope of new products and services, with opportunities for interactive activities and new communications covering social networks, teleshopping, electronic books, webcasting, online telephony, music, films and games.

Computer technology has inspired convergence, reducing different media to compatible chunks of digital information that are rapidly transmitted through expanding networks. This convergence is driving restructuring of the media industry.

The global "information society" today touches people and communities in almost every corner of the world, as shown by the continuing rise in the number of people connected to the Internet (figure 1 and table 1). [1]

The growth of the Internet and wireless mobile communications technology has occurred faster than many in the media anticipated even ten years ago. The largest increases are now in many of the poorer regions of the world.

Figure 1. Internet users by region, 2011



[1] The population numbers are based on data from the US Census Bureau and internet usage information is from data published by Nielsen Online and by the International Telecommunication Union, compiled in tabular form and published by www.internetworldstats.com.

Table 1. World Internet usage and population statistics 31 March 2011

World regions	Population (2011 est.) [1]	Internet users at 31 Dec. 2000 [2]	Internet users in 2011 [2]	Penetration (per cent population) [2]	Growth 2000–11 (%) [2]	Users (per cent of total) [2]
Africa	1 037 524,058	4 514 400	118 609 620	11.4	2 527.4	5.7
Asia	3 879 740,877	114 304 000	922 329 554	23.8	706.9	44.0
Europe	816 426 346	105 096 093	476 213 935	58.3	353.1	22.7
Middle East	216 258 843	3 284 800	68 553 666	31.7	1 987.0	3.3
North America	347 394 870	108 096 800	272 066 000	78.3	151.7	13.0
Latin America/ Caribbean	597 283 165	18 068 919	215 939 400	36.2	1 037.4	10.3
Oceania/ Australia	35 426 995	7 620 480	21 293 830	60.1	179.4	1.0
World total	**6 930 055 154**	**360 985 492**	**2 095 006 005**	**30.2**	**480.4**	**100.0**

Notes: [1] Population data from the US Census Bureau. [2] Internet usage information comes from data published by Nielsen Online, the International Telecommunication Union, GfK Group, local regulators and other sources.

Source: www.internetworldstats.com/stats.htm. Copyright © 2001–11, Miniwatts Marketing Group.

Already the number of mobile telephones in the world outnumbers the adult human population and the number of Internet-linked devices is expected to quadruple from 5 billion in 2010 to 20 billion over the next ten years. [2]

At the same time, more people are joined in expanding social networks and are able to integrate the diverse and disparate elements of communications and media content into a high-speed, interactive, broadband, digital, seamless whole that reaches all parts of the world. At the start of 2011, almost 700 million people, around 10 per cent of the world's population, were members of Facebook, many of them freely sharing at least some basic personal information with other users. [3]

The rise in the pattern of Internet use in countries in transition and the process of development is expected to continue. Internet use in India, for instance, is expected to triple by 2014 to around 300 million according to the *Wall Street Journal*. [4]

Globally, the number of Internet users will increase from 2 billion in 2010 to 2.7 billion in 2015, by which time it is predicted that up to 40 per cent of the world's population will have access to the Internet.

Although these figures suggest that fears of a significant "digital divide" between rich and poor countries have not been realised, inequalities remain where the reach of technologies is restricted by factors such as poverty, weak communications infrastructure and limited connectivity to broadband networks.

Internet penetration in Africa, for instance, is low when compared to the rest of the world even though the telecommunications market, particularly the use of mobile telephones, has grown rapidly and is substantially more widespread than fixed line communications.

[2] Wireless Intelligence study, report BBC 9, July 2011.

[3] From social media analysts Socialbakers. See www.socialbakers.com.

[4] Report *Wall Street Journal*, 16 Sep. 2011.

Almost half of Africa's population now have mobile phones – and not just for texting and talking. In Africa the technology can be used to help design better health products and to collect data that can support and facilitate improvements in health care. Meanwhile, people in developed countries can pay for applications that help to manage illness, such as diabetes.

Indeed, in the developing world as a whole, the mobile phone is creating its own revolution in the world of development, health care and education. The wave of telephone power spreading across the third world is forging a new enterprise and development culture, and promises more efficient disaster relief, cheaper energy and a faster route out of poverty. [5]

The key to Internet access to the population at large in Africa and elsewhere is the potential for faster broadband wireless access and the expansion of mobile telephony. Predictions from the International Data Corporation (IDC) released in September 2011 forecast that the number of people who use mobile devices to access the Internet will increase further over the next few years. More Internet users in the United States, for instance, will access the web through mobile devices rather than through personal computers or wire line services by 2015. [6]

But the prospect of millions of the world's poorer people remaining in the slow lane of Internet access has prompted action by the United Nations to increase access to fast broadband. The United Nations agency International Telecommunication Union (ITU) says all countries must put in place broadband strategies by 2015, by which time it wants to see 60 per cent of people in the developed world online, with a slightly lower target of 50 per cent for people living in the developing countries. [7]

It also wants net access to be made available to 40 per cent of households in the developing world by 2015 and for countries to ensure that broadband services are "affordable" – amounting to less than 5 per cent of average monthly incomes. The ITU will measure each country's progress towards the targets, with an annual broadband report, ranking nations in terms of broadband policy, affordability and uptake.

The ITU says Internet users now make up 20 per cent of the world's population, up from 13 per cent in 2008. The top broadband economies are all located in Europe, Asia and the Pacific. But the report highlights that it is speed of access that defines the divide between nations.

Driver of change: The market

Traditional media markets have been broken apart as people embrace technologies that allow them to watch, interact with and download news and entertainment.

Shifting consumer choice has led to significant falls in circulation of newspapers and the audience for prime time television as people turn to online services to provide their news and information. At the same time the industry has witnessed the migration of substantial amounts of advertising revenue from traditional media to the Internet.

[5] From *Perspectives on the Mobile Consumer* (2011) from analysts Deloitte Touche, a detailed survey covering more than 30,000 users in 15 countries including the United States, Brazil, India and Germany.

[6] See http://www.idc.com/getdoc.jsp?containerId=prUS23028711.

[7] *The World in 2011*, Report ITU (2011).

The impact of these changes in the structure of the media market has been deeply felt in Europe, North America, Australia and Japan in recent years in the wake of recession and a troubled global economy.

Traditional media are moving rapidly to develop new products and services as the information market broadens, with major telecommunications conglomerates now in the mix with traditional media in shaping the new world of news, information and entertainment. Increasingly companies like Vodafone and Deutsche Telekom are investing in content and working on mobile applications to deliver content to the consumer. They will need to have journalists and other content providers as well as technical staff for such services.

As the market takes shape, the role of governments has moved away from direct involvement as an employer in the sector. But new challenges are emerging, not least concerned with labour market regulation to secure social protection and workers' rights for people in the industry who today are more likely to be in atypical employment and less covered by collective bargaining.

Governments are also pressed to consider fresh forms of state support for media in the name of information and cultural pluralism and in the search for new business models, which may include mechanisms for new and hybrid funding of media and journalism.

Government support for media is not new in regions where the state has traditionally played a key role in funding news outlets, particularly in broadcasting, but the question of state aid to media is now on the agenda of governments in many industrialized countries. [8]

Although the break-up of traditional media revenue models has caused much turbulence in Europe and North America, there is a different story emerging in many countries of South America, Asia and Africa where investment in media and journalism has been maintained, and newspaper circulation and profits are rising even as new media technology also takes root in these regions.

The newspaper industry's annual survey, *World Press Trends*, which provides 233 country reports and a detailed global picture of the newspaper scene, illustrates this mixed picture of growth and decline. [9] The report for 2009 indicates that some 1.9 billion people read a paid newspaper daily and the number of newspaper titles has been steadily growing since 2001.

Over the past ten years the free newspaper phenomenon – usually free daily newspapers distributed at transport hubs in metropolitan centres – has provided an alternative market model to traditional paid-for newspapers. However, this sector has also been affected by advertising decline and economic downturn and some commentators believe free newspapers are an interim stage in the progress from paid-for newsprint newspapers to online "papers", and they may survive longer than traditional paid-for newspapers. [10]

Meanwhile, the global circulation for paid-for newspapers slipped from a high of 520 million copies in 2008, to 517 million copies in 2009. This was the first decline in a decade and is evidence of sharp falls in circulation, mainly in the United States and Europe. The industry woes are not just in declining sales. According to the United States

[8] This problem in developing countries is addressed in the WAN–IFRA report *Addressing the Capitalization Gap for Independent News Media (2011)*.

[9] World Press Trends (for 2009 and 2010) WAN–IFRA, see www.wan-infra.org.

[10] See Roy Greenslade, www.guardian.co.uk/media/greenslade/2008/sep/02/freenewspapersfeelthe pinch.

Audit Bureau of Circulation advertising revenue in the American press fell by an estimated 23 per cent in 2008 and again in 2009.

The 2010 survey focused on 69 countries which account for 90 per cent of global industry value and found that circulation declined overall by a further 2 per cent. However, the report added that “what has been lost to print has been more than made up by digital newspaper readers”.

The biggest decreases in newspaper circulations in 2010 were reported in North America, with an 11 per cent year-on-year drop, while Europe also saw negative growth – in Western Europe circulations dropped by 2.5 per cent and in Eastern and Central Europe the losses were even higher at 12 per cent. However, in the Asia–Pacific region, circulation increased 7 per cent in 2010 and by 2 per cent in Latin America. India, for instance, became the world leader in the number of paid-for daily newspaper titles in 2003 when it surpassed the United States, and it is also leading in paid-for daily circulation, overtaking China for the first time in 2008.

One explanation for these contrasting fortunes may be the rates of acceptance of online social networks, according to a report in *The Economist* [11] in 2011, which noted that the penetration of social media in the United States, parts of Europe, Japan and Australia are higher than in countries like Brazil and India, where newspapers are on the rise.

Whatever the underlying cause, publishers have been stung into action by the collapse of traditional markets, says Larry Kilman, Deputy Chief Executive Officer and Executive Director of Communications Affairs for the World Association of Newspapers and News Publishers (WAN–IFRA).

“One of the things that is noticeable has been the speed of our industry in adjusting to change,” he said. “It is not part of our DNA to be a change leader, but there’s no choice these days.” [12]

There are reasons for optimism, he says. All the evidence shows that when the numbers of people reading news – whether online or on paper – are taken together, there is a rising mass audience for news. The crisis for newspapers is, therefore, not of declining interest, but in finding new revenue models for a changing news market.

However, the depth of the crisis in richer countries is profound. A detailed 2010 study by the Organization for Economic Co-operation and Development (OECD), which analysed the impact of the Internet on the news industry, found that newspapers in 20 out of 31 OECD countries are facing declining readership. [13]

The study also stressed that, given the rise of newspapers in non-OECD countries, newspapers are not threatened worldwide and forecast a “period of great opportunity” for news outlets as they look to make best use of the Internet. Traffic to news sites has grown rapidly, with a conservative estimate of 5 per cent of all Internet visits relating to online news reading.

“For policy-makers the only real concern should be how to preserve independent news production, regardless through which medium. For businesses, it is about finding the

[11] “Special report: Reinventing the newspaper: New business models are proliferating as news organizations search for novel sources of revenue”, *The Economist*, 7 July 2011.

[12] Telephone interview with author, 20 September 2011.

[13] *The Evolution of News and the Internet* (2010), OECD.

right business models," says the report's author Sacha Wunsch-Vincent, a senior economist. [14]

The quest for new market models is also seen in broadcast media, although perhaps with less urgency than in the press. The reports a decade ago of the imminent demise of television have been, like that of the newspaper, greatly exaggerated. Although some predicted that communications technologies, the Internet and other new media platforms would kill it off, television maintains its leading position in terms of media consumption and continues to hold its own despite difficult market conditions.

However, like the press, television and broadcast media have been buffeted by the winds of change; and the future remains uncertain, particularly for the public sector. Recent reports confirm that traditional ways of watching television have seen deep declines, especially among young viewers. [15]

Ratings have fallen, too, for the largest channels and advertising has slipped partly as a result of migration to online services during the late 2000s, although in 2010 and 2011 advertising sales recovered ground in many countries. However, the problem of fragmentation of audiences – which leads to the decline of mass-oriented advertising – continues to have impact.

Nevertheless, the bounce back for broadcasters has been significant. In Nordic countries, television companies reported almost full recovery of revenues in 2010: one Swedish network, Channel 4, was forced to turn away advertising when it reached the ceiling of what it is permitted under the country's broadcasting regulations.

In an attempt to keep pace with changing consumer preferences, traditional broadcasters are increasingly offering video content via the Internet. At the same time, their output is made available by aggregators like Google, which stream channels and programmes from multiple sources over the Internet.

As in the newspaper world, new technologies have transformed broadcast journalism and production, reducing start-up costs because distribution of television content via the Internet and mobile technology requires no traditional infrastructure, but finding business models that will sustain traditional electronic media are proving elusive.

Another significant factor for both press and broadcast media in determining strategies to deal with market change is the growth in popularity of using mobile phones and tablets for online access, a trend expected to accelerate in the coming years. [16]

Smart phones now outsell personal computers, and by 2015 most people will use their mobile to access the web. While sales of desktop computers and laptops have slowed, notepads and smart phones disappear off the shelves in record numbers, and the gorillas of the Internet age – Google, Apple, and Microsoft – are engaged in a titanic struggle for share of the expanding portable communications business.

The battered media and journalism industry is no idle bystander in this corporate brawling. Many are discovering that the shift to portable communications may yet be their salvation, in the search for profitability on the net. As BBC Director General Mark Thompson told a London conference, "The greatest month-on-month growth now is not on

[14] Interview, Editor's Weblog, WAN–IFRA, 25 June 2010.

[15] See *Television Across Europe*, OSI/EU Monitoring Programme (2008).

[16] Report *DailyTech*, 13 Sep. 2011.

PCs or cable TVs but on iPads, iPhones, other smart phones and games consoles." In 2011, the BBC will launch its own iPad application at a cost of less than 10 $US per month. [17]

The *Financial Times* already has a paywall around its web edition. Since 2007, it has recruited some 224,000 online subscribers, each paying at least $400 per year. The company now says that 15 per cent of its new digital subscribers access content through mobile phones or pads.

Mobile news is a market where mainstream media outlets have a distinct advantage. Although just about anyone can launch a website or blog, only major news outlets and large web services have the capacity to invest in effective mobile applications. The New York Times Company – covering *The New York Times*, *International Herald Tribune*, the *Boston Globe* and 15 other dailies – now charges $15 a month for its smart phone application. Across the world, media from *The Daily Telegraph* in Britain to the *Sydney Morning Herald* in Australia have followed the lead of Rupert Murdoch's News Corporation titles in charging for mobile applications.

Certainly, the "apps" business is booming, according to industry watchers. In India some traditional media, the *Times of India* for instance, now provide a mobile application and according to a recent analysis of Apple application downloads, while the United States remains the leader, Asia is becoming an apps superpower, with downloads in countries like India and Thailand growing 27 per cent and 40 per cent respectively, since December 2010. [18] Although the growth of smart phone communications raises new fears – the prospect, for instance, of a two-tier reality of designer apps for the rich, and less targeted information for the poor – this trend is likely to lead to more dynamic partnerships between the media and the telecommunications sector.

In France, for example, Vivendi, one of the world's leading media conglomerates, in 2011 formed an alliance with France Telecom, the owner of Poland's major telecommunications company TPSA to exploit the potential of synergies in its takeover bid for Polish broadcaster TVN which operates a pay-TV business, free-to-air channels, and Poland's biggest web portal. [19]

Driver of change: The audience

News is no longer gathered exclusively by reporters and turned into a story, but emerges from a sophisticated and expanding information environment in which journalists, sources, readers and viewers exchange information.

Major media the world over now routinely use their audience to supply content and to refine their own coverage. The rate of clicks on online items, the volume of social network traffic, and the capacity of people with hand-held cameras and mobile phones to provide pictures and video in real-time, for instance, are all helping to target and deliver what's popular, what's correct, and what's wrong.

At first, many news media and journalists' groups were openly hostile, but the impact of bloggers and others – who are able both to challenge the authenticity of information and to undermine the capacity of governments and others to censor news – has changed attitudes.

[17] Report, *The Guardian*, 2 Mar. 2011.

[18] See report http://gigaom.com/2011/06/22/asia-booms-for-mobile-app-downloads/.

[19] Report from Reuters 14 Oct. 2011.

The success of the *Huffington Post*, launched in the United States in May 2005 with a combination of original reporting by members of staff, blog posts from thousands of unpaid volunteers and links to news stories on other sites, demonstrates the appeal of an approach that blends old and new, professional and amateur.

Today, traditional newspapers and news channels have blogs of their own and seek out published material on the Internet. They invite readers and viewers to submit pictures, video and other contributions, thus incorporating non-journalists into the news system.

Some journalists who were largely dismissive of blogs, Facebook, Twitter and other forms of social media changed their minds during 2011, a year of unprecedented news events including uprisings in the Arab world and the Japanese earthquake, Tsunami and nuclear disaster, all of which saw the presence of contributions from social media sources in mainstream media coverage.

A prime example is the incident in December 2010 which triggered the Arab Spring and led to the fall of the Tunisian government when a young Tunisian, Mohammed Bouazizi, set himself on fire to protest against police harassment and the lack of jobs for young people. A video of one of the protests that followed, led by Mr Bouazizi's mother, was posted on Facebook and was picked up by *Al Jazeera*, the Qatar-based satellite news broadcaster. *Al Jazeera* showed the video on air, and by the time Bouazizi died of his burns in January 2011, protests had broken out throughout Tunisia and spread across the Arab world. [20]

The staff in *Al Jazeera's* Arabic and English newsrooms had, as it happened, undergone intense social-media training only a month before this incident, and the network had used material from the Internet in its coverage of Tunisia because it had no reporters on the ground. This training was the culmination of a two-year initiative to make better use of social media throughout the company, which involved convincing journalists that social media are not a threat, but a significant asset to reporting.

Instead of flying a reporter somewhere to cover a story, the network can draw upon networks of trusted volunteers whose credibility has been established. The company also launched a social media-based programme, The Stream, in May 2011 to expand its use of social media, leading to innovative coverage of the Egyptian revolution, with some news relying entirely on Twitter updates for its dedicated Egypt channel *Al Jazeera Mubasher–Egypt*. [21]

This sort of initiative is now common among news organizations. Many have taken inspiration from CNN's iReport website launched in 2008. More than 750,000 people have volunteered as iReporters, says CNN. The station's coverage of the Japanese earthquake in March 2011 drew heavily on iReport material, achieving its best ratings in more than five years.

Before this material is broadcast editors verify the contents to ensure it is suitable. This can be an elaborate and difficult process. Nevertheless, social media like Facebook and Twitter can be a useful way to gauge the public mood about an issue, and they are now often incorporated into news coverage.

Many journalists use Twitter to solicit leads, find sources or ask for information and it is a regular feature of the modern newsroom to have a reporter monitoring the "tweets" of celebrities, politicians and public figures. Even though most media do not have the resources to fully verify the trustworthiness and accuracy of individual tweets, there is now

[20] Report *The Economist*, 7 July 2011.

[21] Reported by http://ijnet.org/ International Center for Journalism.

an established pattern to use the audience as well as journalists to select, filter and analyse information being posted on the Internet.

Studies confirm this trend. A Pew Research Centre survey published in March 2010 found that 37 per cent of American Internet users or 29 per cent of the population, had "contributed to the creation of news, commented about it or disseminated it via postings on social-media sites like Facebook or Twitter".

All of this worries trade unions representing journalists and other media staff who complain that these developments are doing away with the jobs of camera staff, editors and reporters, and are driving job cuts, undermining existing standards of pay and working conditions, and compromising standards of news reporting. [22]

Although there is still an editorial function and the need for someone to make sense of the plethora of information from the Internet flowing into the newsroom – a process known as "curating" – news media are already abandoning attempts to be first to break news, focusing instead on being the best at verifying the accuracy of what is being reported and then providing background and commentary. Readers and viewers have also become part of the news-distribution system as they share and recommend items of interest via e-mail and social networks.

Although many journalists and unions see the shift towards social filtering of news as making news organizations too dependent on networks like Facebook, the audience involvement in gathering, filtering and distributing news is now a fact of life in the media industry.

Rather than thinking of themselves as setting the agenda and managing the conversation, news organizations are recognising that journalism is now just part of a global conversation. The role of journalists is increasingly to add value to the conversation by providing background reporting, context, analysis, and verification and by making available tools and platforms that allow people to participate. [23]

Nevertheless, some worry that the use of raw material from the public at large will not deliver the quality of content that media require, while media unions argue that the use of "amateur" journalists is a cynical cost-saving measure by employers.

In his evidence before a United States inquiry into the future of journalism, David Simon – a former reporter of the *Baltimore Sun* and creator of the successful television series *The Wire* – argued that bloggers and citizen journalists could not and did not replace the added value of informed, skilled and professional journalists.

"The Internet is a marvellous tool, and clearly it is the information delivery system of our future," he added. "But thus far, it does not deliver much first-generation reporting." [24]

[22] J*ournalism: In Touch With the Future*, (2010) International Federation of Journalists.

[23] ibid.

[24] Hearing of the US Senate Commerce Committee, 9 May 2009.

All change at work

The changing structure of the press, broadcasting and entertainment business has also transformed the lives of people working inside the media. In traditional media, for instance, previous demarcation lines between publishing, printing, broadcasting and entertainment have all but disappeared in the process of multimedia convergence.

Hundreds of thousands of jobs have been lost and many more eliminated altogether, across much of the industrialized world. At the same time, new production and "content" jobs have emerged as a result of innovation and development of new online services.

The restructuring of the media workforce and cost-cutting have led to three distinct developments:

- first, a significant reduction in the number of fully-employed workers in the core workforce of journalism and traditional media;
- secondly, an increase in all sectors of the use of atypical workers – freelance, temporary, part-time, and contract workers – many of them employed with limited levels of social protection;
- thirdly, increased demand for flexibility and a wider range of skills from creative workers and others across all sectors of media.

Recent industry reports, union studies and national employment statistics in most industrialised countries all confirm the trend towards reduction of the core workforce, although there is a paucity of available detailed information.

New flexible work patterns in media include: part-time work; working at or from home; the shift from employment to self-employment; increased use of fixed-term contracts; temporary and casualized work; outsourcing, all of it stimulated by the search for lower labour costs. The effects of many of the new forms of flexible jobs can be negative, with less pay, longer hours, more shift work and lower social security.

Also the kinds of jobs carried out in printing, publishing, journalism, film and broadcasting are much changed from those of a decade ago, requiring different skills and changing the status of many workers – an evolution that will continue in the coming years.

There are stark regional variations in labour market development. In countries where labour costs are low, there are still relatively high levels of employment in press and broadcasting, even though there is a rapid switch to adopt new technologies.

"In broadcasting in Asia, for instance, very often there is still a complete newsroom compared to what we find in the United States or Europe," says Johannes Studinger, Director of UNI–MEI, the global union representing workers in the media and entertainment industries. "On the other hand, working conditions in some of these countries are often under pressure and union structures are weaker." [25]

An International Federation of Journalists report in 2010 confirmed the haemorrhaging of jobs in editorial departments as hundreds of newspapers have closed or moved to online-only publication. It also noted that the growth of the flexible workforce in

[25] Telephone interview with author, 20 September 2011.

journalism has been accompanied by a decline in real terms of rates of pay for freelance and contract work. [26]

In the United States, more than 65,000 people in the media industry lost their jobs in 2008, many of them casualties of the recession that began near the end of 2007. In December 2008 alone, 18,000 jobs were shed. A further 40,000 newspaper jobs were lost in 2009. [27]

The impact is being felt across the media spectrum, from newspapers, magazines, television, radio, advertising and marketing. In tune with the changing times, as the traditional media suffered, the online and Internet media saw growth, with 5,400 new jobs added in 2008.

In Europe, the proportion of freelance journalists in the labour market has grown significantly in recent years. Today they make up something between 25 per cent and 60 per cent of the editorial labour force, according to a recent report from the European Federation of Journalists (EFJ). While the proportion of freelance journalists – particularly in Nordic countries – is relatively low, it is especially high in Central Europe: often over 60 per cent. [28]

Many of these freelance workers are not genuine independent contractors, but people who have to continue their previous work on a freelance basis ("forced freelancers"). The trend is inexorable, says the EFJ, which warns that "in future, having a permanent contract may become an atypical form of employment for journalists".

Meanwhile, the workforce in journalism and traditional media is adapting to a multi-skilled environment with reporters and editors expected to be Internet-savvy, and competent in the use of cameras, audio equipment and traditional writing skills. At the same time, some traditional areas of work such as copy-editing and fact-checking, and niche editorial services such as television schedules and business information are centralized or outsourced beyond the traditional newsroom.

These changes and the use of material directly supplied by social networks or bloggers via mobile devices have led to fears of "watered down or corrupted journalism" or forms of mass-produced journalism – "churnalism" – such as that exposed by investigative reporter and writer Nick Davies in 2008. [29]

The main changes identified in the work of journalists in each of its phases are:

Newsgathering and editing

- Information-gathering has not only opened up for "user-generated content", but often entails hyperlinks and even directly embedded journalism that emanates from other sources – many of which are not traditionally in the media sector.

- Multi-skilled journalists are required to handle text, images, audio and video and to supply to different platforms.

[26] Journalism: Unions in Touch With the Future (2010), IFJ.

[27] United States Department of Labor, Bureau of Labor Statistics.

[28] *Managing Changing: Innovation in the News Industry*, European Federation of Journalists (2011).

[29] Author of *Flat Earth News* (Chatto and Windus, 2008).

- Web-first publishing is centred on the requirement for speed over accuracy, and this raises concerns about falling standards and the inability to verify sources.

- News agendas are increasingly being driven by Internet gossip or unchecked blog posts or by corporate communications and public relations.

- There is a drive for more video content online, altering the news agenda with picture-led stories taking precedence over more newsworthy, less visually arresting stories.

- Centralizing or outsourcing editing to cheap-labour destinations.

- New editing systems or online content management systems where journalists write directly in to templates, which allow companies to remove subeditors. In some newspapers, 80 per cent of content is not subjected to additional checks.

- Journalism is generated cheaply by remote communication and much of it is reworked from information already published on the Internet and/or distributed by press release.

- Individualized reporting is growing, while teamwork and collective newsroom experiences are diminishing.

- Newsrooms are under pressure to blur the lines between journalism and the advertising and business interests of the company.

- Authors' rights are under threat, with demands for unrestricted, repackaging, repositioning and redistribution of journalists' works.

Assembling, distributing and commercializing media content

- Value is put on journalists who are able to multi-skill and thereby to service different platforms such as online and mobile, while accumulated experience and background in "old media" is regarded as less significant – even redundant.

- While journalists historically did not have to take much responsibility for distribution, this is not the case today. They now find themselves needing to understand meta-data if they want to ensure visibility of their work on a search engine.

- Real-time generation of news is replacing deadline-based publishing, with continuous streams that draw from countless sources being used to replace the previous model of drip-feed information released according to defined editions and schedules.

- The commercialization of news and the increasing dominance of news aggregators mean that journalists are increasingly required to consider search engine optimization to attract hits and enhance revenue.

These changes also raise questions inside journalism about who is a journalist and how to define journalistic work in the wake of expanding audience participation in the news-gathering process.

Sometimes there are legal definitions and rules about who is a journalist, with defined requirements for educational qualifications or work experience, but in most countries journalism is an open profession and journalists are identified by employment and attachment to recognizable media outlets. However, many people working as journalists may not be entitled to a press card or accreditation, because they are not formally employed. Many more are casual contributors, bloggers or sources of information with no formal recognition at all.

This lack of clear identity and cuts in newsroom costs raises fears about the downgrading of the status of journalism and its impact on the social role of media, and on the quality of information available to the public.

This concern was noted in a report by an independent United States agency, the Federal Communications Commission, in June 2011, which highlighted the importance of original reporting by journalists and noted serious gaps emerging in public interest journalism as a result of changes in traditional media, including in local accountability reporting. [30]

The gaps in journalism, the impact of more audience participation and the changing culture of news gathering are special problems in the news business, but the crisis facing media workers – caused by the shift to a new labour market – is felt everywhere.

Graphical industry

In the world of printing, for instance, technology has been a transformative fact of life for almost 30 difficult years, and the sector is adjusting to life after mass circulation newspapers and books.

A report on the future of the graphical industry in Europe carried out in 2010, which identifies the problem of over-supply in the industry and calls for increased flexibility and further retraining of workers, has also inspired new social partnership in the sector. [31]

"Only those with ability to manage change and identify new opportunities will prosper in the long-term," it says, concluding that the human implications of restructuring are acute but cannot be avoided.

The report's call for better communication, careful management and consultation with unions and employees has led to the creation of a ground-breaking process of social dialogue.

"It is an important breakthrough," says Steve Walsh, Director of UNI–Graphical, the global union representing printing unions. [32] "There will always be a niche market for reading material, but the book and newspaper sectors are changed forever."

Although rising literacy rates in many parts of the world keep the traditional printing and publishing industry buoyant and growing, he predicts that this growth will not be sustained. "In the longer term we will see – even in these countries – the pattern of change now emerging in industrialized countries," he says.

[30] *Information Needs of Communities: The Changing Media Landscape in a Broadband Age* FCC Working Group on Information Needs of Communities, (June 2011).

[31] *In Our Hands*, UNI-Europa and Intergraf (2010).

[32] Telephone interview with the author, 21 October 2011.

Entertainment industry: Music

The transformation of the music market prompted by online file-sharing, which emerged in 1999 and provoked years of legal battles between the recording industry and music file-sharing networks, finally led to online sales, a move initiated in 2003 when Apple Computer launched iTunes, the most successful online music store to date. Since then there has been an uneasy peace, but the problem of Internet piracy remains endemic and the squeeze on profits from online piracy has had an impact on bargaining.

Benoît Machuel, General Secretary of the International Federation of Musicians, says that declining sales in the material market for music, and the changing habits of consumers, have prompted record companies to expand the scope of their negotiation of contracts with performers. Faced with falling sales and a revival in the live performance sector employers are using a so-called 360 degree strategy, by which they seek to exploit all areas of a performers' creativity – including live performances, and tours as well as recordings. This has meant that contractual negotiations have become more complex and the workload of performers more demanding, says Machuel. [33]

At the same time the growth of virtual orchestras has led to startling cuts in the numbers of people employed in live theatre performances, he says. "Increasingly we see the use of smaller orchestras with the missing musicians replaced by electronic digital devices," he says. Unions have responded by negotiating agreements to limit the impact on employment, but nevertheless numbers of job opportunities have declined and union membership in some areas is falling.

Machuel welcomes the positive benefits of technology, but like print workers and editorial workers, he understands its negative impact on the labour market. "Technology is very positive because it provides personal tools that enhance performance and creativity. It often makes life better for individuals musicians, but it is not a job creator," he says. Unlike in journalism, technology is not allowing others to invade the professional space of trained musicians. "In our field you cannot pretend to play an instrument, but the problems remain for those joining the profession, and they are not made easier when there is a low level of awareness among those in the field of music education about the importance of trades unions in this area," he says.

Entertainment industry: Film and theatre

Much the same can be said for actors, says Dominick Luquer, General Secretary of the International Federation of Actors. Essentially, the traditional role of the actor has remained the same, although there are new forms of work, such as the increasing use of actors to give voice to characters in the rapidly expanding video games industry, which is often linked to new film production. [34]

This has become a lucrative source of employment for performers, he says. Although digital imaging has reduced the need for extras in crowd scenes in film, actors have adapted well to new working environments including the use of motion capture and sophisticated software that mix animation, voice and physical appearance.

In some countries, the scope for live performance and theatre work is diminishing; and actors and their unions will face increasing challenges in the coming years, but in others, such as India, there is expansion and many films are now shot in digital formats.

[33] Telephone interview with author, 13 September 2011.

[34] Telephone interview with author, 20 September 2011.

As in other sectors the trend is towards self-employed work, and he supports efforts to clarify the status of professionals like actors, who are often in a subordinate role in their employment relations with employers. “This is not a meeting of equals,” says Luquer. “They cannot set their own conditions. The majority have no buying power. There is a need for a trilateral social dialogue in which we can discuss face to face with our employers. I cannot remember having had such an opportunity.”

Flexible and freelance futures

Flexible forms of work affect all occupational groups, albeit in different ways, and the growing obsolescence of skills means that labour market services in the media industry face some fundamental challenges for the future, not the least of which is to encourage media employers to increase investment in human resources, and specifically in training.

Technology makes it easier for media companies to manage their employees on a variable (freelance) rather than fixed (fully employed) basis and, particularly in countries where labour costs are high, they increasingly choose to employ workers only when they are needed – whether it is for a full day or a few hours.

This trend is already well established in the wider economy. In an employment survey carried out in 2011 it was revealed more than half of employers in the United States expected to use more part-time, temporary, and contingent workers in the years ahead. [35]

Although evidence of more freelance and flexible working in media has been around for more than 20 years, [36] the process has accelerated over the past ten years. Even if some of this may have been driven by the effects of economic downturn, employers say they expect employment of contingent workers to become a more or less permanent element of the media labour market.

It is a reality that workers and managements have to live with, says Caroline Little, President and Chief Executive Officer of the Newspaper Association of America, who was appointed in 2011 with the task of managing the industry's transition "from print to digital".

The impact of change has meant that employers require new workers in the newsroom to be multi-skilled and flexible. "It is a big transition. Journalists today have to be comfortable holding a camera and dealing with sound, as well as writing for print and online publications," she says. [37]

Workers in film production, who are normally expected to hold a camera, are already aware of how work is overwhelmed by technology, says Johannes Studinger, Director of UNI–MEI.

There is less employment around the camera as a result of digital filming, but more work is being created in the areas of post-production and in special effects. "In the production area, the vast majority of the workforce is freelance, even in the public broadcasting area. In all traditional media, we expect the majority of work in the future will be freelance and is likely to remain so," he says.

But even so, he argues that employers need to take more responsibility for their freelance workforce. He criticizes in particular the "cat and mouse" practice of hiring people on a freelance basis, but using them as fully employed workers.

"In Germany we see the development of so-called *feste frei*, the permanent freelance," says Studinger. "Workers are hired to work as freelances on the same job for the same company, and then released just when their time on the job is about to reach the point when they would be entitled to be fully employed. Of course, they are rehired as freelances after a pause in work."

[35] From *US Jobs Survey*, McKinsey Global Institute (2011).

[36] See *The Future is Freelance*, International Federation of Journalists (1987).

[37] Telephone interview with author, 30 September 2011.

Many employers walk a thin line between legal protections provided at national – and even at European level – when they employ and re-employ staff as freelance to avoid the creation of full-time jobs. But given the difficulty in finding work in a congested labour market, many workers go along with these arrangements even when they are unsatisfactory.

Typically at the lower end of the jobs market, where creative freedoms are limited and pay is lower, he says workers have no choice. "We don't have figures but our unions tell us there are many cases of people working for years under these circumstances," he says.

The lack of available data to assess the realities of this evolving employment practice – beyond credible anecdotal evidence – highlights the need for more social dialogue in order to achieve a better understanding of the current situation and to create a fair and sustainable balance between the interests of workers and the interests of management.

Fresh initiatives to promote such a dialogue over employment practices would be particularly welcome in Sweden and Germany, two countries with a history of relatively stable industrial relations in the media sector. Unions and employers in both countries are feeling the strain of adjusting to technology and labour market uncertainty.

In Sweden the major newspaper, public broadcasting and private radio and television associations jointly provided figures in 2011 that show that almost 20 per cent of the journalism workforce is freelance. [38]

The report, based upon the responses of 87 media companies (78 per cent of their members) to an employment survey, recorded a total workforce on 31 March 2011 of 16,226 people, of which 9,498 were journalists (58.6 per cent of total) and of these, 12 per cent were on short term contracts; 4 per cent agency labour, and 3 per cent "false freelances" (that is, employed on freelance basis but in fact fully employed).

But these figures do not tell the whole story. The Swedish Journalists' Federation says it is difficult to know how many journalists there are in total, because of the fragmentation of work and proliferation of small enterprises.

"There are so many new people in new types of work that it is difficult to monitor the numbers," says Anita Vahlberg, of the Swedish Journalists' Federation. She says that many of these new players join the union, but others do not. "Ten years ago around 90 per cent of journalists were members; today the same is true, but only in traditional media," she says. [39]

She says that around 12-13 per cent of the union's membership is freelance and this sector has been steadily growing. Overall, the union has been losing members. Its 2011 membership of 17,500 is almost 1,000 down on the figure ten years earlier, and the union is predicting further loss of 1,400 up to 2015.

The move to flexible working has also seen the increasing use of private employment agencies in the media, a trend that reinforces the problems facing unions seeking to represent the contingent workforce.

"Increasingly employers are using contract agencies, which will only play the role of employer for the period of attachment to a media institution," says Vahlberg, who says that

[38] *How we work in the Media – Forms of Employment in the Media Industry*, (2011) Media Industries Employers Association, Stockholm, Sweden.

[39] Telephone interview with author, 12 September 2011.

the union is making agreements with contract agencies. An initial agreement with a local Swedish contractor in 2005 defined minimum conditions for contract staff and was a stepping-stone to similar agreements with other agencies.

In Germany the shift towards freelance work in journalism is even more dramatic. The country's largest journalists' union, the *Deutscher Journalisten-Verband* (DJV) reports that more than 50 per cent of its membership is freelance; double the figure of ten years ago. "In some of our Federal regions freelance numbers make up to 60 per cent of union membership," says Michael Klehm, of the DJV. [40]

As in Sweden, German union membership is falling, to 38,000 from a peak of 41,000 five years ago. The profile of the membership is also changing, says Klehm. The DJV reports that 52 per cent of its members are women, a trend also found in Sweden across all sectors of media. "And most of the precarious working conditions are suffered by women, not men," he says citing a recent study by the ministry of labour showing a pay difference of 25 per cent between men and women.

The empowerment of freelance workers has become a core concern for unions. Many of them are changing their structures, procedures and services to attract this new workforce. Many unions are opening up their structures to assist and support freelance staff – providing prompt information, better representation, good legal protection, social counselling and assistance in copyright disputes. There is even innovation in the use of appropriate technology. In Norway, for instance, where only around 10 per cent of journalists are freelance, the union has launched a fee calculator for freelancers, which helps them compare and assess the fees they are offered. [41]

[40] Telephone interview with author, 9 September 2011.

[41] Norwegian Journalist's Union tool, presented at the EFJ meeting on managing change in journalism, 28–29 April 2011, Helsinki, Finland.

Public service values in the media

Public service broadcasting suffers from an image problem, not least because in many countries it lacks independence and is seen as an instrument of government, but even in mature democracies some observers warn that it is unsustainable. They say the digital revolution makes the collectively funded public service model of broadcasting obsolete because licence fees (or other tax on audiovisual receivers) are no longer politically sustainable because audiences can now access audiovisual products on other platforms.

The mission of public broadcasting to inform, educate and entertain the citizens who pay for them – either through license fees or through advertising – is under threat at a time when the technology provides more opportunities than ever before to deliver its content to the public. But even where public media can do this, and do it well, it is under pressure.

Few public broadcasters – the BBC in the United Kingdom perhaps being a notable exception – have been able to respond effectively to the challenge of technological change, but even the BBC, by far the richest public broadcaster, with an annual licence fee income of £3.5 billion ($5.5 billion) has been forced to make cuts even though its free online service, available in numerous languages, is one of the most successful in the world. In 2011 the BBC confirmed that it would cut 2,000 jobs and reduce its online coverage.

There is widespread concern over the future of licence fee. It may survive in countries like Britain which have a long tradition of respect for such a fee, but in many countries, even in Europe, the heartland of the public broadcasting tradition, there is a problem of future funding, as questions grow about the relevance of the public service model and in the face of large-scale evasion of payment of the fee.

The case for public broadcasting used to rest on the reality of spectrum-scarcity as well as on arguments about pluralism, democracy and access to high quality content, as well as preservation of national cultural traditions. The end of spectrum-scarcity means that these arguments may need to be re-examined.

In this context, many media unions and civil society groups argue for urgent study of viable models of independent public funding for media that provide public service value, and not just in broadcasting.

There are increasing calls for more public investment to fill the information vacuum caused by editorial cutbacks in traditional media and journalism, which have had an impact on the quality of content available on all platforms.

Media in most countries already receive forms of subsidy or direct state support either in tax breaks, subsidies for postage, or preferential treatment for public advertising. Government subsidies for newspapers alone in Sweden reach €56 million annually. Such press subsidies are evident in all Nordic countries as well as in Austria and Germany.

In some countries, the diminishing capacity for research and investigative reporting in the wake of editorial cuts has prompted some foundations and public bodies to provide direct financial support to journalists who carry out reporting no longer paid for by traditional media.

Employers like Caroline Little are acutely aware of the consequences of lean newsrooms in terms of the scope of news coverage, particularly at local level. This is “the saddest part” of change and she recognizes that there is strength in some arguments for increased public support for media. “However, the industry is reticent to accept public money directly for journalism,” she says, reflecting a widespread concern that public funding of newsrooms carries with it the danger of compromising editorial independence.

Nevertheless, she admires the example of *Propublica* in the United States, a Pulitzer Prize winning online public interest news site, that was established by displaced former newspaper journalists and which is funded by private foundations.

Sweden is one of a number of European countries where, in the name of protection of pluralism, media outside the national public broadcasting system have received public subsidies for decades. Despite political moves to end this system, the country's new coalition government in 2011 agreed a compromise formula to maintain the existing system for five years and steadily reduce levels of subsidy until 2016 when a wholesale review of the subsidy system will take place.

Although subsidies aimed to maintain a competitive market in smaller metropolitan areas where press decline has all but wiped out competition, public funds are now being used to assist loss-making titles even in Stockholm, including one owned by the major media company Schibsted.

A 2011 report from the Reuters Institute for the Study of Journalism (RISJ) shows that this form of public support for traditional media – both public service and private – remains in place even as media in developed democracies have undergone profound change and many news media face serious economic challenges. [42]

Levels of public support remain as they have been for 30 years or more, and are heavily weighted in favour of long-established traditional media.

The single most significant form of intervention in five of the six countries studied is funding for public service media, but indirect subsidies for the private sector press through tax relief amounts to hundreds of millions of Euro per year. Table 2 outlines the estimated value of various forms of public support for the media in 2008, the last year for which comparable data is available.

Table 2. Per capita value (euros) of public support for the media, 2008

	Public service broadcasting (€)	**Indirect press support** (€)	**Direct press support** (€)	**Other forms of support** (€)
Finland	72	59	0.1	None
France	49	13	7	0.01
Germany	89	6	None	None
Italy	28	9	3	3
United Kingdom	68	12	None	None
United States	3	3	None	None

Service tax or VAT exemptions for print newspapers, the most important form of indirect support for publishers, have historically helped keep prices low, circulation high, and industry profitable but, as the authors note, "indirect support systems built around the print platform alone will lose their effectiveness in current conditions. It is time to review and renew media policy arrangements and bring them in line with the principles purportedly behind them and with the times that we live in".

This could encourage moves to increase levels of public support for work in media with a distinct social and democratic value. The European Parliament in 2010, for instance, agreed to a pilot project allocating taxpayers' money – more than 1.2 million Euros – to

[42] *Public Support for the Media: A Six-Country Overview of Direct and Indirect Subsidies* (2011) RK Nielsen and G Linnebank, University of Oxford, Reuters Institute.

support transnational investigative journalism across the European Union. Similar injections of public money are reported at national and local level in France, Italy, Netherlands and the United States.

Isolated action of this kind may be valuable in stimulating job creation in journalism, but the transformative power of the Internet should – suggests media commentators like Dan Gillmor – be the driving force for a wholesale review of mechanisms for increasing public support for journalism across all platforms. He and others argue that the current period of change and restructuring provides a gilded opportunity for redefining the public information space. [43]

Similarly, the fact that the Internet has created a more open information environment but is not compensating for the loss of scope, depth and analysis of information in the wake of cuts in the editorial work of traditional media outlets should be the inspiration for a radical overhaul of attitudes to funding of the media industry, according to American writers John Nichols and Bob McChesney, who argue that there is a new mood of support for public journalism, even in the United States where private sector imperatives have been the dominant force in media for generations. [44]

In one example, the Corporation for Public Broadcasting – a non-profit American corporation that channels government money to public broadcasters – agreed in 2011 to allocate $4 million for an extensive "citizen journalism" project which will expand an existing network of unpaid "citizen sources" to support almost 100 newsrooms by providing local news coverage across the country. [45]

The training challenge for the media

The aim of training is not only to provide the skills necessary for certain forms of work, it must also be part of the equation of helping people into the media labour market and helping them to maintain their employability.

Training must also take account of the decline in traditional sectors of media work, the evolution of new occupations in the media, and the emergence of new cultures of work based upon self-reliance, teamwork and communication skills.

While educators, workers' representatives and media employers might agree that training, research, and equipment for a well-informed and competent workforce are part of the package in building reliable capacity for the media industry, there are concerns that training and education services are not meeting the challenge of change in media.

Over the past decade, training needs and the skill sets for editorial and technical production have changed in line with requirements of work, often simultaneously, on different digital platforms, but too often training is something that individuals themselves have to pay for, says Johannes Studinger of UNI–MEI.

"In some countries like France and Britain there is state support and media corporations may provide help, but in these current conditions it is not enough. In many countries it is just not there at all," he says.

[43] *We The Media*, Dan Gillmor (O'Reilly Media Inc. 2004).

[44] Authors of *The Death and Life of American Journalism* (Nation Books, 2010).

[45] Reported by *Associated Press*, 13 Sep. 2011.

Few countries enjoy the conditions that exist in Sweden, where the state pays for journalism training, most of which is provided by universities, says Anita Vahlberg of the Swedish Journalists Union.

However, she says, employers are against "academic approaches" and want more technical expertise to cope with the demands of modern journalism. There is agreement, though, that many student journalists are ill-prepared for the employment challenge ahead of them and are being thrust into a congested labour market.

A survey of approaches to journalism education and graduate work placement in Australia, the United States and Sweden in 2010 suggests that journalism schools serve their students badly when they direct them to large, traditional media enterprises for employment, without fully briefing them on other journalism opportunities.

The survey found that small-to-medium-sized journalism enterprises in the three sampled countries offer a greater number of employment opportunities for graduates and mid-career professionals alike, as well as measurably more secure employment than those available in media based in major metropolitan centres.

"The problem is that many schools are educating for big media, when most journalists end up in small media," says Maria Edstrom, a former journalist now at the University of Gothenburg, and one of the authors of the report. [46]

Because many journalism educators come themselves from traditional media, Edstrom says not enough attention has been paid to the need to change the journalist's skill set and to recognise that many if not most journalists in future will require individual entrepreneurial skills.

Journalism students might be better advised, she says, to look for jobs in community journalism and "hyper local" media, which may provide more opportunities for employment.

One example from the United States is the Spanish and English language *El Conquistador* newspaper, where Victor Huyke, publisher and founder says the future is bright. *El Conquistador* is located in the City of Milwaukee but offers a niche product unlike large urban daily papers.

The newspaper has 14 employees, a number that has held the same over the past five years. "Niche newspapers and community publications like our own are the future of print journalism. People are looking for news they can't get elsewhere. It is the local newspapers like ours that represent where journalism is going," he says. [47]

The skill set for modern media is reflected in most training programmes – capacity to write and use various platforms – film, audio and online, but trade unions identify a clear generation gap in the approach to training, and they are keen to promote advanced training, particularly in the field of "new media".

In Europe there is a revival of commitment to training as an element in collective bargaining. In 2010, the Italian journalists' association (FNSI) negotiated several company-based agreements which included further training for journalists. In Norway, training of up to two weeks is regulated by contract, supplemented by activities from the

[46] Interview with author, 1 October 2011.

[47] Interview for *Long-Tail Theory and Study on Future of Journalism* presented to World Journalism Education Congress 2010.

union's own educational institute. In Finland, there are two paid days of training per year. Many individual and larger media publishers are also strengthening training opportunities.

While many younger people are willing and enthusiastic for training in multi-skilling tasks, older workers – many of them caught by the industry crisis in mid-career – find it difficult to adapt. According to Luther Jackson, an Economic Stimulus Manager in San Francisco, California, "Many workers are ill prepared for the shock of change in their working lives". [48]

Faced with a state-wide crisis in which thousands of media staff were suddenly out of a job, his company organized a consortium of analysts, new media and unions to study the consequences of structural change in Californian newspapers. [49]

The resulting detailed analysis provided the basis for a new approach that helps people adjust to freelance work by developing business and entrepreneurial skills. A new union group was established, the Pacific Media Workers Guild, one of the first of its kind among journalism unions in the United States, providing for the first time support, training and targeted services for freelance workers – a social network, health care assistance, access to training, and even accountancy training for members.

"The landscape in media is defined by lasting structural change, and workers are going to have to adapt and be trained for a permanently changed environment," says Jackson. "Workers are going to be bouncing around from job to job. This is a major challenge for individuals and for unions."

He recognizes that – with people now expected to have careers and multiple jobs – this is a challenging time for unions. "Unions have to recognize that they have less of a bargaining role," he says. "The future for unions could be in enhancing the labour market value of its members and then placing them in jobs."

With this in mind, trade unions and employers have supported a training-focused "journalism repositioning initiative" that supports journalists and brings employers to the table in a new form of social dialogue. "People need jobs. Employers are looking for skills and we have to create a process for navigation that allows the two to meet," he says. "This is not a salvage mission, it is an asset-based approach that recognizes the skills base among journalists and technical workers," he says. "Older workers have a future because they have experience."

In some regions of the world there has been an explosive growth in training and education opportunities, particularly in journalism. In India, for example, some 70 journalism schools have been established, mostly over the past ten years, all of them providing practical training and each year delivering more new entrants into journalism than the industry can absorb.

Many of these schools are sponsored by media such as the Asian College of Journalism in Chennai and the Manorama School of Communication in Kottayam, which are supported by the Malayala Manorama Group (publishers of the largest circulation daily in Kerala state) and the State's leading private broadcaster, Asianet.

The Indian Institute of Mass Communication (IIMC), an internationally known centre for training and research in Mass Communication, is an autonomous body funded by the Indian government. Generally there is no public funding for journalism education, so costs

[48] Telephone interview with author, 30 August 2011.

[49] *Research Study of Workforce Dislocation among San Francisco Bay Journalists*, (2011) Natelson Dale Group in Association with San Francisco Public Press.

of training have to be paid by students and their families, although some scholarships are available.

However, there is little doubt that in most regions, training and education institutions are experiencing funding difficulties, whether because of financial problems within the industry or low levels of state investment.

In South Africa, for instance, during the past five years media companies that experimented with support for academies for trainee journalists have begun to pull back citing financial problems. Journalism students are returning to systems where they pay for training themselves, through universities or other further education colleges.

Where media companies do engage with training, they often need financial incentives. Some in-service media training in South Africa, for instance, is provided by NGOs such as the Institute for the Advancement of Journalism, for which companies pay with money they reclaim via the levies they pay to the Media, Advertising, Publishing, Printing and Packaging Sectoral Education and Training Authority (MAPPP-SETA), says Guy Berger, former Professor of Journalism at Rhodes University, Grahamstown.

However, this year media sector reorganization within the authority might make it more difficult for employers to obtain tax relief for investment in training and may lead to diminished training. “As it is, newsrooms are so thinly stretched that editors are reluctant to spare staff for short courses,” he says. [50]

In Brazil, the issue of training and education of young journalists has become a flashpoint of conflict between media owners and the country’s journalists and media educators, following a 2009 Supreme Court decision which struck down as unconstitutional a limitation on access to journalism only to those in possession of a recognized diploma from a school of journalism.

“This limitation amounted to formal control over the right to practice journalism,” says Carlos Muller, head of communications at the national publishers association, *Associação Nacional de Jornais* (ANJ), which represents more than 90 per cent of the country’s newspapers. [51]

Although the Brazilian case has attracted attention from press freedom groups in the region, the need for a diploma may be less to do with restricting entry than setting minimum standards of entry to journalism, says Veet Vivarta, Executive Secretary of the Communications and Rights NGO ANDI. [52]

“There has been a sudden growth of journalism colleges, but many of the courses on offer are of poor quality and the ministry of education has been forced to limit the number,” he says. “The diploma should provide an acceptable baseline standard for young people wanting to get into journalism.”

“But in the end it has not made any difference. There are many people in the journalism market, and newspapers are continuing to employ people from schools with the diploma.”

However, the country’s major journalists’ union, *Federação Nacional dos Jornalistas* (FENAJ) and many in the media education community strongly disagree. They say removing the diploma as a condition for entry will lower editorial standards and allow

[50] Response to questionnaire from the author, September 2011.

[51] Telephone interview with author, 30 September 2011.

[52] Telephone interview with author, 15 September 2011.

employers to impose precarious working conditions and pay less to their workers. They have launched a vigorous national campaign targeting lawmakers, to amend the constitution to reinstating recognition for the journalism diploma. [53]

[53] See http://www.fenaj.org.br/.

Transition without trauma

Two countries which are managing the transition to a new information economy without the traumatic effects of collapse of traditional media experienced elsewhere are Brazil and India, both of which have experienced rapid economic growth over the past decade.

Their media industries are thriving as they make the best of both worlds – rising circulation for traditional newspapers and increasing audience for prime-time broadcast amidst a rapidly developing online and electronic media culture.

Brazil is the boom country of Latin America; a regional economic powerhouse and already a world leader in the use of communication technology, with an estimated 75 million Internet users. It has the highest penetration anywhere in the world of Twitter, and its Facebook network, with more than 23 million users, is growing faster than any other country. [54]

Newspaper circulation is at record levels, according to Carlos Muller, at the national publishers association (ANJ). In 2010, total daily circulation topped 8 million for the first time, driven mostly by an expanding market for popular newspapers.

This highlights how some sections of the population are being lifted out of poverty and enjoying a higher standard of living, says Muller. Across the Brazilian economy, the media have benefited from changing conditions.

However, while popular, tabloid newspapers have shown a marked increase, the quality newspaper market has remained stable.

This suggests that in the longer term, the newspaper industry may have to face some of the problems overwhelming the news industry in Europe and North America.

"We see the same trend towards flexible employment and multi-skilling, although there is much less of a tendency towards freelance work in journalism. At the same time, the consumption of digital media is increasing and many quality newspapers are getting more audience from digital media," he says. "We see the same trends as in other countries, but we are not suffering the same impact."

Worries over falling standards in Brazilian media have encouraged media employers like the National Newspaper Association (ANJ) in 2011 to create a Permanent Programme of Self-Regulation, requiring its members to adopt systems of self-regulation as well as to adhere to an industry-wide code of ethics. Other companies in broadcasting and online media have taken similar action.

In India, half a world away, media are also in good heart, both in the traditional and the online sectors. The press is lively. Driven by a growing middle class and rising levels of literacy, newspaper circulation continues to rise in all areas, particularly with the publication of regional editions in local languages.

Broadcasting in particular has flourished since the state television monopoly was broken in 1992. Private cable and satellite stations command large audiences and there is fierce competition among the 24-hour news channels, whose robust and sometimes ethically questionable reporting often outperforms entertainment shows.

[54] Report Aljazeera, 21 October 2011 See: http://english.aljazeera.net/news/americas/2011/09/2011916191351716582.html.

Music-based FM radio stations have proliferated in the major cities, although this development has been handicapped because of restrictions that prohibit private news reporting, except by the state-owned All-India Radio. This restriction is being challenged in the community radio sector where a new law, the Community Radio Act, could see the launch of around 800 new community radio stations in the coming years.

The advertising market has grown substantially and at the same time Internet use has soared – by the end of 2010, around 100 million Indians were online and there were more than 23 million Facebook users in India by March 2011. [55]

Although traditional media are expanding, so too are online media and, like Brazil, India is witnessing a transition to digital platforms and the increasing use of wireless mobile technology for delivery of media content in a much less disruptive economic climate.

Industry leaders are anxious to promote innovation to avoid the trauma being experienced elsewhere. "Transition from print-centric to a multi-platform operation is a game of balancing the decline in print and the growth in digital," said Raju Narisetti, managing editor of the *Washington Post*, at a conference of media industry leaders and newspapers owners. [56]

But this development is not without its downside, according to Panneer Selvan, Director of the Chennai-based media development group PANOS South Asia, who is worried by the lack of responsibility within much of the Indian media, and particularly the country's mushrooming blogosphere, which has more than 2 million Internet users in each of the country's 23 languages operating in the public information space.

"The numbers are extraordinary," he says "but there is very little respect for the basic tenets of ethical behaviour in the public discourse. There is much abusive content, with no progress towards evolving a language of respect for free expression and the rights of others." [57]

The situation is not helped by the fact that many media outlets, particularly in the vernacular languages, are using material from so-called "citizen journalists" with little or no training in basic standards. Often this is done with no payment.

Despite the promising developments in the market, the lack of social dialogue and precarious working conditions across the industry adds to concerns that the development of the media landscape will see a growth of a largely unregulated labour market in India. The country's industrial relations structure, which is based upon the activities of centralized and legally defined wage boards, has become increasingly ineffective in the media sector, says Selvan.

[55] See www.internetworldstats.com.

[56] Intervention at WAN–IFRA, Indian Newspaper Society Conference, Delhi, September 2011.

[57] Telephone interview with author, 9 September 2011.

Women in the media

In spite of optimism that the new media jobs market might provide scope for increasing career opportunities for women working in media, the past ten years have seen only modest improvements in levels of equality at work.

An extensive report on the status of women in media worldwide released in August 2011 by the International Media Women's Foundation (IMWF) concludes that women's employment in media is marked by widespread under-representation and a persistent glass ceiling. [58]

The survey covered 522 companies in 59 in countries from all regions, including 170,000 employees in the journalistic workforce – 59,472 women and 109,763 men.

The impact of technological change has made little or no difference at all to the situation of women in the industry, says Lisa Gross, Director of the IWMF. "Technology cannot make us what we are not; it does not give us equality in the digital world." [59]

She says the fact of pervasive low numbers for women in journalism, where men represent nearly two-thirds of the journalism workforce compared to slightly more than one-third women, is also a characteristic of the digital media.

Addressing a meeting to mark World Press Freedom Day in 2011 she also highlighted the lack of opportunities for women working in new media start-ups. Even less encouraging is the lack of support for women entrepreneurs. "Ninety per cent of all venture capital in new media goes to men," she said.

The global study also confirms the presence of a glass ceiling for women in 20 of 59 countries studied, where qualified women with experience are blocked for advancement by institutionalized prejudice, often found in middle and senior management levels. Around 73 per cent of top management jobs are occupied by men, compared to 27 per cent occupied by women.

Statistically, men are significantly more likely than women to hold full-time jobs, while women are more likely than men to hold part-time regular jobs, confirming the notion of flexible and atypical employment as more attractive to women, who often have to combine family responsibilities with their working lives.

The study also looked at rates of pay for women. Despite problems with gathering relevant data (fewer than half the companies surveyed provided information on salaries, even though they were assured anonymity), the survey found that in most parts of Europe, there is relative similarity in salaries across all media jobs, while in the United States pay inequity persists, with women earning around 77 per cent of what men earn.

In most regions, the pay gap is closing very slowly. In Brazil, Chile and Mexico, for instance, the hourly wage of women is around 80 per cent that of men. In India, women's representation in the media has doubled to 25 per cent of the workforce in the past 15 years, but they are paid generally less than male colleagues.

[58] *Global Report on the Status of Women in News Media* (2011), International Women's Media Foundation.

[59] Telephone interview with author, 14 October 2011.

Challenges for trade unions: Recruitment and bargaining

Media trade unions are overhauling their strategies for recruitment in an effort to build a membership base within the new media workforce. Increasingly, unions also see the need to provide new and additional services including training, legal advice and social assistance to their freelance members.

The entry of major telecommunications companies into the media sector is encouraging unions to join forces – where they can – to organize new media. For instance, in Germany, unions of telecommunications workers and journalists are gathered under the umbrella of a single union, Verdi, which is running some projects for online companies.

However, the blurring of technical and creative work means that some unions, particularly in journalism, are faced with recruitment dilemmas about where and who to unionize. Many are now recruiting not just journalists, but also the people who work with them.

"We are in a period of transition now. We face an organizational and recruitment challenge and we have major internal discussions about the future," says Michael Klehm of the DJV in Germany. "But more important is the need to combat poor working conditions and precarious forms of employment."

He is confident that the next generation of media workers and journalists will come to the union particularly as companies try to enforce a lower pay regime and weaker conditions of employment.

"As telecommunications companies enter the content market, the trade unions will have to change their approach and methods," he says. "The challenges are different today in terms of the work expected of people and the conditions in which they are employed, and many unions still work within systems that were framed in the 1960s."

One key recruiting tool for journalism unions is the professional identity of its members. "People are coming to us because they want to be part of the journalistic family," he adds. "Professional identity is important to them, especially to those who are not in workplaces that are traditional – they want to seen as part of this traditional club and to carry a press card."

In the United States, the same process of review and renewal is underway. "We have to be much more creative in our use of resources and money to provide the best opportunities for our members," says Bernie Lunzer, President of The Newspaper Guild-CWA, which organizes journalists and news staff and, increasingly, freelance people across the media workforce. [60]

After years of keeping its distance, The Newspaper Guild–CWA, the leading newspaper workers' union, is making common cause with other unions that have a long-established record of recruiting freelances in journalism, such as the National Writers' Union. It is a radical shift in organizing strategy, built on fresh awareness that freelance and atypical work in media is here to stay.

"It is as though we have to redesign the union from the bottom up, but unless our local unions change and do more, they will not survive," he says.

[60] Interview with the author, Washington DC, 12 October 2011.

In other regions, different issues prevail. In India, for instance, union influence has weakened as companies have challenged the centralized wages system and introduced personal contracts, which usually pay more than the minimum pay levels set down by the state-run wage board.

Newly qualified student journalists can command salaries higher than the wage board provisions, particularly in the English-language media, but a deep social and professional crisis is overwhelming the information sector, including journalism says Panneer Selvan, of PANOS South Asia.

“Many young journalists today don’t even know about the national disputes over the failure by media companies to implement the wage board awards in recent years,” he says. “The problem is that unions don’t appear to be connected to issues of professionalism and new media developments that concern journalists.” [61]

Unions worry that industry changes are dismantling their traditional bargaining responsibilities, and this is most evident in their fears over the right to organize and bargain for the new workforce, much of which is freelance, often multi-tasking and working in precarious conditions.

“There is a serious challenge for us to ensure that governments recognize the right of the new workforce to be represented by a union and that the union can bargain for rates for them,” says Johannes Studinger of UNI–MEI.

His union, like others in the media industry, have found that labour courts and tribunals – he cites particular examples in Canada, Ireland and the Netherlands – have denied unions the right to organize freelance people because of anti-trust rules which limit the rights of independent contractors to join together to fix rates of pay.

“There is an urgent need for governments and international authorities to revise legislation in this area and not to allow competition law to penalize workers who are trying to get out of precarious work and who want to set minimum standards,” he says. “This is a major question of freedom of association for thousands of our people.”

The same concerns resonate in journalism. The 2011 survey by the European Federation of Journalists, covering union organizations in 19 countries, identified the uncertain legal status of freelance workers as a major concern, with problems about the right to union representation, and collective bargaining being in conflict with applicable laws (particularly competition legislation). [62] As a result, there are uneven levels of protection for freelance and fully employed workers on the media labour market.

“This is an issue for freelances and all of us,” says Michael Klehm at the DJV. “We are barred from representing the greater part of them and this needs to change.” Nevertheless, his union has successfully mounted bargaining campaigns, recently obtaining from media employers a 2 per cent increase in tariffs for freelance journalists.

In the absence of labour regulations to protect their interests as workers, freelancers are increasingly vulnerable, say unions. In most countries, freelance journalists are not included in collective wage agreements.

A possible solution suggested by journalists’ unions might be rules that guarantee specific rights for so-called freelance committees or freelance councils within companies,

[61] Telephone interview with author, 9 September 2011.

[62] Andreas K. Bittner, *Managing change: Innovation and trade unionism in the news industry,* European Federation of Journalists (2011).

that facilitate elections for freelance works councils or their integration into existing structures and that create explicit structures within the framework of industrial relations for freelancers.

There are some starting points, the so-called *Loi Cressard* in France (a 1974 statute which recognizes the social rights of certain freelances or "pigistes" who are unsalaried workers) and, in a significantly weakened form, the status of "employee-like self-employed persons" in Germany.

At the same time, unions wrestle with the problem of recruiting members among freelance staff in an isolated and fragmented labour market, and freelancers demand new forms of support beyond normal collective bargaining arrangements, particularly regarding copyright, training, social protection and protection against unfair treatment. This task is not made easier – says the EFJ – when work in the newsroom is no longer easily classified.

New forms of reporting and editing are emerging sometimes in contexts that are entirely unpaid and without any social protection. Whatever they may be called – bloggers, citizen journalists, aggregators, commentators, forum operators, or reader reporters, communities – these new players in the labour market pose challenges for unions and employers alike.

Opening a dialogue with social partners on this vastly changed labour market is a priority for unions in media. Social dialogue is necessary not just for the future of work, but also in the process of defining the future of the industry, says Benoît Machuel, General Secretary of the International Federation of Musicians. He and his colleagues feel they are excluded from current debates that are shaping the future media landscape. He says, for instance, that unions have no entry point into much of the current discussions between media employers, telecommunications companies and the Internet community. "This lack of transparency means unions are unable to track the impact of change on the workforce," he says.

Main findings

Although the whirlwind is still blowing, there is discernible shape to changes taking place in the media industry, with new partnerships and collaboration emerging between the electronics, telecommunications, computer and traditional media industries.

What is less clear is the presence of employment policies and structures for social dialogue and collective bargaining, particularly to address the rapidly changing labour market and the growth of precarious work.

The growth of freelance and atypical work – and the increasing use of agency workers – provides challenges as well as an opportunity for social partners in the media industry to encourage dialogue on how to regulate the structure of work in this sector.

At this stage, a number of findings are evident:

1. The media industry is more vibrant than ever, digital technology is creating fresh ways to keep the public informed, and the Internet has enabled an unprecedented free exchange of ideas and information.

2. Increasingly, there is more collaboration and cooperation between sectors of the media and communications industry and also the development of distinct commercial and non-profit sectors of the media which are also working together.

3. The disruptive impact of the Internet and technology in the media has led to ownership concentration, closures of newspapers, cutbacks and de-staffed newsrooms and production centres.

4. Changes in employment patterns and the nature of work in the industry have led to new concerns over the proliferation of precarious work and lack of social protection for the workforce.

5. In particular, unions and workers' organizations believe there is a serious flaw in the application of competition law and labour market rules, which undermines the right of some freelance workers to enjoy union representation and rights to decent work.

6. There are significant concerns that existing training arrangements and funding do not meet all the needs of workers and employers in a changed labour market.

7. While the empowerment of the media audience has encouraged new and innovative opportunities for targeted services, such as hyper-local news, there are concerns that this work is unregulated, largely unpaid and can undermine established working conditions.

8. Local news can continue to play a vital employment role, if traditional media, already the largest providers of news online, seize the opportunities available to them.

9. There is a continuing problem of gender inequality throughout the media industry and technological change which has led to new services and workplaces has not diminished levels of under-representation or lack of equal opportunities for women in media.

10. Although there is an abundance of media outlets, in many countries there are gaps in reporting and this can lead to less local government accountability, poorer public services and greater corruption, which is leading to a crisis in journalism.

11. There is a need for an extensive debate about the future of public broadcasting and a need to identify new funding mechanisms that are required to safeguard public service values in media and journalism across all media platforms.

12. The development of new market models in the media industry is leading to more innovation, but the crisis of funding of independent and pluralistic media content – particularly in the news and cultural areas – is leading to discussion of new ways to promote and support public service values in media, and particularly cultural and information pluralism.

13. In many parts of the world where economic and social conditions are improving conditions, such as in India, Brazil and South Africa, which are slowly emerging from entrenched poverty, there is rapid and creative growth in both traditional and digital media.

14. Employment levels in media in these countries remain stable, but levels of remuneration are poor, as are working conditions.

15. While more must be done to enhance online access for people in these countries, their experiences of innovation and development of new media alongside traditional media may be useful for countries where the impact of technological change on traditional or legacy media has been traumatic;.

16. The transformation of the media industry requires a fresh commitment to social dialogue between unions and employers and, when appropriate, involving governments. Such social dialogue needs to address the following issues:

    - Representation and bargaining rights of workers in the industry, including those who are working part-time, freelance, or on short-term contracts.

    - Changes in working practice and actions necessary to enhance continuing respect for international labour standards, including those on freedom of association, collective bargaining, home work and discrimination, particularly related to gender rights.

    - The provision of industry training to meet new skill sets and to address concerns expressed by employers and unions that students are being inadequately prepared for the requirements of working in the new media landscape.

    - Improving communications and dialogue between representatives of the workforce and employers to ensure that changes in the industry take place by agreement, smoothly and with mutual satisfaction.

Recommendations for future action

Arising from this report and its findings, there are a number of actions that are appropriate and relevant for the ILO and its constituents to consider:

Research and monitoring change

Given the lack of reliable data available on the effects of change across the media industry, there is an urgent need for more intensive research into the consequences of change, and particularly the impact of change on employment relations.

The ILO may usefully commission studies and reflection on certain key areas of concern including: new models of industrial relations for the media, information and entertainment industries; employment policy and social protection for atypical workers in the media industry; training needs in the information age; gender rights and the digital media.

Social dialogue

As part of its tripartite role, the ILO is well placed to promote new dialogues between workers, employers and governments at both international and regional level to examine the social and democratic consequences of change in the industry.

Of primary concern is the need for employment protection that avoids precarious forms of work, maintains flexibility and provides incentives for the workforce to work freely. There is a need to examine how the main relevant ILO conventions are made applicable in the new employment market created by changes in the industry

Such a dialogue should also be designed to recommend best practice not only in employment matters but also in the creation of transparent and well-regulated markets that will avoid all forms of corruption in the media industry.

In particular, this could promote common standards in international media houses that are applicable across a whole group, avoiding wide disparities between what happens in the home country and outlying regions, and avoiding the tendency to leave in place bureaucratic, corrupt and weak systems of media administration.

The ILO may also consider a special consultation between social partners directly concerned with the gathering, production and delivery of information services, including journalism, entertainment and cultural products, to discuss the impact of innovation across the sector; and in that context, the protection of the intellectual property rights of producers and creative workers.

In the use of agency labour and outsourcing of work, unions naturally enough want to secure equal working conditions between temporary and permanent workers. In particular, they seek agreements that will create parity of working conditions in the company where agency workers are assigned, but of how this can be achieved is an industrial relations challenge.

A starting point may be to focus on the application of ILO Decent Work Agenda in the media industry, and particularly as it applies to the new contingent workforce. In addition, it may be useful to examine the impact of the ILO's Private Employment Agencies Convention, 1997 (No. 181), which acknowledges the role of private employment agencies on the labour market, and mandates countries that have ratified it to regulate these agencies' work and to protect the rights of agency workers, where appropriate with the participation of the social partners. These rights include union freedom, the right to collective bargaining, the right to minimum wage, and protection of working conditions.

Education and training

In the field of education and training, the ILO may consider the value of supporting a network of researchers and scholars within the world journalism and media training community, to examine the development of appropriate models of training, drawing upon existing databases but also covering more effectively Africa, South and Central America and the Caribbean, the Middle East and Asia, and to compile databases of accurate contemporary media and journalism employment opportunities in those regions.

At the same time, the ILO might invite its constituents in the sector to consider new joint initiatives aimed at establishing some benchmarks for training in a converged media environment, including actions to promote mid-career training and to address the continuing problem of under-funding.

Gender rights

The *Global Report on the Status of Women in News Media* referred to in this report provides extensive information not only on employment status and levels of pay but also covers policies on gender equity, sexual harassment, issues related to maternity, paternity and child care, and on education and training for women. [63]

As the first international baseline examination of women's status in media, it could serve as a guide for the ILO measure progress towards gender equity in the media industry worldwide.

The ILO may consider whether or not this would be an appropriate basis for developing a dialogue with the social partners on the need for a plan of action to improve the status of women in the media.

Raising awareness

As part of its communications work, the ILO may also consider:

(a) encouraging more information-sharing between social partners in different countries and regions, particularly on the development of digital products and tools, noting that some of the most innovative developments are taking place in regions where mobile technology is already providing the most effective and widespread form of communications;

(b) raising awareness of the changing nature of funding and definition of the scope of public service media, beyond traditional models of broadcasting and state institutions.

The range of issues here is immense, but it is indicative of the scope and nature of the change that is taking place in the media industry, and which urgently requires more international attention. A proposal to hold a Global Dialogue Forum on the employment

[63] *Global Report on the Status of Women in News Media* (2011), International Women's Media Foundation.

effects of technological change on the media and entertainment sector and their impact on the decent work objectives of the ILO and its constituents may well provide an important starting point for such reflection.

Sectoral working papers [1]

	Year	Reference
The Warp and the Web Organized production and unorganized producers in the informal food-processing industry: Case studies of bakeries, savouries' establishments and fish processing in the city of Mumbai (Bombay) (Ritu Dewan)	2000	WP.156
Employment and poverty in Sri Lanka: Long-term perspectives (Vali Jamal)	2000	WP.157
Recruitment of educational personnel (Wouter Brandt and Rita Rymenans)	2000	WP.158
L'industrie du textile-habillement au Maroc: Les besoins des chefs d'entreprise et les conditions de travail des femmes dans les PME (Riad Meddeb)	2000	WP.159
L'évolution de la condition des personnels enseignants de l'enseignement supérieur (Thierry Chevaillier)	2000	WP.160
The changing conditions of higher education teaching personnel (Thierry Chevaillier)	2000	WP.161
Working time arrangements in the Australian mining industry: Trends and implications with particular reference to occupational health and safety (Kathryn Heiler, Richard Pickersgill, Chris Briggs)	2000	WP.162
Public participation in forestry in Europe and North America: Report of the Team of Specialists on Participation in Forestry	2000	WP.163
Decentralization and privatization in municipal services: The case of health services (Stephen Bach)	2000	WP.164
Social dialogue in postal services in Asia and the Pacific: Final report of the ILO-UPU Joint Regional Seminar, Bangkok, 23–26 May 2000 (edited by John Myers)	2000	WP.165
Democratic regulation: A guide to the control of privatized public services through social dialogue (G. Palast, J. Oppenheim, T. McGregor)	2000	WP.166
Worker safety in the shipbreaking industries: An issues paper (Sectoral Activities Department and InFocus Programme on Safety and Health at Work and the Environment)	2001	WP.167
Safety and health in small-scale surface mines – A handbook (Manfred Walle and Norman Jennings)	2001	WP.168
Le rôle des initiatives volontaires concertées dans la promotion et la dynamique du dialogue social dans les industries textiles, habillement, chaussures (Stéphanie Faure)	2001	WP.169
The role of joint voluntary initiatives in the promotion and momentum of social dialogue in the textile, clothing and footwear industries (Stéphanie Faure)	2001	WP.170
La situation sociale des artistes-interprètes de la musique en Asie, en Afrique et en Amérique latine (Jean Vincent)	2001	WP.171

[1] Working Papers Nos 1–155 are not included on this list for reasons of space, but may be requested from the Sectoral Activities Department.

	Year	Reference
The social situation of musical performers in Asia, Africa and Latin America (Jean Vincent)	2001	WP.172
Guide sur la sécurité et hygiène dans les petites mines à ciel ouvert (Manfred Walle and Norman Jennings)	2001	WP.173
Seguridad y salud en minas de superficie de pequeña escala: Manual (Manfred Walle and Norman Jennings)	2001	WP.174
Privatization of municipal services: Potential, limitations and challenges for the social partners (Brendan Martin)	2001	WP.175
Decentralization and privatization of municipal services: The perspective of consumers and their organizations (Robin Simpson)	2001	WP.176
Social and labour consequences of the decentralization and privatization of municipal services: The cases of Australia and New Zealand (Michael Paddon)	2001	WP.177
1st European Forest Entrepreneurs' Day, 16 September, 2000 (European Network of Forest Entrepreneurs ENFE)	2001	WP.178
The world tobacco industry: trends and prospects (Gijsbert van Liemt)	2002	WP.179
The construction industry in China: Its image, employment prospects and skill requirements (Lu You-Jie and Paul W. Fox)	2001	WP.180
The impact of 11 September on the aviation industry (Peter Spence Morrell and Fariba Alamdari)	2002	WP.181
The impact of 11 September on the civil aviation industry: Social and labour effects (Prof. Peter Turnbull and Geraint Harvey)	2002	WP.182
Employment trends in the tobacco sector in the United States: A study of five states (Maureen Kennedy)	2002	WP.183
Tobacco: An economic lifeline? The case of tobacco farming in the Kasungu Agricultural Development Division, Malawi (Michael Mwasikakata)	2002	WP.184
A study of the tobacco sector in selected provinces of Cambodia and China (Yongqing He, Yuko Maeda, Yunling Zhang)	2002	WP.185
Child performers working in the entertainment industry: An analysis of the problems faced (Katherine Sand)	2003	WP.186
Informal labour in the construction industry in Nepal (Kishore K. Jha)	2002	WP.187
The construction labour force in South Africa: A study of informal labour in the Western Cape (Jane English and Georg Mbuthia)	2002	WP.188
Social dialogue in health services – Case studies in Brazil, Canada, Chile, United Kingdom (Jane Lethbridge)	2002	WP.189
Teachers and new ICT in teaching and learning modes of introduction and implementation impact implications for teachers (Chris Duke)	2002	WP.190
Best practice in social dialogue in public service reform: A case study of the Norwegian Agency for Development Co-operation (NORAD) (Torunn Olsen)	2002	WP.191

	Year	*Reference*
Best practice in social dialogue in public service emergency services in South Africa (Bobby Mgijima)	2003	WP.192
Case studies in social dialogue in the public emergency services – Argentina (Laura El Halli Obeid and Liliana Beatriz Weisenberg)	2003	WP.193
Employment trends in the tobacco sector: Selected provinces of Bulgaria and Turkey (Roska Ivanovna Petkova and Nurettin Yildirak)	2003	WP.194
How to prevent accidents on small construction sites (Illustrated by Rita Walle)	2003	WP.195
Sectoral trends: A survey (Katherine A. Hagen)	2003	WP.196
The impact of the restructuring of civil aviation on employment and social practices (Bert Essenberg)	2003	WP.197
Raising awareness of forests and forestry. Report of the FAO/ECE/ILO Team of Specialists on Participation in Forestry and the FAO/ECE Forest Communicators Network	2003	WP.198
Teaching and the use of ICT in Hungary (Eva Tót)	2003	WP.199
Violence and stress at work in the postal sector (Sabir I. Giga, Helge Hoel and Cary L. Cooper)	2003	WP.200
Violence and stress at work in the performing arts and in journalism (Sabir I. Giga, Helge Hoel and Cary L. Cooper)	2003	WP.201
Making ends meet: Bidi workers in India today: A study of four states	2003	WP.202
Civil aviation: The worst crisis ever? (Bert Essenberg)	2003	WP.203
Informal labour in the construction industry in Kenya: A case study of Nairobi (Winnie V. Mitullah and Isabella Njeri Wachira)	2003	WP.204
Violence and stress at work in the transport sector (Bert Essenberg)	2003	WP.205
The impact of Severe Acute Respiratory Syndrome (SARS) on health personnel (Christiane Wiskow)	2003	WP.206
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