Content Matters: The Media and Cultural Industries In Ireland's National Information Strategy

Paschal Preston

'Content' Matters: The Media and Cultural Industries In Ireland's National Information Strategy

Paschal Preston

Introduction

> The debate on media policy ... has undergone a profound change in emphasis. It has become focused on 'information superhighway', 'multimedia' and 'convergence' ... there is a real sense in which a gradual accumulation of quantitative changes has now produced a qualitative transformation in the framework of media policy debate. (Goodwin: 1995:677).

When, in the spring of 1996, the Irish government appointed an official Information Society Steering Committee (ISSC) with a brief to develop a national 'information society strategy and action plan' it was following a significant international policy trend. In so doing, Ireland became the latest member of the OECD to launch a policy and research initiative focused on the economic and social implications of new information and communication technologies (ICTs).

This latest wave of official policy and research interest in the socio-economic implications of new ICTs began with the Clinton/Gore National Information Infrastructure initiative in the USA in the early 1990s. It was subsequently extended with the launch of the Global Information Infrastructure by member governments of the Group of Seven (Gore, 1994) as well as of other similar projects in other countries (e.g. Denmark, 1994; Canada, 1994). Another important marker of this new policy trend was the publication of the Bangemann Report and related policy initiatives in the European Union context (CEC, 1994a, 1994b, 1994c, 1996a, 1996b). These key EU-level documents and related discourses and initiatives have major implications for the Irish policy context. Compared even to most other member states, the EU context is critically important in any consideration of national information sector strategies in Ireland. Not only is it the crucial nexus in industrial and employment terms — it has shaped the key developments in the information economy in Ireland over the past ten to twenty years, not least the relatively large ICT supply sector located here. But the EU context is also crucial to any understanding of the development and orientation of most recent national policy initiatives in Ireland related to new ICTs and indeed any other aspects of the information economy (Preston, 1994, 1995a, 1995b, 1996a).

The Irish government's ISSC published its report, *Information Society Ireland: Strategy for Action'* (ISSC, 1997), in March 1997. Like its predecessors in other countries, the ISSC report places a great stress on the radical implications of new ICTs for the future of employment, industry and business practices as well as government services in Ireland, including an expanding future role for information and communication services in terms of job and wealth creation. Soon after its publication, the report led to a number of relatively rapid follow-up actions. These included the announcement of the establishment of a more permanent Information

Society (IS) Commission under the Taoiseach's office. It was also followed in April 1997 by the announcement of an initiative to link the nation's schools to the new electronic communications networks. These and other recent responses suggest that this is one policy report which will not merely sit on the shelves like many of its predecessors. Rather it is one whose recommendations are likely to move to implementation stage in the near future. As it is likely to be an important guide and reference point for subsequent policy initiatives, and especially those related to the development of the media and communications sectors, the ISSC report deserves close and critical scrutiny.

This paper will focus on a particular aspect of the ISSC report and related EU policy documents: their stress on the changing role and characteristics of the media and other information 'content' services — and especially new multimedia or digital media based services — and their perceived future role for job and wealth creation in Ireland. In this context, it explores a number of key issues related to the direction and components of a coherent information sector strategy and more targeted national innovation networks in the Irish and all-important EU policymaking contexts. In so doing, the paper will also provide a critical commentary on some issues raised in the recent ISSC report and their underlying conceptions or assumptions, especially those which directly concern the media and information content services.

Like many of its counterparts elsewhere, the content of the ISSC document tends to be high on the rhetoric and hype usually associated with popular discussions of the implications of new ICTs and low in terms of the specificities of the economic, social and cultural dimensions (Preston, 1997a). This paper will seek to transcend some of the limitations of the analysis of the ISSC report by outlining aspects of a more grounded and comprehensive approach to the content industries and some of the key policy implications in the Irish and EU policy contexts. In other words, it will seek to move beyond the heady realms of hype and abstract visions to consider some of the more concrete nuts and bolts (or atoms and bits) of the information content sectors and related strategy debates in Ireland and the EU, including the tensions between industrial and cultural policy goals.

Although the ISSC report does not explicitly address this matter, it is important to note here that the publication of the document also follows on from two other important and related sets of recently published policy proposals which need to be more closely integrated into the discussion of any coherent information sector strategy. The first includes the October 1996 White Paper on science and technology and the more recent appointment of a Science, Technology and Innovation Advisory Council (STIAC). Basically these and other related initiatives follow on from the STIAC report and they aim to develop a more coherent set of national technology and industrial innovation policies. Second, the ISSC report also closely follows the publication of *Clear Focus* by the Department of Arts, Culture and the Gaeltacht. This latter document sets out the government's proposals for new broadcasting structures and policies and explicitly seeks to respond to the changing economic role and policy environment of broadcasting activities, including some of the implications of convergence tendencies associated with new information and communication technologies.

In this author's view any coherent proposals for a future national information strategy must also be directly related to policy debates and initiatives concerning the direction of both industrial innovation and broadcasting policy initiatives. In the ISSC report's analysis and in the follow up debates so far, there has been little attempt to relate these convergent industrial and policy fields within a coherent strategic framework in the Irish context. Hence, in what follows, I will also indicate some of the implications of the other recent national policy initiatives as they relate to the development of a more coherent information strategy, with particular reference to the media and 'content' sub-sectors.

Thus, this paper will explore the meaning and implications of the recent spate of national, EU and global information society and infrastructure initiatives for the media and cultural industries in Ireland and the EU. I will consider some of the key conceptual problems involved in recent national as well as EU 'information society' policy analyses and discourses, especially as they relate to the future role,

development and regulation of this particular cluster of industries: the so-called 'content' sector. In the next section, I will explore some of the conceptual difficulties involved in national and EU policy documents and discourses based on the notion of an 'information society' and some of their implications. In section three, I will move on to explore some of the more practical policy problems posed by the tensions between industrial/economic development and more cultural policy goals. Section four will present some specific policy recommendations and some concluding comments. The paper will focus on the mature media industries as well as the new/emergent multimedia fields which have been identified as potential rapid growth areas in many recent policy reports.

Limits of the 'Info Society' Idea and 'Content' as Focus
The increasing popularity of the 'information society' notion (and related information superhighway/infrastructure' metaphors) within official EU and more global policy debates over the past 3-4 years has been rather striking, as noted above. But the growing popularity of such notions must be greeted with a mixture of apprehension as well as a critical welcome. Certainly this trend provides an additional spur to the funding of social and economic research focused on the implications of new ICTs. However such notions and conceptions must be held up to critical scrutiny in terms of their adequacy as guides to understanding the key contours of contemporary social and economic change on the part of politicians, industrialists and ordinary citizens as well as researchers. I believe that this is one of the important lessons to be drawn from the work of many social scientists who have addressed competing models and approaches to the socio-economic and policy implications of new ICTs over the years and who have strongly criticised the core notion of the 'information society' since it was first advanced more than twenty years ago (see, for example, Garnham, 1981, 1994; Melody, 1985; Bannon, ed., 1981; Douglas and Guback, 1984; Slack and Fejes, 1987)

There have been many dimensions to this criticism of the 'information society' idea. For present purposes, I will simply note the fact that many of the criticisms focused on an inherent or frequent tendency to adopt a highly abstract and idealized technology-centred analysis of the changing role, characteristics and implications of information and knowledge production, as well as its control, distribution and management in advanced capitalist economies. As a result, the notion tends to gloss over or neglect the important political, economic and institutional settings of information production, ownership rights, and management/control questions. A parallel criticism is that the information society notion relies on very partial ethno-centric (socially and temporally-specific) assumptions about of what constitutes 'information' and 'non-information' work or occupations as well as their implications for social and cultural activities. These and other criticisms point to a lack of coherence and the inadequacy of this notion as a guide to a practical understanding of the implications of new ICTs in the context of the key socio-economic and policy challenges of the early 1980s and 1990s (Preston, 1984, 1985, 1989, 1997a).

In essence, the past criticisms indicate that the 'information society' notion places an exaggerated emphasis on the inherent technical characteristics and benefits of new ICTs and that it ultimately involves a very particular and technocratic vision of society and the processes of change. Its understanding of what constitutes 'information' (as good, service, resource) and knowledge and its relation to socio-economic wealth, welfare and well-being is very partial and specific. As an attempt to theorize socio-economic and cultural change, it starts off and ends up confusing ends (goals and values) with means. It is inherently focused on the pace and scale of production and adoption of information technologies, services and products. Whilst this may well help to further expand the sales and markets of new ICTs products and services and the related high-tech sector, it fails to address the wider public interest issues involved in developing a progressive strategy for macro socio-economic change and development in the Advanced Capitalist Countries (ACCs) at the close of the twentieth century. Its ultimately flawed and narrow 'vision' is marked by one key irony: on the one hand it extols the revolutionary power of new ICTs to transform social and economic relations and yet, on the other hand, it combines it with an extremely

conservative set of political-economic and cultural orientations and values. In general, the overall drift of the information society discourses is one which asserts a strong (if not necessary) relationship between new ICTs and the (perceived) 'market-driven' logic of neo-liberal political economy approaches (Preston, 1994, 1995b, 1996a). Indeed, this linkage is generally asserted or assumed, without ever explaining why or how this is so.

But, of course, despite the many earlier criticisms of social scientists, the 'information society' notion is very much alive and well today. Indeed, as the recent spate of policy reports, initiatives and conferences testify, it has become an ever more highly fashionable item on the menu of political rhetoric in the late 1990s. In the EU context, the 'Information Society' (with appropriate capitals) has been ascribed an enhanced role and status (and indeed 'aura') as a central reference point or meta-text for many, if not most, areas of policy debate and planning in more recent years (Garnham, 1997). Thus, the popularity of the 'information society' idea amongst the political and economic elites in the late 1990s is itself an important social phenomenon and political fact that cannot be ignored. But this does not mean that the previous criticisms of the concept have now been rendered invalid in the light of subsequent technological and socio-economic changes.

This is not some question of scoring a mere academic point concerning the adequacy of different conceptual models of the nature of current changes (and continuities) in the social and economic landscape at the close of the twentieth century. Rather, given the context, my argument here is primarily based on some pressing practical considerations and it is necessarily brief. It is focused on the practical adequacy and utility of the 'information society' approach for policy-makers, industrialists, and the vast majority of citizens concerned with some of the most pressing socio-economic and indeed cultural aspects of change in the late 1990s. For one of the more practical problems with the information society notion is the real difficulty involved in seeking to apply or operationalize it for the purposes of empirical research or practical policy analysis. In brief, the information society approach is markedly flawed when it comes to concrete attempts to map and measure the contours of socio-economic change and continuities.

For one thing, and perhaps most fundamentally, the notion of a singular 'content' sector adopted in many such information society policy documents is based on a very crude and minimalist distinction between different primary information industries and markets. It tends to apply a similar market-focused and economic reasoning to all segments of the primary information economy (i.e. whether involved in the supply of ICT devices, systems and 'tools' or more purely content or hybrid information services). Secondly and relatedly, it fails to recognise or adequately address the fundamentally different characteristics and roles of different types of information 'content' services (e.g. as indicated in boxes 1b, 1c and 1d of Table 1). As a result, it tends to assert or assume an economistic approach to communication and cultural matters which fails to recognise the specific cultural and political role of the media and cultural services and the special requirements for diversity and pluralism which apply to policy approaches in this sphere (as will be discussed further below). Thirdly, and more directly relevant to present concerns, even in terms of purely economic sectoral analysis, market development or industrial policy considerations, this approach is incoherent. The notion of a singular 'content' sector within these information society discourses is a rather chaotic concept. It tends to lump together a wide range of quite diverse and distinctive sets of product/service characteristics, industrial activities, and market segments under the single but inadequate category. For example, at a very basic level, it fails to stress the important distinctions between information content services which are directed at intermediate markets ('producer' information services) and those which are directed at final consumers and citizens. These conceptual problems with the notion of 'content' within prevailing information society policy discourses have very real practical effects in relation to the framing of policy options and debate. For example, like many of its recent counterparts published by the European Union institutions, the ISSC report places a great emphasis on the growth potential of the existing media and emerging new ICT-based multi/digital media industries and other information 'content' services (ISSC, 1997;

CEC, 1994a, 1994b, 1994c, 1996a, 1996b). Both sets of policy documents tend to exclusively stress the role of the media and cultural industries (alongside other information content services) in terms of their industrial and employment development potential. In stressing their future role in wealth and job creation in an assumed emerging or expanding 'information society', the distinctive cultural and political roles of the media and other content services is neglected or actually denied. In addition, they tend to privilege the role of the emergent, new ICT-based or multimedia content services and thus neglect the continuing role of mature or established media and content industries, including their role as important sites for process innovations. In the case of new ICT-based developments, they also often fail to make adequate distinctions between new multimedia developments as ICT-based tools, devices or systems on the one hand and as new media and cultural forms ('content') on the other hand (Preston, 1996b, 1996c).

Thus, at the very least, a more nuanced alternative approach is required, one which is sensitive to the different components of the 'content' services sectors within the overall primary information sector. Clearly it is also important to link this to the development of national information strategies which are relevant and appropriate to the specificities of national economic and institutional conditions (Melody, 1997; Preston, 1995a, 1995b, 1996b). In brief, I would suggest that the concept of an information 'sector' or 'economy' can provide a more concrete and illuminating alternative to the 'information society' idea, especially when seeking to explore the strategic socio-economic implications and historical specificity of new ICTs with respect to the media and cultural industries. These alternative concepts also carry much less ideological baggage than the 'information society'. I believe that a nuanced reworking of the information sector/economy concept can provide a useful initial framework for many kinds of empirical inquiry and research addressing the strategic national industrial and policy implications of new ICTs (Preston, 1997a). As briefly indicated in Table 1, it can be utilised to explore the scope of different types of content services and move beyond the rather crude singular or simplistic conceptions of 'information' sub-sectors which are often implicit in many recent 'information society' policy documents and associated debates.

Broad Components of the Information Sector or Economy	Position and Potential of the Sub-Sectors in Ireland
1) Primary Information Sector (PIS) The 'Primary Information Sector' (PIS) covers those goods and services 'which intrinsically convey information' (e.g. books; newspapers) 'or which are directly useful in its production, processing or distribution' (e.g. computers, telecommunications). The PIS has four basic sub-sectors:	
1a) ICT devices, systems, 'tools' and services Industries supplying ICT Hardware, Software, Components and Electronic Communications. Facilities, Networks and Services): Production and distribution of devices, blank media, systems (and components) required for the storage, processing, manipulation, distribution and communication of information.	Ireland is already a favoured location for foreign Multinational Companies (MNCs) in this sub-sector. But generally poor/low indigenous industry performance. Recent evidence of some scope for indigenous 'application' innovations in specific niche markets, especially in software.
1b) Specialized 'producer' Info services Activities involved in the supply and/or distribution of specialised scientific	Very high economies of scale; highly centralised in a few global centres;

distribution. of specialized scientific, technical, economic, financial, etc., knowledge and information.	low inward investment or indigenous growth potential in Ireland (few exceptions e.g. FEXCO);
1c) Media and 'content' products or services directed at the final consumer and citizens This category covers the production and distribution of the mass media, cultural products and other information services to final consumers, households and individual citizens (i.e. primarily for use/consumption outside a work setting, sometimes referred to as 'the sphere of everyday life').	Popular perceptions of Irish 'advantages' in the initial/creative moments of the value-chain. But weak in the economically more important downstream stages of the value chain: i.e. publishing, packaging, marketing and distribution of content products. Challenge: to develop key 'downstream' stages in both 'mature' and emerging multimedia content industries
1d) 'Hybrid professional /information. services Professional, financial, business and other 'producer' services with a separate and distinctive primary economic function but which are also deemed to be highly/increasingly information/knowledge based (e.g. consultative [medical, invest, business, etc.] services; monetary and other financial institutions; financial, security and insurance brokers, agents and jobbers; components of legal services, accounting, audit and book-keeping services, engineering, architectural and technical services.	The domain of many 'new ICT-based growth service industries'. Some of these hybrids will increase 'tradability' via impact of new ICTs. Some offer significant ICT 'applications innovation' opportunities (e.g. new CD-ROM and Internet-based products), especially in services with indigenous industrial competencies and strength (e.g. banking, medical, etc. fields).
2) The Secondary Info Sector (Sis) This refers to the 'value added' and role/content of information. activities used in producing 'non-informational' goods and services, and which are not supplied by or purchased/bought-in from the PIS.	An important component of the information economy in Ireland as elsewhere but not directly relevant to this paper/sector study.

Table 1. 'Content' services in the overall 'Information' economy and potential for Irish content industries
Source: Preston (1984, 1985, 1989, 1996b). This particular typology is based on the author's modifications to the earlier models advanced by Machlup, Porat and the OECD.

'Content matters' and the ISSC report: the Irish media and cultural 'content' industries
The perception that the various information 'content' services , including the media and cultural 'content' industries, are marked by a relatively high potential for growth and 'tradability', (or marketability or commodification) as a result of new ICTs dates back to the early 1980s (e.g. Toffler, 1980, 1983; ITAP, 1983, 1986; GLC, 1983; CICI/RIIA, 1986). Thus, the perception that 'content' represents an expanding 'new frontier' for economic growth long pre-dates the surge of information infrastructure/society policy initiatives and debates which have emerged since the early 1990s. But what is very striking is the degree to which the growth potential of the media and cultural industries, and especially new multimedia services, has been re-emphasised in many national, EU and global strategy documents in more recent years (CEC, 1994a, 1994b, 1994c, 1996a, 1996b; Australia, 1994a, 1994b, 1995; Canada, 1994, 1995, 1996, 1997). In part, this is a response to the fact that the media and other content services directed at households and final consumers appear to have had relatively rapid market growth rates compared to ICT hardware and

software devices and systems in the mid-1990s (Preston, 1996b; Gates, 1995; Negroponte, 1995).

The recent ISSC report also places a major emphasis on these industries in the Irish context. It states that 'one growth sector deserving particular attention is that of the content industry' (ISSC, 1997:42). The report focuses on the content sub-sectors of film, music, radio, publishing, and advertising (and in this respect, the report avoids the conflation of different content sub-sectors which occurs in many other parallel reports from the EU). The ISSC report suggests that this is already a significant sector in Ireland in terms of employment; it suggests that 'already over 30,000 are employed' and that output amounts to more than £1 billion annually. It further suggests that 'this value can be increased several-fold'. The report goes on to suggest that the 'content industry in the Information Society involves the creation of products and services that aggregate (sic) music, audio-visual and information/data services, drawing on Ireland's culture and heritage, using digital delivery technology and skills' (ISSC, 1997, 42).

The ISSC claims that 'significant opportunities will arise for adding value in such areas as localisation and adaptation of such new digital products and services as, in general, content is most attractive when it is local. (Recent examples of this are the success of *Riverdance* and the film *Michael Collins*)'. It declares that Ireland's youthful, educated, English-speaking population is a crucial advantage in this global industry. Furthermore, it argues that 'Ireland has internationally recognized abilities in the conception, creation and generation stages of content production', especially in literature and music and increasingly in film/video (ISSC, 1997, 42). It proposes that Irish enterprises 'must develop a leadership position in key growth areas such as the content industry' (ISSC, 1997: 58).

Thus, in general the ISSC report provides a very optimistic and upbeat account of the past and potential future growth and performance of the media and cultural industries sub-sector in Ireland. Essentially this is based on a celebration of the creativity of Irish authors, musicians and artists — in itself a rare event in what is essentially an industrial policy document. But such an optimistic reading of national creative competencies or comparative advantages in relation to the media and cultural industries is not an Irish monopoly however. As noted above, it is almost the norm or convention in many other national information strategy reports of this kind, although the analysis in the ISSC report seems to assume otherwise.

Now I do not wish to dispute the ISSC report's identification of these particular content industries as major sites for potential industrial growth in Ireland. It is my own belief that these fields may well represent one of the most promising sites for indigenous and application innovations within the national information economy. But on close reading, it appears that the ISSC report's analysis is based on a rather abstract and idealized reading of both the past economic performance of the Irish media and cultural services (in industrial and employment terms) and the future opportunities afforded by new technologies. What is required is a more focused and grounded analysis, which addresses the strengths and weaknesses of the sector and the challenges that must be addressed by both public and private sector actors. This is especially the case if appropriate policies and support systems are to be developed and implemented in the future in order to realise the goal of rapid job growth promised in the report.

First, despite its very optimistic view of the strengths and growth potential of the media and cultural industries, the ISSC report registers one apparent sectoral weakness: it notes that the 'Irish content providers and creators have only limited experience in exploiting new channels such as the Internet and multimedia' (ISSC, 1997: 42). The identified weakness is a technology-centred one — which again is typical of the conceptual framework underpinning this and similar information strategy policy reports. However, this apparent lack of experience of new/emergent media is hardly unique to the Irish industry, especially since very few of the CD-ROM based multimedia content products produced (including those produced with major subsidies within the EU) have yet proved to be commercially successful. Indeed, apart from pornographic services, very few of the Internet/WWW-based 'content' service offerings produced in the EU or USA have achieved the stage of commercial

success either.

Second, there are more fundamental sectoral weaknesses (besides the lack of experience with new/multimedia technologies) which the ISSC report tends to gloss over too lightly. By many of the available indicators, the ISSC report may well be essentially accurate in its stress on the performance of Irish authors, musicians and artists in relation to the initial creative (origination) stages of the value-added chain in the media and cultural industries. But the report is marked by a significant silence concerning a very important and long-established weakness in national performance in relation to other moments of the overall value-added chain in the cultural and media content industries.

Here I am referring to the general and long-established failure to follow-through and harness the potential of these undoubted achievements in the initial creative moments with respect to the all-important 'downstream' high-value added functions and labour-intensive occupations within most if not all the established Irish media and cultural industries. For well over a century, the celebrated performance of Irish writers, for example, has not been 'exploited' for job and wealth creation in the downstream fields of publishing, printing, marketing and distribution, for example. Turning the focus away from a predominantly technology-centred approach, it is first of all, both possible and important to recognise that Irish content industries have very 'limited experience in exploiting' the creative performance of Irish content originators (writers, musicians) based on the *established/mature technologies or platforms* of print-based publishing and distribution, as well as in the fields of film, television and recorded music. This fact, and its underlying reasons, must be more fully addressed and analyzed. This is an essential step before cultural entrepreneurs or policy-makers can move on to successfully embark on the road to 'exploiting the new channels such as the Internet and multimedia' as suggested in the ISSC report (1997:42). In essence, there is no simple 'technological fix' to the long-established dependency on imported content in most media market fields in Ireland, most notably in the audio-visual arena.

The underlying causes of this weak performance in the past cannot be primarily defined as technical in nature. Nor, even in the case of new multimedia content products and services (especially if defined in terms of *process* as well as *product* innovations), can they be addressed and remedied by a purely technology-centred analyses and policy responses The policy and industrial challenges I am pointing to here are very important, if little understood in the Irish policy context as yet. They are central to any viable and sustainable strategy for the Irish content sector, whether this is focused on emergent new multimedia content industries or the more established media content sectors, or — which seems indisputably preferable to this author — both. They involve much more than mere questions about awareness of, training in, or exploitation of, new communication technologies, important though these may be.

1) Firstly, they involve important research and strategic policy questions concerning the matter of entrepreneurship, managerial, marketing and other (non-technical) competencies and skills related to the development of media and cultural content industries in the Irish context. They also concern the matter of how these elusive competencies may be developed to play an important role in the fuller exploitation of the potential of indigenous creative/origination efforts for wealth and job creation. This challenge must be addressed more fully both in relation to home and overseas markets and in the case of both mature and new/emergent media markets.

2) Secondly, they require a comprehensive approach which addresses the peculiar economic and political-economic characteristics and policy structures which have marked the media and cultural content industries in the past as well as in the 1990s (Grisold and Preston, 1995). This must involve a concern with the specific economic characteristics of these markets, including the tendencies towards monopoly/oligopoly structures at global, regional and national levels and the crucial controlling role of distribution bottlenecks (which appear to be rapidly emerging in the new media content fields despite all the hype about open accesses and the democratization of publishing functions). Important concerns here include the role of cultural 'proximities' and affinities as opposed to purely economic factors in shaping the scale and form of such 'content' market boundaries. These and related

specificities of the content industries suggest the need to abandon or radically modify the notion of 'localization' which the ISSC report appears to borrow from the ICT supply sector.

3) Thirdly, a more focused and explicit consideration of the very specific social and cultural characteristics and roles of media/cultural products and services is required compared to that suggested in the ISSC report. This includes active consideration of the potential role of new ICTs in enhancing and sustaining the continuing value of cultural pluralism and diversity in the content spheres. The absence of such considerations is particularly striking in the case of the key policy documents and approaches to the media and cultural industries produced as part of the EU's 'information society' initiatives. As noted earlier, the media and cultural content sectors are generally treated within a singular and undifferentiated 'information market' and industrial logic — alongside microchips, computers, telephone systems and other ICT hardware and software tools and systems. Here the information society approach (especially as it underpins the analysis within the most influential EU policy documents) tends to put the technological cart before the social or cultural horse — despite the token and superficial rhetorical stress on 'society' and 'People First' in many of the key documents and surrounding discourses. For example, a similar neglect of the specificities of the cultural and media sphere can be found in the EU's 1996 Green Paper on 'social dimensions of the information society' (CEU, 1996b). This neglect is all the more surprising since there was at least some tentative recognition of the specificity of content matters and the potential to use new ICTs to enhance diversity of content and expression within the interim report produced by the High Level Group of Experts prior to the publication of the Green Paper (CEC, 1996a).

These represent important gaps in the analysis advanced by the ISSC report and key EU information strategy reports concerning the role and characteristics of the media and cultural content industries. In essence, there is a significant silence in these and information society discourses concerning the crucial role of the media of public communication in fostering any meaningful sense of 'development' and socio-political cohesion, both in the past (McBride Commission, 1980) as well as in the construction of a distinctive conception of 'Europe's Way to the Information Society' for the future (Preston, 1996a, 1996b). There is a one-sided and rather crude economistic approach to the industrial aspects of the media and cultural content industries and a marked failure to address let alone promote the cultural policy issues involved. This results not only in an impoverished cultural strategy at national and EU levels, but it may also result in a flawed approach in terms of realising the job creation goals identified in these reports. So far there has been little evidence of the rapid growth in the numbers of 'high-level, grey-matter' jobs involved the audio-visual 'content' industries which were promised and anticipated by the European Commission in 1993/4. A radical re-orientation of such EU and national policies which seeks to take diversityPluralism of content seriously and actively stimulate local production of films, television programming (and other types of new and mature media content) not only makes sense in terms of cultural policy goals. It also makes sense in terms of these declared job creation goals.

Some conclusions and recommendations

In this paper I have sought to explore some of the features and implications of the ISSC report and related EU 'information society' policy documents, especially in relation to the changing role of the media and cultural 'content' services. I have argued that many of the earlier criticisms of the information society concept are still relevant, despite its growing popularity in policy circles in the 1990s. I have examined some of the key conceptual problems and their implications for policy debate and initiatives related to these particular content services at the national and EU levels. On balance, I believe that the appointment of an Information Society Steering Committee in Ireland and the recent publication of its report is to be welcomed. Clearly, several aspects of the report's analysis have been criticised here, especially those related to its conception and analysis of the media and cultural content industries. Nevertheless, I concur with the report's basic argument that these

represent important sites for industrial and employment growth. They represent important centres for indigenous innovation, both product and process innovation, related to the application of new ICTs in an expanding information economy. Thus I believe that the ISSC report provides a useful and valuable starting point for further debate concerning the requirements for a more strategic and comprehensive approach to the future development of the sector in Ireland, not least in response to the implications of new ICTs. The criticisms and ideas advanced here represent simply one contribution to the kind of debate that is required if the cultural and industrial goals of a stronger and more vibrant set of national media and cultural industries is to be realized.

In this final section I will now also seek to advance some suggestions concerning a more coherent policy response for both the new and mature media content industries in Ireland. Here, I will propose a number of related but quite specific recommendations for the policy debate and actions which are expected to follow from the publication of the ISSC report.

1) A key requirement is the creation of more coherent and comprehensive policy fora and structures which can address both (a) the convergence tendencies across traditional media and policy boundaries, and (b) the specificity of the media and cultural content services. For too long considerations of media policies have not been sufficiently related to broader developments within the communication and information services sectors related to the diffusion of new ICTs (Preston, 1993). The recent legislative proposals for broadcasting contained in the *Clear Focus* document go some way in this direction, but a more radical reorientation and broadening of the institutional support and policy matrix shaping both the mature and new multimedia content services may be usefully explored in this context. Figure 1 sets out one set of proposals related to the recommendations outlined here and which may contribute to further discussions concerning the possible policy structures and options in this regard.

2) The (currently disparate) activities and goals of government departments and agencies concerned with both (a) industrial and innovation policy on the one hand and (b) cultural and media policy on the other must be brought into greater dialogue and cross-engagement. This is necessary, I believe, if appropriate action and support is to be provided to enable these content services to realise their potential as major sites for indigenous application innovations. This means that new institutional arrangements are required in order to provide:

(i) an increased share of industrial development supports and investment resources corresponding to the sector's growth potential;

(ii) the very specific forms of institutional and policy structures appropriate to the special industrial culture and managerial styles of these industries, including its relatively small scale and fragmented 'cottage industry' organisational structures (with RTE and the Independent Group as the two notable exceptions in terms of scale and scope of resources and operations);

(iii) promotion and protection of the goals of diversity and pluralism of content, including an increasing share of local (national and regional etc.) content within the various domestic media markets ;

3) Appropriate new national policy institutions are needed to support the particular mixes or configurations of skills and competencies which are required for the development of multidisciplinary content productions (i.e. to promote and broker links between the disparate disciplines, professions and other components of the media cultural industries sector). New forms of innovation networking, across wider industrial, professional and technical competencies are required especially (but not exclusively) to promote/realize the potential development of new/emergent multimedia products and services.

This may involve the development of novel brokering and support institutions in order to stimulate the diverse forms of innovation networking across different professional disciplines and specialist industrial competencies. Some of these may be 'virtual' and ICT-based. But some could be based around the notion of 'industrial districts' as in the original conception and plan for the cultural industries quarter in the Temple Bar

area in Dublin. These kinds of networking supports are very important given the generally small scale and fragmented structure of the indigenous content industries. Besides, some new forms of industrial support and brokerage institutions, specifically attuned to the culture and style of these industries may be required. Indeed, the 'digital park' idea proposed in the ISSC report might be best approached in these terms (rather than in terms of a single island site centred around the assumed benefits of a separate and expensive high-tech infrastructure).

4) Education and training policies must address not only the technical skill requirements related to the application of new multimedia technologies. An equal or probably more important requirement is to address the shortage of managerial, entrepreneurial, marketing, and policy-related skills/competencies which led to relative under-performance in the important 'downstream' segments of the value-added chain in these industries in the past (i.e. compared to the high national performance in the initial authoring and creative stages).

5) There is a pressing requirement to develop more pro-active and comprehensive national approaches to shaping the disparate range of EU policies which impinge upon the media and cultural industries (especially those based in a relatively small economy/society). This must be linked to a more positive role in shaping all areas of EU policy which impinge upon the development and application of new information technologies and infrastructures and services compared to the past (Preston, 1994, 1995b, 1996a). This involves a shift towards more active engagement in the whole spectrum of relevant policy fora, not only those which explicitly or solely address media and cultural policy issues (e.g. it includes those dealing with competition and trade policy, technology and standards matters, regulatory policies related to the new distribution systems such as the Internet/WWW, intellectual property rights, digital broadcasting, etc.).

6) The EU's singular information society/market approach must be challenged and reversed not only for (very valid) cultural diversity and pluralism reasons. A radical re-assertion of these goals is also necessary in employment terms — if the declared goals of significant increases in the numbers of 'high-level, grey-matter' jobs within the audio-visual and other media industries are to be realized.

References

Australia (Government of) (1994a) *Creative Nation: Commonwealth Cultural Policy.*

Australia (1994b) *Commerce in Content: Building Australia's International Future in InterActive Multimedia Markets* (Report by Cutler and company for Department of Industry, Science and Technology, CSIRO and Broadband Services Expert Group).

Australia (1995) *Excellence in Content* (Report prepared by Coopers and Lybrand for the Australian governments Department of Industry, Science and Technology, and the Department of Communications and Arts).

Bannon L ., et al (ed.) (1981) *Information Technology: Impact on the Way of Life* (Dublin).

Canada(1994)*The Canadian Information Highway — Building Canada's Information and Communication Infrastructure*. Ottawa: Information Technologies and Telecommunications Sector:

Canada (1995) *Connection, Community, Content: The Challenge of the Information Highway. Final Report of the Information Highway Advisory Council.* Ottawa: Industry Canada.

Canada (1996) *Building the Information Society: Moving Canada into the 21st Century.* Ottawa: Industry Canada.

Canada (1997) *Preparing Canada for a Digital World: Information Highway Advisory Council Phase II Conclusions and Recommendations*. Ottawa: Industry Canada.

CEC (1983) *Community Programme for the Development of the Specialised Information Market in Europe.* COM (83)661 FINAL.

CEC (1994a) *Growth, Competitiveness and Employment — Challenges for entering in the 21st century.* (White Paper, colloquially called 'the Délors Report'). Luxembourg: European Commission.

CEC (European Commission) (1994b) *Europe and the Global Information Society: Recommendations to the European Council* ('Bangemann Report'). Brussels: CEC,

26 May 1994.

CEC (1994c) *Strategy Options to Strengthen the European Programme Industry in the Context of AudioVisual Policy of the EU* (Green paper on the AudioVisual sector). Brussels: CEC (COM(94)96 Final, 6.4.1994).

CEC (European Commission) (1995a) *Europe's Way to the Information Society. An action plan.* Communication from the Commission to the Council and the European Parliament and to the Economic and Social Committee and the Committee of Regions. (Document obtained via Internet.)

CEC (1996a) *Building the European Information Society for Us All: First Reflections of the High Level Group of Experts.* Brussels: EU, DGV.

CEC (1996b) *People First: Living and Working in the European Information Society* ('Green Paper'). Luxembourg: Bulletin of the European Union: Supplement 3/96.

CEC (1996c) *People First: Report on the Dublin Colloquium, Dublin Castle, 30 Sept. - 1 Oct. 1996.* Brussels: DGV.

Corcoran, Farrel and Paschal Preston (eds.) (1995) *Democracy and Communication in the New Europe: Change and Continuity in East and West*. Creskill, New Jersey: Hampton Press Inc.

Denmark (Ministry of Research) (1994) *Information Society 2000 —The Committee on the Information Society by the Year 2000.* Copenhagen.

Department of Arts, Culture and the Gaeltacht (1997) *Clear Focus.* Dublin: The Stationery Office.

Forfas (1996) *1995 Employment Survey.* Dublin: Forfas.

Garnham, Nicholas (1981) 'The Information society is also a Class Society' in L. Bannon, et al, (ed.) (1981) *IT: Impact on the Way of Life.* Dublin.

Garnham, Nicholas (1994) 'Whatever Happened to the Information Society?' in Robin Mansell (ed.) (1994) *Management of Information and Communication Technologies: Emerging Patterns of Control.* London: ASLIB.

Garnham, Nicholas (1997) 'Discussant's Comments'. Presentation to European Communications Policy Research Conference, Venice, Italy, March, 1997.

Gates, Bill with Nathan Myhrvold and Peter Rinearson (1995) *The Road Ahead.* London: Viking.

GLC (1983) *The Audio Visual Media Industries in London.* Strategy Document No 7. London: GLC.

GLC (1984) *Electronic Publishing.* London: GLC.

Goodwin, P. (1995) 'British Media Policy Takes to the Superhighway' in *Media Culture and Society,* 17:4(677-689).

Gore, Al (1994) 'The Global Information Infrastructure: Forging a new Athenian Age of Democracy' in *Intermedia*, 22:2(4-7).

Grisold, Andrea and Paschal Preston (1995) 'Unpacking the Concept of Competition in Media Policy Making: The Cases of Ireland and Austria', in F. Corcoran and P. Preston (eds.) *Democracy and Communication in the New Europe: Change and Continuity in East and West.* Creskill, New Jersey: Hampton Press.

Hall, Peter and Paschal Preston (1988*) The Carrier Wave: New Information Technology and the Geography of Innovation.* London: Unwin Hyman.

HLEG (High Level Group of Experts) (1996) *Building the European Info Society for Us All: Interim Report.* Brussels: CEC

Ireland (Government of) (1996) *White Paper on Science and Technology.* Dublin.

ISSC (Information Society Steering Committee) (1997) *Information Society Ireland: Strategy for Action.* Dublin: Forfas.

ITAP (IT Advisory Panel, Cabinet Office) (1983) *Making a Business of Information.* London: HMSO.

Mandela, Nelson (1995) 'Towards a world-wide information society' in *Intermedia* 23:6(46-7).

Mc Bride Commission (1980) *Many Voices, One World* (Report for UNESCO) London: Kogan Page.

Melody, William H. (1985a) The Information Society: unveiling some contradictions'. Special issue of *Media Culture and Society*, 7(3).

Melody, William H. (1987) 'Information: An Emerging Dimension of Institutional Analysis'. *Journal of Economic Issues.* May 1987.

Melody, William H. (1996) 'Towards a Framework for Designing Information Society Policies'. *Telecommunications Policy*, 20:4(243-259).

Melody, William H. (ed.) (1997) *Telecom Reform: Principles, Policies and Regulatory Practices.* Lyngby, Denmark: Technical University of Denmark.

Morris, M and Ogan-C. (1996) 'The Internet as Mass Medium'. in *Journal of Communication,* 46:1(39-50).

Negroponte, Nicholas (1995) *Being Digital: The Road Map for Survival on the Information Superhighway.* London: Hodder and Stoughton.

Preston, Paschal (1984a) *Innovation in Information Technology: Defining IT and Related Job and Wealth Creation Potential.* Innovation in IT Project Working Paper 2.1.

Preston, Paschal (1985) 'The Changing Role of the Information Sector/Economy: A Proposal for a New Research Framework and Initiative'. Reading University, Department of Geography/JCLDS.

Preston, Paschal, et al (1989) *Measuring the Information Economy: Proposals for Updating the ISIC*. London: Economic and Social Research CouncilPICT.

Preston, Paschal (1993) 'Going Comprehensive: Irish Cultural Industries Policy' in *TEAGLAIM: DCU Communication and Cultural Review,* 1(71-76).

Preston, Paschal (1994) 'Neo-liberal regulation and the smaller and peripheral economies: an institutionalist perspective' in H. Williams et al (eds.), *Telecommunication: Exploring Competition.* Amsterdam: IOS Press.

Preston, Paschal (1995a) 'Ireland and the Information Age: A Scoping Study' (Commissioned Report).

Preston, Paschal (Guest Editor) (1995b) *Telecommunications Policy,* 19:4(May/June). Special theme issue on 'Competition and telecoms infrastructure in the peripheral regions and smaller economies of Europe'.

Preston, Paschal (1996a) 'Technology, Space and Cohesion: An Irish Perspective on 'Europe's Way
to the Information Society' in *Telematics and Informatics,* 13:2-3(123-40).

Preston, Paschal (1996b) *Content Matters: Proposals for a 'Content' Industries Strategy in the Irish Information Economy'* (mimeo).

Preston, Paschal (1996c) 'Multimedia Convergences or Divergences?: The Uneasy Encounter Between Industrial Innovation Logics and the Cultural/Media Spheres'. Paper presented to 'Regional Innovation Networks. The Case of Multimedia' session, 4S/EASST Conference, Bielefeld, Germany, 10-13 October 1996.

Preston, Paschal (1997a) 'Beyond the 'Information society': Selected Atoms and Bits of a National Information Strategy'. Paper presented to the *Ireland in the European and Global 'Information Society'* conference, held at the Irish Film Centre, Dublin, 24-25 April, 1997.

Slack, J. and F. Fejes (eds.) (1987) *The Ideology of the Information Society.*

Sweden (Prime Minister's Office) (1994) *Information Technology: Wings to Human Ability*. Stockholm, Sweden: Prime Minister's Office.

Toffler, Alvin (1980) *The Third Wave.* London: Pan Books.

Toffler, Alvin (1983) *Previews and Premises*. London: Pan Books.

Wasko, Janet (1994) *Hollywood in the Information Age: Beyond the Silver Screen*. Cambridge: Polity Press.

Williams, Raymond (1983) *Towards 2000*. London: Verso.