

# IMPACT OF THE COVID-19 PANDEMIC ON THE AUDIOVISUAL AND LIVE ENTERTAINMENT SECTOR IN THE AMERICAS.

A study in eight countries



# IMPACT OF THE COVID-19 PANDEMIC ON THE AUDIOVISUAL AND LIVE ENTERTAINMENT SECTOR IN THE AMERICAS.

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### Framework of the study

This report summarizes the results of a study prepared by a research team of the Universidad Metropolitana para la Educación y el Trabajo (Metropolitan University for Education and Work) (UMET) commissioned by UNI Media, Entertainment and Arts (UNI-MEI), the International Federation of Actors (FIA) and the regional groups of each Federation, FIA-LA and Panartes, with the objective of understanding the impacts of the crisis caused by the pandemic in the audiovisual and live entertainment sectors. The study was funded by Union to Union in the context of joint FIA and UNI-MEI projects for union strengthening in the region.

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# 1. INTRO- DUCTION





# 1.1. PRESENTATION OF THE PROBLEM AND OBJECTIVES

The outbreak of the COVID-19 pandemic in March 2020 has had a profound impact on the economic dynamics in all countries of the world, with drastic effects on the productive, labor and union spheres.

As highlighted by some international organizations, the isolation and/or social distancing provisions that countries were forced to implement as a method of protection had a special impact on entertainment, artistic and cultural activities, in which the agglomeration of people and the relationship with the environment and the public is a constitutive dimension (Organization for Economic Cooperation and Development, 2020; International Labor Organization, 2020).<sup>1</sup>

These trends are evident in the audiovisual and live entertainment sector, although due to the diversity of the segments and activities that they encompass, within them the impacts of the pandemic take on different scopes, depending mainly on how much they have been affected by the isolation provisions and how quickly primary and related activities have been resumed - with protocols.

In this regard, it is noted, for example, that the impact on the television and radio segment has tended to be more moderate and that even a part of this segment has benefited from the increase in its audiences as a result of the centrality acquired by the information and cultural services broadcast via streaming or similar, although there has also been a significant negative impact on that portion linked to programming and feature broadcasting, to the extent that activities have tended to be suspended, rescheduled or directly cancelled (ILO, 2020).

As for the situation concerning the film segment, the same source points out that it is strongly conditioned by the drop in box office takings and by the fall in income from productions throughout the entire distribution cycle.<sup>2</sup> In this regard, although the production and filming sector has begun to resume its activities with protocols, the precautions of social distancing continue to significantly limit the distribution and exhibition segment due to the impossibility of operating fully. However, as with television, other online distribution channels were less affected.

Finally, it should be noted that the live entertainment sector has been the most affected, while activity in traditional live performance environments has disappeared during the pandemic (ILO, 2020). As with the production activities of audiovisual contents in the filming phase, the brake on activity was disruptive, sudden and widespread, forcing the cancellation and postponement of projects that involved the loss of jobs in all cases.

Certainly, the bulk of activities of the audiovisual and live entertainment sector suffered a major paralysis, exposing a historical problem derived from an unstable way of working on projects, which

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<sup>1</sup> In this regard, the Organization for Economic Cooperation and Development (OECD) identified the arts, entertainment and recreation sector as the one that, along with tourism, will be most impacted by the crisis resulting from the pandemic, meaning that between 0.8% and 5.5% of total employment in North and South America, Europe and Asia-Pacific is at risk (OECD, 2020).

<sup>2</sup> Along these lines, it is indicated that worldwide box office losses reached 17 billion dollars at the end of May, strongly affecting production and primary distribution in cinemas (OECD, 2020).

was exacerbated under the new circumstances.<sup>3</sup> A good proportion of workers lost their source of employment and were not supported with economic benefits and social protections.

On the other hand, the activities that remained in operation, those that returned and those that are projected to return face renewed challenges linked to technological innovations, digital change and their effects on the world of work. The processes of organizational reconfiguration regained prominence with the pandemic, substantially increasing remote work and the logics of pre-existing labor delocalization.<sup>4</sup>

Without a doubt, the pandemic poses a critical scenario for the trade union organizations of these sectors, with many questions at multiple levels. The need to construct a diagnosis of the situation in terms of its scope and effects from a regional perspective is imperative. The state of knowledge on the subject requires collaborative efforts of exchange, reflection and research between the scientific-academic, labor and union fields.

In order to make progress in this direction, the study presented in these pages has been drawn up as a priority objective to analyze the impacts of the COVID-19 pandemic in the sector, focusing on the activities achieved by union representation based on a series of questions linked to the following central dimensions, which we distinguish in analytical terms, but which are examined in-depth:

- **Economic activity and employment:** how has the pandemic influenced sectoral growth, how many people lost their jobs due to the pandemic, which segments and activities were most affected, were there specific economic supports or social protection measures for workers in these sectors?
- **Working conditions:** how were working conditions affected in the different segments and activities, what has been the incidence of remote work, how were health protocols implemented and monitored, what have been the responses, adaptations and resistance in terms of work, what are the specificities according to gender?
- **Union organization and operation:** what are the greatest difficulties that unions have had to face during the pandemic, in what ways could they have been strengthened in this context, what actions did they take to defend the interests of workers, what assistance did they provide to those who were left without income, what perspectives and challenges do they project for the post-pandemic scenario?

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<sup>3</sup> This problem has aroused growing interest in the academic field in recent decades when these activities were no longer perceived as something separate from, or even opposed to, the world of work, but rather as one of the most accurate representations of its present and future challenges. In this regard, it is suggested that the following be consulted: Bulloni (2017, 2020b); Bulloni and Del Bono (2019); Christopherson and Storper (1989); Lash and Urry (1998); Menger (2005); Scott (2000); Segnini and Bulloni (2016); Smith and McKinlay (2009).

<sup>4</sup> These organizational trends have a more marked weight in the activities of the audiovisual field, although the study of their impact on the productive, labor and union fields remains an area that has received scant attention. Some contributions in this regard stand out: Bulloni (2020a); Del Bono and Bulloni (2018).

## 1.2. SCOPE OF THE STUDY AND METHODOLOGY

### *Sectoral delimitation*

The audiovisual and live entertainment sector lacks a uniform definition among the countries of the Americas. At the national level, various conceptualizations coexist depending on the institutional environment, its aims and objectives. Without attempting to settle this complexity, the sectoral delimitation elaborated upon in this study considers the following classification of activities and main economic segments:

Sector	Main activities involved	Prioritized segments
Audiovisual	Production of content for television, film, advertising, new media. Cinema exhibition. Broadcasting services.	Television and radio Cinema
Live entertainment	Artistic activities and shows.	Theater

This delimitation is linked to the scope of union representation responding to the interests of the institutions that demanded the study, while seeking to homogenize the diversity of terms related to these areas and their normative, conceptual and methodological criteria, which will be referenced when appropriate.

### *Geographical scope*

The study covers eight countries: Argentina, Brazil, Canada, Chile, Colombia, Mexico, United States and Uruguay.

### *Time frame*

The research was undertaken between September and November 2020.

### *Methodological design*

A methodological strategy was used that combines qualitative and quantitative techniques and primary and secondary sources. The research design envisaged a single approach strategy for the eight countries based on two main methods:

- *Interviews with trade union representatives*: this is the main strategy of the study and consisted of a survey aimed at UNIMEI/PANARTES and FIA/FIALA member unions linked to the sectors of interest in the eight countries. This survey has provided us with a very broad and rich picture

of information that was central to accounting for labor impacts in the sectors under union representation and the responses and challenges for the unions themselves.<sup>5</sup>

- *Analysis of documentary sources and statistics:* a wide range of sources was used: union publications, labor regulations, health protocols, specialized literature, sector studies and reports, public statistics, press articles, web pages and social networks, among others. This method was important in order to achieve a satisfactory sectoral contextualization complementary to the reduction preferred here, linked to the scope of trade union representation and the experiences and perspectives of member organizations.

To complement this, exchange meetings and permanent consultations were held with representatives of the applicant institutions and observation participants in seminars and presentations organized by them.

The empirical information presented in this report thus arises from the analysis of the data that we have been developing on the basis of a combined use of various techniques and sources of information. However, to understand the scope of the research presented in this report, it is important to emphasize that a qualitative approach focused on the union source has been prioritized, complemented with the preparation of quantitative data and structured information at the national level, seeking uniform criteria among countries, for which additional methodological decisions have been made.<sup>6</sup>

## 1.3. STRUCTURING OF THE REPORT

The report presents a diagnosis of the impact of the pandemic originated by COVID-19 on the audiovisual and live entertainment sector, structured in eight sections differentiated by country. In addition, a closing section presents an overall assessment by way of comparison based on the issues and dimensions addressed.

The country sections have the same structure of presentation. They address, first, the impacts of the pandemic on economic activity and sectoral employment at the national level and then focus on the analysis of the trade union sphere on the labor impacts in the sectors under representation, the trade union strategies to alleviate the crisis and the impacts and challenges for the trade unions themselves.

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<sup>5</sup> The Methodological Appendix contains details on the unions interviewed and the instruments used for the surveys (section 5.1: Union interviews).

<sup>6</sup> See section 5.2: Delimitation of the sector for the processing, preparation and analysis of statistical data, in the Methodological Appendix.

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# 2. COUNTRY REPORT



## 2.1. ARGENTINA

### 2.1.1. Relevance of the sector in the national economy<sup>7</sup>

With some 44.9 million inhabitants and a GDP in the order of 990 billion dollars, Argentina has 0.6% of the world's population and 0.8% of the global gross product according to the World Bank. The added value generated by the audiovisual and live entertainment sector represented, in 2019, 0.74% of the GDP and 34.5% of the added value corresponding to the cultural sector. These sectors employed 106,031 workers in that year, a figure that represents 0.51% of the total number of employed people in the country and 34.3% of employment in the cultural sector. The audiovisual sector is the largest one: it has 84.3% of the added value of the sector and 51.2% of the jobs.

### 2.1.2. Impact of the pandemic on economic activity and sectoral employment<sup>8</sup>

According to information provided by INDEC, the economic impact of the pandemic has been marked in Argentina. In the second quarter of the year, the country's GDP fell by 19.1% compared to the same period last year and by 12.6% year-on-year in the first half of 2020 (in the first quarter of the year, overall activity had fallen by 5.2% year-on-year). With regard to activity in the audiovisual and live entertainment sectors, it can be seen that during the first quarter of 2020 its gross added value contracted by 10.6% in relation to the same period in 2019, a figure that reached a decrease of 84.6% year-on-year during the second quarter of the year, when the impact generated by the provisions for isolation and curbing of activities was more fully grasped. Thus, in cumulative terms, during the first half of 2020, the activity of the sector shows a retraction of 47.4% in the year-on-year comparison.

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<sup>7</sup> This section presents data based on the information provided by Cuenta Satélite de Cultura prepared by INDEC. This source, given the methodology it employs, is the most appropriate for such purposes (see the Methodological Appendix for details).

<sup>8</sup> For the data prepared in this section, the quarterly estimates of the GDP and the number of employed people that emerge from the System of National Accounts and the Permanent Survey of Households prepared by INDEC were used as a source of information. It must be taken into account that the information provided by these sources does not feature a sectoral breakdown that allows us to understand the evolution of what was strictly defined as a sector of interest from the Cuenta Satélite de Cultura; the data provided corresponds to the evolution of those branches of activity in which the audiovisual and live entertainment sectors are contained. The Methodological Appendix specifies what additional activities are within the branches in each case, as well as those on which it was not possible to obtain information.

**Table 1** Impact on activity. Year-on-year variation 2019-2020. GDP and added value of the audiovisual and live entertainment sector

Level	1 <sup>st</sup> quarter	2 <sup>nd</sup> quarter	1 <sup>st</sup> half of year
<b>GDP</b>	<b>-5.2%</b>	<b>-19.1%</b>	<b>-12.6%</b>
<b>Audiovisual and live entertainment</b>	<b>-10.6%</b>	<b>-84.6%</b>	<b>-47.4%</b>

Source: Prepared in-house based on INDEC.<sup>9</sup>

The effects of the pandemic on sectoral employment in Argentina have also been more marked than in the economy as a whole. These were felt most severely towards the second quarter of 2020, with overall employment falling by 20.9% from the previous quarter.

In the audiovisual and live entertainment sector the reduction in employment was notably higher: it reached 58.2% year-on-year during the same period. This dynamic was mainly explained by the behavior of the live entertainment segments, where the drop during the year reached 84.1%, and the cinema segment, which registered a drop of 81.2%. On the other hand, in the broadcasting segment the number of employed people grew by 16.8% year-on-year.

**Table 2** Impact on employment. Variation in the number of employed people between the second quarters of 2019 and 2020

Sector and segments	Year-on-year variation
<b>Country total</b>	<b>-20.9%</b>
<b>Audiovisual and live entertainment</b>	<b>-58.2%</b>
Audiovisual	-34.3%
Broadcasting (television and radio)	16.8%
Cinema	-81.2%
Live entertainment	-84.1%

Source: Prepared in-house based on INDEC.<sup>10</sup>

Finally, the official source allows us to specify that in the broadcasting segment the expansion of informal wage-earning employment was the most significant (70% year-on-year), followed by the growth of formal wage-earners (27%). For its part, in the film segment, the loss of employed workers reached 95% year-on-year, and in informal workers the loss was 100%. In the self-employed group, the decline in employment reached 75% year-on-year. Similarly, in the live entertainment sector there was also a total loss of salaried jobs without social security registration (and an 80% drop in the total number of salaried workers), along with a 69% year-on-year decrease in self-employed workers.

<sup>9</sup> For more details on the sector delimitation, see the Methodological Appendix.

<sup>10</sup> Ditto.



### 2.1.3. Impact of the pandemic on activities under union representation. Responses and challenges for organizations<sup>11</sup>

As noted in the previous section, in Argentina, the crisis caused by the COVID-19 pandemic had a strong impact on economic activity and sectoral employment at the national level. In this section, the scope of the crisis in the activities under the following trade union representation is addressed:

Trade union	Sector segment	Scope	Employment situation
Sindicato Argentino de Televisión, Telecomunicaciones, Servicios Audiovisuales, Interactivos y de Datos (Argentine Union of Television, Telecommunications, Audiovisual, Interactive and Data Services) (SATSAID)	Audiovisual  Television, (free TV, series production and data transmission)	National	Stable salaried contract (73%). Temporary/self-employed (25%). No contract (2%). 35,000 represented.
Sociedad Argentina de Locutores Argentine Society of Broadcasters (SAL)	Audiovisual  Broadcasting	National	Stable, independent and informal salaried contract. 25,000 represented.
Asociación Argentina de Trabajadores de las Comunicaciones Argentinian Association of Communications Workers (AATRAC)	Audiovisual  Broadcasting	National	Stable salaried contract (86%). Temporary/fixed-term (14%). 3,500 represented.
Sindicato de la Industria Cinematográfica Argentina, Animación, Publicidad y Medios Audiovisuales (Union of the Argentine Film Industry, Animation, Advertising and Audiovisual Media) (SICA APMA)	Audiovisual  Film and advertising	National	Temporary/fixed-term contracts (91%). 4,000 represented.
Sindicato Único de Trabajadores del Espectáculo Público (Single Union of Public Show Workers) (SUTEP)	Audiovisual  Television, radio and cinema	National	Stable salaried contract (47%). Temporary/self-employed (53%) 38,000 represented.
Asociación Argentina de Actores (Argentine Actors Association) (AAA)	Audiovisual  Radio and television broadcasting  Live entertainment	National	Temporary/fixed-term (100%). 15,000 represented. 6,000 members.

To contextualize the following analysis, it is important to note that work in the sector is historically regulated by labor legislation and collective bargaining. Not without difficulties, marches and countermarches, this protective regulation seeks to be protected and amplified by the action of the

<sup>11</sup> This section presents the analysis of the interviews carried out with trade union representatives in the sector. The Methodological Appendix presents an overview of the unions that were targeted for interview and the dates and references of those that were contacted, which are a privileged source of information for this report.

unions and representative professional associations.<sup>12</sup> The strength of the Argentinian unions in the sector is linked to an outstanding industrial development articulated with a historical model of union unity. It is also important to note that in Argentina unions are one of the pillars of the health system, based on the medical benefits they provide through the social works they administer.

With the arrival of the new government at the end of 2019, there were new expectations in terms of labor matters, but the outbreak of the pandemic originated by COVID-19 caused an unprecedented crisis in the sector.

On March 20, 2020, the Argentine Government established the Social, Preventive and Mandatory Isolation (ASPO), which involved the confinement of the population to the locations in which they were present at that time and determined some labor activities as essential and, therefore, authorized to operate during the ASPO (Decree 297/2020), shaping a critical and heterogeneous panorama in the labor and union environments of the country (Arias et. al, 2020). In this situation, some essential tasks and activities of the broadcasting segment (TV and radio) were defined, while the bulk of those corresponding to the cinema and live entertainment segment were paralyzed, with enormous challenges for all parties involved.

In view of this situation, various public policies were developed, among which it is possible to highlight the one implemented by the Ministry of Culture of the Nation from the “Cultura Solidaria” program. Together with the provincial governments, it developed a series of actions to mitigate the social and economic effects affecting cultural workers in this health emergency context.<sup>13</sup> However, as a recent publication reports (Bulloni, 2020), given the characteristics of labor regulation based on predominantly casual labor, workers in these activities were left for months extremely unprotected, since they were not easily supported by the various measures and economic aid that were put in place by the State. It was not until the end of August that the conditions for a return to work in the audiovisual segment were established with the presentation of a national protocol in which the unions played a key role.<sup>14</sup>

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<sup>12</sup> After a process of strengthening labor institutions in the country during the Kirchner governments (2003-2015), the logic of flexibility became more acute with the arrival of the Cambio coalition government (2015-2019) and its regressive framework in labor matters. However, the strengthening of union practices during the previous period allowed the influence of the weight of union regulation in the sector to be sustained. These issues are addressed in detail in Bulloni (2017); Bulloni and Del Bono (2019); Bulloni and Pontoni (2019); Vocos (2019).

<sup>13</sup> The main measures consisted of economic support, and included: the extension of the budget of the “Puntos de Cultura” program to strengthen community organizations; the “Fondo Desarrollar”, oriented to cultural spaces; the “Sostener Cultura” Grants from the Fondo Nacional de las Artes; and the “Fortalecer Cultura” plan for artists in emergency situations. Zero-interest loans were also offered to cultural industries and SMEs in the cultural sector.

<sup>14</sup> It is a mission coordinated between the Ministry of Culture of the Nation and the technical team of the Superintendencia de Riesgos del Trabajo (SRT), developed jointly with the representative entities of the audiovisual sector. Available at: [https://www.cultura.gob.ar/media/uploads/ministerio\\_cultura\\_-\\_protocolo\\_general\\_covid19\\_para\\_el\\_rodaje\\_y-o\\_grabacion\\_de\\_cine\\_television\\_y\\_contenidos\\_para\\_plataformas\\_audiovisuales\\_v.pdf](https://www.cultura.gob.ar/media/uploads/ministerio_cultura_-_protocolo_general_covid19_para_el_rodaje_y-o_grabacion_de_cine_television_y_contenidos_para_plataformas_audiovisuales_v.pdf)

### 2.1.3.1. Impact on the labor environment and union responses

The diagnosis on which the different trade union organizations agree is that the pandemic generated by COVID-19 has deepened the complex situation that was being experienced by the sectors during the Cambio coalition government (2015-2019). In relation to the impact of the pandemic among the various sectors and segments covered by union representation, SATSAID reported that the loss of employment among the workers in the audiovisual sector amounted to 28% (76.1% of the total were men), the majority of which being workers hired on a fixed-term basis.

In the case of free TV, the response of the TV channels was to reduce the allocation to a minimum and for the most part to leave informative programs and some live entertainment programs. Any task that could be performed remotely was transferred to the homes of the workers along with those who were identified as at-risk population. At first, since the protocols had not yet been implemented, a high level of infection was verified, which led to the cessation of several live programs.

On the other hand, due to international commitments, audiovisual content production companies for foreign channels (Disney, Turner, Fox, ESPN) continued to carry out their tasks. These companies found it easier to implement remote working, as they had partially implemented this modality before the pandemic.

In the case of feature producers, activities were almost totally stopped. The trade union organization estimates that the slowdown of activities reached 95%, impacting on jobs, especially in non-permanent or temporary contracts, which are numerous in this segment.

In the case of cable TV, given the technological convergence with Internet services, there was a growing need for connectivity in homes, which implied a strong demand for this service. Workers continued to carry out their tasks, both installation and maintenance, based on the agreement of a very strict prevention protocol in the field of health and safety at work<sup>15</sup> with the business sector shortly after the declaration of the ASPO.

In relation to the radio sector, the unions (AATRAC, SAL, SUTEP) point out the profound difficulties they had in getting employers to incorporate the various health prevention measures. The companies minimized the situation, until in some radio stations the levels of contagion were extremely high. After that, remote work was implemented for different tasks (operators, announcers).

In relation to the activities achieved by SICA APMA, the paralysis of the activity caused by the pandemic impacted, according to the data provided by the union, 160 feature and documentary films, 650 advertisements and 20 short films. To these productions that were in progress or in the pipeline must be added a significant number of projects, 120 features and documentaries and about 500 advertisements for new projects that had to be canceled or postponed. Only 10 feature films were released on platforms. Within this framework, only 10% of the workers were able to continue working in activities related to the activity. In the case of advertising, a trend towards relocation was observed.<sup>16</sup>

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<sup>15</sup> Protocol of action for service companies that provide connectivity (ATVC - SATSAID), March 19, 2020.

<sup>16</sup> Several productions began to be made in different provinces of the country and in Uruguay due to the impossibility of filming in Buenos Aires. In the case of advertising, it is possible to visualize an opportunity in the future, since the frequent use of communication platforms would allow the increase of filming in the country of foreign productions, since the direction and the executive production could be handled in the place of origin.

For their part, the different specialties linked to film exhibition were completely paralyzed. SUTEP emphasizes that it was possible to curb layoffs and that workers continued to receive their salaries.

As for actresses and actors, since the AAA there is a need for data that account for the employment crisis suffered by them in the context of the pandemic. According to their records, between January and August 2020, activity decreased by 46% compared to the same period in 2019 in the acting segment. It is necessary to apply a caveat in that a differential impact is observed within this segment: dubbing (-82%) and advertising (-55%) stand out as those experiencing greater retraction, and the broadcasting sector as that in which the decrease was substantially lower (-3%). In terms of projects, it was also indicated that 100% of the productions already underway and planned to be launched during 2020 were halted as a result of the ASPO declaration in March.

In August, shooting of advertising and 3 series to be broadcast on platforms resumed. In relation to live entertainment, the union registered up to that moment the realization of about 30 plays to be transmitted by streaming.

In a context as dynamic as the one heralded by the pandemic, on November 9<sup>th</sup> the “General Protocol for theatrical activity and live music with an audience” was approved,<sup>17</sup> as a result of which the first shoots of recovery for theatrical activity began to be seen.

SUTEP warns that theater workers hired on an ad hoc basis continued to be paid during the pandemic.

Another aspect to highlight refers to the impacts of teleworking on psychosocial health and working conditions. Trade unions report with concern that teleworking has blurred the working day, and companies repeatedly fail to respect working hours and fail to pay overtime. Other difficulties that usually arise are the lack of compliance with the right to disconnect and the requirement of compliance with work tasks by superiors during non-working hours.

On the other hand, it has been emphasized that some companies have intensified their tasks and made progress in the implementation of different modalities of labor flexibility.

In this sense, in the case of the companies linked to the cinema segment, the hiring periods were shortened in order to reduce costs associated with possible infections.

In this particular context of pandemic, the trade unions had to face different types of conflicts.

On some occasions, especially in activities with a predominance of stable employment, the unions had to demand the payment of salaries when activities were suspended. To be able to carry out these demands, two measures implemented by the national government were vital – according to the unions themselves: the extension of the decree of necessity and urgency that prevents dismissals and suspensions (Decree 329/2020)<sup>18</sup> and the implementation of the “Work and Production Assistance Program (ATP)”<sup>19</sup> in which the State makes a compensatory allocation of salaries to companies.

The business response was uneven and, to a large extent, the union’s demand was met. A resounding conflict in this context has been that of the largest audiovisual production company in the country: Polka,<sup>20</sup> which, despite having great financial backing, decided to suspend the payment of

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17 Available at: <https://www.boletinoficial.gob.ar/detalleAviso/primera/237264/20201113>.

18 Available at: <http://servicios.infoleg.gob.ar/infolegInternet/anexos/335000-339999/335976/norma.htm>.

19 Available at: <https://www.argentina.gob.ar/produccion/medidas-pymes-covid/atp>.

20 It is a company belonging to the largest media business group in Argentina (Grupo Clarín), with an open anti-union policy and constant intervention in the public agenda.

salaries. The union organizations involved in the conflict (SATSAID and AAA), faced with the company's intransigence, opted for different forms of collective action, from mobilizations to the company's headquarters to an active campaign on social networks. This conflict remains ongoing and the company has used the months of the ASPO to implement a policy of "voluntary withdrawals" and termination of contracts outside the legal framework. Union pressure allowed the economic compensation received by the workers to be much greater than that initially offered by the company and in the case of SATSAID, that the workers could continue to receive 75% of their salary (involving many obstacles and payments made in installments).

Another conflict of singular magnitude is the one in which SUTEP has been embroiled in order to demand wages from one of the largest multinational film chains. This singularly important company chairs the Argentine Chamber of Multi-Screen Exhibitors (CAEM) and deliberately offered during the negotiations to resolve the salary situation in exchange for implementing different labor flexibility clauses in the activity's Collective Labor Agreement (CCT).

Also, given the particular structure of collective bargaining, there were several wage updates pending from 2019 and, at the same time, negotiations were to be carried out this year.<sup>21</sup> Various unions were able to move forward and agree on a salary increase, such as the organizations of the Intersindical Radial (AATRAC, SAL and SUTEP)<sup>22</sup> and the SICA APMA, which, despite the lack of film activity, was able to reach an agreement on a 32% increase with a review clause.<sup>23</sup> In the case of SATSAID, after announcing various strict measures and the intervention of the Ministry of Labor declaring conciliation obligatory, the business chambers were willing to negotiate and managed to agree on salary increases.

In this regard, the union entities considered that, throughout the different conflicts, the new technologies facilitated communication and participation of the workers. Companies frequently held assemblies and some entities even held national plenaries of delegates and leaders, increasing the capacity to respond with greater agility and speed in terms of union action.

On the other hand, the unions also responded to those workers who, as we saw previously, began to carry out their tasks remotely in their homes.

In some activities, there was a massive exodus due to the implementation of teleworking, which safeguarded workers by giving them the possibility of remaining isolated, although other difficulties began to be experienced, mainly those related to ensuring work tasks were completed in the face of domestic obligations and care of children and other family members. Faced with this extremely demanding situation, the unions paid special attention to the situation of women from different organizational levels (for example, commissions and secretariats). This is the case of SATSAID, which, in coordination with its gender secretariat, has succeeded in getting some companies to exempt female workers from performing their work tasks.

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<sup>21</sup> In 2019 there was a 53.8% increase in the consumer price index (CPI); and between January and October 2020, it was 26.9%, according to INDEC (2020a, 2020b).

<sup>22</sup> Within this framework, they achieved wage increases for private radio workers by activating the 2019/2020 wage review clause. Available at: <https://mundogremial.com/radios-privadas-gremios-logran-revision-salarial-y-levantan-medidas/>.

<sup>23</sup> Available at: [https://sicacine.org.ar/nota.aspx?tl=INFORMACI%C3%93N-IMPORTANTE---PARITAR-IA-PUBLICIDAD\\_jkmsdajsvfejiaomsdh](https://sicacine.org.ar/nota.aspx?tl=INFORMACI%C3%93N-IMPORTANTE---PARITAR-IA-PUBLICIDAD_jkmsdajsvfejiaomsdh).

The union entities, together with the Ministries of Culture and Human Rights of the Nation, processed the delivery of food for its later distribution among the members. In order to implement this unprecedented measure, leaders, union delegates and volunteers, in solidarity, made their vehicles available and distributed food to the homes of the workers who needed it.

Similarly, the unions took the initiative to promote economic assistance from the State which later led to the already mentioned “Becas Sostener Cultura I y II”. Within this framework, the unions provided the program applicants with a guarantee of working at their activity.

Undoubtedly, one of the key responses sought as soon as the ASPO was declared is the establishment of health protocols for each activity. It is important to note that this rapid initiative is the result of the international exchange promoted by UNI-MEI and FIA-LA with different trade union organizations that, in their countries, had made progress in the design of these prevention measures. At first, SATSAID found that the free TV camera was not available for the assembly of the protocol, and as previously observed, the absence of prevention measures meant that the activity was hampered by a significant number of infections. On the other hand, it was possible to make progress with the program producers’ camera, with the cable and satellite TV camera, and different protocols were signed by each company. SICA, AAA and SUTEP also began negotiations with the advertising chamber for the establishment of the health protocol.

The unions visualized the need to create a general protocol for audiovisual activity, so they requested the intervention of the Ministry of Culture of the Nation, which invited the group of social actors that integrate the activity to participate in its construction. The SRT was added to the work of development.<sup>24</sup> The technical work provided by this unit was key to the design of the various health measures in a highly complex context such as the pandemic. The document involved a general agreement that included the contributions and needs of each sector, and was endorsed by more than twenty associations in the country.<sup>25</sup>

Similarly, at the beginning of November the protocol for theatrical activity came into force.<sup>26</sup>

It should be added that these protocols were developed using a participatory methodology that involved the formation of working groups, in which there were debates and consensus among the various organizations. This dynamic was completely different from the one implemented by the Government of the Autonomous City of Buenos Aires, which unilaterally defined the protocol of the

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<sup>24</sup> An organization that depends on the Ministry of Labor, Employment and Social Security (MTEySS) and whose main objective is to guarantee the effective fulfillment of the right to health and safety in the workplace.

<sup>25</sup> “General protocol for the prevention of COVID-19 in the filming and/or recording of features for cinema, television and contents for audiovisual platforms”. Available at: <https://anuncios.cultura.gob.ar/lt.php?id=fEgFXABTAk1aAQMOTgsECgYBAG>.

<sup>26</sup> Available at: [https://www.argentina.gob.ar/sites/default/files/protocolo\\_general\\_para\\_la\\_actividad\\_teatral\\_y\\_musica\\_en\\_vivo\\_con\\_publico.pdf](https://www.argentina.gob.ar/sites/default/files/protocolo_general_para_la_actividad_teatral_y_musica_en_vivo_con_publico.pdf). In this case, the agreement reached is the result of the work and coordination of numerous representative groups of the theater and music sector together with the Ministry of Culture of the Nation, the Ministry of Health and the SRT, in which, without a doubt, the participating union organizations played a prominent role.

advertising film production industry.<sup>27</sup> In relation to the protocol for the audiovisual sector, the unions turned to different organizational bodies to monitor its application.

A relevant tool used by SATSAID is the result of previous collective negotiations, such as the formation of “Joint Committees on Health, Hygiene and Occupational Health” in companies with more than ten workers. Without a doubt, this organizational tool allowed the union to intervene more in the workplace. In the companies where the “Mixed Committees on Health, Hygiene and Labor Health” were not yet formed, the action of the personnel delegates was fundamental.

Other trade union organizations have resorted to different forms of control to make the protocol effective. SICA APMA and the AAA have implemented an inspection system in which inspectors verify compliance with the forms of contract and working conditions. In entities such as SUTEP, SAL and AATRAC, the action of the union delegates is vital for daily compliance with the various health and safety measures in the workplace.

In addition, several unions implemented training activities on the scope and modalities of work defined by the protocols, so that delegates and members could have the tools to apply them in their workplaces. In this sense, the unions argue that in the absence of government controls on health and safety at work, it is the workers who must enforce what has been agreed.

Finally, it should be noted that, given the growth of the platforms as global producers of audiovisual content, the trade union organizations held meetings with Netflix and established the commitment of the parent company to comply with labor legislation.

### **2.1.3.2. Impact on unions and coping strategies**

The declaration of the ASPO involved a profound transformation of the trade union organizations, which, among other aspects, had to modify the way they relate to the workers they represent.

The various unions interviewed reported that when the union headquarters were closed, they began to carry out their tasks remotely, which at that time posed a profound challenge in terms of ensuring attention and demands of members.

New technologies made it possible to resume operations within a few days. In the sectors with a predominance of casual labor, trade unions were one of the few social actors to whom workers could turn when faced with a lack of employment. The demands intensified notably and, in part, could be channeled through meeting spaces and participation through digital platforms.

In this same direction, the unions had to transform their communication policy. The eagerness of the affiliates who were in a pressing situation to receive information implied a turn towards social networks, looking for a more dynamic and agile communication.

The pandemic also affected the amount of financial resources needed to maintain its organizational structure. The AAA recently issued a press release in which it states the seriousness of the situation it is experiencing and adds that “our reality is becoming increasingly hard and unsustainable.”<sup>28</sup>

For the same reasons, the union social works were also found to be underfunded in the face of the sharp drop in income. In a context where a large number of workers were unable to continue making

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<sup>27</sup> “Protocol for the prevention and management of cases of COVID-19 in activities of the advertising film production industry”, published on August 21, 2020 Available at: <https://www.buenosaires.gob.ar/sites/gcaba/files/if-2020-20232487-gcaba-mcgc.pdf>.

<sup>28</sup> Available at: <https://actores.org.ar/asociacion/grave-situacion-asociacion-argentina-actores>.



their contributions, the decision was made to continue providing the benefits in a supportive manner. In this aspect, it is important to highlight the significant transfer of funds they received from the State to cover the decrease in economic resources.<sup>29</sup>

In these complex circumstances, social work entities also faced the high costs of medical care resulting from COVID-19. They even provided medical benefits to those workers who contracted the virus while doing their job and whose claims were rejected by Aseguradoras de Riesgos del Trabajo (ART).<sup>30</sup>

#### 2.1.4. Union perspectives and challenges for the post-pandemic scenario

The particular situation that triggered the pandemic allows us to identify multiple challenges to be faced by the trade unions.

Firstly, the sudden halt in the various activities of the audiovisual and live entertainment sectors revealed the enormous vulnerability of a large number of workers who, in their various trades, are hired on a casual basis.

In view of this problem, there is a need to design proposals linked to social security so that workers in the sector can have access to unemployment insurance.

On the other hand, it is also key to make progress in collective bargaining on the implementation of teleworking. To this end, it is convenient that the new law,<sup>31</sup> which has not yet been regulated, comes into force. In relation to this problem, there are several aspects that should be considered, such as the provision of equipment, connection and input costs and the definition of the workday. Likewise, the union entities have voiced their concern about the impact that this modality of work could have from the organizational point of view. They point out that it is key that companies have the obligation to provide the contact details of the workers who are carrying out their tasks remotely. Unions are aware that teleworking can represent a strategy that encourages the atomization of labor groups and discourages union activity.

Another relevant aspect is linked to how to strengthen the different tools that made it possible to increase levels of participation. The unions are analyzing, with a view to future implementation, the various ways of integrating face-to-face intervention together with the virtual entities that facilitate constant communication.

In this sense, many questions remain in terms of how the pandemic will condition future collective action. It is important to analyze the most appropriate ways to push demands in a scenario that has weakened workers in terms of the balance of power.

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29 Resolution 1284/2020. National Ministry of Health. Available at: <https://www.boletinoficial.gob.ar/detalleAviso/primera/232638/202007281%20de%204%20MINISTERIO%20DE%20SALUD%20Resoluci%C3%B3n%201284>.

30 The occupational risk system resulting from Law 24557 states that in the event that the illness or accident suffered is the result of work or occurs during work, the medical benefits must be covered by Aseguradoras de Riesgos del Trabajo (ART). These are for-profit insurance companies hired by employers.

31 Law 27555. Available at: <https://www.boletinoficial.gob.ar/detalleAviso/primera/233626/20200814>.



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## 2.2. BRAZIL

### 2.2.1. Relevance of the sector in the national economy<sup>32</sup>

With some 211 million inhabitants and a GDP of the order of 3 trillion dollars, Brazil has 3% of the world's population and 2% of the global gross product according to the World Bank. In the country, the added value generated by the audiovisual and live entertainment sector accounts for 0.9% of the GDP and 8.8% of that of the cultural industry as a whole, and represents 0.5% of the total number of people employed in the country and 9.1% of those employed in the cultural industry. The broadcasting segment is the most relevant within the sector, followed by cinema and live entertainment.

### 2.2.2. Impact of the pandemic on economic activity and sectoral employment<sup>33</sup>

As data from official sources shows, the economic impact on the sectors addressed is certainly profound. During the second quarter of 2020, a period in which the restrictions forced by the COVID-19 pandemic were fully felt, Brazil's economy contracted by 11% year-on-year. However, given the better relative performance recorded during the first three months of the year (there had only been a 0.3% fall compared to the same period last year), the accumulated decline during the first half was around 6% year-on-year.

Within this framework, the volume of income from the audiovisual sector fell by 32.7% year-on-year during the second quarter of the year, a figure that is considerably higher than the drop recorded in service activity as a whole (-16.3% year-on-year). Thus, it can be seen that during the first half of 2020 the activities of the sector experienced a fall of 17.9% with respect to the same period of the previous year, given that in the first quarter of 2020 the decrease in the volume of the offer of these services was 2.6% year-on-year.

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<sup>32</sup> This section presents sectoral data prepared by us based on the 2017 *Sistema de Información e Indicadores Culturales* (SIIC). This source, since it follows the methodological principles of the development of the culture satellite accounts, is the most appropriate for dimensioning the sector in relative terms to the size of the national economy. See details in the Methodological Appendix.

<sup>33</sup> This section uses as sources of information the monthly volume index of sales in the audiovisual sector and the national household survey, compiled by Instituto Brasileiro de Geografia e Estatística (IBGE). It should be taken into account that, since the information provided by these sources is not broken down by sector, which would make it possible to ascertain the evolution of what was strictly defined as a sector of interest based on the culture satellite account, the data provided corresponds to the evolution of those branches of activity in which the audiovisual and live entertainment sector is included. The Methodological Appendix specifies the additional activities that are included in each case, as well as those about which it was not possible to obtain information.

**Table 3** Impact on activity. Year-on-year variation 2019-2020.  
GDP and volume of income from the audiovisual sector

Level	1 <sup>st</sup> quarter	2 <sup>nd</sup> quarter	1 <sup>st</sup> half of year
<b>GDP</b>	<b>-0.9%</b>	<b>-10.9%</b>	<b>-5.9%</b>
<b>Total services</b>	<b>-1.2%</b>	<b>-16.3%</b>	<b>-8.7%</b>
Audiovisual	-2.6%	-32.7%	-17.9%

Source: Prepared in-house based on data from the Central Bank (IBC-Br) and the Brazilian Institute of Geography and Statistics (IBGE).

However, it is worth noting that the fall in activity in the audiovisual sector would seem to have somehow bottomed out during May 2020. In that month, the most notable retraction of activity of the year was recorded (36.3% year-on-year) and, since then, although the drops continue to be pronounced and much higher than those recorded for services as a whole, these have tended to decrease slowly over the months (the last record, corresponding to August 2020, shows a decrease of 24.2% compared to the same month in 2019).

As a complement to this analysis, the unions involved in the study reported that the isolation provisions implemented as a result of COVID-19 involved various challenges for the sector: a drop in turnover levels, the interruption of projects in progress, the suspension - partial or total - of other work projects and even the closure of companies themselves.

In relation to the impacts on employment, unlike what happens in other countries analyzed, where after the second quarter of 2020 employment levels have begun to show some signs of recovery, in Brazil the fall still continues to deepen over time. In particular, during the quarter June-August 2020, not only was there a year-on-year drop of 12.8% in the employment level, but also a 5% decrease with respect to the quarter March-May (Instituto Brasileiro de Geografia y Estadística, 2020). In absolute terms, this implied losses in the order of 8 and 12 million jobs, respectively, during the quarters in question with respect to the June-August 2019 quarter.

**Table 4** Impact on employment. Variation in the number of employed people between the second quarters of 2019 and 2020

Sector and segments	Number of employed		
	2 <sup>nd</sup> quarter (2019)	2 <sup>nd</sup> quarter (2020)	Year-on-year variation
<b>Country total</b>	<b>93,224,853</b>	<b>83,276,759</b>	<b>-10.7%</b>
<b>Audiovisual and live entertainment</b>	<b>448,910</b>	<b>382,336</b>	<b>-14.8%</b>
Audiovisual	163,146	155,023	-5.0%
Broadcasting (television and radio)	123,713	112,704	-8.9%
Cinema	39,433	42,319	7.3%
Live entertainment	285,764	227,313	-20.5%

Source: Prepared in-house based on data from National Research by Amostra de Domicílios Contínua (Brazilian Institute of Geography and Statistics – IBGE, 2020).<sup>34</sup>

In the audiovisual and live entertainment sector, the reduction in the number of employed people reached 14.8% year-on-year during the second quarter of 2020 (latest available data). This is a loss of around 66,600 workers, mainly explained by the dynamics of employment in live entertainment - in which the drop during the same period reached 20.5% - and broadcasting (which registered a drop of 8.9%). In contrast, the number of people employed in the film sub-sector remained above the level recorded in the same period in 2019 (7.3%) in the second quarter, although it has since shown quarter-on-quarter reductions that imply that the loss of jobs compared to the end of 2019 reached 12% (6,000 jobs).

### 2.2.3. Impact of the pandemic on activities under union representation Responses and challenges for organizations<sup>35</sup>

As shown in the previous section, the crisis caused by the COVID-19 pandemic had a strong impact on economic activity and sectoral employment at the national level. The following is an approximation of the scope of the pandemic in the activities of the audiovisual and live entertainment sector in Brazil, as contemplated in the following trade union representation:

<sup>34</sup> For more details on the sectoral delimitation, see the Methodological Appendix (section on country details).

<sup>35</sup> This section presents the analysis of the interviews carried out with trade union references in the sector. The Methodological Appendix presents a detail of the union organizations in the eight countries that were targeted for interview (35 unions) in the survey, and the dates and references of those that were contacted (29 unions), which are a privileged source of information for this report.

Trade union	Sector segment	Scope	Employment situation
Federação Interestadual dos Trabalhadores em Radiodifusão e Televisão (Inter-State Federation of Radio and Television Workers) (FITERT)	Audiovisual Radio and television broadcasting	Federation of 24 unions (mostly statewide)	Stable salaried contract 50,000 affiliated workers 230,000 represented.
Sindicato dos Trabalhadores na Indústria Cinematográfica e do Audiovisual (Union of Workers in the Film and Audiovisual Industry) (SINDCINE)	Audiovisual Cinema	Regional Union (São Paulo, Rio Grande do Sul, Mato Grosso, Mato Grosso do Sul, Goiás, Tocantins and Federal District)	Stable salaried contract (17%) Unstable (83% temporary, self-employed, without contract). 600 affiliates.
Sindicato dos Artistas e Técnicos em Espetáculos de diversões do Estado de Minas Gerais (Union of Artists and Technicians in Entertainment of Diversities of the State of Minas Gerais) (SATED-MG)	Audiovisual Live entertainment	Trade union. State scope of action: Minas Gerais	Informality. 7,465 affiliates. 16,500 represented.

By way of contextualization, it is important to point out that although the labor situation of the bulk of the activities of these sectors is framed in professional categories that allow for the protection of the labor relationship and the assurance of individual and collective rights, in practice, processes of labor flexibilization can be observed (Bulloni, 2016), deepened as a result of the brutal labor reform of 2017 and the orientation of labor policy during the last five years.

Likewise, it is pertinent to clarify that the sector's union organization, in line with the country's union model, is supported by state-based unions, with significant asymmetries depending on the state.<sup>36</sup> The reality reported by the interviewees is limited centrally to the situation in São Paulo, Rio de Janeiro and Belo Horizonte, where a large share of the film, radio and live entertainment activities are concentrated.

On March 18, quarantine was decreed in Belo Horizonte; on March 22, in the state of Rio de Janeiro;<sup>37</sup> and on March 24, in the state of São Paulo, where the filming for cinema and television and live shows were cancelled and interrupted,<sup>38</sup> so the great majority of the workers in these sectors were unable to carry out their activities and underwent various situations.

### 2.2.3.1. Impact on the labor environment and union responses

In terms of the overall diagnosis of the impact of the pandemic, the unions SINDCINE, SATED-MG and FITERT agreed that it was very negative, (in the words of our interviewees “a disaster”, “very violent”, “chaotic situation”). The workers found themselves unexpectedly without their source of work and, therefore, their income. The advertising market shut down for two months and audiovisual production was paralyzed for more than four months, while live artistic activities were paralysed, at the time of writing. As a consequence of this situation, an impact on the sector's labor market is beginning to be noticed, especially on the labor situation of workers and their working conditions.

<sup>36</sup> For more details, see Robles (2016).

<sup>37</sup> Available at: <https://pge.rj.gov.br/covid19/municipal/decretos>.

<sup>38</sup> See “Decree interrupts filming in São Paulo” at <https://propmark.com.br/mercado/decreto-interrompe-filmagens-em-sao-paulo/>.

In relation to the radio workers, FITERT's union leader, in general terms, highlighted the loss of jobs, the suspension of work contracts and the decrease in wages. These circumstances, with a previous development, deepened its scope during the crisis of the COVID-19.<sup>39</sup>

In this context of flexibilization, companies established the remote work mode, a condition that was accompanied by a decrease in salary, but not in the hourly workload.

With regard to the activities under the representation of SINDCINE, the union was able to specify that of the 460 projects that should have been underway during 2020, 150 had to be terminated or suspended, and another 100 new projects to be launched had to be postponed or cancelled. This situation affected 10,000 jobs, while the postponement or cancellation of new projects to be launched put an additional 300 workers at risk.

In relation to the impact of the pandemic on employment, the union highlighted a 43% drop, which is centrally explained by the 83% contraction in the self-employed or independent employment segment (from 300 to 1,800 workers) and, to a lesser extent, by the losses registered among salaried workers with stable contracts (57%) and temporary contracts (33%). According to a survey conducted by SINDCINE, self-employed workers, not having a fixed income, only had savings to survive two months.

As far as the working modality is concerned, some projects and filming was able to be done remotely using equipment belonging to the technicians themselves and stored scenery and costumes. Remote working, which involved a very small force of about 1,500 workers, was the only working mode developed during the first three months of the quarantine.

An important aspect mentioned in the interview is that COVID-19 has had a differentiated impact on female workers - who represent about 30% of the workers in the sub-sector - since they have had to combine their work with household chores and childcare (because schools were closed). It was also noted that social isolation left many female workers unprotected in situations involving gender violence.

In terms of workers' health, the union recorded four deaths from COVID-19 in the state of São Paulo and several cases of asymptomatic people. This low incidence can be attributed to the fact that the measures of suspension of activities were adopted in time, thus protecting the health of the people. An important aspect that was highlighted is that of health insurance: since no work was being done, companies did not pay for private health insurance. In the event that a worker became ill, he or she had to turn to the Unified Health System (SUS) of the public system. The same happened with life insurance, which was also suspended. In the face of this, it was the union itself that began paying the life insurance fees of its members so that they would not lose coverage.

Regarding the situation of SATED-MG, the crisis caused by the COVID-19 pandemic had a strong impact on the employment situation and working conditions of artists, actors and technicians, since the vast majority are self-employed. According to this union, there was almost no activity at all for

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<sup>39</sup> In Rio de Janeiro, for example, some radio and television stations fired more than 300 workers. Between March 23<sup>rd</sup> and 24<sup>th</sup>, professionals from Dial Brasil (radio stations Mix and Sul América Paradiso FM) and Casablanca (the biggest TV Record producer) were dismissed en masse. The Globo Network fired workers with job stability. See: <http://www.radialistasp.org.br/index.php/servicos/noticias/4262-globo-demite-trabalhadores-que-tem-direito-a-estabilidade-no-emprego.html>.

seven months,<sup>40</sup> which made actors extremely vulnerable: without work, without income and with financial difficulties, they had to resort to state assistance and union support. On this point, it should be noted that the supply of work has historically been unequal between large and small cities. While in cities such as São Paulo or Rio de Janeiro there are greater job opportunities because the main television channels are located there, in small cities activities are restricted to theatrical activity and, sporadically, to film production.

With regard to the employment projection made by the union, we do not have precise information. Although a high proportion of the projects planned for 2020 were re-launched via streaming, this strategy was marked by actions that were rather individual and uncoordinated with each other, which meant that the results in terms of activity were scarce.

Regarding workers' health, the union has not registered any of its members as having COVID-19.

With the shows and audiovisual productions cancelled or suspended, many of the people who work in these sectors were unable to access official emergency aid, either because of delays in collecting the subsidy or because a large number did not meet the requirements for access to the benefit. Faced with this situation, unions began to develop strategies, in some cases in alliance with companies in the sector, with the aim of protecting the employment, income and health of workers represented by them. The following is a brief description of the main actions developed.

With respect to FITERT, in April, the unions representing journalists and broadcasters sent a Joint Circular to companies providing communication services, urging them to adopt the necessary measures to guarantee the safety and health of workers.

Most of the unions belonging to FITERT developed actions to protect health and to guarantee labor income. SinRadTv-RJ distributed food baskets to all the radio stations that signed up for the solidarity campaign that began in April, through the Vakinha Online platform. The Sindicato dos Radialistas de São Paulo distributed a basic food basket for each person worth 200 reais. The Federation, for its part, unable to move to the various states, encouraged local unions to develop actions that would bring them closer to their members.

One of the strategies highlighted by FITERT's management was the initiative of the Sindicato dos Radialistas de Sergipe, which managed to get the Sergipe State Secretary of Health to carry out a general COVID-19 test exclusively for radio broadcasters. This action was fundamental for these workers to be able to carry out their work in line with the recommended safety measures.

Finally, some unions negotiated and agreed to addenda to existing Collective Bargaining Agreements, thus ensuring working conditions during the pandemic period. However, beyond this specific strategy, according to FITERT, there is currently a process in which collective agreements are losing ground in terms of the historical advances made and in which the main characteristic is the lack of reaction, mobilization and power of collective organization.

In the case of SINDCINE, with the objective of guaranteeing food safety for workers in the audio-visual sector and their families, the union reports that, during the state of health emergency, baskets containing food and hygiene and cleaning products were delivered.<sup>41</sup> This initiative was financed through the union's social fund and donations from various associations in the sector, such as the

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<sup>40</sup> The Prefeitura de Mina Gerais authorized the opening of the theaters on October 31.

<sup>41</sup> Each basket (approximately 40 kg) contained enough products to support a family of four for two months. According to SINDCINE, during the state of health emergency, about 2,000 bags of food were delivered.



Associação Brasileira da Produção de Obras Audiovisuais (APRO). Due to the limited resources of the union, this initiative was intended for affiliated technicians only.

In relation to aid actions, the union leader highlighted the COVID-19 Emergency Fund, created in Brazil from the global initiative of the company Netflix<sup>42</sup> for audiovisual workers.<sup>43</sup> The economic aid consisted of 1,045 reais (\$200), equivalent to a minimum wage, paid on a one-off basis. It is estimated that around 5,000 workers in more than 90 positions within the sector were able to access this benefit. The union took an active role in supporting and guiding its members to access the benefit. The initiative was evaluated by the president of the union as a sign of the company's commitment to the Brazilian audiovisual sector.

Advertising film production was one of the hardest hit (99% of workers belong to the self-employed category). To help self-employed advertising film workers, the union along with the Brazilian Institute of Audiovisual Contents (ICAB), created the Fund for the Support of Advertising Film Technicians. The Fund sought to gather resources to distribute to professionals who were unable to access national/federal government assistance or assistance from the Netflix Emergency Fund. Unlike other initiatives already based on previous resources, this was a fundraising campaign based on donations from individuals and companies in the sector. For this purpose, a website was created<sup>44</sup> in which Brazilian advertising films and a photo gallery of film set equipment were presented, and through which donations could be made. The assistance consisted of 500 reais for each technician with professional registration, made through bank deposit. At the time of the survey, 60 grants had been awarded.

In April, SINDCINE, through a communication<sup>45</sup> on its website, recommended the suspension of all filming due to the fact that hygiene and safety measures were not guaranteed. This situation led the union to start working together with the São Paulo Audiovisual Industry Syndicate (SIAESP) and the Brazilian Association of Audiovisual Works Production (APRO) on a protocol that would allow the gradual resumption of filming in safe environments. For this purpose, a working group was set up, made up of entities representing the sector, with the aim of having a single protocol that could be adopted by the sector as a whole. After three months of intense work, the Protocol for Safety and Health in the Audiovisual Sector was presented in June.<sup>46</sup> This protocol is based on the standards and guidelines of international bodies and government agencies and on the best practices and protocols of countries such as the United States, Mexico, Uruguay, Portugal, Spain and New Zealand. It contains detailed safety procedures (relating to number of working hours, distancing, hygiene, disinfection and monitoring) for working on film sets (pre-production, filming and post-production stages), in

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<sup>42</sup> See <https://www.forbes.com/sites/travisbean/2020/03/20/netflix-sets-up-100-million-coronavirus-relief-fund-for-production-workforce/?sh=251c3e037694>.

<sup>43</sup> In Brazil, aid amounted to 5 million reais (almost \$1 million) and was channeled through the Brazilian Institute of Audiovisual Contents (ICAB), from a call addressed to people who, at the time of the emergency, were working in the pre-production, shooting or post-production stages of projects that were not Netflix productions.

<sup>44</sup> Available at: <http://icabrasil.org/sindcine/>.

<sup>45</sup> Available at: <http://www.sindcine.com.br/Site/NoticiaInterna/429/sindcine-recomenda-manter-a-suspensao-de-filmagens-ate-o-fim-do-isolamento-social>.

<sup>46</sup> Available at: <http://spcine.com.br/wp-content/uploads/PROTOCOLO-DE-SEGURANC%CC%A7A-E-SAUDE-NO-TRABALHO-DO-AUDIOVISUAL.pdf>.



consideration of a gradual resumption plan divided into three phases: remote, on-site and return to normal. It is worth mentioning that the Actors' Union did not participate in the process and that this protocol was approved by the state government of São Paulo and by the Prefecture and adapted by unions from other states in the country. Also, in October, SINDCINE - together with the associations of technicians that make up the union - produced the Manual COVID-19 Procedimentos de Segurança para o cinema e audiovisual.<sup>47</sup> This is a good practice manual that was designed to complement the Protocol and whose main objective is to provide reliable information to professionals in the different areas involved in the filming process. The manual was developed from the manuals of the various associations<sup>48</sup> affiliated to the union. In October, the first filming was done in compliance with the Protocol and Manual with very good results.<sup>49</sup> On this point it is important to note that the union conducted an awareness campaign with companies and advertising agencies so that the protocol was complied with and with the workers so that they controlled its application.

With regard to employment protection, in May, SINDCINE and the São Paulo Audiovisual Industry Union (SIAESP) signed an addendum to the Labor Collective Agreement,<sup>50</sup> with the objective of avoiding dismissals and preserving the jobs of workers in the film and audiovisual industry with open-ended contracts. According to the president of SINDCINE, although not all producers in the state of São Paulo have collective labor agreements, the health emergency situation somehow forced them to respect the measures agreed in this agreement. Broadly speaking, the agreement signed took into consideration the possibility of a reduction in working hours and wages, the possibility of temporary suspension of the employment contract for a maximum period of 60 days, the maintenance of the benefits granted by the employer and the possibility of renegotiating the contracts of temporary, self-employed and outsourced workers.<sup>51</sup>

Finally, with regard to SATED-MG, in March, the union launched a solidarity action campaign called Salve a Arte (Save Art). Ajude um Artista (Help an Artist), with the aim of ensuring food security for artists and technicians. This was a fundraising campaign open to businesses and the community to buy basic food baskets and cleaning supplies to be distributed to artists and technicians in vulnerable situations. To do this, a media and social media campaign was developed<sup>52</sup> and a bank account was opened to receive the donations. Also, some artists made shows via streaming, and the revenue derived from these was also used to buy food. According to our interviewee, about 500 baskets were delivered during the months of March, April, May and June.

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<sup>47</sup> Available at: <http://www.sindcine.com.br/Store/Arquivos/manualgeralcovd19bb-30setarev01.pdf>.

<sup>48</sup> Available at: <https://acasp.org/covid-19/>.

<sup>49</sup> The film filmed was *La Casa da Rua do Grito* by the production company Corazón da Selva. In order to comply with the Protocol, the scripts had to be adapted and the filming logistics modified. It was shot over four weeks and proved compatible with application of the protocol, which offers real protection. Available at: <https://business.facebook.com/Sindcine/posts/1697807517037384>.

<sup>50</sup> Available at: <http://www.sindcine.com.br/Store/Arquivos/termo-de-aditamento-cct-01abr2020.pdf>.

<sup>51</sup> The renegotiation of the service provided is permitted in the event of a reduction in the volume of the service during a period of public disaster of up to 75% of the contract, keeping the proportionality between the time of provision and the renegotiated value. Likewise, the contracting companies may waive the value of the contracts for the provision of services up to a maximum of R\$6,000 for a maximum period of 4 months, and those over R\$6,000 for the entire period of the quarantine.

<sup>52</sup> Available at: <https://www.facebook.com/100004993172766/videos/1587007214809036/>.

In June, the union joined the alliance Arte Salva,<sup>53</sup> an initiative promoted by the State Government of Minas Gerais to help cultural and tourism professionals during the pandemic. Constituting an alliance of more than 50 partners, the project includes actions to support, assist and promote the productive chain of both sectors. Among the specific actions are the awarding of prizes to 1,300 projects,<sup>54</sup> the provision of information on access to public policies, credit lines and donation campaigns. Regarding this alliance, the union pointed out that the initiative could provide an opportunity for the government to compile a register of artistic and cultural media to plan the resumption of cultural activities.

On the other hand, the president of SATED-MG actively participated as a member of the Strategic Management Commission of the Aldir Blanc Law of Minas Gerais. The Commission, made up of various civil society actors, worked hard for three months to define the 27 published calls representing 119.5 million reais for the cultural segments of music, dance, circus, theater, performance, crafts, photography, literature, audiovisual and cultural production, among others, and to define aspects linked to the registration of the emergency economic aid of 600 reais. On this point, the union pointed out the significant difficulties in decentralizing the resources provided by the Aldir Blanc Law to the municipalities.<sup>55</sup>

Finally, the union developed a prevention protocol before COVID-19 based on the recommendations of FIA, UNIMEI and PANARTES, which was adopted by the Prefeitura de Belo Horizonte as the basis for developing the official protocols *Filmagens e Gravações em Locais Públicos - Protocolo de Funcionamento*<sup>56</sup> and *Teatros, Shows e Espetáculos - Protocolo de Funcionamento*.<sup>57</sup> Although it has not yet been determined, the union may be in charge of controlling its compliance.

### 2.2.3.2. Impact on unions and coping strategies

In relation to this dimension, FITERT highlights the Federation's financial difficulties - prior to the COVID-19 crisis - which have conditioned the union's activity for several years. Since the elimination of the mandatory contribution of workers to unions, a reform promoted in 2017 by the Temer government, there has been a sharp reduction in the power of unions. In that context, the impact of the pandemic deepened the atomization. During those months, each union responded with its own strategies according to its circumstances, and the Federation saw its ability to coordinate even more limited.

For its part, during the quarantine period, SINDCINE began a campaign of affiliation without the collection of union fees. As a result, the number of union members increased from 400 to 600 technicians. As gleaned from our interview, this growth is mainly due to the fact that, to a certain extent, the crisis made even more visible the precarious labor condition of workers in the audiovisual sub-sector and the

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<sup>53</sup> Available at: <https://fb.watch/1XYbyfzCsq/>. The productions must meet technical criteria of resolution, proportion and audio, with a duration of 10 to 20 minutes. According to the announcement, the areas of music, performing arts, visual arts, audiovisual, heritage, literature and sectors integrated with these were considered. For more information on the call, see: <https://fb.watch/1XYm1gS7rG/>.

<sup>54</sup> Each project received an investment of 1,900 reais to make videos covering various artistic expressions, which were broadcast free of charge in digital environments and on state-run stations, such as Rede Minas and RádioInconfidência.

<sup>55</sup> Minas Gerais has 853 municipalities.

<sup>56</sup> Available at: [https://prefeitura.pbh.gov.br/sites/default/files/estrutura-de-governo/planejamento/2020/pbh\\_protocolos\\_filmagensgravacoes.pdf](https://prefeitura.pbh.gov.br/sites/default/files/estrutura-de-governo/planejamento/2020/pbh_protocolos_filmagensgravacoes.pdf).

<sup>57</sup> Available at: [https://prefeitura.pbh.gov.br/sites/default/files/estrutura-de-governo/planejamento/2020/pbh\\_protocolos\\_teatrosshows\\_1920x1080\\_0.pdf](https://prefeitura.pbh.gov.br/sites/default/files/estrutura-de-governo/planejamento/2020/pbh_protocolos_teatrosshows_1920x1080_0.pdf).

need for union representation that could defend their rights. An interesting aspect to point out and which stems from this issue is that Law 6533/2017 regulating the profession also includes artists (represented by SATED) and that this fact sometimes generates tensions between the two unions with regard to registration with the Ministry of Labor.

As far as the difficulties are concerned, as the union is financially supported by the union fees paid by the workers and the fees it collects from the registers, the cessation of activities had a negative impact on the collection of resources; the existing funds were redirected for the social support of its members.

However, when conducting a general evaluation of the impact of the COVID-19 crisis on union organizing, the leadership of SINDCINE considered that the union was strengthened. This is mainly due to the permanent contact it has had with its affiliates throughout the period of social isolation (contacting, advising, assisting) and the active role it has assumed in the problems arising in the sub-sector (taking a position on issues, negotiating with companies). In the words of our interviewee, in a way the crisis helped to “generate confidence again”.

For SATED-MG, one of the questions mentioned about the impact that the months of quarantine had on union organizing has to do with the degree of union fragmentation. The strategies and actions developed by SATED-MG were union actions aimed at defending the immediate interests of the workers represented, but that did not result in other union organizations implementing a collective action for the defense of all the people involved in the activity.

Another aspect pointed out was the difficulties inherent in maintaining the structure of the union. Falling monthly collections and non-payment of union dues by workers exacerbated problems in maintaining the premises’ rent, staff and service payments. With accounts in the red, thinking about a post-pandemic scenario, the union is considering the need to reduce expenses and costs.

On the other hand, during the period of social isolation the union did not have any new affiliations. However, communication and information strategies were developed to encourage new memberships and the re-entry of former members.

Despite these situations, the SATED-MG leadership believes that the union has been strengthened. In this regard, there is a certain “revitalization” of the base of the organization due to the involvement and interest of younger workers.

#### **2.2.4. Union perspectives and challenges for the post-pandemic scenario**

In terms of the challenges of the immediate future, FITERT aims to overcome the problems of poor coordination between unions that the COVID-19 crisis left exposed. Beyond the economic problem of union financing, the Federation aims to improve virtual entities - of communication and organization of exchanges and meetings - to mitigate the problem of the suspension of travel and transfers between states. The final challenge is to regenerate the power of mobilization and collective organization among the workers in the sector.

For SINDCINE, the main challenge is related to the application of the Protocol. Although the union claims that there is no possibility of structuring a 100% safe film set to prevent COVID-19 - due to the fact that audiovisual production involves the interaction of many people simultaneously - the protocol developed has been shown to be effective in protecting the health of workers. In this sense, the

challenge posed by the pandemic is to be able to unite the current ethical climate of care for workers with business behavior. That production companies and contractors are responsible and apply the Protocol, even knowing that this means higher costs for the audiovisual market.

In the case of SETED-MG, facing the post-pandemic scenario, and given the weakness that Brazilian unions currently exhibit across the board, the need to coordinate joint union strategies with other social actors and unions is emphasized. With very significant structural limitations emanating from the labor and union reform of 2017, the very existence of the union organizations depends on the development of new action strategies. As in the other cases, SETED-MG also faces the challenge of reducing its structure due to funding problems, but without undermining its ability to represent and defend the interests of workers. As a specific challenge, it is necessary to make progress in the construction of a global scale of representation, an international federation that is visible to the various governments - especially in Latin America - to work towards the valorization of artistic work.

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## 2.3. CANADA

### 2.3.1. Relevance of the sector in the national economy<sup>58</sup>

With some 37.6 million inhabitants and a GDP of the order of \$1.8 trillion, Canada has only 0.5% of the world's population and 1.4% of the global gross product according to the World Bank. It is estimated that in 2018, the added value generated by the audiovisual and live entertainment sector in the country was 0.79% of GDP and accounted for 29% of the added value generated by cultural industries as a whole. In relation to employment, the sector generated 184,076 jobs, which represented 0.96% of the country's employment and 28% of that of culture.<sup>59</sup> The broadcasting segment is the most relevant in terms of production, followed by cinema and live entertainment. Depending on the employment generated, however, cinema and live entertainment emerge as the most important.

### 2.3.2. Impact of the pandemic on economic activity and employment<sup>60</sup>

Live entertainment was the sector most affected by the COVID-19 crisis. In this case, the fall in activity during the first quarter of 2020 amounted to 14.4% year-on-year and 64.5% year-on-year during the period April-June 2020. From this, it is assumed that the effect of the restrictions impacted more deeply, and although a recovery is observed in the following months, the accumulated January-August period still shows a 45% year-on-year decrease. For its part, the audiovisual sector shows a different dynamic between broadcasting and cinema during the first quarter of 2020, registering a reduction of 8.2% year-on-year and an increase of 3.7% year-on-year in activity, respectively. However, during the second quarter and as a result of the isolation provisions, both segments show contractions in the order of 39% when compared to the same period in 2019. Thus, despite the improvements in recent months, in the first eight months of 2020 the drops reached 22% year-on-year in broadcasting and 21% year-on-year in cinema.

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<sup>58</sup> This section uses the information provided by the Culture and Sport Satellite Account of Canada, produced by Statistics Canada. This source, which is based on the methodology for forecasting culture satellite accounts, is the most appropriate for such purposes (for more details, see the Methodological Appendix).

<sup>59</sup> Prepared in-house based on Provincial and Territorial Cultural Indicators, 2018 (Statistics Canada, 2020d). Since the source follows the methodological principles of the culture satellite accounts, it is the most appropriate to dimension the sector in relative terms to the size of the national economy (for more details see the methodological annex).

<sup>60</sup> This section uses as sources of information the monthly estimates of GDP by sector of activity and the number of employed persons according to the System of National Accounts and the Labour Force Survey produced by Statistics Canada (2016, 2020b). Given that this information is not broken down by sector, which would make it possible to ascertain the evolution of the sectors of interest in this study, the data corresponds to the evolution of the branches of activity in which the audiovisual and live entertainment sectors are included. The Methodological Appendix specifies the other activities included within the branches in each case, as well as those on which it was not possible to obtain information.

**Table 5** Impact on activity. Year-on-year variation 2019-2020.  
Audiovisual and live entertainment GDP and revenue

Sector and segments	1 <sup>st</sup> quarter	2 <sup>nd</sup> quarter	Accumulated January-August
<b>GDP</b>	<b>-0.4%</b>	<b>-12.5%</b>	<b>-6%</b>
<b>Audiovisual and live entertainment</b>	<b>-7.1%</b>	<b>-50.4%</b>	<b>-31.8%</b>
Audiovisual	-1.4%	-39.4%	-21.6%
Broadcasting (television and radio)	-8.2%	-39%	-22.4%
Cinema	3.7%	-39.7%	-21%
Live entertainment	-14.4%	-64.5%	-44.8%

Source: Prepared in-house based on data from Statistics Canada (2020a).<sup>61</sup>

To complement this analysis, we recovered data prepared by a local consulting firm that enhances the overall perspective of the impact on the audiovisual sector (Nordicity, 2020). According to this survey, between March and June, 2.5 billion dollars of production expenses were perceived to be at risk of suspension or permanent loss for the *screen-based media production sector*. 62% of the resources committed to the pandemic are linked to the segment of feature films and television programs filmed in Canada by foreign producers or Canadian service producers, 34% to Canadian television production and the remaining 4% to Canadian theatrical films. In addition, the consulting firm identifies that of the USD 2.5 billion at risk, 56% is explained by reduced labor costs.

In relation to the impact of the pandemic on employment, overall employment in Canada has been greatly affected. Almost 3 million jobs were lost between February and April, with a 12.35% year-on-year drop during the second quarter of the year.

In the audiovisual and live entertainment sector, the drop in employment was even more pronounced. According to Statistics Canada (2020), in April, employment in the sector was down 24% from the time before the pandemic (February), resulting in 181,000 job losses. Compared to the same period last year, in the second quarter of the year, the drop in employment reached 22.16% year-on-year, almost double the drop recorded for the economy as a whole.

**Table 6** Impact on employment. Variation in the number of employed people between the second quarters of 2019 and 2020

	Year-on-year variation
<b>Country total</b>	<b>-12.35%</b>
<b>Audiovisual and live entertainment</b>	<b>-22.16%</b>

Source: Prepared in-house based on Statistics Canada (2020b).<sup>62</sup>

<sup>61</sup> For more details on the sector delimitation, see the Methodological Appendix.

<sup>62</sup> For more details, see the Methodological Appendix.

Towards mid-2020, however, a recovery in sectoral employment began to be recorded, which, although it seems to have reached levels close to those prior to the impact of the pandemic, still shows year-on-year falls of around 15% compared to the summer months of the northern hemisphere. In this regard, as in other sectors and countries, Canada appears to be experiencing a rebound with employment stabilizing at a level below that of 2019. The data for September 2020 show a sustained recovery which, however, is 4.6% lower than that of the same month in 2019.

### 2.3.3. Impact of the COVID-19 pandemic on activities under union representation. Responses and challenges for organizations<sup>63</sup>

As can be seen, the crisis caused by the pandemic had a strong impact on economic activity and sectoral employment at the national level. In this section, a more accurate approximation of the scope of the pandemic in the sector is made, based on the analysis of the interviews conducted with representatives of the following unions:

Trade union	Sector segment	Scope	Employment situation
Directors Guild of Canada, Ontario (DGC Ontario)	Audiovisual: television, cinema, new platforms.	Provincial (Ontario)	2,700 members. All workers are self-employed.
Alliance of Canadian Cinema, Television and Radio Artists (ACTRA)	Audiovisual: television, cinema, new platforms, advertising, broadcasting.	National with 9 jurisdictional offices	27,000 members, mostly self-employed.
International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts of the United States, its Territories and Canada (IATSE)	Audiovisual: television, cinema, new platforms, advertising, broadcasting, film exhibition. Live entertainment: concerts, theater, conventions.	International	34,000 workers represented in Canada; 29,000 members. Most are self-employed.
Canadian Actors' Equity Association (CAEA)	Live entertainment: theater, dance, and opera segments	National with a provincial office	6,000 members. 2% are salaried workers and 98% are self-employed.

In order to contextualize the analysis, it is important to point out that the regulation of the field of labor relations in Canada is decentralized at the provincial level and includes workers in the sector, despite the fact that they carry out their tasks under non-salaried occupational categories, mostly as self-employed workers (Gruber, 2019).

It is also important to add other key elements to frame the analysis that follows. Regarding the status of the pandemic, on March 13, the Federal Government ordered the closure of the borders and the cessation of non-essential activities. The sectors examined by us were immediately impacted by these measures, and almost all activity stopped as of that date. In the case of the audiovisual

<sup>63</sup> This section presents the analysis of the interviews carried out with trade union representatives in the sector. The Methodological Appendix presents an overview of the unions that were targeted for interview and the dates and references of those that were contacted, which are a privileged source of information for this report.



sector, the three major areas of production are British Columbia, Ontario and Quebec, and due to the measures implemented in the wake of the pandemic, the timing of a return to activity in all three provinces varied.<sup>64</sup> Another characteristic of audiovisual production in Canada is that a considerable proportion of the productions carried out in the country are of American origin. This is especially relevant in the current context, since the failure to manage the pandemic in the United States jeopardized the development of productions there, increasing the migration of projects to Canada. This situation meant new perspectives of labor expansion not exempt from challenges.

#### **2.3.3.1. Impact on the labor environment and union responses**

As mentioned, the vast majority of the workforce in these sectors performs its tasks under non-salaried occupational categories, such as self-employed or *freelancers*. This is especially important for understanding the extent of the impact of the COVID-19 crisis on employment, such as the gaps in social protection, as a result of which contingents of workers were exposed to sudden loss of income. All interviewees agreed that this was the first major challenge to the responsiveness of their union organizations.

In terms of DGC Ontario members, about 1,500 workers were active at the time of the pandemic. The low proportion of active workers (55% of members) is common for the Canadian winter period, when activity in the industry generally contracts.

Although the vast majority of the sector's activities were interrupted in March, there were some exceptions for DGC members, especially in the areas of accounting and post-production tasks. A small number of workers (about 100, especially image and sound editors) were able to continue working during the pandemic. Some did so in their usual workplace in compliance with mandatory health measures, others continued to work from home as they did prior to the pandemic, and others had to adopt the remote working mode, either by moving equipment from their workplaces to their residences or investing their own resources to meet the demand for work. Although post-production workflow increased during the pandemic, the other activities under representation were completely paralyzed.

At the time of the interview in October, activity in Ontario had recovered to levels close to March, and all of the members of DGC were working again. However, some activities were resumed under the remote working mode. By mid-October, between 500 and 600 members (about 20%) were working remotely. On this point, the union representatives interviewed mentioned that a conflict associated with this type of work was linked to the cost of food and mentioned having intervened to ensure that the collective agreements were respected and that the workers were reimbursed for their food expenses.

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<sup>64</sup> According to a report by the Canadian Media Producers Association (2020), in the period 2018-2019, these three provinces developed 93% of the total volume of film and television production in Canada. The distribution was: British Columbia (37%), Ontario (34%) and Quebec (22%). As for the resumption of activity, in the province of British Columbia some projects were taken up again between June and July, while in Ontario and Quebec the revival of the industry started towards the end of August and the beginning of September.



Regarding member health care during the pandemic, no complications were reported in the operation of the Health Plan, despite reduced employer contributions.<sup>65</sup>

In the case of IATSE Canada, almost all of the workers under its representation had their activities stopped. As for audiovisual workers, 18,632 experienced cancellations or rescheduling of the productions projected for 2020. In this sector, 100% of the members are self-employed and all of them lost their jobs during the pandemic, a situation that lasted more than 4 months. In relation to the return to work, the reconfiguration of the working conditions from the application of the health protocols stands out.

In the live entertainment sector, the union was able to specify the situation of 4,793 members.<sup>66</sup> In this regard, it was noted that prior to the pandemic, 940 workers (20%) were typical wage earners, while the remaining 80% were temporary workers. With the outbreak of the pandemic, 564 stable salaried workers and 4,009 temporary workers lost their jobs, representing 95% of the workforce represented.

Of the small proportion of workers who remained active during the pandemic, half did so from their usual workplaces and half in remote working mode. In relation to the development of projects via streaming, only 10% of the planned projects adopted this modality, and although the demand for labor force did not vary substantially, there was a drastic reduction in hours and income for those who were occupied in these productions. At the time of the interview in November, the activity of the sector had not been resumed.

As for the ACTRA members, when everything came to a standstill, a small number of activities could be carried out during the quarantine: video game production, voice recording and commercials. In relation to remote work, the union leader interviewed commented that the greatest challenge was observed in recorded auditions due to the costs involved in making a quality product and the risks involved for some artists who must perform high-risk maneuvers in inappropriate and unsupervised spaces. In this regard, it was noted that some members invested their own resources in equipment to ensure a quality recording and that, in this way, employers are offloading costs and responsibilities onto workers.

Health coverage during cessation of activities was not highlighted as a problematic issue, while the union benefits program (Actra Fraternal Benefit Society, AFBS) continued to provide services to members during the pandemic.

In the case of CAEA, most of the members became unemployed when their activities ceased in mid-March. Although they were able to create pieces and develop small projects via streaming, these did not come to represent an alternative source of income. Here it is important to mention that, like many other workers, the artists represented by CAEA have also invested in expensive equipment to facilitate remote work, although no specific conflicts were recorded on this issue.

With regard to health care during the cessation of activities, the union representative commented that insurance obtained through the union continued to provide services during the pandemic and

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<sup>65</sup> As stated on the union's institutional website, Health Plan managers must keep a one-year reserve for insurance and administrative expenses. In 2020, the Plan had reserves that exceeded the expenses involved annually. See: <https://www.dgc.ca/en/national/news/benefits-information-sheet/#G>.

<sup>66</sup> Estimates made by IATSE Canada, based on information provided by local affiliates on stage and audit workers. Cinemas are not included.

also reinforced the peace of mind of having a universal basic health care policy in Canada: “In Canada, at least as far as health care is concerned, we are very well protected. No one has any worries there.

Those who were able to resume their activities included the dancers who have long-term contracts with ballet companies, although due to the restrictions imposed on live entertainment, they only perform rehearsals in order to sustain the high artistic level that characterizes them, but they do not perform live shows in front of an audience. By the end of September, in addition to the salaried dancers, there were 167 other active workers. These two groups account for 5% of CAEA members, which reveals the extent of unemployment in this sector.

The immediate challenge faced by all the unions interviewed was the cessation of the vast majority of ongoing activities and cancellations of planned projects and, consequently, the sudden loss of workers’ income. Although they encountered some resistance from the employers, they all ultimately managed to get their collective agreements respected and the estimated days for cancellations paid in each of them.<sup>67</sup>

However, the extension of the quarantine gave rise to the second problem: the prolongation of unemployment in the industry. As mentioned above, almost the entire workforce in these sectors is composed of self-employed workers, so they are not classified as *employees* under the Canadian Labor Code and are not eligible to apply for unemployment insurance upon loss of employment. While the Canadian government responded quickly to sustain wages through the implementation of an emergency subsidy (CEWS), this measure also did not reach workers in these sectors due to their precarious condition, so unions had to redouble their efforts to obtain income support measures for their members. Thus, the unions interviewed, in addition to other industry workers’ organizations,<sup>68</sup> formed a coalition that issued its first collective letter to the government in March, urging it to broaden the base of workers supported by the government measures.<sup>69</sup> The pressure exerted individually and collectively through the coalition had immediate effects and, in mid-April, an emergency benefit (CERB) was paid for a period of 16 weeks<sup>70</sup>

While the audiovisual sector began its recovery process in the middle of the year, the live entertainment sector, on the other hand, continued to be completely paralyzed, which is why in June a second note from the coalition was issued,<sup>71</sup> this time signed exclusively by the organizations in this sector, requesting the extension of the benefit, which was achieved with the approval of 8 additional weeks.

Beyond collective efforts, all of the unions interviewed developed various strategies to support their members. DGC Ontario approved the waiver of all membership fees and made a donation to the Actors’ Fund of Canada (AFC).<sup>72</sup> In relation to communication with its members, the guild maintained permanent contact through weekly newsletters and the organization of web seminars on various

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<sup>67</sup> On this point, the leadership of Netflix, which paid 5 weeks of work to the main teams and made donations to charities within the industry, was highlighted.

<sup>68</sup> CAEA, IATSE, CFM, ADC, DGC, CGD and CWA Canada.

<sup>69</sup> The letter can be consulted at <https://bit.ly/36nzhS>.

<sup>70</sup> Although the CERB is not exclusive to workers in the industry, but considers a range of similar situations in other economic activities, the speed with which the sector’s trade unions acted is remarkable.

<sup>71</sup> The letter can be consulted at <https://bit.ly/3mpuf2j>.

<sup>72</sup> The AFC is a support fund for professionals in television, film, music, theater and dance. Between March and October, it delivered \$1.2 million in assistance to workers in the industry. See: <https://afchelps.ca/>.

topics. In the words of union officials, this strategy was key to strengthening members' ties with the union: "We became even more popular because people were at home and waiting for Wednesday to come and read the newsletter. In addition, they provided training activities under a virtual modality, supporting creative and formative spaces for their members. In addition, the union organized a network of volunteers among its members to help people at risk by offering them a delivery service, technical support in new technologies and emotional support. As for the resumption of activities, DGC Ontario showed leadership in the development of protocols.

IATSE highlighted the efforts made by local unions that negotiated with employers to support members' incomes. According to the leader, this strategy was successful during the first 4-6 weeks, in which they managed to prevent layoffs and suspensions. In addition, intensive advocacy work was conducted with officials from all relevant ministries and decision makers from across the political spectrum to gain support for the industry and its workers. The union took part in discussions about safety and return-to-work protocols and formalized a large number of applications to lobby for income support and relaunching benefits,<sup>73</sup> and local members also made contributions to the AFC. In terms of communication with members, it designed a centralized web portal on COVID-19 to facilitate access to secure and up-to-date information. As for the workers in the live entertainment sector, at the time of the interview, the union was designing a strategy to relocate them to the audiovisual sector, since many of the technical skills can be transferred from one sector to another.

ACTRA also developed various strategies to support its members. Members across the country worked closely with government and industry partners to design return-to-work guidelines. On this point, the communication with the members stands out. In May, the national office launched an anonymous survey to learn about their concerns and the most valued safety measures, key issues in ensuring that the protocols fit the concerns and needs of the artists. Finally, in order to mitigate the risks involved in conducting the home auditions mentioned above, ACTRA's larger affiliates made free facilities available to workers to safely record their auditions.

CAEA, for its part, has maintained a vigorous agenda of meetings with officials and policy makers to achieve concrete benefits for its members. As a result of their active policy, the union was called upon to present its concerns and proposals to industry-specific committees at the federal level and they were able to strengthen ties with the entire political spectrum: "We have done so much that elected politicians and senior officials are coming to us as a group to say 'this is what we think will work for your people.'"

In relation to the development of health protocols, the Canadian case reveals particular characteristics that deserve to be mentioned. Firstly, because the Canadian federal model provides autonomy to the provinces in terms of health and safety legislation, the unions had to launch multiple negotiations to define guidelines in accordance with the provisions of the jurisdictional health authorities and the Occupational Health and Safety Committees of each region. Secondly, the work coordinated between the sector's unions and guilds, which quickly formed a unified front to develop protocols that would allow the industry to be revived, stands out. Finally, the third element is that the guidelines were developed in conjunction with employers, the provincial government and other key stakeholders in the industry, giving the document a remarkable framework of consensus and legitimacy.

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<sup>73</sup> The notes can be consulted at <https://iatsecanada.net/the-international>.

In the province of Ontario, the Film and Television Health and Safety Advisory Committee is called Section 21.<sup>74</sup> With the outbreak of the pandemic and in order to focus the discussion, an emergency COVID-19 sub-committee was created to bring together all industry stakeholders in the province of Ontario,<sup>75</sup> who collectively developed a consensus protocol.<sup>76</sup> The result is a tool that can be adapted to the diversity of productions and budgets that are developed within the industry. From these guidelines, each employer should develop its own protocol for its particular project.

In British Columbia, the process was similar and key industry players in the province came together in a COVID-19 Best Practice Collation. The document was agreed upon by the province and the Occupational Safety and Health Board, WorkSafeBC. Here, one of the major conflicts mentioned by IATSE leaders was that the provincial Ministry of Health does not authorize mass testing of asymptomatic people, so that the preventive testing stipulated in the protocols, especially in productions involving U.S. casts, was a critical point.<sup>77</sup>

With regard to the control of compliance with the protocols, these include COVID-19 supervisors/officials. These are people hired by the production who must ensure the availability of inputs and supervise procedures in the workplace, and who can even make the decision to close down a production. Beyond this, the unions have their own mechanisms of control in the productions and the great majority provide diverse channels of communication for members (emails, telephone lines, apps). Another important point is that worker training on the protocols is mandatory, as is adherence to them. The unions interviewed, especially IATSE and DGC Ontario, were emphatic on this point: “We unions are very serious about this. They were not protocols to be stuck on the wall, they were protocols to be implemented”.

Finally, with regard to positive cases detected in productions, at the time of the interview, DGC Ontario had no recorded cases of infected members. ACTRA commented that although they identified individual situations that should have led to isolation, they did not register an outbreak that compromised the productions. The IATSE representative, on the other hand, mentioned having been notified of contagion and the closure of some productions for a few days. However, all of the leaders interviewed stressed the effectiveness of the protocols both in preventing contagion and in controlling outbreaks in the event of detected cases.

As for live entertainment, CAEA also developed guidelines for a return to work. In the case of dancers who have resumed activity, the union reviews and monitors each of the ballet companies’

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<sup>74</sup> The Committee was appointed by the Ministry of Labor in 1988, in accordance with the Occupational Health and Safety Act (OHSA) and is composed of representatives of the workers, the employers and the provincial labor ministry. Its function is to design specific occupational health and safety guidelines for the sector.

<sup>75</sup> Unions and guilds, producers (Canadian and American) representing United States studios, facility owners and providers, and government officials from the Ministries of Culture, Health, and Labor participated.

<sup>76</sup> The subcommittee was organized into 11 working groups that addressed specific guidelines for the activities represented. The work began at the end of April and at the beginning of June the final version of the document was obtained, which was supported by the Ministry of Labor. The protocol can be consulted at <https://www.filmsafety.ca/wp-content/uploads/2020/12/S21-Film-Television-COVID19-Guidance-Revised-Nov.24.20-Final41.pdf>.

<sup>77</sup> The protocol can be consulted at <https://www.worksafebc.com/en/about-us/covid-19-updates/covid-19-returning-safe-operation/motion-picture-television-production>.

protocols. The most prominent conflict is the reopening of the theater, where the restrictions imposed (casts of 5 people and audiences of 50 at most) put the economic viability of the activity at risk.

A sensitive issue in the return-to-work negotiations has been that of sick leave. Although with mixed results according to the regulations in force in different jurisdictions, the unions managed to get sick days paid, a benefit without precedent in the industry. Finally, in mid-July, the federal government announced the creation of a temporary program that provides 10 days of paid leave for COVID-19 for all workers.

As the industry began to show signs of recovery, another problem emerged linked to the ever-present risks of project disruptions, increased production costs due to safety protocols, and production insurance companies that began to establish exclusions for closures or disruptions linked to the pandemic.

The lack of coverage, especially in domestic productions, imposed great uncertainty on the entire local industry. Therefore, the organizations consulted supported the government's request by the Canadian Media Producers Association (CMPA) for the creation of a temporary compensation fund that would allow them to gain financial predictability. The collective strategy bore fruit and the domestic productions were able to secure their projects.<sup>78</sup> In this regard, the IATSE representative commented that they were in talks to negotiate similar insurance for live events and theaters that are in a position to reopen their doors. However, so far, they have not been successful with their demands.

As can be seen in the Canadian case, all the unions consulted have established solid relationships with government bodies and occupied strategic places in discussions on relief measures and recovery plans for the sectors they represent.

### **2.3.3.2. Impact on unions and coping strategies**

Although the COVID-19 crisis has had a different impact on the trade union organizations addressed, it is possible to identify at least three experiences common to all of them: the reduction of regular income flows, the increase in the workload for the organizations' staff and, on a more positive note, the strengthening of trade union influence and collective solidarity.

In the case of GCD Ontario, the impact of the pandemic on the organization was perceived to be more attenuated than in other organizations interviewed. In this regard, the representatives commented that they managed to sustain the activities scheduled in the union's planning, and although at the time of the interview there had been no change in the union's membership, it is expected that the membership will rise to more than 3,000 by 2021, given the sustained increase in demand for labor.

The ACTRA representative stressed that the blow to the institution's finances was significant and, as a consequence, all the affiliates had to initiate dismissal processes that impacted a third of the staff, while another third was sustained by the emergency wage subsidy (CEWS). When the industry began to recover, the union was able to reinstate disaffected personnel. In terms of union activities planned for 2020, they were able to hold planned elections and there was no change in the organization's membership.

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<sup>78</sup> The Government of Canada approved the creation of the Fund that provides financial assistance to secure producers, consisting of CDN\$1.5 million for partial closures and CDN\$3 million for total closures.

IATSE was one of the strongest organizations in terms of membership. The union implemented a digital card system that allowed it to achieve a successful unionization campaign.<sup>79</sup> From the perspective of the union representative, the success of the membership campaign is due to a combination of two factors: on the one hand, the lack of protection to which contingents of workers were exposed in the face of the pandemic highlighted the need for union representation; on the other hand, the approval the union won by defending its members during the pandemic.

In the case of CAEA, the organization has registered a drop in institutional income of close to 90%. In the face of the critical financial situation, the union was able to sustain its operations because of the availability of institutional reserves and because of measures in the state emergency package.<sup>80</sup> Even so, the union was forced to reduce the working hours of its staff (with the exception of executive positions) and the size of its plant by 7%.

The intensification of tasks undertaken by executives has been highlighted by several leaders interviewed. As has been observed, the unions have had to resolve very diverse demands, not only from the workers, but also from the producers themselves who, in an unknown context, relied on the union organizations for guidance. Within this framework, the tasks related to the development and implementation of the protocol system are highlighted. These involved arduous negotiations between provinces and the exhaustive review of the documents submitted by each production that was re-shooting (“The more time goes by, the more our members get upset and start making demands, which increases the stress on the staff. We feel responsible for having to save our organizations”).

#### **2.3.4. Union perspectives and challenges for the post-pandemic scenario**

With regard to this aspect, one of the challenges highlighted by the leaders of DGC Ontario has been the preponderance of remote work during the pandemic and its potential impact on the deepening of international offshoring of activities carried out by its members, especially post-production teams that are not required to be present on the set.

ACTRA, on the other hand, highlighted that in a post-pandemic scenario a challenge for the industry in general is to make progress in specific regulations for streaming platforms, so that they contribute to the creation and production of Canadian content that improves the supply of work within the industry.

IATSE believes that the main challenge for the future lies in sustaining the level of alliance and solidarity between unions that was achieved during the pandemic: “The challenge is to stand together when all this happens”. CAEA represents the sector that has been hit the hardest and its future outlook is the most uncertain. While the union has been able to cover its costs so far, supported by the government’s measures, there is no certainty that the sector will fully recover by the time the measures are lifted. The leader consulted estimates that, in the medium term, there will be fewer and smaller productions, so there will be fewer job opportunities and, consequently, the union will have to face a considerable reduction in its members. The challenge for live entertainment is that it

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<sup>79</sup> Among the new affiliates are AQTIS of Quebec, Titmouse Vancouver (the first unionized animation company in British Columbia) and Associated Designers of Canada (ADC).

<sup>80</sup> In particular, the Canada Salary Subsidy (CEWS) and the Canada Emergency Rental Subsidy (CERS).

depends not only on artists and technicians being able to return to work, but also on the sustainability of a business that must operate with greatly increased costs due to health protocols and with reduced audiences.

A point highlighted by all the interviewees was that of dealing with unprecedented uncertainty. In an unprecedented scenario, many of the situations that arise are not considered in the collective agreements, nor do they relate to similar previous experiences on which to rely, so the permanent challenge has been to solve new problems, every day, without weakening the collective agreements or putting at risk the rights that have been won.

Finally, it should be mentioned that, at the time of writing, Canada was experiencing the second wave of the COVID-19 pandemic. In mid-September, the government again imposed restrictions, and although the audiovisual industry was still active and the leaders were confident in their protocols, signs of tension in the industry were beginning to show.

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## 2.4. CHILE

### 2.4.1. Relevance of the sector in the national economy<sup>81</sup>

With some 18.9 million inhabitants and a GDP in the order of 459.1 billion dollars, Chile has 2% of the world's population and 0.4% of the global gross product according to the World Bank. In that country, the audiovisual and live entertainment sector represented 0.65% of the Chilean gross product and 0.5% of the total number of employed people in the country (42,074 people) in 2018. The broadcasting segment is the most relevant in terms of contribution to the GDP: it accounts for 65.3% of the added value generated by the sector. It is followed, in decreasing order, by movies and live entertainment.

### 2.4.2. Impact of the pandemic on economic activity and sectoral employment<sup>82</sup>

As in the rest of the economies analyzed, the impact of the crisis on the country's activity was most profound during the second quarter of 2020. During that period, the country's economic activity fell by 14.1% year-on-year, 13.2% in relation to the previous quarter, resulting in a contraction during the first half of the year of 7.1% year-on-year (as a result of a 0.2% year-on-year growth in the first quarter).

In the audiovisual and live entertainment sector, in line with the development of sales in the sector, the impact of the pandemic was more pronounced and even began to be felt intensely during the first three months of 2020. Specifically, during this period, sales in the sector experienced a contraction of 18% year-on-year, with the live entertainment segment having the largest retraction (19.2% vs. 15.7% corresponding to the audiovisual segment). For its part, during the second quarter of 2020,

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<sup>81</sup> This section uses the information provided by the Structural Survey of Information and Communication Services, Business Services, Personal and Social Services prepared by the National Institute of Statistics of Chile (INE) (2019, 2020). Given that, unlike most other countries, Chile does not have a satellite culture account that is updated periodically (only partial estimates have been made for this account in 2009 and 2012, so the information provided there regarding the value added by the sector is probably not representative of the reality prior to the outbreak of the COVID-19 pandemic), this source of information is the most appropriate for these purposes. This is because, like the satellite accounts, the source replicates the estimated sectoral aggregate values following the methodological framework of the system of national accounts (see Methodological Appendix for details).

<sup>82</sup> This section uses as a source of information the Sales Index at the current peso rate for Services and the National Employment Survey prepared by the INE (2019, 2020). The sales index is used because, unlike most other countries, Chile does not have quarterly estimates of GDP by branch of activity that allow for approximation of the impact of the pandemic on the audiovisual and live entertainment sector. Even so, and as in the other economies analyzed, it must be taken into account that, given that the information provided by these sources does not have a sector breakdown that allows us to view the evolution of what was strictly defined as a sector of interest from the culture satellite account, the data provided corresponds to the evolution of those branches of activity in which the audiovisual and live entertainment sector is included. At the bottom of each table and in the Methodological Appendix, the additional activities included within the branches are specified in each case, as well as those about which it was not possible to obtain information.



when the health emergency affected the mobility of people and the normal operation of production establishments, the sector showed a decrease of 50.1% compared to the second quarter of 2019, driven mainly by a contraction of 64.4% for live entertainment.

**Table 7** Impact on activity. Year-on-year variation 2019-2020. GDP of the Services Sales Index<sup>83</sup> at current audiovisual prices

Sector and segments	1 <sup>st</sup> quarter	2 <sup>nd</sup> quarter	1 <sup>st</sup> half-year
<b>GDP</b>	<b>0.2%</b>	<b>-14.1%</b>	<b>-7.1%</b>
<b>Audiovisual and live entertainment (excludes cinema)</b>	<b>-18.0%</b>	<b>-50.1%</b>	<b>-31.8%</b>
Broadcasting (radio and TV)	-15.7%	-36.2%	-26.2%
Live entertainment	-19.2%	-64.4%	-35.9%

Source: Prepared in-house based on data from the National Institute of Statistics.<sup>84</sup>

Moreover, according to this source, the most affected segment of the sector, live entertainment, accumulated seven consecutive losses between March and September 2020, so that the accumulated year-on-year fall in the first nine months of the year amounted to 43.8%. After the fall in March, which reached 38.2% compared to the same month in 2019, the subsequent falls were always over 60% in year-on-year terms. In this way, although the lowest point of the crisis was registered in the month of June, when the fall in sales reached 72.9% year-on-year, subsequent decreases were not so severe; by the month of September (last available data), the drop was still significant (64.3% year-on-year).

With regard to the impacts on employment, as of March 2020, the Chilean labor market began to demonstrate the impact of the pandemic, which peaked around the middle of the year (during the May-July quarter). In particular, the official source (INE) indicates that during the second quarter of 2020, employment in the country contracted by 20% year-on-year.

In the audiovisual and live entertainment sector, the reduction in the number of people employed was even more significant, given that during the same period it reached 26% year-on-year. This dynamic was mainly explained by the trajectory of employment in the live entertainment segment, in which the drop reached 54% year-on-year, while for the audiovisual segment the loss of jobs was lower (5%).

<sup>83</sup> The source does not allow us to account for the activity trajectory of the film segment since it is not included in the sales index measurements due to its low participation in the branch of activity in which it is included (communications and information services).

<sup>84</sup> For more details on the sectoral delimitation, see the Methodological Appendix

**Table 8** Impact on employment. Variation in the number of employed people between the second quarters of 2019 and 2020

Sector and segments	Year-on-year variation
Country total	-20%
Audiovisual and live entertainment	-26.2%
Audiovisual	-5.2%
Live entertainment	-54.3%

Source: Prepared in-house based on the National Employment Survey (National Institute of Statistics, 2019, 2020).<sup>85</sup>

If we analyze the impact of the pandemic on employment in the audiovisual and live entertainment sector according to gender, we find that although its outbreak did not cause major changes in the distribution of employed people according to that aspect, the fall in employment was more marked among women. Similarly, while employment among men recovered by 21% between the second and third quarters of 2020, among women it recovered by only 11%.

In relation to the differential impact according to the type of employment relationship, it can be seen that, in general terms, those workers who did not have written contracts suffered the most pronounced impact of the crisis. In the particular case of the live entertainment segment, it can be seen that although the loss of jobs affected all those employed (whether or not they had written contracts), it was more intense among workers without written contracts (60% year-on-year vs. 41% year-on-year).

### 2.4.3. Impact of the pandemic on activities under union representation Responses and challenges for organizations<sup>86</sup>

On March 3, 2020, the first case of COVID-19 was diagnosed in Chile in a highly complex political context.<sup>87</sup> In the context of a strong social outbreak, the crisis caused by the COVID-19 pandemic had a profound impact on economic activity and sectoral employment at the national level, as the previous section aimed to show. The following is a more detailed presentation of the scope of the pandemic in the audiovisual and live entertainment sector in Chile under the following union representation:

<sup>85</sup> For details on sector delimitation, see the Methodological Appendix (section on country breakdown).

<sup>86</sup> This section presents the analysis of the interviews carried out with trade union representatives in the sector. The Methodological Appendix presents an overview of the unions that were targeted for interview and the dates and references of those we were able to contact that are a privileged source of information for this report. It should be specified that for the actors' union SIDARTE the survey was carried out exclusively using secondary sources.

<sup>87</sup> In October 2019, the conservative government of Sebastián Piñera faced a wave of mass protests that lasted for months. The mobilized society and a significant proportion of the political opposition expressed the unsustainability of socio-economic inequalities and rejected the Political Constitution of Chile of 1980, designed by the Pinochet dictatorship to protect the *status quo* (Castiglioni, 2020).

Trade union	Sector/segment	Scope	Employment situation
Federación Nacional de Sindicatos de Canales y Productoras de Televisión (National Federation of Television Channels and Producers' Unions) (FETRA TV).	Television	National federation. Unions of the 7 television channels.	With labor contract: Fixed-term contract Severance Insurance Collective agreements
Sindicato Nacional Interempresa de Profesionales y Técnicos del Cine y Audiovisual (National Inter-company Union of Film and Audiovisual Professionals and Technicians) (SINTECI)	Audiovisual  Cinema	National inter-company union. Jurisdiction throughout the national territory.	No labor contract (80%). Amongst those hired: Mostly fixed-term contracts.
Sindicato de Actores y Actrices, Trabajadores y Trabajadoras de Artes Teatrales de Chile (Union of Actors and Actresses, Workers of Theatrical Arts of Chile) (SIDARTE)	Audiovisual  Live entertainment	National inter-company union.  11 active subsidiaries: Tarapacá, Antofagasta, Coquimbo, Valparaíso, O'Higgins, Maule, Ñuble, Bío-Bío, Araucanía, Los Lagos, Magallanes.	Informality Mostly: Self-employed workers Freelance with fee schedule.

By way of context, it is worth mentioning that people who work in the audiovisual and live entertainment sectors are strongly affected by informality, outsourcing and non-compliance with working hours. In this sense, in the audiovisual branch there are only signed company collective agreements in the television sector (Robles, 2016). Likewise, although the Labor Code in force in Chile has a special section to regulate the contract of arts and entertainment workers (Law 19889), in practice this regulation is not effectively applied. With respect to the collective organization of workers, Chile has a considerable development of unionism, although it is limited by legal restrictions that have imposed a model of unions by establishment, subcontractor and company and collective agreements of the same scope, in which branch collective agreements are prohibited, promoting the fragmentation of union representation (Robles, 2016)<sup>88</sup>

With the outbreak of the pandemic, President Pinera decreed on March 18 the State of Constitutional Emergency for 90 days. On June 15, this measure was extended for 90 more days by a decree of the Ministry of the Interior and Public Security with the argument of facing the strong impact on public health caused by the pandemic. With restrictions on their activities, thousands of workers saw their incomes disappear or decrease for an uncertain period of time and faced various situations associated with limitations on their work.

#### 2.4.3.1. Impact on the labor environment and union responses

The audiovisual and live entertainment sector, which had already been affected by the cancellation of activities resulting from the social protest of October 2019, entered with the arrival of the pandemic and the quarantine that interrupted much of the activities a period of severe crisis. The advertising market - reeling since October 2019 - ended up paralyzing itself; face-to-face work at TV stations was reduced as much as possible while the measures to make the staff more flexible, which were already

<sup>88</sup> For more details, see Robles (2016).

in place before the health crisis, were further enforced; and in the field of culture and entertainment, functions, festivals and cultural events were cancelled across the board. The coronavirus crisis has revealed the precarious reality of the sector, especially with regard to the situation of workers and their working conditions.

With regard to workers in the television sector, the FETRA-TV union leader stressed that although TV was considered an essential service, the outbreak of the COVID-19 pandemic forced television channels to suspend some recordings and take measures to prevent contagion. Teleworking<sup>89</sup> was the modality implemented to reduce the amount of work done at the office; during the state of emergency, the budgets of TV channels were reduced by up to 20% and 14-day rotating shifts and strict health measures were implemented. In each situation - in Chile there are seven nationwide television channels managed mostly by large multinational groups, with which the unions have signed collective agreements in all cases - the workers' representatives cooperated in the operation to protect the health of employees. According to FETRA-TV's management, companies and unions coordinated efforts and achieved an effective infection prevention strategy that made the few infected<sup>90</sup> mobile workers on the street.

With regard to the impact on the labor situation in the sector, it should be noted that in the last three years the Chilean media have been experiencing a constant reduction of their workforce, through massive layoffs and suspensions, a process that deepened with the social outbreak of 2019 and the pandemic caused by COVID-19. Whether due to permanent closures, restructuring processes or outsourcing of companies, since 2017 around 3,000 workers have been laid off in newspaper publishers, magazine publishers, television channels and radio stations throughout the country. In the context of the pandemic, the companies laid off workers from the television channels represented by FETRA-TV, with Televisión Nacional de Chile (TVN) and Canal 13 being the television media most affected. In addition, some companies - under the Employment Protection Act -<sup>91</sup> took measures such as the temporary suspension of employment contracts, reduction of salaries, advance vacation and suspension of benefits, such as bonuses. Most of the suspended workers were able to access their paychecks because of their coverage with Unemployment Insurance.<sup>92</sup>

Regarding the activities under SINTECI's representation, the union reported on the historical crisis in which the measures imposed to contain the coronavirus are framed and the state of total uncertainty of the workers in the sector in terms of how to generate income during the months of

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<sup>89</sup> Some of the tasks performed remotely were support tasks, such as production and editing.

<sup>90</sup> For example, on Channel 13 there were only 4 workers who were infected.

<sup>91</sup> On April 1, the Chilean Government enacted the Employment Protection Law, which seeks to protect the labor source of workers against the advance of COVID-19, allowing them to access the benefits and allowances of the Unemployment Insurance when the work contract is suspended by the company or by mutual agreement or in the event of the reduction of the workday.

<sup>92</sup> Unemployment Insurance has operated in Chile since 2002 and aims to provide monetary benefits to all employees governed by the country's Labor Code - once they face the event of unemployment - and support their reintegration into productive jobs through employment services and job training. It is financed from periodic contributions from employers and workers, to which an annual state contribution is added. These contributions are deposited in individual accounts - the workers' equity - and in a Sharing Fund, with the purpose of financing a set of benefits which vary according to the cause that generates the unemployment and the type of contract held by the protected worker (Velásquez, 2009).

quarantine. The precariousness of labor, denounced for years, but ignored by all the powers of the State, was exposed during the most critical months of the pandemic.

Regarding the impact of the quarantine on employment, the union stressed that the first signs of the crisis emerged prior to the circumstances posed by the advance of the virus. Since October 2019, social mobilization has resulted in a considerable drop in the number of projects in advertising and production services due to the temporary suspension of the activities of foreign producers in the country. Although the production of advertisements was strongly affected, the shooting of series and films did not stop because of the upheaval. Therefore, in March 2020 many of the people working in the audiovisual sector had been working for two or three months with little or no activity. According to SINTECI's representation, those most affected by the cessation of activities during the quarantine were the advertising technicians, since this is a very precarious sector, with a predominance of workers who invoice based on a fee slip (self-employed) and labor contracts without registration. As independent workers, the audiovisual technicians could not benefit from the unemployment insurance and had to face confinement without this protection.

However, this situation is also widespread in other audiovisual activities. In the cinema sector, for example, intermittent work and fixed-term contracts for each project make up the predominant form of employment. In this activity, since mid-March, series in the filming stage were completed more quickly and those that were about to begin postponed the start of filming. According to the union's leadership, from there on it was all a bit of a mess.

According to data from the survey conducted by SINTECI (2020) at the beginning of the quarantine, more than 80% of the workers declared themselves as being without a labor contract. Meanwhile, 26% of those employed were under the fixed-term figure and only 7% had permanent contracts. On the other hand, 44% were unemployed less than 1 month ago, while 51% had been unemployed once or twice in the last year. This survey indicates the problems faced by workers in the audiovisual sector and reflects the vulnerability of these workers in the face of the cessation of activities that accompanied the health crisis. This situation lasted from March to August, when the filming of advertisements gradually resumed. The pre-production stage of series and films began in November.

According to SINTECI's leadership, the number of workers infected in the workplace since the beginning of the health crisis is around ten. However, the union recorded the deaths of several workers from various chronic diseases whose treatment was impaired due to the collapse of the health care system. Several cases of depression were also recorded.

In relation to the differential impact of the employment crisis based on gender, the union referred to the fragility of single-parent households made up mostly of women, in which alimony was not paid. It was also mentioned as particularly worrying that, with the return of some shoots, the producers were mobilizing more men than women.

Regarding the situation of SIDARTE, the COVID-19 crisis had a strong impact on the artistic world in general and on the employment situation and working conditions of artists, actors and actresses in particular. Since the outbreak of COVID-19 in Chile was made official, the union warned that they would face a tougher scenario than that caused by the social protest, which had already resulted in the cancellation of projects and the loss of jobs (Espinoza, 2020). Among those involved in theater, it is completely normal to work without a contract, not to have unemployment insurance or a guaranteed right to health, and to have no pension or retirement fund in place. In the context of such undignified working conditions, the impact of confinement was strongly felt.

According to data from a survey conducted by the union,<sup>93</sup> 80% of respondents said they would not receive their scheduled income for March and April because of COVID-19 and 50% said they would receive less than 25% of their scheduled income. The scope of this problem is visualized in all its magnitude taking into account data relating to suspensions and cancellations of artistic activities, according to SIDARTE; during March 2020, more than 40% of activities were cancelled and another 40% were suspended until further notice. In the following months, live entertainment came to a complete standstill. Historically, workers in the live entertainment sector were not paid from the moment activities stopped. At the time of our survey, in November, live artistic activity was still suspended.

Given the situation outlined in the previous section, the unions in these sectors took some measures to address the crisis and protect their representatives.

With respect to FETRA-TV, the actions developed were oriented to the defense of acquired rights, compliance with collective bargaining agreements and improvement of working conditions. In this sense, during the pandemic, the Federation participated in numerous meetings, commissions and working groups with areas of the government and parliament to discuss and reach agreements on these issues. On the other hand, the unions associated with FETRA-TV were consulted to agree on the implementation of the COVID-19 prevention protocols developed by the various television companies.

In relation to the SINTECI union, one of the first strategies in the face of the cessation of activities was to try to arrange economic support measures to help the large number of workers in the sector who, because they lacked an employment contract, were neglected by the measures promoted by the Government. With this objective, the union launched a video illustrating the situation of nearly 2 million independent workers in Chile who are unable to access real unemployment insurance or any type of subsidy.<sup>94</sup> With an intense campaign including virals in social networks and letters to the media, the Minister of Finance was able to contact the board of SINTECI. Although the official's response was negative, the outreach campaign was considered successful.

Also worth noting is the effort made by the union to develop actions aimed at getting the Ministry of Culture, Arts and Heritage to promote decisions favorable to the interests of the sector. At the end of April, the guild made a presentation to the Culture Commission of the Chamber of Deputies, expressing its concern about the delay and lack of announcements from the Ministry in the face of the health crisis that was having a severe effect on the film and audiovisual sector.<sup>95</sup> Discontentment was then expressed in response to the lack of measures and actions were demanded to promote work in the short term. In addition, together with other art, entertainment and cultural organizations, SINTECI participated in the Intersectoral Table convened by the Ministry of Cultures, but withdrew after unsuccessful meetings.

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<sup>93</sup> This is a community of 1,453 respondents (only performing artists). More than 60% work independently and sporadically, more than 70% work on a fee basis, 50% are primary breadwinners of their households, and more than 60% have one or more dependents (Fajardo, 2020)

<sup>94</sup> With this material, the union publicized its proposal to get economic support from the State: the return of 100% of the withholding portion from the 2020 Income operation and the deferment of the payment of the pension fund administrator (AFP), occupational health and safety and a series of taxes and credits until 2021. Video of SINTECI available at: <https://sinteci.cl/2020/04/07/sintei-lanza-video-exigiendo-la-devolucion-completa-de-impuesto/>.

<sup>95</sup> The full debate in which SINTECI, SIDARTE and other organizations participated is available at [https://www.youtube.com/watch?v=-VDaS6Yg8N8&feature=emb\\_logo](https://www.youtube.com/watch?v=-VDaS6Yg8N8&feature=emb_logo).

Another action developed by SINTECI was the organization of virtual assemblies with the objective of strengthening communication channels with its members and to have a better understanding of the labor crisis experienced by the sector. To respond to immediate needs, it was decided to pay regular dues in advance to pool that income with other union funds and generate a relief plan. According to the information that emerges from the interview with SINTECI, during the crisis, 4 million Chilean pesos were distributed among affiliates and some non-affiliates in the form of food packages. A voucher was also awarded to families of members who had died from COVID-19.

With respect to the development of protocols for the return to face-to-face activities, together with seven other organizations, they formed a working group and created the COVID-19 Protocol for the Audiovisual Industry.<sup>96</sup> After extensive negotiations, the Ministry of Health approved the protocol of the sector's organizations in September.<sup>97</sup>

For its part, SIDARTE also participated in late April in the meeting of the Committee on Culture of the Chamber of Deputies and there presented its action plan to control the impact of the cessation of activities during the crisis caused by the COVID-19. As a first action, the union articulated a call for on-line meetings in order to be able to identify problems and propose various measures. The network of delegates in the first weeks grew, expanding to other disciplines, until it formed the National Network of Performing Arts, which is larger than SIDARTE. Organized organically and horizontally, this network has carried out several surveys that have confirmed the critical situation and have made it possible to identify transversal and specific problems in the different disciplines that make up the sector.

As with the technicians' union, SIDARTE also exhausted all instances of dialogue with the Ministry of Cultures and decided to withdraw from the sector in view of the lack of progress.

In the context of extreme social vulnerability associated with the nature of independent work, the union created a solidarity fund with voluntary contributions as a mechanism to help deal with the consequences of the health crisis.<sup>98</sup> In a first stage, a survey was carried out to diagnose the socio-economic outlook of the partners, associates and colleagues in general, and the types of assistance were defined.<sup>99</sup> In a second stage, a fundraising campaign was carried out by convening various spaces and people with the capacity to collaborate. In the first months of the crisis, more than 70 workers and their families benefited, and in early September the food packages reached 60 new families.<sup>100</sup>

Also, the emergence of numerous consultations and concerns in the labor field was used to launch a union registration campaign with many facilities. Along the same lines, aimed at consolidating the

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<sup>96</sup> In addition to SINTECI, the Chilean Actors and Actresses Union (SIDARTE), the Association of Film and Television Producers (APCT), the Association of Independent Producers (API), the Association of Advertising Film Producers (APSP), the Association of Documentary Filmmakers of Chile (ADOC) and the Chilean Animation Association (ANIMACHI) participated in the preparation of the document.

<sup>97</sup> Preventive Protocol for the Audiovisual Industry in Chile in times of COVID [https://sinteci.cl/wp-content/uploads/2020/09/PROTOCOLO\\_PREVENTIVO\\_PARA\\_LA\\_INDUSTRIA\\_AUDIOVISUAL\\_EN\\_CHILE\\_EN\\_TIEMPOS\\_DE\\_COVID\\_19-1.pdf](https://sinteci.cl/wp-content/uploads/2020/09/PROTOCOLO_PREVENTIVO_PARA_LA_INDUSTRIA_AUDIOVISUAL_EN_CHILE_EN_TIEMPOS_DE_COVID_19-1.pdf).

<sup>98</sup> SIDARTE Solidarity Fund <https://www.sidarte.cl/web2/conoce-de-que-se-trata-el-fondo-solidario-sidarte/>.

<sup>99</sup> Bank transfers, food and hygiene baskets and delivery of medicines were arranged for partners. For non-members, a Solidarity Fund membership plan was designed with the payment of the fees from January 2021 and the management of family baskets.

<sup>100</sup> Second delivery of food for members of SIDARTE <https://www.sidarte.cl/web2/2-entrega-de-cajas-de-alimentos-para-socias-y-socios-sidarte/>.



union organization, the board of SIDARTE organized in July the first major virtual meeting with 172 members connected throughout Chile.

Finally, the union also participated, together with SINTECI, in the development of the Prevention Protocol before COVID-19. In view of the need to resume artistic activities in the short term, the document establishes preventive measures to be taken in the workplace to reduce the risk of COVID-19 infection and the guidelines for action in the event of a possible case of infection in the workplace.

#### **2.4.3.2. Impact on unions and coping strategies**

In the case of FETRA-TV, it should be noted, first of all, that while unions and their capacity for collective action were temporarily affected by the impact of the crisis caused by COVID-19, the real structural limit to robust worker representation is caused, in the case of Chilean television, by outsourcing and subcontracting of labor. The layoffs that took place during the months of confinement are part of a previous and far-reaching process driven by the outsourcing of activities from the channels to independent production companies that function as simple service providers. This type of outsourcing strategy leads to a lack of accountability on the part of the main companies and the fragmentation of groups of workers and their representation.

For a couple of years now, the major free television companies in Santiago de Chile have been laying off hundreds of workers to be rehired by outsourced companies. In this context, workers saw their working conditions and salaries deteriorate while the unions began to face a process of declining memberships. With unions becoming less and less representative, the role of the Federation becomes more central. The strategy that must be implemented in order to curb this process is, as stated in the interview, to strengthen the union presence that has been rebuilt in the outsourced companies - with the national Federation officiating as a link - to contain the dispersion.

In the case of SINTECI, the negative impact in financial terms of the crisis posed by COVID-19 is highlighted first. In the absence of effective policies of economic support for the sector by the State, the union came out to respond to the needs of the workers. In one of the virtual assemblies, members voted to allocate the organization's savings to meet the most urgent needs. In response to this critical situation, the union called for the advance payment of union dues. Thanks to the solidarity of the members, 500,000 Chilean pesos were collected, which were also used to respond to the emergency. The financial situation is therefore very delicate. The health crisis also had a negative impact on people who are members of the organization's Board of Directors, who described the proposed scenario as strenuous. With the same problems as their comrades, the leadership was forced to take time off to meet the new demands and to do so without any pay or union hours.

In the case of SIDARTE, situations of wear and tear were also experienced which, as reflected on the union's website, led to the collective resignation of the union's Board of Directors, leaving the need for a decentralized institutional structure to promote better and greater democracy, particularly through more regional autonomy.<sup>101</sup>

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<sup>101</sup> Collective waiver of SIDARTE Directory <https://www.sidarte.cl/web2/renuncia-colectiva-directorio-sidarte/>.



#### 2.4.4. Union perspectives and challenges for the post-pandemic scenario

In terms of the challenges of the immediate future, FETRA-TV identifies the challenge of strengthening the trade union organizations that have been built up in the outsourced companies so that these, together with the sector's historic unions, will be barriers to halting the deterioration of working conditions and the loss of labor rights. With that perspective, solving the problem of financing union structures in a scenario of free-falling membership is a crucial issue. The challenge ultimately is to regenerate the power of mobilization and collective organization among the workers in the sector.

As for the union of film and audiovisual technicians, in the immediate future SINTECI aims to achieve a good degree of control of compliance with the measures outlined by the protocol for the audiovisual industry, working in conjunction with the camera and production companies in the sector. The reactivation of the sector and the participation of the union in this process - to raise the sectoral needs at an institutional level - is one of the main objectives of the organization. In order to move in that direction, one of the main challenges is to establish clear guarantees and rules so that reactivation can take place. In terms of union strength, the union describes its situation as very auspicious, given the visibility achieved during the critical months of the pandemic that resulted in new members joining the organization.

Finally, the actors in SIDARTE have begun a refoundational process in which they consider it necessary to propose new internal mechanisms to stimulate the debate of ideas and the quality of discussions, as well as to consider the role of artists and art in general in the economic and social development of the country.

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## 2.5. COLOMBIA

### 2.5.1. Relevance of the sector in the national economy<sup>102</sup>

With a GDP close to 741 billion dollars and just over 50 million inhabitants, Colombia's economy represents 1% of the world's gross product and 0.7% of the global population, according to the World Bank. In the country, the audiovisual and live entertainment sector accounts for approximately 1.2% of the GDP and 13.3% of the added value generated by the cultural industry and the orange economy, while employing 117,170 people (19.6% of the total workers in the cultural industry and the orange economy). Among the segments, broadcasting activities have the greatest weight, followed by movies and live entertainment.

### 2.5.2. Impact of the pandemic on economic activity and sectoral employment<sup>103</sup>

The impact of the pandemic caused by COVID-19 on the trajectory of national economic activity in the first half of the year has been significant. During the second quarter of 2020, Colombia's GDP contracted by 15.7% year-on-year and 14.9% in relation to the first three months of the year. In the sector of interest, the retraction in activity started to be felt during the first quarter of the year, for which a drop of 0.6% was noted with respect to the first quarter of 2019, which deepened during the second quarter, in which the drop reached 16.9% year-on-year.

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<sup>102</sup> This section presents sectorial data based on the information provided by the Cuenta Satélite de Cultura y Economía Naranja (CSCEN) [Cultural Satellite Account (CSC) and orange economy] prepared by the National Administrative Department of Statistics (2020c). This source, given the methodology it employs, is the most appropriate for such purposes (see the Methodological Appendix for details).

<sup>103</sup> This section uses as a source of information the quarterly estimates of the GDP and the number of employed persons as indicated by the System of National Accounts and the Large Integrated Household Survey prepared by the National Administrative Department of Statistics (2019, 2020a, 2020b, 2020d, 2020e, 2020f, 2020g). It must be taken into account that, since the information provided by these sources is not broken down by sector, which would make it possible to ascertain the evolution of what was strictly defined as a sector of interest based on the culture satellite account, the data provided in the section corresponds to the evolution of those branches of activity in which the audiovisual and live entertainment sector is contained. The Appendix specifies the additional activities included within the branches in each case, as well as those about which it was not possible to obtain information.

**Table 9** Impact on activity. Year-on-year variation 2019-2020.  
GDP of the audiovisual and live entertainment sector

Level	1 <sup>st</sup> quarter	2 <sup>nd</sup> quarter	1 <sup>st</sup> half-year
<b>GDP</b>	<b>1.4%</b>	<b>-15.7%</b>	<b>-7.4%</b>
<b>Audiovisual and live entertainment</b>	<b>-0.6%</b>	<b>-16.9%</b>	<b>-8.8%</b>
Audiovisual	1.4%	-5.2%	-2.0%
Live entertainment	-3.8%	-35.6%	-19.6%

Source: Prepared in-house based on data from the National Administrative Department of Statistics<sup>104</sup>

In the audiovisual sector, the falls during the second quarter were significantly lower than those of the economy as a whole, while the live entertainment sector showed notably higher falls, with a contraction in activity during the second quarter of around 35.6% year-on-year and 32.5% compared to the first quarter of the year.

In relation to impact on employment, the pandemic has had a significant effect on the level of employment in Colombia. During the second quarter of the year, the number of employed people fell by 21.8% year-on-year, and although the latest data show a recovery in employment, it is still nearly ten percentage points below the level before the health crisis.<sup>105</sup>

In the audiovisual and live entertainment sector, the fall was even more pronounced, reaching 32.8% year-on-year during the second quarter of 2020, with falls of 24.9% in the audiovisual sector and 34.2% in live entertainment.

**Table 10** Impact on employment. Variation in the number of employed people between the second quarters of 2019 and 2020

Sector and segments	Year-on-year variation
<b>Country total</b>	<b>-21.8%</b>
<b>Audiovisual and live entertainment</b>	<b>-32.8%</b>
Audiovisual	-24.9%
Live entertainment	-34.2%

Source: Prepared in-house based on data from GEIH-DANE (2019, 2020a).

In the live entertainment sector, the evolution of employment shows strong volatility. For example, although in the months of April and June there were year-on-year falls of 30%, this result was almost completely compensated for in the second quarter, given that there was a 37% year-on-year increase in the number of employed people during the month of May. With respect to the form of hiring, in January 2020 the presence of labor contracts reached 40%, while in August 2020 this percentage

<sup>104</sup> For more details on the sectoral delimitation, see the Methodological Appendix (section on country details).

<sup>105</sup> This is an estimated loss of 1.9 million jobs according to the Large Integrated Household Survey (National Administrative Department of Statistics, 2019, 2020).

was reduced to 33%. Likewise, the relationship between written and verbal contracts was reversed, with the latter prevailing by mid-2020, as opposed to the months prior to the pandemic.

The audiovisual sector also shows a general tendency to fall in terms of the level of employment, although, within this, it should be noted that broadcasting activity is one of the few that shows an upward trend (it registered during the second quarter of 2020 an increase of 13% year-on-year). On the contrary, both the production and the screening of films saw their activity strongly curtailed, with falls in employment of the order of 50% in the first case and 35% in the second. In the case of production activity, moreover, there was an increase in employment without a contract, rising from 48% in January 2020 to 74% in August.

### 2.5.3. Impact of the pandemic on activities under union representation Responses and challenges for organizations<sup>106</sup>

As can be seen, the crisis caused by the COVID-19 pandemic had a strong impact on Colombian economic activity and sectoral employment at the national level. In this section, a closer look is taken at the scope of the pandemic under the following trade union representation in the audiovisual and live entertainment sector in Colombia:

Trade union	Sector segment	Scope	Employment situation
Asociación Colombiana de Trabajadores de la Industria Audiovisual (Colombian Association of Workers in the Audiovisual Industry) (ACTV)	Audiovisual (trabajadores técnicos, artísticos y creativos) (Audiovisual technical, artistic and creative workers)	National	70 affiliated workers The “service contract”, freelance, predominates.
Círculo Colombiano de Artistas (Colombian Circle of Artists) (CICA)	Live entertainment (artists)	National	332 affiliated artists.
Asociación Colombiana de Actores (Colombian Actors Association) (ACA)	Live entertainment (artists)	National	332 affiliated artists.

To frame the analysis that follows, it is pertinent to point out that in the labor situation of the sector, the presence of non-salaried workers largely predominates, which should be framed in a national reality characterized by high levels of unemployment, informality and outsourcing fostered by a neo-liberal government with a clear anti-labor and anti-union orientation. Trade unionism in Colombia presents a critical reality, atomized and with low levels of adherence. This weakness is evident in the sectors addressed: there are no collective bargaining mechanisms to safeguard acceptable levels of

<sup>106</sup> This section presents the analysis of the interviews carried out with trade union representatives in the sector. The Methodological Appendix presents the union organizations in the eight countries that were sought to be interviewed (35 unions) in the survey and the dates and references of those that were contacted (29 unions), which are a privileged source of information for this report.

employment and wage conditions, which also generates high levels of unprotected health and social security. This weakness is also reflected in the mechanisms of action and claim of collective demands.

As in other countries in the region, activities in the sector were paralyzed from the outset, in this case, having not developed public policies to support the sector or to propose protocols for the return to work, beyond the recommendations that the World Health Organization (WHO) established at the global level. The latter were proposed and made by the unions, which is why they have been considered as technical recommendations and have not reached the status of protocols.<sup>107</sup>

### **2.5.3.1. Impact on the labor environment and union responses**

The crisis caused by COVID-19 made the typical working conditions of the sector in the country even worse, as a result of the isolation measures and protocols that began to be implemented and allowed employers to impose very unfavorable conditions for workers. The pandemic thus revealed and deepened this precariousness in working conditions, the lack of registration of its workers and the consequences of this lack, the absence of a collective agreement and the lack of wage rates among the most relevant issues.

According to estimates by the ACTV union, the aggregate audiovisual sector is comprised of a universe of approximately 4,500 to 5,000 workers directly linked to the sector, which is also marked by a high level of precariousness in terms of its contracting conditions. Although official figures maintain that two-thirds of employees are not directly employed but are self-employed (*freelancers*), for the union this figure is much higher: 90% are temporary independent workers who carry out their tasks through service contracts.

In addition, it is relevant to point out that the union reports a strong labor crisis in the sector since 2019, which the pandemic exacerbated.

As seen in the previous section, the overall diagnosis of the aggregate impact of the pandemic on working conditions is largely negative. Firstly, the total unemployment in these activities for more than half a year since the end of March, and as a consequence, the loss of the source of income, stands out. The only activity in the sector that continued to develop during this period was that related to news information systems, which were considered an essential activity.

The inability of a large number of workers in the sector to work generated a search for income in other labor branches, which, although it is a characteristic of the type of labor market insertion of workers, was even more pronounced given the general framework of the pandemic.

In a second period of the year, with the gradual reactivation of the sector, the ACTV representatives highlighted the deepening precariousness of the labour situation. Within this framework, employers automatically made conditions even more flexible, becoming even more abusive and finding justification in increasing production costs, where COVID-19 became an excuse for imposing almost naturally worse working conditions. On the other hand, this context forced some workers to accept

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<sup>107</sup> Government measures to address COVID-19 have been taken since March (Decree 385/2020). Within this framework, provisions such as the “general biosafety protocol for the mitigation, control and adequate management of the COVID-19 Coronavirus pandemic” (Resolution 666 of the Ministry of Health) were issued.

these conditions given the urgent need to work, revealing once again the dynamic according to which wages are established mainly by individual negotiation and without union intervention.

This higher level of precariousness takes two dimensions: on the one hand, in terms of wages, the reduction of salary and the increase in delay in payments, already typical of the sector; secondly, in terms of working time and the extension of the working day, since the health and biosafety protocols imply longer cleaning times, forcing a change in working methods.

It should also be noted that this general situation highlighted gender issues within the sector. Although ACTV leaders did not evaluate that there has been a differential impact, female workers in the sector are directly affected as they are not beneficiaries of the breastfeeding law or the maternity law because they do not have an employment contract, showing how these general circumstances leave female workers more unprotected.

In terms of new working modalities, the workers who returned to the activity with *streaming* projects did not experience an improvement in their working conditions either, since companies do not pay for services used at home, the internet or whatever is necessary to guarantee that filming takes place.

Health is another issue in which the precariousness of the sector can be seen. Health is the responsibility of workers, which generated difficulties in coverage. As for the level of infections and deaths from COVID-19, in the interviews the union's representatives maintained that there is no official estimate or precise general information from companies. It is also important to note that COVID-19 is only considered an occupational disease in the country for health sector workers, while a national decree<sup>108</sup> states that no other occupation or work is covered by occupational risk insurance companies (the ARLs) even prior to the pandemic, which worsens the situation of care for workers in the sector.

As for actoral activity throughout the sectors contemplated, the pandemic generated a very worrying situation, given the suspension of all television and advertising productions and the closure of the theaters, which, in addition, depend on the assistance of the public for their support. It is not easy to know the number of actors affected because there is no single national register of actors in the country, but the union leaders interviewed (both from CICA and ACA) described a dramatic situation. In fact, the channels and producers have dedicated themselves to repeating soap operas and series, making the situation even more difficult for those workers who live off the income from this activity.

On the other hand, as already mentioned, the actors do not have a collective agreement, which creates many problems for the artists in terms of social protection and health expenses. This decentralization also encourages actors to try to resort to individual solutions in this crisis, such as producing their own content using social networks, thus making the task of the trade organizations more difficult.

With resumption of the sector's activities and the reopening of theaters allowed within certain limits, the highly precarious conditions remained unchanged. On the one hand, theaters cannot exploit their full capacity, an excuse used by employers to lower wages; on the other hand, recordings

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<sup>108</sup> Decree 676/2020, which incorporates a direct disease into the table of occupational diseases. Available at: <https://dapre.presidencia.gov.co/normativa/normativa/DECRETO%20676%20DEL%2019%20DE%20MAYO%20DE%202020.pdf>.

have been delayed due to the need to comply with health and biosafety protocols. The return to activity seems, however, not to be able to reactivate the big theaters, not only because of the smaller audiences allowed and the high costs of opening - even in the alternative theatres - but also because of the fear the public has in attending big events again. This is a scenario of uncertainty for the sector.

Finally, the interviewees pointed out that the structure of the workers is very uneven and that the great majority of them do not have savings; while only a minority of actors, perhaps the best known, are those who have been able to get through the months of the pandemic with fewer shocks.

In summary, the pandemic has highlighted the precarious working conditions in the sector at both times of the crisis. On the one hand, the paralysis of activity – in which 90% of the workers do not have an employment contract – left a large part of the workforce without income; on the other hand, this same situation allowed for further progress from the business sector in the return to face-to-face activities in terms of salary levels, hiring modalities, versatility in work and even the length of the working day.

Given the situation outlined in the previous section, the unions in these sectors took some measures to address the crisis and protect their representatives. As an immediate measure, the **ACTV** union automatically stopped collecting the contribution to the union, thus trying to offer a measure of respite to its members. On the other hand, in view of the urgent need for income of the workers in the sector, an attempt was made to help with a fund by delivering products to people experiencing economic hardship; however, these funds lasted only a short time, as the donation and aid campaigns could not be sustained.

Secondly, a primary strategy is established for the health care of their constituents, using mostly social networks (Facebook and Twitter, in particular) with the aim of informing workers about ways to prevent the disease. These communication channels are also enhanced with the objective of raising awareness about the labor situations being imposed upon the sector, the diverse realities that its workers face and the demands that the union has in this regard. Thus, one strategy was to encourage and increase communication from the organization: to provide as much information as possible in an agile and accessible way, in an attempt to capture the attention of workers who had not previously approached the union, especially the youngest ones.

Finally, the organization ACTV is working to develop a collective agreement, investigating everything related to salary scales, nomenclature of tasks and trades and labor laws. The union representatives have pointed out that this is still a “debt” to national workers in this sector.

With regard to the development of protocols for the return to face-to-face activities, the ACTV union maintained that all the measures arranged by the government so that the economy would not grind to a halt basically followed the general recommendations of the WHO, but without going into them in any depth, and therefore they are considered “precarious”. In fact, five unions made public a letter based on Resolution 957 of the Ministry of Health,<sup>109</sup> in which they criticized the fact that the purchase of personal protection items by the employer was not ensured and that the fulfillment of various roles and functions by a single worker was promoted, which could encourage labor discrimination

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<sup>109</sup> Available at: [https://www.minsalud.gov.co/Normatividad\\_Nuevo/Resoluci%C3%B3n%20No.%20957%20de%202020.pdf](https://www.minsalud.gov.co/Normatividad_Nuevo/Resoluci%C3%B3n%20No.%20957%20de%202020.pdf).



against those who do not accept these conditions. Finally, they also called for a collaborative participation of all labor sectors when implementing provisions and protocols for the sector.

In this sense, the union carried out an exhaustive search of protocols for the sector in the rest of the countries of the world, but decided not to take them into account to make their own, since they considered that the business sector, backed by the government, would not incorporate the protocol as a mandatory regulation, but only as a recommendation for the activity to continue with the task of disseminating the rules of care for workers, but without drafting a protocol.

As for compliance with the existing protocols and recommendations by the workers, the ACTV union points out that it is very complex to comply with them in detail due to the type of activity, because of the particularities of the work that involves a lot of almost constant personal interaction.

From the union perspective, resources earmarked for the sector during the pandemic have been basically geared to businessmen, especially for the big international capital companies,<sup>110</sup> which for the union representatives is an attempt to “convert Colombia into a kind of maquila for international production”.

For their part, the unions linked to artistic and acting work have found it quite difficult to deal with the pandemic, although they have managed to provide some assistance to workers. For example, CICA members provided assistance to the most economically challenged workers in the theater field in general and not just to CICA members, while ACA was able to set up a fund to assist older actors and actresses.

Also, in the case of the ACA, campaigns such as “Save the Theatre” were carried out, an initiative to alleviate the situation of Colombian theaters through fundraising, which raised resources for some ten theaters in Bogotá and another ten nationally. To this end, social networks were used to mobilize the community to achieve this goal and to raise awareness about the severe situation endured by these spaces and their workers.

The lack of centralized mechanisms to discuss and resolve the sector’s demands was highlighted in each of the interviews, a situation that was deepened given that the only concrete proposal from the government towards the live entertainment sector was based on certain calls and competitions made by different organizations, which were clearly insufficient to sustain the sector and to reverse the lack of labor income. The unions have explained that the calls have been limited and are beset by very long deadlines.

A more successful call from ACA’s point of view has been “Great stories with small cameras”, exclusively for the actors of their guild, which consisted of short films that would be broadcast by state channels. Likewise, there were also quite a few difficulties in some contests, as pointed out by CICA, with the expenditure of resources and elementary situations that were not yet resolved, such as payment of the public services of the Circle itself. The implicit discrimination suffered by those who,

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<sup>110</sup> Such as the modification of Law 1556 that benefits international investment within Colombian territory for audiovisual production, which was extended by Decree (474) in 2020 within the framework of the national emergency. This law provides negotiable securities for up to 35% of the investment made in the country by producers of audiovisual works. With respect to workers in the sector, the government carried out numerous training campaigns through the National Learning Service, but the union also criticized them in their objective, since they concentrated on producing low-skilled technical labor, which cannot be performed in the future at higher wage levels

because of their age, often have neither access to computer resources nor ease of use for participation in these calls was also highlighted. Finally, it is stressed that the resources from the competitions of the Ministry of Culture and the Institute of the Arts have already ended, although activities are still far from being normalized at the date of this report.

Likewise, CICA has collaborated with its spaces for rehearsals or audio theaters, or also organizing video workshops, in a situation that became very complicated because, due to the pandemic, the offer was very extensive and they did not achieve the desired results.

The ACA has also produced a fourteen-episode web series called *Operation Evita*, which seeks to raise awareness of the Colombian reality in times of pandemic. Some of these episodes were paid, which also helped support actors and actresses who were without income.

As for the protocols, in the case of the ACA, these could form part of the preparation of the biosafety protocols for the return to work.<sup>111</sup> Within this framework, the actors had the benefit of the supervision of the union organizations and made additional progress in that, on television, the channels paid union commissioners, who were in charge of supervising compliance with the protocols in the recordings. The CICA, for its part, drew up a biosafety protocol for the return to activity in July.

Other initiatives by the unions involved training of workers, either with CICA, trying to collaborate with those who did not manage computer resources due to what virtuality currently represents, as with ACA, which attended universities and drama schools to conduct union pedagogy.

In the case of live entertainment workers, they have also been critical of the support provided by the government, which was considered by the union representatives to be insufficient at best. In this sense, only the fiscal and tax benefits for employers are questioned and, on the other hand, the incentives of the Ministry of Culture did not include the majority of the workers in the performing arts.

In summary, the sector's unions have tried to cope with the crisis in various ways. Firstly, by assisting those of its members without income, and then with the concern for protocols and safe ways of working in the absence of clarification of official recommendations. On the other hand, they have strongly questioned the official policy for the sector, both because it is mostly aimed at employers and because of their inability to reach the majority of workers in the sector.

### **2.5.3.2. Impact on unions and coping strategies**

In the case of ACTV, the first thing that stands out is the negative impact in financial terms as a counterpart to the aforementioned measure by the union itself to stop collecting the mandatory fund from members, which in terms of the structure, entails salaries of the union's own workers and the services it provides to its members.

However, at the time of making a general evaluation of the impact that the crisis has had on union organization, the leadership of ACTV highlights several other positive repercussions, such as the board of directors having more time available for organization, with the aim of continuing with the activities that the union considers to be a priority in order to improve the situation of its members.

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<sup>111</sup> So far, there are various protocols according to the spaces, districts and companies, but none agreed upon by the national government with all the trade union organizations in the sector.

Finally, the positive effect is the increase in membership and the consequent strengthening of the organization as a result of the tremendous situation experienced by the workers, their helplessness and the lack of income generated by the pandemic.

The actors' unions had certain difficulties in unifying their claims and petitions to the government in the face of the closure of their branches. This situation is aggravated when one considers the general context faced by actors in relation to the country's political situation, in which the murder of social leaders is currently being denounced. In the case of the ACA, they have denounced persecutions and lists of social networks where there are artists and even union board members "profiled" by the government, configuring a very difficult framework for union activity.

On the other hand, these unions also went through serious economic complications, since their support depends on the dues of their members, who, being unable to work, could not continue paying their memberships. The activities they tried to carry out to raise funds also failed to match economic demand. For example, in the case of CICA, video theater performances were held for a diverse audience, but did not meet the intended expectations. In this framework, the economic needs of the unions could not be covered either by the union federations at the national or international level. In addition, they were questioned by workers in the sector in view of the complicated situation.

As mentioned, the situation became difficult in terms of militancy and activism as well. ACA members point out time-related challenges in finding their own source of income and subsistence, which made it very complicated to sustain the union's activities.

As a positive consequence, ACA has opened the Secretariat of Women's Affairs to address various gender issues - which has been very well received - and the activities of the Secretariat of Youth and Promotion in relation to raising awareness among new generations about the importance of unity among workers and the existence of the union.

In conclusion, the structure of the Colombian unions was in serious difficulty, above all because they were unable to collect their members' dues or receive assistance from the State or companies. However, they have remained active in their union role.

#### **2.5.4. Union perspectives and challenges for the post-pandemic scenario**

According to the ACTV union, they are very concerned about the reality of workers in the audiovisual sector. Its main objectives in this regard are to achieve greater regularization in contractual terms, so that access to health and social security protection, as well as basic labor rights, are guaranteed. It is also key from the point of view of the leaders interviewed to obtain a collective agreement for the activity, so that the regulation of the general working conditions, as well as the salaries (that is, levels of the salary scales), are ultimately fixed collectively. To this end, it is necessary to recognize the new tasks and trades in the sector - new in terms of modernization of the activity and greater technological presence - in the national nomenclature of occupations.

Another challenge they focused on was the union's struggle against the stigmatization of these political organizations by the workers themselves, in order to overcome the fear they express towards unionization, derived from the general political context already described as well as from the recent political history of the country. This would be the first step to achieving greater affiliation. To this

end, they also argue that they need to draw attention to the collective organization of the younger demographics, who are mostly resistant to this type of movement.

As far as the actors' unions are concerned, both CICA and ACA point out as a main challenge the search for greater solidarity among unions in the sector, as well as with respect to national and international federations in order to overcome the critical situation in which they are immersed. From their perspective, overcoming union and political fragmentation, as well as articulating strategies with other unions, is key for the future.

As far as post-pandemic perspectives are concerned, although it is not considered easy to foresee a scenario clearly, neither union finds the future very promising in terms of activity, employment and, therefore, the income of their workers and the situation of the organizations themselves. An immediate concern is how to sustain the organization if the pandemic continues without external input from either the government or its members. This is a very delicate situation, considering that the union is the collective representation body necessary to carry out the defense of the workers in the sector.

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## 2.6. UNITED STATES

### 2.6.1. Relevance of the sector in the national economy<sup>112</sup>

With some 328.3 million inhabitants and a GDP in the order of \$20.5 trillion, the United States accounts for 4.3% of the world's population and 15.8% of global gross product according to the World Bank. In 2017, the audiovisual and live entertainment sector accounted for 1.5% of U.S. GDP and 33% of the added value generated by the cultural industry as a whole. In addition, the sector employed about 1,141 million workers in the same year, representing 22% of the total cultural sector and 0.75% of the total national economy. In terms of added value generation, the broadcasting segment is the most relevant, followed by cinema and live shows.

### 2.6.2 Impact of the pandemic on economic activity and sectoral employment<sup>113</sup>

In the United States, the fall in activity has been pronounced because of the pandemic caused by COVID-19. During the second quarter of 2020, the country's activity registered a decrease of 8.5% compared to the same period last year, and 9.5% compared to the previous quarter. As a result, the accumulated decline during the first half of the year reached 3.2% year-on-year.

The impact on the audiovisual and live entertainment sector was even more pronounced, and even began to be felt from the beginning of 2020: during the first three months of the year there was a 1.9% year-on-year contraction in the sector's activity, explained mainly by the live entertainment and cinema segments (retractions reached 12.7% and 6.5% year-on-year, respectively). During the second quarter, the sector recorded a 16% year-on-year decline in activity, with losses in all segments. Thus, the first half of 2020 ended with an accumulated decline of 9% in relation to the same period in 2019, with the segment of live entertainment being the most affected.

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<sup>112</sup> This section uses the information provided by the artistic and cultural production satellite account prepared by the country's Bureau of Economic Analysis (BEA). The satellite account, given the methodology it employs, is the most appropriate for such purposes (for more details, see the Methodological Appendix).

<sup>113</sup> In this section, GDP and employment estimates from the System of National Accounts and the U.S. Bureau of Labor Statistics, prepared by the BEA, are used as sources of information. Given that this information is not broken down by sector, which would make it possible to ascertain the evolution of the sectors of interest in this study, the data corresponds to the evolution of the branches of activity in which the audiovisual and live entertainment sectors are included. The Methodological Appendix specifies the other activities included within the branches in each case, as well as those about which it was not possible to obtain information.

**Table 11** Impact on activity. Year-on-year variation 2019-2020. GDP and added value of the audiovisual and live entertainment sector

Sector and segments	1 <sup>st</sup> quarter	2 <sup>nd</sup> quarter	1 <sup>st</sup> half-year
<b>GDP</b>	<b>2.1%</b>	<b>-8.5%</b>	<b>-3.2%</b>
<b>Audiovisual and live entertainment</b>	<b>-1.9%</b>	<b>-16%</b>	<b>-9%</b>
Audiovisual	0.3%	-7.7%	-3.7%
Broadcasting (radio and TV)	1.5%	-2.7%	-0.6%
Cinema	-6.5%	-34.5%	-20.9%
Live entertainment	-12.7%	-59.9%	-35.8%

Source: Prepared in-house based on data from BEA.<sup>114</sup>

A recent report published by the organization Americans for the Arts (2020) estimated, according to information provided by 643 companies, that the financial losses for the audiovisual segment<sup>115</sup> amounted to \$ 52.8 million and that 91% of companies surveyed had to cancel projects. In relation to the live entertainment sector,<sup>116</sup> from a survey of 8,266 companies and organizations, the same source indicates that between March and October financial losses were around 862.4 million dollars and 97% of the companies had to cancel scheduled events

With regard to employment in the U.S. economy in general, it is noted that between February and April 2020 the unemployment rate went from its lowest level in half a century (3.5%) to 14.7% (the highest since the 1929 crisis). Specifically, between the second quarter of 2019 and the second quarter of 2020, the number of employed people registered a contraction of 11% year-on-year (16.9 million people).

The impact on employment in the audiovisual and live entertainment sector was even more significant: during the same period, the employed population contracted by 39% year-on-year. Within the sector, the most affected segment was the cinema. In this case, the contraction in employment during the second quarter of 2020 was of the order of 51% year-on-year. It was followed, in order of relevance, by live entertainment (-49% year-on-year) and broadcasting (-10% year-on-year).

<sup>114</sup> For more details on the sectoral delimitation, see the Methodological Appendix (Detailed section by country).

<sup>115</sup> It corresponds to the sector labelled in the report as Multimedia, cinema and video.

<sup>116</sup> It corresponds to the sector labelled in the report as Performing Arts.

**Table 12** Impact on employment. Variation in the number of employed people between the second quarters of 2019 and 2020

Sector and segments	Year-on-year variation
<b>Country</b>	<b>-11%</b>
<b>Audiovisual and live entertainment</b>	<b>-39%</b>
Audiovisual	-32%
Broadcasting (television and radio)	-10%
Cinema	-51%
Live entertainment	-49%

Source: Prepared in-house based on data from BEA.<sup>117</sup>

As will be seen below, these falls in employment are certainly contrasted and more intense in activities under union representation.

### 2.6.3. Impact of the pandemic on activities under union representation Responses and challenges for organizations<sup>118</sup>

As can be seen, in the United States the crisis caused by the COVID-19 pandemic has had a strong impact on economic activity and sectoral employment at the national level. In this section, the scope of the crisis in the activities under the following trade union representation is addressed:

<sup>117</sup> For more details, see the Methodological Appendix (Detailed breakdown by country).

<sup>118</sup> This section is based centrally on the analysis of the interviews carried out with trade union representatives in the sector. The Methodological Appendix presents an overview of the unions that were sought for interview and the dates and references of those that were contacted, which are a privileged source of information for this report. It should be specified that in the case of the Writers Guild of America-East (WGAE), the information provided in the self-administered questionnaire and in email exchanges with the guild's reference is included. Also, in-depth interviews could not be conducted.



Trade union	Sector segment	Scope	Employment situation
Screen Actors Guild-American Federation of Television and Radio Artists (SAG-AFTRA)	Audiovisual: television, cinema, new platforms, advertising, broadcasting, film exhibition.	National	Workers represented: 185,000 Affiliates 161,631 Of these, 6,645 (4%) are salaried and 154,986 (96%) are freelance or temporary workers.
International Alliance of Theatrical Stage Employees, Moving Picture Technicians, Artists and Allied Crafts of the United States, its Territories and Canada (IATSE USA)	Audiovisual: television, cinema, new platforms, advertising, broadcasting, film exhibition. Live entertainment: concerts, theater, conventions.	International	153,000 affiliates in North America, in USA 125,000. Most are self-employed.
Writers Guild of America - East (WGAE)	Audiovisual: television, cinema, new platforms. Digital news, podcasts.	Regional	Workers represented: 7,000 Affiliates: 6,000. One third of the members are salaried workers; the rest are independent or casual workers.

To contextualize the analysis that follows, it is important to point out that the regulation of the field of labor relations in the United States is governed by federal and state laws that cater to workers in the sector, even though they carry out their tasks under non-salaried occupational categories; mostly as independent workers.

It is also important to add some additional considerations. First, as we saw in the previous sections, the sector under study, as a nodal part of the entertainment industry, is one of the most prominent economic drivers in the country and an important employer in the private sector, so its collapse had a direct and indirect impact on hundreds of thousands of workers. Another characteristic of this country, which is particularly relevant in a global health crisis scenario, is that the U.S. health system is characterized by a very limited scope of public health coverage, putting workers who lost their sources of income in a critical situation. Finally, another factor that gives particularity to the context of labor relations in the context of analysis refers to the tense relations between workers and unions in the sector with the Federal Government since the beginning of Donald Trump's administration, which became more acute in the context of the pandemic.

In connection with the pandemic, on March 20, the States of New York and California enacted mandatory quarantine and the cessation of all non-essential activities. These are the largest production centers in the industry, so much of the activity stopped from that date, and only in the audiovisual sector could work be resumed in September, as shown below.

### 2.6.3.1. Impact on the labor environment and union responses

In the case of IATSE, the paralysis of activities reached 90% of the workforce represented. Within the audiovisual sector, episodic film and television workers saw all ongoing and scheduled productions canceled, and activity came to a complete halt for about six months. In the broadcasting segment, although it was considered an essential service, the main television networks (CBS, ABC, NBC) closed their studios and began to broadcast from the homes of journalists and hosts, so most of the technical and artistic teams working in this segment were also affected. Finally, live entertainment workers suffered the total collapse of their sector and no ongoing activity could continue.

The return to activity was sporadic according to the segment and sector in which members were working. In the case of the audiovisual segment, television production was the first to resume in July after four months of inactivity, while cinema and episodic television were reactivated from September. These activities include the reconfiguration of working conditions based on the application of health protocols, which manifested itself in various ways. Among the most extreme cases, there are certain productions that operate under “bubble” systems, in which workers must remain without external physical contact for the duration of their contract.

In relation to live entertainment workers, at the time of the interview they remained without work for an indefinite period of time. The representative interviewed estimates that this sector could resume activity in July-August, or even in September-October 2021. The situation of this group of workers is the most critical, and the impact of the pandemic on them was characterized as devastating by the IATSE leader.

With regard to health care during quarantine, the interviewee noted that the high cost of health care in the United States imposes considerable barriers to access for the entire population, a problem that is exacerbated for workers who have suddenly lost their income.

With respect to health protection and infection control in the workplace, IATSE mentioned that at least one positive case has been identified in all productions, although it was noted that, so far, they have been able to identify and monitor them. However, a major resurgence of cases in the United States was beginning to challenge the ability to ensure safety on the film set.

In the case of WGAE, 3,800 members were active at the time of the pandemic. Prior to the implementation of isolation measures, 87% of the workers performed their tasks at their workplaces, while the remaining 13% were already working remotely. During quarantine, these figures were reversed, reaching 21% and 79%, respectively.

In terms of employment, the impact of the pandemic on WGAE members was slight relative to that recorded for other activities. According to the union leader, screenwriters for television, film and new platforms continued to meet the demand for scripts, as producers hoped to have them in place for the resumption of production. The news sector, on the other hand, experienced some dismissals and suspensions.

In relation to the activities achieved by SAG-AFTRA, according to data provided by the union, of the 5,142 productions in progress or scheduled for development during 2020, 4,560 (89%) were cancelled or rescheduled, directly affecting 60,000 (67%) of the 90,000 workers committed to these projects. Of the total production planned for 2020, only 438 (9%) could be developed via *streaming*.

In labor terms, SAG-AFTRA’s membership consists of a small proportion of salaried workers who work in radio and television stations (4%) and a large majority of independent workers who perform tasks under contracts of variable duration (annual, for a certain number of episodes, per day). In relation to the impact of the pandemic on the employment of their members, the leader interviewed mentioned that some workers continued to work during the quarantine without interruption, such as television and radio journalists, *disc jockeys*, as well as artists who perform *voice over* recordings and animation who had their own studios in which to carry out their tasks.

On this point, the representative pointed out a tension exposed by the pandemic between, on the one hand, the promotion of remote work as a health strategy of risk prevention and, on the other hand, the exclusion of those who cannot afford to maintain their own studio. Thus, the pandemic

exacerbated the polarization of the labor market, affecting those with fewer resources even more significantly.

With respect to workers who had their projects cancelled, the situation varied according to the individual contracts they had in place at the time activities ceased. Thus, those with annual contracts for episodic series received the compensation stipulated in their contracts, and those who had no income at all were able to access unemployment assistance from the federal government, which allowed the impact to be mitigated for a few months.

With the return to work, although some isolated projects began to be taken up again in July, as already mentioned, the resumption of audiovisual activity was registered in September, after a sectorial protocol was agreed upon. In this regard, the SAG-AFTRA leader mentioned that, although they have maintained the terms of the contracts, the contracting process was modified by the protocols. Specifically, they provide for mandatory pre-employment testing of COVID-19, and employers may waive the services in the event of positive results.<sup>119</sup>

As for health care during the pandemic, SAG-AFTRA mentioned that the union health plan recorded a deficit of over \$150 million following the cessation of employer contributions during 2020. In view of this situation, it was decided to modify the eligibility criteria to apply to the plan, considering that the affected persons meet the criteria to access the available public insurance. The representative interviewed estimates that the measure will affect around 8,000 workers.

In relation to the state of contagion in the industry, SAG-AFTRA reported that the union was notified of isolated situations of infected workers and of a single production that had to stop due to an outbreak of COVID-19 on the film set. The role of health protocols in minimizing the impact of infections in cases identified was also highlighted here, and it was emphasized that in these situations, both preventive sick leave and quarantine are covered by employers as part of the protocol negotiations.

Because of the unusual employment relationships of industrial workers, the vast majority of workers represented by the unions interviewed were not eligible for State assistance during the pandemic, as required by the CARES Act.<sup>120</sup> The challenge of securing some form of financial assistance for its members was addressed jointly by a coalition of arts and entertainment trade unions grouped in the historic national confederation, the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO). In March, through various strategies (letters to public officials, press releases, network campaigns), policy makers were urged to include industry workers in measures to contain the crisis in the world of work. The emergency package was updated on March 27 and self-employed workers were included to receive financial assistance for unemployment due to COVID-19.

A second challenge was to ensure fair unemployment insurance for mixed-income workers who are both employed and self-employed.<sup>121</sup> Here they also lobbied as a coalition to correct this exclusion in the CARES Act packages, by having the weekly benefit estimated from the workers' actual earnings.

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<sup>119</sup> Once the contract is in effect, they must also be tested regularly, but in this case, if someone tests positive, employers cannot terminate contracts and must guarantee financial compensation for the days of illness or quarantine.

<sup>120</sup> Coronavirus Aid, Relief, and Economic Security (CARES Act).

<sup>121</sup> These are workers who report income as employees (W-2) and as self-employed workers (1099). Unemployment insurance is estimated from what is reported as W-2 which, in these cases, does not represent the total income received.

Also noteworthy in this regard are the union's efforts to sustain its members' health coverage in a critical health context, even in the absence of employer contributions, especially in the case of IATSE.

Finally, another collective strategy emphasized was the development of a protocol in which the main actors of the audiovisual sector agreed to resume activity.<sup>122</sup> The first step was the presentation of general safety guidelines for the authorities in New York and California to examine the resumption of production. This document, known as the White Paper, was prepared by the Labor Safety Committee - Industry Management Working Group, composed of the Unions and the Alliance of Film and Television Producers (AMPTP). It was presented to the competent bodies on June 1 and, two weeks later, a multi-union report entitled "The safe way forward" was published, specifying the measures to be implemented by employers in order to ensure safety in the workplace. The proposal was negotiated for more than three months between the producers and the unions, until finally, on September 21, a consensus protocol was reached.<sup>123</sup>

Regarding this process, one of SAG-AFTRA's representatives pointed out that the preparation of the guide did not involve state participation, although he highlighted the interest shown by the governors of the states involved. He also highlighted that the coordinated work between the unions made it possible for the final document to cover all the demands presented in the multi-union report.

With regard to the supervision of the protocols, it was noted that the supervisor of COVID-19 is responsible for their compliance, and, according to the same protocol, must be hired by the production company exclusively for this purpose. In addition to this mechanism, the organizations interviewed indicated that they have already established resources, such as mobile applications and hotlines, so that workers can warn the union about risk situations or report non-compliance. Both also devoted efforts to the development of intense campaigns to disseminate the protocol and training activities for members. On this point, both interviewees were emphatic: while workplace safety is the responsibility of the employer, adherence to protocol and compliance with established rules is a responsibility shared by all persons involved in a production.

Regardless of the joint actions mentioned above, each union deployed various support measures for its members. In the case of IATSE, the first challenge that the union faced was to guarantee payment for layoffs and cancellations stipulated in the collective agreements when the activity ceased. Here the intervention of the international president in the negotiations with both American and Canadian studies was highlighted. In addition, the Executive Board allocated \$2.5 million to charities that provide emergency financial assistance to members and a network of volunteers was formed to provide support to members most at risk during the pandemic crisis. The initiative, called IATSE CARES, also proved to be a central tool for providing up-to-date information on the pandemic and the return to work. Finally, as for live entertainment workers who remained unemployed, the union was looking for opportunities for them in the audiovisual sector, so that they could earn some income until their sector resumed activity.

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<sup>122</sup> At the time of the interview, the unions were coordinating campaigns aimed at making progress in developing a joint protocol for the advertising film segment. An extra difficulty arose here, since SAG-AFTRA has direct links to the brands or advertising agencies, while the rest of the unions negotiate with the producers.

<sup>123</sup> The protocol can be consulted at [https://www.iatse.net/sites/default/files/return\\_to\\_work\\_agreement\\_9-21-20\\_00227310xbe9d7\\_0.pdf](https://www.iatse.net/sites/default/files/return_to_work_agreement_9-21-20_00227310xbe9d7_0.pdf).

For workers represented by WGAE who returned to their usual workplaces, the union negotiated health protocols with employers to ensure safe return to the newsrooms.

In the case of SAG-AFTRA, it highlights intense communication with members through the production of *podcasts*, virtual seminars and the distribution of digital material. Also, during the pandemic, the union concluded a collective bargaining agreement with the television, film and *streaming* production companies for the next three years, achieving a considerable wage increase. Although this negotiation was successful in terms of the union, the leader noted that the economic situation of the industry is analyzed on a case-by-case basis to advance wage agreements. On this point, one issue highlighted in the interview was that at no time were collective agreements negotiated with a view to safeguarding working conditions in the post-pandemic period.

### **2.6.3.2. Impact on unions and coping strategies**

In this regard, IATSE highlighted the positive aspects caused by the pandemic. First, the leader stressed that the union's ties with its members and with public officials were strengthened during this period, bolstering the organization.

Secondly, reference was made to the fact that the pandemic revealed the precariousness of working conditions in non-unionized production, in the face of which thousands of workers began to demand union representation for a safe return to activity. The result was a major membership campaign for the union and a revaluation of workers' organizations as guarantors of occupational safety and health.

Finally, the union solidarity deployed during the pandemic and the coordinated work with other unions in the industry was highlighted: "We have never had such a united front of solidarity with our comrades in the actors' and directors' union."

For their part, SAG-AFTRA's representatives pointed out that the main impact on the organization revolved around finances. Union contributions are made through two channels: On the one hand, the annual basic fees and the payment of a percentage of the individual earnings obtained under union contracts during the previous year. This implies that, in 2020, the union should have received the contributions corresponding to 2019. However, with total paralysis of the industry and no guaranteed income, members deferred payment of their obligations to the union and, as a result, income contracted by 30%. Faced with this situation, the organization began a process of layoffs that reached a third of the *staff*, which also led to more intensive workloads for those who remained employed: "Now we have to do with 400 employees what we did with 600 in February. It is very difficult."

Given the union's contribution mechanism, it is projected that the organization's budgetary difficulties will continue next year, since the union's income depends on the profits of the current year which, as mentioned, registered a half-year of inactivity for the vast majority of the members.

Finally, SAG-AFTRA representatives also highlighted the collective work of the multi-union front as a positive aspect of the pandemic that is still sustained by the daily task of administering the agreement reached: "On the bright side, our unions have worked more closely than ever before. We have discussions every week."

#### 2.6.4. Union perspectives and challenges for the post-pandemic scenario

As for future challenges, both interviewees emphasized the short term. In the context of COVID-19's resurgence, tensions began to reappear in the industry and uncertainty about the continuity of activity was imposed: "There is a lot of tension. We are afraid that they will close everything again." Additionally, they mentioned the challenge of vaccine acceptance in a society that is largely skeptical of scientific advances linked to the pandemic.

For his part, the WGAE representative pointed out that although screenwriters for film and television have not yet seen a decrease in work flow, the advances and setbacks of the pandemic that threaten to paralyze production again would end up affecting the demand for scripts in the medium term. Likewise, he pointed out that a sustained economic recession will imply a decrease in advertising income, which is the main source of digital agencies, accentuating the problems being endured by the news sector.

At the time of the interview, the tensions generated by the advance of the pandemic and the fear of a further shutdown were visible. At the same time, however, the United States was beginning the presidential transition and the IATSE leader was projecting an encouraging scenario of increased dialogue and coordination between industry and the new incoming federal government.

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## 2.7. MEXICO

### 2.7.1. Relevance of the sector in the national economy<sup>124</sup>

With some 127.5 million inhabitants and a GDP in the order of 2.5 trillion dollars, Mexico accounts for 1.7% of the world's population and 1.9% of the global gross product according to the World Bank. The added value generated by the audiovisual and live entertainment sector in 2018 represented 0.45% of the country's GDP<sup>125</sup> and 13.2% of the added value of the cultural industry, while the volume of employed people is 141,340 (0.5% of total national employment). The broadcasting segment is the most relevant in terms of its contribution to GDP, followed in order of importance by live entertainment and cinema.

### 2.7.2. Impact of the pandemic on economic activity and employment<sup>126</sup>

In Mexico, the economic impact of the pandemic was very relevant to the sector: in the second quarter of the year, the country's GDP fell by 18.7% compared to the same period last year, and by 10.1% year-on-year in the first half of 2019 (in the first quarter of the year, general activity had fallen by 1.3% year-on-year). In the audiovisual sector, the impact was even more significant: during the second quarter, it contracted by 61.3% year-on-year, and even during the first quarter there was a drop in the order of 13.5% year-on-year. As a result, in the first half of the year, the fall in activity in the sector reached 38.1% year-on-year, a figure more than three times higher than the fall recorded in the economy as a whole.

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<sup>124</sup> This section uses the information provided by the Mexican Culture Satellite Account and the 2019 National Economic Census, prepared by the National Institute of Statistics and Geography (INEGI). The satellite account, given the methodology it uses, is the most appropriate for these purposes (for more details, see the Methodological Appendix and the Documentary Appendix). Unlike other countries, in the case of Mexico we chose to measure the sector in terms of employment based on information from the National Economic Census, given that, on this dimension, the satellite account provides figures for 2013, that is, 5 years prior.

<sup>125</sup> The figure includes all live entertainment, except for sports. Counting only the theaters, the sector's relevance drops to 0.3% of GDP.

<sup>126</sup> This section is based on information from the quarterly estimates of the GDP and the number of employed people according to the National Accounts System and the Telephone Survey of Occupation and Employment prepared by the INEGI. It should be taken into account that, since the information provided by these sources is not broken down by sector, which would make it possible to ascertain the evolution of what was strictly defined as a sector of interest based on the culture satellite account, the data provided corresponds to the evolution of those branches of activity in which the audiovisual and live entertainment sector is included. At the bottom of each table and in the Methodological Appendix, the additional activities included within the branches are specified in each case, as well as those about which it was not possible to obtain information.



**Table 13** Impact on activity. Year-on-year variation 2019-2020. GDP and added value of the audiovisual and live entertainment industry

Sector and segments	1 <sup>st</sup> quarter	2 <sup>nd</sup> quarter	1 <sup>st</sup> half-year
<b>GDP</b>	<b>-1.3%</b>	<b>-18.7%</b>	<b>-10.1%</b>
<b>Audiovisual and live entertainment</b>	<b>-13.5%</b>	<b>-61.3%</b>	<b>-38.1%</b>
Audiovisual	-16%	-59%	-37%
Broadcasting (radio and TV)	-9%	-29%	-19%
Cinema	-22%	-87%	-55%
Live entertainment	-10%	-64%	-39%

Source: Prepared in-house based on data from INEGI.<sup>127</sup>

It is worth mentioning that this trend in the activity shows a similar performance in all segments of the sector, reflecting in all cases an impact of the pandemic in terms of activity of greater depth than in the economy as a whole. However, it should be noted that in broadcasting the withdrawals have been less pronounced relative to the other segments. In particular, during the second quarter of 2020, the drop in the segment's activity reached 29% year-on-year, a figure that is well below the falls recorded in cinema (87%) and live entertainment (64%).

In terms of employment, the pandemic had a significant impact: during the second quarter of 2020, the number of employed people fell by 18% year-on-year, resulting in the loss of nearly 10 million jobs.<sup>128</sup> In the audiovisual and live entertainment sector, the impact was even greater: in this case, during the second quarter of 2020, employment was reduced by 37% year-on-year. This decrease was mainly explained by the dynamics of employment within the live entertainment segment, in which the drop reached 62% year-on-year. On the other hand, in the audiovisual segment, which includes both broadcasting and cinema, there was a reduction in the number of employed people of only 8% year-on-year.

**Table 14** Impact on employment. Variation in the number of employed people between the second quarters of 2019 and 2020

Sector and segments	Year-on-year variation
<b>Country total</b>	<b>-18%</b>
<b>Audiovisual and live entertainment</b>	<b>-37%</b>
Audiovisual	-8%
Live entertainment	-62%

Source: Prepared in-house based on the Telephone Survey of Occupation and Employment (National Institute of Statistics and Geography, 2020b)<sup>129</sup>

<sup>127</sup> For more information on the sectoral delimitation, see the Methodological Appendix.

<sup>128</sup> According to the Telephone Survey of Occupation and Employment (ETOE) carried out by INEGI.

<sup>129</sup> For more details see the Methodological Appendix (Detailed breakdown by country).



With respect to the distribution of job losses according to the characteristics of the contractual ties, it is worth noting that in the audiovisual segment there was a 70% increase in the number of workers without contracts towards the end of the second quarter of 2020 compared to the beginning of the year, so it is assumed that the sector's labor structure was beset by a process of greater precariousness. In contrast, in the segment of live entertainment, job losses affected non-contract labor relations much more strongly (here, the number of employed people fell by 88%, while the number of employed people on-site fell by only 6% year-on-year by the second quarter of 2020).

### 2.7.3. Impact of the pandemic on activities under union representation Responses and challenges for organizations<sup>130</sup>

As could be seen, the crisis caused by the COVID-19 pandemic had a strong impact on the sector's activity and employment, although it was differentiated according to subsector, especially between activities considered essential and those that were not.

In this section, a closer look is taken at the scope of the pandemic under the following trade union representation in the audiovisual and live entertainment sector in Mexico:<sup>131</sup>

Trade union	Sector segment	Scope	Employment situation
Sindicato Industrial de Trabajadores y Artistas de Televisión y Radio (Industrial Union of Television and Radio Workers and Artists) (SITATYR)	Audiovisual, radio and television.	Federal union with 39 sections	It represents more than 20,000 workers: 11,000 in the cable industry and 9,000 between radio and television.
Asociación Nacional de Actores (National Association of Actors) (ANDA)	Live entertainment (artists).	National union, with sections and delegations by zone	8,000 affiliated artists.

In order to frame the following analysis, it is relevant to highlight the coexistence of two forms of labor insertion of workers, with their corresponding consequences in terms of protection and labor relations: on the one hand, the outsourced formal employees, the informal and non-salaried (independent and *freelance*, as is the case of artists who are often not even recognized as labor subjects), who do not have labor protection or collective bargaining agreements; and, on the other hand, the non-surveyed formal employees covered by the Federal Labor Law (LFT) and by the collective bargaining agreements<sup>132</sup> (which, in the case of radio and television, is called the Radio and Television Contract Law). This panorama of the sector must be framed in a national reality marked

<sup>130</sup> This section presents the analysis of the interviews carried out with trade union representatives in the sector. The Methodological Appendix presents an overview of the unions that were sought for interview and the dates and references of those that were contacted, which are a privileged source of information for this report.

<sup>131</sup> For an overview of the sector's unions, see Robles (2016).

<sup>132</sup> Mexico has a union model that allows for the establishment by collective bargaining agreement of automatic membership in the recognized union or exclusive hiring of unionized workers (Robles, 2016).

by high levels of precariousness, informality and outsourcing, further fostered by recent changes in labor laws, despite the political inclination within the progressive arc, but with a clear anti-union bias.

As in other countries in the region, activities in the sector were initially paralyzed, except for those deemed essential. The Mexican Ministry of Culture, as well as the different sectoral institutes, proposed measures to mitigate the crisis, observing different regional plans with a clear epicenter in the State of Mexico, in which more policies were evidenced. However, despite their relevance in relative terms, most of them were welfare actions, ephemeral and superficial; food and monetary contributions that represented limited actions, as has generally been the case in the other countries where such actions have taken place. Thus, the governmental actions that have been undertaken at the federal and local levels have not been up to the challenge (Feregrino, 2020).<sup>133</sup>

In relation to the measures for the return to work, each grouping of unions by sector prepared detailed strategies to reactivate the activity as soon as possible with protocol for the different specialties (as will be seen in the following section), since the Government did not develop initiatives for the sector.

### **2.7.3.1. Impact on the labor environment and union responses**

In the audiovisual sector, SITATYR referred to the paralysis of the sector during the first months as critical, since all productions not related to news services, considered essential activity, were stopped. When the COVID-19 infection cases began to decrease, some activities resumed, and the union maintained that the filters applied were effective in keeping the spread of the virus under control in the workplace.

Among the difficulties encountered by the sector, there were wage contract revisions that had to be postponed, since only the most urgent negotiations with the business sector were addressed in the context of the pandemic. There were also activities where jobs were lost, such as in the broadcasting sector, although with the commitment of the companies to reincorporate these workers in the future.

Another fact highlighted in the interviews was the progress of the *home office*, where it was pointed out that this modality would probably continue in the future and would be further regularized. This would allow, according to the union's vision, a greater employer control now provided by digital tools, while it could also be beneficial for the workers of the sector, who could have a greater integration with their families by performing their work tasks from their homes, taking advantage of the possibilities offered by new technologies.

An additional comment regarding working conditions, however, is that the pandemic made it very difficult for families at home to return to workplaces - whether headquarters or television studios - while schools remained closed. This meant that, in many cases, it was ended by relying on family support for childcare tasks.

As for the conditions of workers in the live entertainment sector, the ANDA representatives maintained that due to the confinement resulting from the emergence of the pandemic, the precarious

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<sup>133</sup> To give some examples, in the area of radio and TV, a plan was developed for the production and dissemination of content due to the suspension of face-to-face classes, in association with private television and radio stations. In the scenic arts, from the initiative Contigo en la Distancia, plans for digital culture, *streaming* and other alternatives were launched to unite audiences with creators.

conditions of the sector were strongly accentuated, in particular for workers not protected by the union and collective agreements, since a distinctive factor of the labor activity of actors and actresses is the classification of their quasi-structural hiring as temporary.

In the current context, unemployment and labor discontinuity was especially accentuated after the sector was out of work for five months. Although some television productions resumed in July, networks such as Azteca only managed 2%, and Televisa, one of the main employers, only managed 10% of what they had planned. In the interviews, the union recognized a total of only 200 actors working out of the 8,000 that are affiliated with ANDA.

For its part, in other sectors represented by the union - such as the theater - the productions were reactivated, but limited to a maximum of 30% of the audience capacity, which also generates a framework of present and future uncertainty for all workers who depend on this activity to generate income.

As for salaries in the live entertainment sector, union representatives acknowledge that they were not particularly affected by the pandemic and collective bargaining agreements continued to be honored; in fact, the contracts that needed to be updated were updated. However, the forms of contracting are very diverse, and include day contracts, week contracts and production-based contracts, making the income of the workers represented by the union very variable.

Finally, some new practices have emerged in the face of the pandemic. On the one hand, there are actors and actresses who have begun to make productions on the Internet (via *streaming*), an activity that is difficult for the union to regulate and that generates almost no income. At the other extreme, there were also productions with very high budgets, in particular foreign ones, which operated by isolating the whole team in a hotel and thus preventing external contact with these workers, moving only to the recording location without being exposed to possible contagions in other environments.

In summary, in the audiovisual sector, although productions that were not related to news services decreased with the outbreak of the pandemic, a certain return to activity was achieved thanks to compliance with health protocols. However, the live entertainment sector experienced a much harder and more persistent impact; on the one hand, very few workers resumed activity and, on the other hand, being a very unequal sector in terms of hiring modalities, although collective agreements continued to be applied for some workers, day contracts or week contracts became more common for others. Within this framework, the activities that have been able to continue developing are *streaming* productions and, at the other extreme, large productions, particularly foreign ones.

In the face of the pandemic, unions in the sector had to readjust their practices. Regarding the assistance of workers in the workplace, SITATYR representatives commented that since the beginning of the pandemic, workers who were at risk of contracting the disease, such as elderly people, diabetics or those suffering from obesity, began to be isolated and kept at home, as part of the activity never stopped completely and continued to develop as it was considered essential. To facilitate this, the trade union leaders argued that they needed to make requests to the companies both to ensure that the groups at risk could work from home and thus keep the fewest workers in the companies' facilities and protect the most vulnerable, and to request improvements in the protective elements for the personnel attending the workplaces.

As for the protocols used for the purpose of resuming activities, general rules were applied, such as sanitizing studios and equipment and maintaining distance between workers, and emergency

medical hotlines were set up to follow up on cases exhibiting symptoms similar to COVID-19 and to establish on the basis of that information whether PCR analyses or rapid tests were required.

In turn, they began with the work of raising awareness and training workers on the safety measures needed to carry out the activities, in particular using social networks for that purpose; in their words, they sought to “take care of the safety of workers without stopping the operation of the companies,” recognizing the willingness of the business community to apply them and the role of the union in controlling when some rules were not being complied with. The cooperation between the companies and SITATYR has also been reflected in the messages of communication to the workers, in which firms such as Televisa generated content that the union then disseminated among its workers.

Within this framework, the Health and Safety committees in which the union and the companies participate were very active in their work, as they monitored the problems arising from the context. In this sense, the panel highlighted a permanent communication that has been effective in solving the difficulties that were presented, as well as in reactivating protection mechanisms that could have been relaxed over time beyond forming part of the protocols of the activity.

Among the difficulties that existed, the union points out the lesser dynamism of part of its union activity, as in the case of contractual revisions of salaries, since although virtual meetings were held with the business community, they were only limited to the most urgent matters, as noted in the previous section.

According to union leaders, some employers had difficulty paying the salaries of workers who were not working due to leave, so measures were agreed such as paying salaries without counting the social burden, but maintaining the pocket salary received by the workers. For its part, in some radio stations where the level of work and personnel was reduced, the union maintained that the companies have the obligation to rehire these workers when an apparent normality returns.

In the live entertainment sector, ANDA’s union representatives highlighted the natural synergy that emerged with the pandemic among all industry players, including producers, directors, workers and unions, both for the development of health protocols and for the commitment to their enforcement. All these recommendations for the different activities, trades and tasks of the sector were developed by the National Chamber of the Film Industry, the Mexican Association of Filmmakers and ANDA, among others. Thus, numerous protocols and technical guides were prepared by the department for the audiovisual industry<sup>134</sup>

Within this framework, the times for carrying out the tests for the detection of symptoms (swabs, PCR) have been established, which, in larger budget productions, amount to a total of three per week in the locations or even at the *staff’s* home. Also, specialized work areas have been proposed for certain workers and to keep the personal protection equipment of each one separate, which they estimated increased the cost of each production by an average of 25%. In these tasks, the Union Commissioners play an important role, as they are permanently present in the productions and are in charge of guaranteeing the fulfillment of the safety protocols.

The pandemic also confronted ANDA with various setbacks, such as attempts by some producers to avoid involvement with the union. A paradigmatic case occurred with a production by Netflix, in

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<sup>134</sup> For more information on the various protocols in which ANDA participated, see <https://laanda.org.mx/la-voz-del-actor/> and also <https://seguridadaudiovisual.mx/direccion>.

which the union used press releases and notes to denounce its refusal to negotiate the collective agreement, violating human and labor rights in the country. This ended in the implementation of a new labor framework with the company and the elaboration of a new collective agreement, something that is extremely relevant for this union given the importance of the business actor.

In terms of communication with members, in addition to the use of social networks, solidarity meetings were held through digital platforms, in which the Executive Committee reported and answered questions, including on the financial and administrative status of the union.

In conclusion, throughout the sector it seems that unified work has been achieved among the different actors in the face of the pandemic. Trade union and business actors have been able to unify criteria for the preparation of health protocols that allow them to carry out their activities in a safe framework, relying on the work of the mixed commissions of Health and Safety. This consensus in the audiovisual sector meant both that at-risk personnel could stay at home and commitment agreements to rehire workers in the future in the sectors most affected by the decline in employment, such as radio, were concluded. In the case of live entertainment, the situation is more complex, because despite these agreements and the great task undertaken by and participation of the union in developing protocols and the union commissioners in the workplaces, the activity has not returned to normal and very few productions are still being made.

### **2.7.3.2. Impact on unions and coping strategies**

With regard to the impact on union organizations in the sector, SITATYR points out that it had to suspend all electoral processes. Indeed, in 2020, elections were to be held in 14 sections, which have been postponed to 2021 if conditions permit; in that case, 27 electoral assemblies are to be held at the union next year.

It also had to close its headquarters for more than two months, after which it began to operate with special protocols, with little assistance from its staff and reducing the number of days and hours, encouraging as much as possible the non-use of public transport. The offices also had mandatory personal protection equipment (such as mask) and protocol routines (temperature checks on entry and exit, for example), and from approximately September they began working from 0900 to 1700.

For its part, in the live entertainment sector, ANDA was very affected in economic terms. On the side of the union's own workers, who are also actors and actresses and, in turn, all union members, they were forced to reduce salaries by between 30% and 50%, estimating that their income as an organization has been reduced by between 10% and 15%. These wage reductions and some pre-existing savings have enabled them to withstand the worst months of the pandemic better than other unions.

The new technologies also made it difficult for the union to make money, since, as a result of the closures, many actors and actresses began to perform theater performances through platforms that are not listed with the union. Something similar has occurred with independent theater, which accounts for about 20% or 25% of the productions, which was the first to be reactivated, also mostly consisting of spaces that work outside the union.

The combination of all these factors produced a very delicate financial situation, because the union's expenses are high and have not been reduced to the same extent as its income, which in turn translated into inter-union disputes and claims within the union. On the other hand, trade unions are

not creditworthy either, so they cannot receive financial assistance from banks and have not obtained other forms of financing from other larger unions or trade union federations.

Finally, the situation also generated positive and fruitful aspects, such as a better coordination and communication among the actors of the sector through forums and dialogue tables that allowed consensus to be reached on ways for activities to resume.

In conclusion, in terms of the impact on trade organizations, the audiovisual sector seems to have had fewer difficulties than the live entertainment sector, both at the beginning of the pandemic and as some activities began to be reactivated. SITATYR only had to limit operations at its headquarters and postpone electoral processes until 2021. However, the closures were much harder for the live entertainment sector, as in the case of ANDA, since their income was significantly reduced and they had to face serious problems in covering their current expenses, without the possibility of accessing loans. Added to this are new difficulties, since new initiatives such as independent theater and functions on digital platforms that remained active are not listed with the guild entity. Finally, as a positive aspect, the relationship between the different actors in the sector was increased through forums and dialogue tables that were generated during the pandemic, which were very fluid and led to an improvement in terms of communication.

#### **2.7.4. Union perspectives and challenges for the post-pandemic scenario**

The SITATYR representatives maintained a positive outlook after the challenges they had to face in 2020. On the one hand, their union structure was not affected to any great extent and, on the other, they achieved a better relationship with both their workers and the companies within the sector. The interviewees highlighted as positive the fact that the pandemic allowed a greater inclusion of the relationship between workers and their families in the labor sphere: “We should be concerned about human issues, seek mechanisms so that we transcend the worker-employer relationship and transform it into the family relationship, if possible”.

However, they have encountered difficulties in this scenario and a great challenge in expanding and improving relations with other unions, particularly those in the public sector, in a context in which the union’s representatives have argued that the Government is trying to individualize labor relations and dispense with collective bargaining, which makes it necessary for them to have greater collaboration from the different unions.

On the other hand, in the sector of live entertainment, the ANDA representatives reinforced the lessons learned this year that allowed them, based on that experience, to resume activities while controlling infections in the workplace and complying with the protocols. According to them, the audiovisual industry in its entirety: “should be considered as essential in order to continue supplying content that helps to reduce the social psychological impact, while informing, guiding, and entertaining”.

However, within the sector, they also stress the need to strengthen the trade union organizations, which in some cases have a negative image, particularly among young people, who do not see the need for union protection of workers or often directly end up naturalizing the existence of the collective agreements. This situation is also reinforced by the existence of unions that refuse to affiliate new members for fear of losing control of the organization, which generates the emergence of

independent organizations outside the traditional guilds among workers in the activity, as is the case of photographers, directors and assistant directors, among others.

ANDA also points out some of the weaknesses inherent in their actions, because although it is a strong union that does not have problems of unionization and achieves respect from the audiovisual industry's business community, it has more difficulties in other areas, such as dubbing or advertising. To manage these activities, new strategies are being evaluated by the guild, such as the possibility of large companies taking responsibility for the bad practices of their suppliers.

In order to try to unite these activities, ANDA supported the need to increase union strength and solidarity, creating a confederation of unions in the audiovisual or entertainment industry, a challenge that was raised in virtual forums and dialogue tables and obtained some positive responses.

In the sectors analyzed, the pandemic has allowed for better coordination and communication with both companies and their workers. In both cases, however, there are great challenges to be faced when it comes to strengthening the union actors. In the case of the audiovisual sector, by improving collaboration with other unions in defense of collective bargaining laws. For its part, the live entertainment sector highlighted the need to unify the claims of the audiovisual sector and the need to form a confederation of unions in the industry, which also makes it possible to add many young people who do not currently feel represented by the unions and to consider new strategies for the new forms in which the activity is developed today, such as productions via *streaming*.

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## 2.8. URUGUAY

### 2.8.1. Relevance of the sector in the national economy<sup>135</sup>

With some 3.5 million inhabitants and a GDP in the order of 74,639 million dollars, Uruguay accounts for 0.05% of the world's population and 0.06% of the global gross product according to the World Bank.

In the country, the audiovisual and live entertainment sector represented, in 2017, 0.7% of the added value of the national economy and, with 620,000 employees, accounted for 0.8% of total employment in the country, equivalent to nearly 5,000 jobs. Within the sector, the broadcasting segment is the most relevant. In terms of activity, it is followed in decreasing order by cinema and live entertainment, although in terms of employment the relationship between these last two segments is reversed.

**Table 15** Audiovisual and live entertainment sector.  
Contribution to the added value and employment level. Year 2017

Sector and segments	Added value as a percentage of national added value	Employees	
		Number of people	As a percentage of the total employed
<b>Audiovisual and live entertainment</b>	<b>0.7%</b>	<b>4,967</b>	<b>0.80%</b>
Audiovisual	0.30%	3,314	0.53%
Broadcasting (radio and TV)	0.18%	2,390	0.39%
Cinema	0.13%	923	0.15%
Live entertainment	0.15%	1,653	0.27%

Source: Prepared in-house based on the Survey of Economic Activity of the National Institute of Statistics (INE). Note: the gross value added is expressed in Uruguayan pesos.<sup>136</sup>

It should be noted that the Uruguayan audiovisual industry exports an average of 20 million dollars a year, considering production services for commercials and fiction content. This activity also employs 1,500 people in production, post-production and film projection activities. Another 1,500 people are involved in filming activities: transport, equipment rental, catering, accommodation. There are

<sup>135</sup> This section uses the information provided by the Structural Economic Activity Survey prepared by the National Statistics Institute of Uruguay (INE). Since, like Chile, Uruguay does not have a regularly updated culture satellite account (only partial estimates have been made for 2008 and 2012), this source of information is the most appropriate for such purposes. This is because, like the satellite accounts, the source replicates the estimation of the sectoral aggregate values following the methodological framework of the system of national accounts.

<sup>136</sup> For more details on the criteria used to define the audiovisual and live entertainment sector in Uruguay, see the Methodological Appendix (Detailed breakdown by country).



460 companies linked to the production of audiovisual content, mostly micro and small. Audiovisual budgets spend an average of 55% on salaries and about 30% on services in other sectors, such as hotels, catering, transport and consultants.<sup>137</sup>

### 2.8.2. Impact of the pandemic on economic activity and sectoral employment<sup>138</sup>

According to information provided by the Central Bank of Uruguay (BCU), in the second quarter of the year the country's GDP fell by 11% compared to the same period last year and by 6% year-on-year in the first half of 2019 (in the first quarter of the year general activity had fallen by 1% year-on-year).

According to the results of the Continuous Household Survey (ECH) carried out by the INE, the Uruguayan economy shows signs of recovery in activity from the April 2020 level. In particular, the hours worked show an uninterrupted increase between April and August 2020 (last data available), which is consistent with a reduction in the incidence of teleworking, which went from representing 19.3% of the employed in April to 9.4% in August. Similarly, absentee workers (7.3%) already register lower values than those of March (9.4%), before the peak of April, when they had reached 23.7%.

Although the Uruguayan System of National Accounts does not allow for a monitoring of the audiovisual and live entertainment sector during the first half of the year, the information provided by various sources consulted indicates that, as in the other countries, the impact of the pandemic also became relevant.

From a survey carried out by the Sindicato de Trabajadores, Técnicos y Profesionales del Cine y el Audiovisual (Union of Workers, Technicians and Professionals of Cinema and Audiovisual) (GremioCine), it could be established that 10 advertising projects and 8 cinema and series projects were suspended. Until the resumption of filming, a total of 510 jobs were affected by the suspension of activities (283 in advertising and 227 in cinema and series). It was estimated that lost wages amounted to around \$900 billion (GremioCine, 2020).

For its part, the Sociedad Uruguaya de Actores (Uruguayan Society of Actors) (SUA) highlighted that of the 300 projects planned to be developed during 2020, more than 200 had to be cancelled or postponed and another 30 were suspended. Regarding jobs, SUA reported that of the 2,000 workers who were to be involved in the projects, more than 60% were affected by the pandemic. The source indicated that 100% of the temporary/non-permanent contracts were lost and it is not possible to know with certainty the job losses among those who are not registered. About 50 projects were taken up or launched via *streaming*.

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<sup>137</sup> Available at: <https://icauc.mec.gub.uy/innovaportal/v/124815/3/mecweb/programa-uruguay-audiovisual-pua?parentid=111724>.

<sup>138</sup> This section is based on the information provided by the entities consulted and other studies carried out in this regard. This is because, unlike the other countries under study, Uruguay's System of National Accounts makes available quarterly GDP estimates disaggregated at the level of sets of branches of activity. Based on this, it is not possible to consider them as representative of the dynamics of the different segments that make up the audiovisual and live entertainment sector, since these fall into groups that have a low influence (particularly, transport, storage and communications and other service activities).

According to the data from Monitor Trabajo - Equipos Consultores, , it is noted that, as a result of the pandemic, 79% of employed people consulted who work in the arts, entertainment and recreation segment suffered the closure or cessation of activities, a figure that reached 33% in the information and communication segment (even below the average number of activities (Monitor Laboral, 2020).

### 2.8.3. Impact of the pandemic on activities under union representation Responses and challenges for organizations<sup>139</sup>

The previous section showed how the COVID-19 pandemic affected economic activity and sectoral employment in Uruguay. This section specifically addresses the scope of the crisis in the activities under the following trade union representation:

Trade union	Sector segment	Scope	Employment situation
Federación Uruguaya de Trabajadores de la Televisión y Afines (Uruguayan Federation of Television and Related Workers) (FUTTVA).	Audiovisual  Television, (open TV, municipal TV, cable TV, series production).	National	1,800 represented. Affiliation (44%).  Permanent salaried contract (67%). Temporary/self-employed (33%)
Sindicato de Trabajadores, Técnicos y Profesionales del Cine y el Audiovisual / Asociación Uruguaya de Cineastas (Uruguayan Association of Filmmakers) (GremioCine)	Audiovisual  Cinema, series and advertising.	National	500 workers with direct employment. Affiliation (72%).  Advertising (55%). Cinema and series (45%).  Sole proprietorships (80% approx.). Cooperative members (20% approx.). Dependency ratio (0.5%).
Sociedad Uruguaya de Actores (Uruguayan Society of Actors) (SUA).	Audiovisual  TV, cinema, series, streaming and advertising.  Live entertainment	National	3,000 represented. Affiliation (53%).  According to SUA records: 180 permanent employees. 100 temporary contracts. 300 independent/self-employed/freelance 1,000 independent theater workers (without registration or formal contract). 380 workers in competitive theatrical projects.

It is important to keep in mind that Uruguay has a trade unionism with an important development, which has been strengthened since 2005 from the revitalization of the Wages Councils, tripartite negotiation areas organized in groups by branches and sectors. Group No. 18 of Cultural Services of Leisure and Communications is the one that deals with workers in the audiovisual and live entertainment sector.

<sup>139</sup> This section presents the analysis of the interviews carried out with trade union representatives in the sector. The Methodological Appendix presents an overview of the unions that were sought for interview and the dates and references of those that were contacted, which are a privileged source of information for this report.

Also relevant is the sanctioning in 2008 of Law 18384, which establishes the Statute of the artist and related professions (Robles, 2016). This great union achievement involved the recognition of the rights of various cultural workers (national integrated health system and social security bank, among others) and their obligations.

Another significant advance within the framework of labor relations occurred in 2014 with the signing of the first collective agreement in the audiovisual sector. The agreement has a national scope and establishes the minimum conditions for actors and hired technicians, as well as the mechanisms of salary adjustment.<sup>140</sup>

It should also be noted that on March 1, 2020, after a decade and a half of a progressive orientation in the running of the state, a center-right coalition took office, thus bringing about a substantial change in government policy.

A few days later, on March 13, with the outbreak of the COVID-19 pandemic, a state of national health emergency was declared (Decree 93/2020)<sup>141</sup> which involved, among other measures, the need for extreme disinfection in public and private spaces, the isolation of certain segments of the population and the suspension of public entertainment.<sup>142</sup> In this way, while the activities linked to broadcasting continued to operate, those linked to cinema, advertising and live entertainment were initially paralyzed. Given the low incidence of infection levels in relative terms, in May, after the signing of the protocol of the audiovisual activity, filming in advertising was resumed<sup>143</sup> and, in June, different activities linked to the performing arts began with the approval of a specific protocol.<sup>144</sup>

Beyond the different measures implemented by the national government to counteract the impacts of the pandemic on audiovisual and live entertainment activities,<sup>145</sup> the change in political orientation threatened the core public policies that had been developed so far. This is the case of the National Budget Law (2020-2024), which aims, among other things, to repeal the updating of the film promotion fund and the elimination of the subsidy for independent theater in Montevideo. This places conditions on the future development of the audiovisual industry and affects the items of the largest program linked to theatrical activity (Program for Strengthening the Arts). With the approval of

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<sup>140</sup> Asociación de Productores y Realizadores de Cine y Video del Uruguay (Association of Film and Video Producers and Directors of Uruguay) (ASOPROD), SUA, GremioCine and representatives of the Ministry of Labor and Social Security participated in its development. It includes production companies, actors and technicians who are registered in the National Registry of Artists and Related Activities, created by Article 3 of Law 18384 (Contartese and Ríos, 2017).

<sup>141</sup> Available at: [https://medios.presidencia.gub.uy/legal/2020/decretos/03/cons\\_min\\_18.pdf](https://medios.presidencia.gub.uy/legal/2020/decretos/03/cons_min_18.pdf).

<sup>142</sup> Available at: <https://www.presidencia.gub.uy/comunicacion/comunicacionnoticias/decreto-presidencia-rige%20estado-emergencia-sanitaria>.

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<sup>144</sup> Available at: [https://medios.presidencia.gub.uy/tav\\_portal/2020/noticias/AG\\_564/Protocolo%20Oficial%20para%20Reapertura%20de%20Salas%20de%20Espect%C3%A1culos.pdf](https://medios.presidencia.gub.uy/tav_portal/2020/noticias/AG_564/Protocolo%20Oficial%20para%20Reapertura%20de%20Salas%20de%20Espect%C3%A1culos.pdf).

<sup>145</sup> Among the specific policies linked to the performing arts, we can mention the development of a web platform to project works and the call for a series of competitions and contests in order to finance the activity of artistic groups and institutions. On the other hand, performances were bought in advance for when the theatrical activity could be resumed. In the audiovisual sector, competitions were held to finance the creation of new film and audiovisual content in general terms. Along these lines, the municipality of Montevideo established an agreement with production companies and unions to promote the generation of film cycles on TV.

another regulation promoted by the national government - the Law of Urgent Consideration (LUC) - aid to civil society and social organizations, many of them linked to the theater, was restricted.

Finally, it is possible to warn that public aid policies for the sector are not agreed upon with the union entities and are highly inefficient in subsidizing employees with certain purchasing power. The arbitrary nature of the discretionary management of funds undermines the social dialogue that was common with previous management.

#### **2.8.4. Impact on the labor environment and union responses**

It should be noted that, unlike what happened in different countries in the region, Uruguay has been one of the least affected by the pandemic, both in absolute and relative terms, although since mid-October the number of infections has increased significantly.

According to FUTTV, after the state of emergency was declared, the free TV companies continued to work with a minimum amount of money to guarantee their operation. The production was restricted to the basics, and for different trades (editors, writers, etc.) different modalities of teleworking were implemented. Although there were no dismissals, it is possible to verify a decrease in staff numbers due to early retirements.

It is possible to visualize how companies exploited the critical situation triggered by the pandemic to suppress rights that had been acquired under another balance of power. These achievements must be ratified in every collective bargaining, and since this has been suspended, the companies have given up on them and stopped providing them. Even wages have fallen behind inflation.

On the other hand, for the channels the precariousness of the labor situation is becoming worse due to the increase in temporary hiring. This situation is aggravated in production companies where independent and/or *freelance* contracts are predominant.

The daily climate in the TV channels is one of deep uncertainty, fundamentally due to how the different modalities of precariousness will last. On the other hand, given the growing number of positive cases since mid-October, channels have begun to carry out random swabbing, particularly of the members of some productions. Some drivers have even begun to conduct their programs from their homes.

According to GremioCine's representative, among the technicians and film professionals the impossibility of filming highlighted the vulnerability in which they find themselves due to the predominant form of contracting sole proprietorships, which does not allow them to access social security benefits, including unemployment insurance.

After almost three months of suspension, advertising activity resumed in June and, some time later, activities in the cinema sector (movies and series) also resumed. Paradoxically, the pandemic gave Uruguay a unique opportunity, being one of the first countries to return to film sets. The sector has grown compared to the same period last year, resulting in almost full employment. The increased movement also involved a deterioration in working conditions, as the workload increased and there were fewer workers on each film set.

In the case of actors, particularly in theater, as the SUA leader points out, the pandemic also highlighted the high levels of informality prevailing in the sector, so that for this group of workers too, it is very significant not to be able to access the various rights provided by social security. It is

in advertising that the situation is most acute, since the producers have systematically rejected the possibility of negotiating a collective agreement, so that no model contract has been established. The companies have benefited to the extent that historically in the country there has not been a policy of control by the labor portfolio.

Also, as highlighted in the interview, during the pandemic the great problem of sexual harassment suffered by performing arts workers became visible. Various complaints were made known via social networks. Unfortunately, during the current administration, there has been no response to such a sensitive issue.

When the state of emergency was announced, the various trade union organizations began to respond to a new situation, which placed them in an unprecedented context.

According to FUTTV, the emphasis was placed on maintaining the workstations and monitoring remote working modalities in the TV channels. The union representatives demanded that the employers implement sanitary measures to prevent the possibility of contagion.

According to GremioCine and SUA, as soon as the state of emergency was implemented, they reacted quickly and created a solidarity fund for the workers who were without income and could not access unemployment insurance. To this end, they resorted to the contributions of workers who have a permanent income and, from the public sector, they received assistance mainly from the municipality of Montevideo. In order to define who would receive the aid, a socioeconomic survey was conducted that allowed them to prioritize solidarity measures towards households with large families and female heads.<sup>146</sup>

From SUA, an “emergency commission” was created, which also organized food baskets for members to pick up at the union’s headquarters or, in case they could not be collected, they made a home delivery. Under the same criteria, meals were offered from the union’s canteen, and for those who could not pay, these were provided free of charge.

On the other hand, according to GremioCine, it was considered impossible to continue working at the film sets until the preventive sanitary measures were established. In this way, the union took the initiative to design a protocol to be able to resume activities under safe conditions. Thus, together with the Cámara Empresarial de Productoras Publicitarias del Uruguay (Business Chamber of Advertising Producers of Uruguay) (CEPPU), the Asociación de Productores y Realizadores de Cine del Uruguay (Association of Film Producers and Directors of Uruguay) (ASOPROD) and the Ministry of Labor and Social Security, a first safety protocol was presented for the month of May, detailing the prevention measures for each phase of work. In the first stage, which was established until June, it was decided to allow only advertising shoots to resume.

It was also observed that with the return of audiovisual activities, delegates of GremioCine verified the compliance of the protocol at the film sets. This work has been extremely successful, as no infections have been recorded during filming.

In theater, after intense negotiations between the different groups involved, the protocol was approved in mid-August. In this case, as detailed by the union sources, the times were extended as a result of the inaction of the different State portfolios.

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<sup>146</sup> The aid granted was not a donation, but a consideration with which audiovisual materials of a community nature were generated.

When the return of the activities linked to the performing arts was allowed, with a capacity of 30%, the union participated in the promotion of a festival in the largest independent theater hall, so that the different companies could present the play they had prepared. The response from the public was very good, generating a backlash in society against cultural workers.

Given the various policies of budgetary restrictions promoted by the national government, and insofar as the public sector is decisive in activities linked to the performing arts, the SUA began an active campaign in defense of public resources. To this end, a continuous debate was held before the top officials of the Ministry of Culture both in different media and in the legislative field.

The context implied redoubling the actions of resistance, so different coordination spaces for social organizations were introduced. In the Intersocial, the SUA promoted the formation of a space dedicated specifically to cultural issues, which became very dynamic. The Intersocial Cultura stood out for the large number of people it called on in different mobilizations against the budget adjustment.

As previously noted, during the pandemic, the harassment present in the sector became visible. The SUA organized various training activities on new standards of male behaviour at the request of those who had experienced various situations involving gender violence.

#### **2.8.4.2. Impact on unions and coping strategies**

The development of the pandemic produced repercussions of different types, which marks the heterogeneous character that it had for the trade union organizations.

According to the interviews conducted, the change in the political orientation of the current government involved a substantial modification in terms of the context, and therefore employers strengthened their anti-union policies. Companies waged an offensive on the unions that were trying to consolidate in sectors that were not fully organized. This happened in several base unions belonging to cable TV, in which the companies used a temporary employment model so as not to renew the hiring of workers who were promoting union organization, and thus their leaders were incapacitated.

In union entities of the television branch, a weakening of their power can be seen as a result of the demobilization and the subjugation of the employer. There was also a decrease in resources due to the substantial decrease in contributions, which led to the cessation of certain benefits that complemented health services, such as dental services and the provision of eyeglasses (SUA).

On the other hand, the pandemic accentuated the solidarity between workers and their trade unions and generated a greater articulation with different groups involved in the activity, thus positioning the unions in a place of reference.

In the case of SUA, several groups (extras, technicians, sound engineers) increased their interest in joining the union. Similarly, the cooperative Valorarte, linked to SUA, gained greater visibility given the endorsement that gives it a history of responsible management. In this sense, according to the leader interviewed, several businessmen from the sector transmitted their interest in hiring actors who are partners of the cooperative, since in this way they ensure that they comply with the current regulations on labor relations.

Also, during these months, there has been a noticeable increase in the level of participation in different organizational instances that SUA has. This is the case with several commissions (gender, labor, emergency) that doubled their membership. The continuous presence of the union's leaders in the media garnered wide public recognition, which places it in a relevant position in the union field.

According to the union entity, it is considered that, during the pandemic, the organization has been strengthened significantly in this sense.

### **2.8.5. Union perspectives and challenges for the post-pandemic scenario**

The union challenges that emerge from the pandemic are varied and are deployed at different levels.

One of the challenges that has become most apparent in the testimonies of the leaders interviewed is the need to strengthen the unions in an adverse context, in which the difficulties generated by the COVID-19 are accentuated by a government that fails to promote social dialogue.

In view of this situation, there is a need to enhance the development of the different aspects that make up its “social” element. The importance of creating a link with partners that exceeds the demand for wages is stressed. This need increases in a context of withdrawal from some activities, where it is extremely difficult to obtain economic benefits.

Similarly, it is vital to be able to generate from the unions a continuous and effective communication with the workers represented workers and with society in general. In this sense, FUTTV marked the significant deficit in this regard, which is key to reversing this situation as a tool of union building, even more so in the current situation.

According to GremioCine, the challenge is to redefine the type of employment relationship for technical workers who work in advertising, and to move towards a type of recruitment that exceeds that of sole proprietorships. The representative interviewed warns that intensive work is being done so that a collective work agreement is established with the chamber in the short term.

Another of the evaluations made about the challenges that remain, especially in the case of audiovisual production (GremioCine and SUA), is the need to have a body of inspectors to monitor compliance with the regulations in the various labor areas (TV channels, film sets, theaters, etc.). It is argued that this work could be more effective if carried out in a coordinated manner among the various unions. One of the difficulties identified in this policy is the possibility of having the necessary resources for its implementation.

On another level of labor relations, there is also the idea of making progress with the conclusion of international agreements between the various platforms of the audiovisual sector with the various trade unions (GremioCine). In this way, compliance with labor rights in each of the countries could be guaranteed.

Finally, given the constant growth of international platforms in the production of content, GremioCine also poses as a future challenge the development of an audiovisual policy that accounts for cultural heritage. The growth of the sector has been largely oriented to providing production services to foreign films, even more so during the pandemic, and while this has enabled a significant productive and labor development, it is clear that this has neglected the promotion of an industry with local content. This orientation is completely absent in international productions; even in shootings, the particular features that make up each country are hidden. For this reason, the unions began a campaign centered on the question “Who will tell our stories? In this way, the trade union organizations, as outstanding actors of culture, position themselves as promoters of public policies that promote the cultural heritage of the country.



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# 3. OVERALL ASSESSMENT AND CON- CLUSIONS



### 3.1. RELEVANCE OF THE AUDIOVISUAL AND LIVE ENTERTAINMENT SECTOR IN THE AMERICAS AND ITS INTERREGIONAL DIFFERENCES<sup>147</sup>

The countries of the Americas that are part of this study together make up about 11% of the world's population and 23.3% of the global economy and, on average, have a per capita income 69% higher than the world average. However, as we saw, within the universe of nations addressed by the study there are strong heterogeneities, and even countries belonging to geographical regions with strong disparities. Canada and the United States alone have a per capita income that is three times the world average, while accounting for 17% of the world economy and 4.8% of the population. The remaining six countries have a level of wealth similar to the world average (their average product per inhabitant exceeds the world average by only 15%) and account for 6% of the global population and GDP.

The audiovisual and live entertainment sector generated, according to the latest available data, a worldwide income level of 727 billion dollars and 10.05 million jobs. These figures represent about 32% of income and employment in the global cultural industry. Within the sector, as in most of the countries analyzed, the broadcasting segment is the most relevant in terms of market size, followed by live entertainment and movies. In terms of employment, however, the first place is shared with the entertainment segment.

The regions to which the countries in this study belong (North America and Latin America and the Caribbean) represent 47.6% of world income and 15.8% of employment in the sector on a global scale, shares that remain relatively stable among the different segments that make up the sector.<sup>148</sup>

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<sup>147</sup> In this section, the objective of which is to estimate the scale of the audiovisual and live entertainment sector in the Americas in terms of the size of the sector on a global scale, the information provided in the document prepared by UNESCO (2015) is used. Unlike the sources used in the previous sections, this one refers to the level of income generated by the sector as an indicator of its size in strictly economic terms and the number of jobs generated. As a result, this information is not comparable with that presented in the previous sections, which was extracted from the culture satellite accounts and the structural surveys of economic activity in each country, given that the variables selected to quantify the relative relevance of the audiovisual and live entertainment sector are not intended to measure comparable magnitudes in an economic sense (for more details, see the Methodological Appendix).

<sup>148</sup> The information provided regarding the American continents and their regions refers to all the countries constituting them. Since the source does not present the estimates broken down by country, it is not possible to determine the specific participation in the sector of interest and its segments in the eight countries under study.

**Table 16** Audiovisual and live entertainment sector in North America and Latin America and the Caribbean Contribution to income and jobs generated by the sector worldwide

Sector and segments	North America		Latin America and the Caribbean	
	Percentage of income worldwide	Percentage of jobs worldwide	Percentage of income worldwide	Percentage of jobs worldwide
<b>Audiovisual and live entertainment</b>	<b>40.2%</b>	<b>11.5%</b>	<b>7.5%</b>	<b>4.3%</b>
Audiovisual	38.4%	11.1%	8.3%	3.6%
Broadcasting (television and radio)	38.7%	10.4%	8.5%	3.0%
Cinema	36.6%	12.3%	7%	4.6%
Live entertainment	48.4%	12.1%	3.7%	5.6%

Source: Prepared in-house based on data from UNESCO (2015).<sup>149</sup>

North America has established itself as the most relevant region in economic terms in the Americas, representing 84.3% of the region's sales in the sector and 72.7% of employment. This situation derives from the preponderance of the United States and is reproduced in all the segments that make up this country, although with heterogeneous magnitudes among them.

## 3.2. THE EMPLOYMENT CRISIS IN THE SECTOR IN TIMES OF PANDEMIC

The results obtained in relation to the first objective - which is to estimate the impact of the COVID-19 pandemic and its segments in terms of activity and employment - convincingly support the idea of the special depth of the crisis in the sector, in line with the warnings of international organizations (Organization for Economic Cooperation and Development, 2020; International Labor Organization, 2020). Although the measurements that were constructed in the different countries have their limitations and are not strictly comparable, certain noteworthy issues are clearly evident.

→ In all the countries considered, it can be seen that what we have defined as the audiovisual and live entertainment sector has experienced declines in economic activity that are greater than the economy as a whole.

<sup>149</sup> For more details on the delimitation of the audiovisual and live entertainment sector in this section, see the Methodological Appendix (Delimitation of the sector for the processing, elaboration and analysis of statistical data. Overview).

- Therefore, the sectoral impact is not homogeneous at the level of the countries, but acquires different scopes, depending mainly on how much the activities considered within them have been affected by the isolation provisions and how quickly the activities have been resumed. In this sense, it can be seen that in the broadcasting segment the impact has been moderate in relation to that registered in cinema and live entertainment, where it has certainly been more marked. Likewise, it can be seen that the differences recorded over time are very noticeable. The reference period for the analysis (first half of 2020) shows a scenario that, despite the short term, presents very marked variations over time. This is particularly relevant in the film and audiovisual sector, as production and filming activities have begun to resume their activities with protocols in place throughout the period.
- The dynamics of the economic activity were correlated in the employment trajectory of the sector, with similar characteristics: falls in the level of employment higher than those of the economy as a whole and, within the sector, more pronounced decreases in the levels of employment within live entertainment and cinema and audiovisual production.
- A considerable proportion of the jobs in the sector are governed by links other than formal and continuous salaried contracts (self-employed, independent, micro-enterprises, temporary and casual workers, without registration, among others), as a result, the greater exposure to unemployment has been linked to growing difficulties in accessing employment protection mechanisms, social security, paid leave, health care and aid funds (International Labor Organization, 2020).
- In some cases, the pandemic has not only destroyed jobs, but has also increased the precariousness of the sector's structure (increase in the number of employees without contracts and in the number of self-employed workers versus decrease in the number of salaried workers in Brazil, Mexico, Colombia and, to a lesser extent, Uruguay).

These trends reveal the fragmented nature of the universe of workers that make up the sector, while exhibiting a historical problem linked to the logic of project-based labor insertion, widely predominant in audiovisual production, film and live entertainment, precisely the activities that were most affected by the pandemic. These workers are, certainly, those who have felt the impact of the crisis most in the sector, being notably exposed to unemployment and lack of social protection.

In relation to the segments in which stable wage-earning employment is more relevant (radio broadcasting, audiovisual broadcasting), the crisis in the employment situation is linked to the presence of employer adjustment strategies, such as layoffs, voluntary withdrawals, suspensions and labor outsourcing, among others, which in several aspects are articulated with previous flexibilization processes deepened within the context of the current crisis. All the radio unions interviewed and those linked to the broadcasting (SUTEP, Argentina) reported on the progress of these measures.

### 3.3. TRADE UNION RESPONSES TO THE EMPLOYMENT CRISIS

The crisis in the employment situation of the sector is manifested differently between activities with a predominance of stable work and those in which unstable work modalities are the majority, associated with the temporality of the projects (audiovisual production, cinema and live entertainment). When these activities stopped, workers were left without an income from work and with difficulties in accessing health and social security. According to the interviews conducted with union leaders, this difficult situation has been similar in the eight countries covered by the study and is the greatest challenge they have faced, although this has varied over time and with some nuances depending on specific pre-existing labor regulations (health coverage was maintained, not without difficulties, for example, in Argentina with the social system; in Uruguay, with the artist's statute sanctioned under the previous government; and in Canada and the United States, with union health insurance) and the orientation of current governments in terms of general and sector-specific labor public policies. No less important is the predominance of a neoliberal orientation in most Latin American countries (Brazil, Colombia, Chile, the United States and, more recently, Uruguay).

The strategies deployed by the trade union organizations to alleviate the critical situation have been diverse and energetic, and their scope has depended to a large extent on the responses they have managed to coordinate with other social partners and, particularly, with government policy. The main strategies include:

- Economic support for subsistence: in some countries, together with government agencies, economic support measures for members were managed, both specifically for workers in the sector and in general in the face of emergencies (Canada and, to a lesser extent, Argentina have been successful in this regard). Faced with the limitations, delays and/or absence of official aid, another recurrent measure during the emergency has been the organization of aid funds and the distribution of food bags, from union funds and/or private solidarity contributions (Colombia, Brazil, United States, Uruguay, Chile). In some cases, the importance of the funds acquired from private companies has also been highlighted, specifically the global initiative of the company Netflix for workers in the audiovisual sector (SINDCINE-Brazil and SICACINE-Colombia).
- Health care: in some countries, unions have played an important role in sustaining health coverage for workers who do not have a permanent job, although this strategy is not free from challenges in the face of the duration of the crisis (Argentina, Canada, United States).
- virtual training and education activities: this is a containment strategy aimed at sustaining links with members.
- Protocols and measures for the return to work: trade unions have played a central role in the development of protocols or manuals of good practice for the return to activity. The tripartite efforts of Canada and Argentina are noteworthy in this regard, as they involved joint work with the bases, in permanent dialogue with other unions in the sector, with business chambers and with State agencies. At the other extreme, there are cases such as that of Colombia (ACTV), where despite the union's efforts, no progress was made due to the discretion of the business

sector in this matter, which is endorsed by the Government. The cases of the audiovisual sector in Brazil (SINDCINE), Chile, Mexico, Uruguay and the United States (inter-union front) are also noteworthy in terms of the development of consensus protocols.

Although some experiences can be identified as more successful than others linked to stronger union models or to a certain orientation of labor policy, the depth of the crisis has revealed the limits of union organizations in facing the dilemmas of casual labor and the shortcomings of regulatory frameworks and government measures to address the crisis.

With regard to the strategies developed to confront employment adjustment policies under conditions of stability (radio broadcasting, cinema screenings), some unions emphasize that the pandemic has heightened a balance of power that is extremely unfavorable to workers (Chile, Brazil). Therefore, it is important to emphasize that the protective framework of labor policy has also played an important role in the nuances of the impact in these cases. Measures such as the ban on layoffs and suspensions and the funds to help companies sustain employment in Argentina resulted in a more beneficial set of labor relations for these workers.

### 3.4. THE REPERCUSSIONS ON WORKING CONDITIONS AND UNION ACTION

The outbreak of the pandemic led to the more or less accelerated and consensual incorporation of business strategies in the activities that were kept in operation and in those that were incorporated over time, which have had varying degrees of impact on the organization of work processes. Throughout these months, the working conditions of the sector were subject to complex and dynamic logics of restrictions, reorders and diverse protocols, articulated, in turn, with processes of outsourcing of tasks.

According to the information gathered in the interviews with union representatives, two main repercussions are identified in this field: the extension of remote work and the effects of distance measures in the face of health emergencies (protocols and good practice measures).

#### *Extension of remote work*

The spread of remote work has been uneven in the sector, in line with the diversity of forms of work that converge there. According to the trade union representatives consulted, this trend has been notable in activities linked to broadcasting (TV and radio), which continued to operate with a predominance of continuous work, and in some tasks and phases of audiovisual production (scriptwriters, pre-production and post-production of image and sound, and, to a lesser extent, live transmissions via *streaming*).

In some cases, it represented the deepening of a pre-existing trend, but in others, its deployment was novel in that, especially in the early days, efforts were made to restrict workplace attendance

as much as possible. Although this strategy has allowed for the continuity of certain activities and sources of work while preserving health, it is not without problems in the area of working conditions.

When it comes to specifying the conditions under which remote work is carried out and what the most worrying effects are on workers in the sector, the trade union representatives have mentioned various negative impacts: extension of the workday, intensification and overloading of work (mainly among female workers), imbalances between the work and personal spheres, inadequate environments and connection and input costs, among others.

### *Effects of distancing measures, protocols and good practices in the usual workplaces*

With respect to how the working conditions of those who have remained at work on-site were affected by the adjustments and measures adopted in those spaces, two groups of concerns can be distinguished.

The first has to do with the *degree of adequacy of the new provisions for the effective prevention of contagion*. At this point, a diversity of situations can be appreciated depending on different factors, mainly on the more or less adjusted timings involved in the implementation of the measures and the degree of union participation in their development and supervision.

As some broadcasting unions point out, radio and television broadcasting activities had to implement measures immediately, which had a negative impact on the number of infections. However, since these are generally activities with a union presence and a tradition of collective bargaining, over time more adjusted prevention mechanisms were tried.

The sectors that discontinued activities and returned at a later time (mainly those of audiovisual production) had a wider margin of time to develop protocols that, as already mentioned, were promoted by the unions together with the business representatives in view of the urgent need to work. Effective compliance with the regulations, however, has not been free of conflict (health insurance coverage, provision of safe food, imbalances with international production standards and procedures for detecting symptoms linked to COVID-19, among others).

The second issue of concern about the effects of the application of protocols and distancing measures on labor conditions refers to the increase in the level of abuse and business discretion in terms of labor flexibilization.

With some exceptions (United States and Canada), unions have stressed that certain companies have intensified their efforts and made progress in implementing various forms of labor flexibilization. An extreme example of this situation is that of Colombia, where the unions point out that COVID-19 became an excuse for imposing almost naturally worse working conditions: salary reductions, delays in forms of payment and extension of working hours. Although no differential impact on gender is highlighted here, it is stressed that this worsening of conditions results in a deepening of the pre-existing gender-sexual division of labor.

## *Responses from the unions*

Faced with the impacts on working conditions, unions have deployed various initiatives and strategies. We distinguish the main ones:

- *Strategies to promote special leave* with a gender perspective, or exemption from tasks for workers considered at risk and mothers with school-age children or sick dependents. This type of initiative is most visible in broadcasting activities with a predominance of stable employment and protective labor regulations (Argentina, Uruguay, Canada, Mexico).
- *Strategies for the preservation of health in the workplace* Verifying compliance with health measures is a central strategy from the union's perspective, even more so in activities that depend on these efforts to avoid a return to the previous critical situation. Among the strategies deployed at this level are:
  1. Mechanisms for supervision through union representation in the workplace: union delegates (Argentina, United States), joint health and safety committees (Canada, TV producers in Argentina, Mexico) and company unions (TV channels in Chile).
  2. New communication strategies for non-compliance reporting: mobile applications and dedicated phone lines (United States)
  3. Training activities on the scope and modalities of work with protocols and/or prevention measures: this is the most widespread measure, especially in cases with little union penetration at workplaces (Brazil, Colombia)
- *Strategies to achieve health coverage and sick leave for casual workers in cases of COVID-19 infection at work.* This is a major unresolved dispute in most countries.
- *Strategies against labor flexibilization and worsening working conditions* The most recurrent has been to seek mechanisms that guarantee the exceptional nature of the agreed measures (Brazil, Argentina, United States, Canada, Mexico). In some specific cases, the balance of power allowed the deployment of more offensive strategies, such as negotiating salary improvements and direct action (Argentina). In others, the situation is more complex: in the face of persistent hostility from labor and union policy, the current crisis appears in the accounts as the corollary of a tendency towards the sustained loss of labor rights, individual and collective, union persecution and demobilization (Colombia, Chile, Brazil and, more recently, Uruguay).



## 3.5. IMPACT ON UNIONS AND COPING STRATEGIES

The pandemic crisis triggered by COVID-19 certainly had a major impact on trade unions themselves in many ways and in a variety of ways. The various experiences can be grouped around the following related issues:

- *Reduction of income and financial resources:* all unions mentioned this problem, but the impact in the short term has been more profound in those linked to the activities most affected by the crisis (audiovisual production and, above all, live entertainment).

The *broadcasting* unions refer to a pre-existing crisis that, in recent years, is more directly linked to neoliberal policies and the advances of flexibilizing labor reforms (clearly, the case of Brazil, but also of Chile, Mexico and, beginning this year of the pandemic, Uruguay). Trade unions linked to audiovisual production have a variable situation between countries depending on the time of return to the activity and the resources that the States themselves provided for its operation. However, their organizational structures depend mainly on membership fees and/or registration of activity, so they have endured a critical situation. Even as a support measure for their members they have stopped collecting dues during the strike and/or have redirected their own funds to meet the needs of their members. In unions with larger structures, such as in Canada, layoffs and downsizing stand out, a situation that could be reversed with a return to work and public funds for the emergency (salaries and rents). In Argentina, state subsidies to support union structures, transfers of funds for social work and subsidies for salaries (for a limited time) are also noteworthy. The unions representing live entertainment, especially actors, remain in general in a very critical situation in all countries, with salary reductions, dismissals and problems in maintaining the union premises. Colombia is also beset by political violence and persecution of trade unions.

- *New strategies for strengthening in the context of crisis:* various strategies are identified to respond to the unprecedented situation brought about by the pandemic. In all cases, the priority has been to be able to respond to the workers in the crisis situation through a wide range of measures, as mentioned above.

But the measures of isolation and social distancing also caused the closure of the union establishments and the suspension of normal operations (electoral processes, assemblies, mobilizations). In some rather exceptional cases, the gradual return to union establishments with protocols and distancing measures stands out. But the most widespread situation has been that of operating through remote work and the use of new digital technologies to maintain communication with the bases, guarantee attention and respond to members' demands. In the interviews, the complexity of readjusting union operations from these resources is highlighted. Despite its novelty for the majority of organizations, many of them have been able to become reference points for deployment of the various aids and collective actions analyzed throughout this report.

The various unions have commented that the demands and problems have increased significantly and, over time, some have been channeled through virtual spaces for meeting and

participation. This need, in many cases, led to greater use of social networks to establish more dynamic communication with affiliates. The intensified work of the governing bodies was another effect of the pandemic, as they have had to deal with very numerous, complex and varied demands.

- *Revitalization of trade union influence and collective solidarity:* most unions have reached a positive balance in terms of trade union influence and collective solidarity. Despite the enormity of the crisis facing the sector, and perhaps because of it, they perceive that they have gained power and presence at different levels: at their own bases (assisting, advising, contacting), in coordination with other unions and key actors in the sector and in broader areas of society, by playing a leading role in a sector in which the crisis of employment and lack of social protection was the constant.

Nevertheless, we must not lose sight of the fact that some unions, particularly those linked to live entertainment, are at a crossroads and do not see any immediate possibility of improvement. This is even more true in countries with the greatest neoliberal and anti-union offensive (Brazil, Chile, Colombia).

## 3.6. UNION PERSPECTIVES AND CHALLENGES FOR THE POST-PANDEMIC SCENARIO

In relation to the perspectives of the unions for the post-pandemic scenario and its underlying challenges, the union representatives interviewed express numerous concerns regarding the three dimensions that make up the study: the employment situation, working conditions and the unions themselves.

### *Employment Situation*

Regarding the employment dimension, one of the most relevant challenges posed by the pandemic in the short term is undoubtedly the depth of the crisis due to the predominance of activities based on casual and discontinuous contracts. Practically all the unions linked to audiovisual production and live entertainment have made reference to this issue. Although in the last few months it has been possible to reactivate a good proportion of the activities - especially the audiovisual ones - with protocols, there are still others that remain inactive, added to which there is a context of the resurgence of COVID-19 infections that endangers the potential to continue working for those who may have returned.

In the case of audiovisual production activities, some unions refer to the fact that the crisis caused by the pandemic made the effects on employment visible, deepening the strategies of international delocalization of filming and remote work in post-production tasks. Countries such as Canada,

Uruguay and Colombia benefited at this juncture, but all unions are aware that these are forms of employment growth that are difficult to sustain over time.

The unions linked to live entertainment have a gloomier prognosis, since they do not consider it possible to overcome the crisis in the short term due to the particular dynamics of these activities, whose economic sustainability requires presence in higher proportions than allowed by protocols. As a way to alleviate this crisis, interesting measures are proposed, such as advancing specific regulations for *streaming* platforms, so that they contribute to the creation and production of local content that improves the job offer in the sector or that promotes cultural policies for the creation of proprietary content.

Finally, in the face of the more structural problems linked to deficits in labor regulation and protection, some trade unions have raised the need to make progress in this area, in some cases, towards the recognition of the salaried relationship (ACTV, GremioCine) and, in others, towards greater social security coverage (SICAAPMA).

### *Working conditions*

In relation to the challenges that remain in the area of working conditions, the question arises for the immediate future of how to sustain the preservation of health in the workplace, especially on film shoots (SINDCINE, SINTECI). While the return to work with agreed and safe protocols is considered a goal achieved in broad terms, there are several factors from both business and labor that can make the sustainability of its effectiveness over time more complex.

In the current framework of the pandemic, which is prolonging itself on the horizon and even getting worse in some places, the unions refer to the challenges of having to continue to face unforeseen situations and solve new problems, avoiding making collective agreements more flexible and worsening working conditions.

Challenges for a more distant future are also identified, specifically with regard to the potential durability of the extension of remote work during the pandemic. While this strategy has helped to preserve health, it is a business solution that relies on the extra skills, time and resources contributed by workers and makes collective organizing and union action more complex.

Some unions have emphasized pre-pandemic challenges, such as moving towards a collective bargaining agreement that limits corporate discretion in determining working conditions (ACTV).

### *Trade Union Organizations*

The future challenges posed in relation to the dynamics of the trade unions themselves have also been varied. A recurring question refers to the need to generate and/or strengthen virtual communication and participatory mechanisms that, in these times of pandemic, have become essential for overcoming the impossibility of continuing face-to-face work.

On another front, the broadcasting federations express the desire to overcome the problems of lack of coordination and organizational weakening in order to re-generate power for collective organization and mobilization. They propose that new strategies are needed to revitalize the structures and functioning of the organizations (Brazil, Uruguay and Chile). In this sense, gaining union representation

in outsourced companies and on work modalities outside collective agreements has been pointed out as a valid strategy to face this challenge (Uruguay and Chile).

Similarly, the unions of audiovisual production and live entertainment, with structures already weakened in moments prior to the pandemic, propose that new strategies and actions should be deployed not only to strengthen themselves, but also to sustain their own organizational survival. In these cases, the immediate concern refers to the depth of the crisis of activity, employment and, therefore, of the trade union structures themselves. They propose that it would be appropriate to develop certain strategies, such as increasing trade union solidarity by strengthening links at the sectoral, national and international levels, as well as making progress in trade union representation in activities linked to new digital media and in those segments of younger workers, often far from the trade union field. In the most critical cases (Colombia), the need for more drastic changes to reverse the negative images and fears of union organizing derived from the broader political context is raised.

For the strongest unions (audiovisual sector in the United States, Canada, Argentina and Mexico), the future challenges at this level are mainly to avoid the degradation of labor gains and to sustain the solidarity and unity achieved in these moments of crisis. In the immediate term, the focus is on defending the rights achieved. It does not seem easy to push for more offensive strategies in a context that weakened workers in terms of the balance of power.

In summary, in these brief pages we have tried to summarize the impacts of the pandemic and the responses articulated from the trade union movement in the sector, trying not to lose sight of the sectoral peculiarities, the political contexts and the institutional frameworks of labor relations insofar as they help us to understand the national experiences in their richness and uniqueness.

One of the greatest challenges has undoubtedly been to be able to distinguish the short-term impacts from the structural trends linked to technological changes and policies of labor flexibilization and precarization in a broader sense. In this sense, although the differences between countries, sectors and individual cases are very notable, the underlying problems are comparable. The pandemic led the entire industry on a global scale into a crisis situation unlike any other, but its costs have been significantly more profound for workers and their unions.

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