

# FILM & TELEVISION PRODUCTION IN IRELAND

AUDIOVISUAL FEDERATION REVIEW 2008



*Eden*



*The Secret of Kells*



*Fado Fado*



*Zonad*



*The Daisy Chain*



*Prosperity*



## AF

The Audiovisual Federation consists of IBEC member companies involved in Ireland's audiovisual industry. These include broadcasters, producers, animators, studios, facilities and other organisations supporting the sector.

The Federation has a number of objectives designed to support Ireland's audiovisual production and distribution industry. These include promotion of the sector, representing the views of members to relevant bodies and submitting the industry view on relevant policy.

The Audiovisual Federation maintains an economic database for the Irish audiovisual production sector and publishes the results in an annual report with an economic analysis on the benefits of the audiovisual sector to the Irish economy. In order to sustain the growth and development within the sector during the last number of years the Federation has sought internationally competitive financial incentives and international co-production treaties. Together with Enterprise Ireland, the Federation organises conferences, seminars, and workshops on relevant audiovisual issues.

The Audiovisual Federation is a member of the Irish Business and Employers Confederation (IBEC) and is affiliated to ICT Ireland - The Voice of Technology within IBEC.

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### **IBEC Mission**

IBEC promotes the interests of business and employers in Ireland by working to foster the continuing development of a competitive environment that encourages sustainable growth, and within which both enterprise and people can flourish









## Review 2008

The data in this report relates to feature films, independent TV productions (including major TV dramas) and animation projects where the majority of the work was carried out in 2007. It also gives an overview of productions to date in 2008. It does not include other productions in this sector, e.g. commercials, promotional videos, games, etc. This report is based on productions where completed forms have been returned to the Audiovisual Federation.

This is the sixteenth report on the audiovisual sector, which was drawn up under the auspices of the following organisations - members of the Audiovisual Federation Database Steering Committee:

● Chairman AF Database Steering Committee	Kevin Moriarty, Ardmore Studios
● Bord Scannán na hÉireann/Irish Film Board	Teresa McGrane Patrick O'Neill
● Radio Telefís Éireann	Michael Hyland John Dunne
● TG4	Pádraic Ó Ciardha Máire Uí Chadháin Sile Bhreathnach
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● Facilities	Kevin Moriarty, Ardmore Studios
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● Broadcasting Commission of Ireland	Diarmaid Breathnach
● Audiovisual Federation of IBEC	Tommy McCabe (Director) Emer Condon (Executive) Eoin Keogh, (IBEC Research Unit) Carolyn Doumeni (Personal Assistant)

This data for this report was compiled by the Research Unit of IBEC.

### Acknowledgements:

The Audiovisual Federation is very much indebted to the members of the Steering Committee for their commitment and guidance in producing this report.

The Audiovisual Federation Review 2008

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Prepared by the Audiovisual Federation of IBEC

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## Awards 2008

## International Awards for the Sector

**The Tudors -****Joan Bergin -**

Emmy for Outstanding Costumes for a Series

**Maria Doyle Kennedy -**

Best Performance by an Actress in a Featured Supporting Role in a Dramatic Series – Gemini Industry Awards Canada

**Tom Conroy, Eliza Solesbury -**

Best Production Design or Art Direction in a Fiction Program or Series – Gemini Industry Awards Canada

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**Once** - Academy Award for Best Original Song for Falling Slowly; Best Foreign Film Award at Independent Spirit Awards

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**Eden** - Best Actress Award (Eileen Walsh) at Tribeca Film Festival

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**New Boy** - Best Narrative Short Award at the Tribeca Film Festival

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**The Wednesdays** - Audience Awards at Clermont Ferrand

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**Granny O'Grimms Sleeping Beauty** - Audience Awards at Palm Springs

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**Niko and the Way to the Stars** - Jury Award 2008 – Cinekid International Film Festival, Amsterdam

Audience Award 2008 – Cinekid International Film Festival, Amsterdam

*For the first time in the festival's history one film has been awarded with both prizes.*

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**Cartoon Saloon** - European Animation Studio of the Year, Cartoon Forum, Germany



*The Tudors*



*Aifric*



*Skunk Fu Award Presentation*



*Once*



*Niko and the Way to the Stars*



*Kings*

## Awards 2008

### RTÉ Awards

**At Home With the Cleary's -**

Best Documentary – Boston Irish Film Festival & First Time Director Award – Celtic Media Festival & Documentary: General – Prix Italia

**Get Collins** – Jury Award – Celtic Media Festival**Prosperity** – Best Drama – Celtic Media Festival & Dramatic Series – Hugo Awards, Canada**Eileen Gray – Invitation to a Voyage** – Best Portrait – FIFA (International Festival of Arts Canada)**Being John Banville** – Documentary: Arts – Hugo Awards, Canada**The Catalpa Rescue** – Cinematography – Hugo Awards, Canada**The Killings at Coolnacree** – Documentary: History & Biography – Hugo Awards, Canada**Thomas Lynch – The Undertaking** – Silver World Medal – New York Festivals TV

### TG4 Awards

**Fear na nOileán** – Audience Award – International Islands' Film Festival 2008 (Isle de Groix, Brittany)**Kings** – Best Foreign Film, Westchester Film Festival 2008, Spirit of the Festival Award – Celtic Media Festival 2008  
Irish Language Award, IFTA 2008**Pádraic Ó Conaire - An Fear**

Best Feature Documentary- Celtic Media Festival 2008

**Aifric** – Gafa le Mata

Best Children's Programme – Celtic Media Festival 2008

**Imeacht na nIarlaí** – Paul Larkin

Best Director in the International Documentary Category  
New York Independent Film and Video Festival 2008

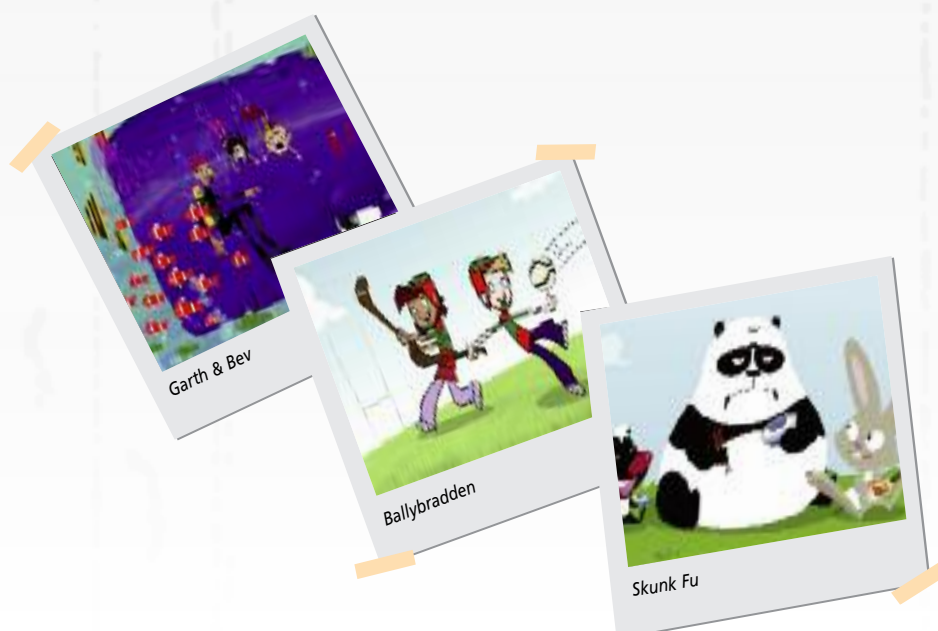
### Significant Nominations include:

Skunk Fu – Best Children's Animation, BAFTA



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## Foreword

The annual Audiovisual Federation Review of Film and Television Production in Ireland is an important resource for monitoring the growth and trends within the industry over the years.

The economic analysis for 2007 shows a production value of €195.7 million. This is a significant reduction on 2006 (€279.8 million). This downturn had been predicted last year but it was more significant than estimated. While the funding and commissioning input by the Irish Film Board, the Broadcasting Commission of Ireland and the Broadcasters was maintained over this period the reduction was inevitable because of the non competitiveness of the financial incentive Section 481 resulting from improvements in corresponding incentives in other jurisdictions. The decision by the Government to extend Section 481 to 2012 and provide the necessary enhancements to this incentive in the 2009 Finance Bill to restore competitiveness indicates the Government's commitment to our industry. These measures should enable a return to growth for the Irish Film and Television industry with the effect of increased economic activity, an injection of foreign currency into the economy, creation of employment and significant tourism profile.

This analysis is divided under three headings and the trends shown therein highlight the challenges to be addressed if the potential for continuous growth is to be achieved.

### Feature Film

Production activity in 2007 declined significantly to €19.3 million, a reduction of 77% on 2006. It is estimated that the level of production activity for feature films will increase to €64 million in 2008 but this is still significantly below levels achieved in earlier years and confirms the overall loss of growth in feature activity which had achieved a level of €244.3 million in 2003.

Indigenous production activity has maintained continuous growth over this period as a result of funding made available through the Irish Film Board. The profile and success of Irish indigenous production is currently very high (see awards on pages 4&5) but Ireland has not been sufficiently competitive to attract international feature film production as a result of enhanced incentives in competing jurisdictions. Continuation of this dramatic reduction in inward production activity would have had a serious negative impact on the level of experienced personnel and infrastructure which in turn would have been a significant restriction on indigenous development.

The Government has been very supportive of maintaining competitiveness in the past through the Section 481 film tax relief scheme and the Irish Film Board's International Production Fund. The current amendments contained in the 2009 Finance Bill, providing certainty and restoring competitiveness, not only continues this support but demonstrates the Government's willingness to respond to the changing international competitive landscape.

### Independent TV including Major TV Drama

This area had shown a consistent upward trend in recent years. Total production in 2007 was €154 million compared to €143.8 million in 2006. This is less than the €165 million projected and it is estimated that total production for 2008 will reduce to €145 million.

Fluctuations in the rate of exchange during 2007 influenced this reduction in the rate of growth as it impacted on Ireland's attractiveness for incoming production. Domestically, however, RTÉ continued its policy of strong investment in the independent television sector, TG4 maintained its position as an important source of television commissions and the BCI's Sound and Vision broadcast funding scheme provided a significant allocation to film and television production.

Unlike incentives in other jurisdictions Section 481 is applicable to television as well as film. This fact, and the International Production Fund, has enabled Ireland to attract many international television productions which had an important impact on the growth of this sector. As with film, however, the ongoing effectiveness of Section 481 is crucial to maintaining competitiveness in attracting this inward investment.

### Animation

Animation in Ireland has shown consistent growth in recent years and the sector is now the largest provider of full time and permanent employment in the Film and Television independent sector. Total output in 2007 reduced to €22.4 million compared to €51.4 million in 2006. The estimate for 2008 is €37 million. These figures highlight the difficulties faced by this significant sector in a highly competitive international market. The adequacy of tax incentives, funding opportunities and commissions will all play an essential role if the earlier growth in this sector is to be continued.

### Overview

This report concentrates on measuring and analysing Film and Television production output in the independent sector which is one aspect of the industry as a whole. Recognition should also be given to other developments taking place.

The Audiovisual Federation welcomes the Broadcasting Commission's speedy decision-making process for the licensing of Ireland's Digital Terrestrial Television platform. While this will make it possible for Irish consumers to access many additional television channels from 2009, there is a concern that most of this DTT capacity is likely to be allocated to the relaying of non-indigenous television services and consequently will not result in the creation of any significant amount of new Irish content in television programming, animation or feature film. The Government has stated its intention to introduce tax incentives to encourage R&D and make Ireland a centre of IP excellence with the potential for high level jobs. Given the logic that film will be at the core of the Government's strategy to establish Ireland as a knowledge based, IP and creative economy this is a welcome development.

Overall the Film and Television industry continues to be a significant employer with great potential economically and culturally. The Government is to be congratulated on taking measures to restore competitiveness and enable Ireland to continue to participate in the huge growth internationally of the industry.

### Kevin Moriarity

Chairman, Audiovisual Federation Database Steering Committee. November 2008

## Achoimre Feidhme

Déanann an tuarascáil seo anailís ar an tionchar eacnamaíúil a d'imir 265 léiriúchán chlosamhairc san iomlán, a críochnaíodh a bhformhór in Éirinn i 2007, ag a raibh luach léiriúcháin iomlán €195.7 milliún. Léiríonn tuarascáil 2007 laghdú i réimse na mórscannán ach feictear neart leanúnach san earnáil léiriúcháin teilifíse agus mórdhrámaí teilifíse. Cé gur léir laghdú a bheith tarlaíthe i 2007, tugann ár gcuid meastachán do 2008 le fios go bhfuil biseach suntasach tagtha ar chúrsaí i 2008.

## Caiteachas na hÉireann

Rinneadh caiteachas iomlán €143.2 milliún i 2007 ar earraí agus ar sheirbhísí Éireannacha ag eascairt ó léiriúcháin chlosamhairc. Infheistíocht láidir RTÉ i léiriúcháin dhúchasacha neamhspleácha teilifíse ba chúis leis seo den chuid is mó arís i rith na bliana sin mar aon le tionchar na mórtograí eile i léiriúcháin neamhspleácha teilifíse ar nós The Tudors agus Rock Rivals, lena mhéadaigh an caiteachas san earnáil neamhspleách teilifíse in Éirinn ó €113.8 milliún i 2006 go €118.6 milliún i 2007 (feic Aguisín I).

## Fostaíocht

Maidir le socrúchán d'fhostaíocht Éireannach iomlán, tháinig laghdú beag ó 15,143 i 2006 go 12,727 i 2007. Tháinig laghdú freisin ar an líon postanna comhionanna lánaimseartha agus meastar gur 1,735 a bhí fostaíthe go díreach san earnáil i 2007.

## Cuidiú Fioscach

Ar bhonn tairbhe costais, lean Earnáil Chlosamhairc na hÉireann de bheith ag cur go suntasach le heacnamaíocht na hÉireann. Infheistíodh, €33 milliún ón gcoigríoch san earnáil i 2007 (feic Aguisín I). Mar a tharla i mblianta eile, bhí na haischur chuig an Státchiste i 2007 níos mó ná an cháin nár gearradh trí Alt 481. Thug seo glanhnóthachan €18 milliún d'Eacnamaíocht na hÉireann i 2007.

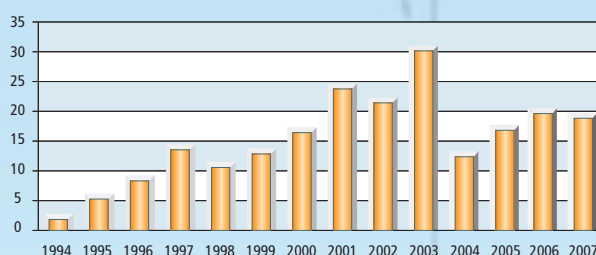
## Foinsí Maoinithe

Tháinig €162.7 milliún den mhaoiniú as Éirinn. Chuir Alt 481 ollmhaoiniú €81.6 milliún ar fáil. Ar na foinsí tábhachtacha eile bhí RTÉ, TG4, Bord Scannán na hÉireann agus Coimisiún Craolacháin na hÉireann

Aschur Closamhairc	2004	2005	2006 € milliún	2007	2008*
Mórscannáin	80.1	33.5	84.6	19.3	64
Teilifís Neamhspleách (Mórdhrámaí san áireamh)	67.5	74.1	143.8	154.0	145
Beochan	22.3	44.8	51.4	22.4	37
Aschur Iomlán	169.9	152.4	279.8	195.7	246

\*meastachán

Sochar Glan don Eacnamaíocht Éireannach (€ Milliún)



Caiteachas Éireannach	2004	2005	2006 € milliún	2007	2008*
Mórscannáin	37.9	17.5	29.8	12.2	35
Teilifís Neamhspleách (Mórdhrámaí san áireamh)	53.7	66.3	113.8	118.6	113
Beochan	15.1	13.1	17.6	12.4	11
Aschur Iomlán	106.7	96.9	161.2	143.2	159

\*meastachán

### \*Cúlra na Tuarascála:

Tiomsaíodh an tuarascáil seo agus tuarascálacha a foilsíodh roimhe seo 1993-2007 ó staitisticí a fuair Cónaidhm Chlosamhairc IBEC. Ag tráth a scríofa, ní raibh fáil ar fhigiúirí iniúchta do léiriúcháin iomlána 2007. Dá thoradh sin tagraíonn an phríomhanailís eacnamaíoch do 2007. Léiríonn na figiúirí do 2008 tuairisceáin neamh-iniúchta nach raibh dian go leor le go bhféadfaí anailís mhionshonraithe a dhéanamh orthu.



## Executive Summary

This report analyses the economic impact of a total of 265 audiovisual productions, where the majority of which were completed in Ireland in 2007, comprising a total production value of €195.7 million. The 2007 report shows a downturn in feature film productions but a continuing strong performance in TV and major TV drama productions. Although 2007 is showing a drop in activity our estimates for 2008 show a significant recovery.

### Irish Expenditure

There was a total spend of €143.2 million in 2007 on Irish goods and services arising from the audiovisual productions. This was largely due to RTE's continued strong investment in indigenously produced independent television production and the impact of major Independent TV productions such as *The Tudors* and *Rock Rivals*, which shows the Independent TV sector's Irish spend rising from €113.8 million in 2006 to €118.6 million in 2007 (see Appendix I).

### Employment

Total Irish employment in terms of placement fell slightly from 15,143 in 2006 to 12,727 in 2007. The number of full-time equivalent jobs also decreased and it is estimated that 1,735 were directly employed in the Sector in 2007.

### Fiscal Contribution

On a cost benefit basis the Irish Audiovisual Sector continued to make a significant contribution to the Irish economy, €33 million was invested from abroad in the sector in 2007 (see Appendix I). The returns to the exchequer in 2007 derived from incomes and expenditure generated again exceeded tax forgone through Section 481. This yielded an €18 million net gain to the Irish Economy in 2007.

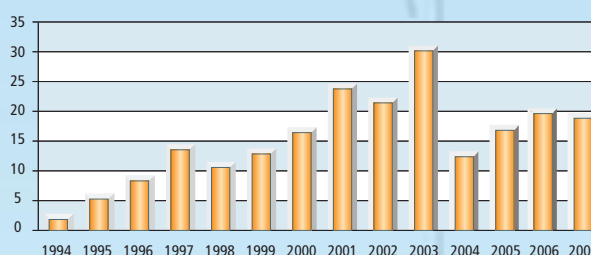
### Sources of Funding

The proportion of funding originating in Ireland was €162.7 million. Section 481 contributed gross funding of €81.6 million. Important sources of Irish funds were RTE, TG4, Irish Film Board and the Broadcasting Commission of Ireland.

Audiovisual Output	2004	2005	2006 € million	2007	2008*
Feature film	80.1	33.5	84.6	19.3	64
Independent TV Incl. major TV Drama	67.5	74.1	143.8	154.0	145
Animation	22.3	44.8	51.4	22.4	37
<b>Total Overall Output</b>	<b>169.9</b>	<b>152.4</b>	<b>279.8</b>	<b>195.7</b>	<b>246</b>

\*estimate

Net Benefit to the Irish Economy (€ Millions)



Irish Expenditure	2004	2005	2006 € million	2007	2008*
Feature film	37.9	17.5	29.8	12.2	35
Independent TV Incl. major TV Drama	53.7	66.3	113.8	118.6	113
Animation	15.1	13.1	17.6	12.4	11
<b>Total Overall Output</b>	<b>106.7</b>	<b>96.9</b>	<b>161.2</b>	<b>143.2</b>	<b>159</b>

\*estimate

#### \*Background to Report:

This report and previous reports published in 1993-2007 have been compiled from statistics obtained by the IBEC Audiovisual Federation. At the time of writing, audited figures for all 2008 productions were not available. As a result the main economic analysis refers to 2007. Figures for 2008 represent non-audited returns that were not sufficiently rigorous to allow detailed analysis.

*"A movie called ONCE gave me enough inspiration to last the rest of the year!"*

**Steven Spielberg**

## Chapter One

### Martin Cullen TD, Minister for Arts, Sport and Tourism

The film making industry in Ireland has never been stronger in terms of international acclaim, the challenge is to build on this success during this difficult period, and I am committed to doing what I can to ensure that happens.

It is very encouraging for me as the Minister with responsibility for the film industry to see the success achieved by Irish film in recent times - with the Camera D'Or award at the Cannes film festival in May 2008 for *Hunger*, and of course the unforgettable Oscar triumph back in February for *Once*. This is the third successive year that Irish film has been honoured at Cannes, following on from *The Wind that Shakes the Barley* and *Garage* in 2006 and 2007.

I welcome the fact that international audiences experience Ireland and some of our leading creative talents through the medium of film. It is an important means of highlighting the diversity and creativity of Irish film making talent and represents a vital opportunity to demonstrate the diversity, dynamism and richness of Irish film making culture to a global audience.

The ongoing commitment of the Government to the Irish film industry can be gauged from the levels of funding provided to the Irish Film Board over the last few years and also the extension of the Section 481 film tax relief scheme until the end of 2012.

I am confident that the film making industry can continue to win international awards and create employment in Ireland over the next few years, thanks in no small part to the undoubted talent that is evident across all sectors of the industry.



### Eamon Ryan, TD, Minister for Communications, Energy and Natural Resources

One of the most significant developments in the broadcasting sector in Ireland in 2008 is without doubt the publication of the Broadcasting Bill. Published in May, the Bill seeks to deal in a comprehensive manner with the regulation and provision of broadcasting content in Ireland. It introduces many new concepts, grants a range of new functions to broadcasters and regulators, and sets the framework for new activities and services, particularly in light of technological developments. It will create a new Broadcasting Authority and will level the playing field in the broadcasting sector. Its primary focus is to support and grow the wide variety of services and information, diversity of viewpoint, entertainment and enjoyment currently available to the Irish listener and viewer.

We have also continued in our development of the deployment of Digital Terrestrial Television (DTT) which was legislated for under the Broadcasting (Amendment) Act, 2007. Since the Act was passed in April 2007, RTÉ has been licensed to provide a national free to air DTT service offering access to RTÉ, TV3, TG4 and some new Irish TV channels such as Oireachtas TV and the Irish Film Channel. It has started to build the network to provide this service. In addition, a Swedish company, Boxer Ltd. has been offered a contract by the Broadcasting Commission of Ireland (BCI) to provide commercial DTT services. It is anticipated that digital television will launch in autumn next year, and I am keen to ensure that the European Commission analogue switch-off deadline of 2012 is met.

We have also continued in our funding of the sector through the Sound and Vision scheme under the Broadcasting (Funding) Act, 2003, administered by the Broadcasting Commission of Ireland. This continues to successfully provide support to broadcasters and independent producers in the production of programme material on Irish culture, heritage, experience and adult literacy, as well as programmes in the Irish language for broadcast on Irish television and radio. A key objective of the scheme is to increase public access at national, local and community level to high-quality radio and television programmes. To date, a sum in excess of €40 million has been disbursed under the Scheme by the Broadcasting Commission of Ireland in the development of such programming.

We also made progress with our European developments. Following on from the adoption of the Audiovisual Media Services Directive, new regulatory frameworks for audiovisual services will be developed in Europe, which take account of advances in technology and market developments over recent years. In practical terms, almost half of television services watched by Irish audiences are provided by broadcasters based in other member states. The Directive provides the guarantee that such services will be subject to a certain minimum degree of harmonised measures, and will be transposed across all Member States by the end of next year.

With a number of these developments due to continue into 2009 and beyond, the possibilities for this sector are promising.



**Simon Perry, Chief Executive, Bord Scannán na hÉireann/the Irish Film Board**

2008 has been very successful year for Irish film production with a record number of local feature films shooting and carrying out post-production in Ireland. This can be attributed to a number of factors including the increased Government support of Bord Scannán na hÉireann / the Irish Film Board, the stability of Section 481, the entrepreneurialism of Irish producers and the wealth of emerging talent in front of and behind the camera. IFB-funded film and television projects contributed an estimated total of over €75 million to the Irish economy in 2008, showing a significant return on government investment in this sector.

Whilst production crews have been busy at home, Irish films have continued to perform to critical acclaim on the international front, scooping major award at the highest levels in the industry.

- *Once* finished off its phenomenal successful international run by winning the Academy Award for Best Original Song for *Falling Slowly* and the coveted award for Best Foreign Film at the US Independent Spirit Awards.
- Both *Eden* and *New Boy* picked up awards at the celebrated Tribeca Film Festival with Eileen Walsh receiving the Best Actress award for her role in *Eden* and *New Boy* picking up the Best Short Narrative prize.
- After picking the Best Feature Award at the Galway Film Festival, *Kisses* was selected for the Locarno, Telluride, Toronto, London and Thessaloniki film festivals and went on to receive unanimous acclaim from the Irish critics when it was released in Irish cinemas in November this year.
- Irish short films also proved successful with *New Boy* and *Frankie* screening at major film festivals all over the world and scooping a host of awards including the top prize at the Berlinale Film Festival, whilst *The Wednesdays* and *Granny O'Grimms Sleeping Beauty* both won Audience Awards at the renowned Clermont Ferrand and Palm Springs International Film Festivals respectively.

However, the film industry still faces significant challenges. Our tax incentive struggles to attract large US studio film productions that chose Ireland as a film location in the past. Whilst the production of low budget Irish film is achieving impressive results, the industry is losing valuable large-scale international projects which contribute to the core employment, infrastructure and skills of the industry whilst providing valuable international investment. In 2008, the IFB in consultation with the industry, commissioned a study of Section 481 which proposed changes to the tax incentive designed to make Ireland more self-sufficient, under a new economic outlook. The IFB report '**Restoring viability and balance to the Irish Film Production Industry**' addresses the need for balance in the industry focusing on the restoration of the investor relief to 100%. The long term success of the industry depends on maintaining both international and local activity and this target will remain a key priority for the IFB throughout 2009.

Another key focus for the IFB in 2009 will be the local distribution of Irish films. The IFB is taking an increasingly prominent role in distribution support, through improved direct support for Irish films on theatrical release and the support for arthouse exhibitors through the Cultural Cinema Consortium. The CCC has already provided support to the new Lighthouse Cinema in Smithfield and has just launched the Cinema Digitisation Scheme which will ensure that Irish audiences have the opportunity to see more diverse cinema programming.



**Clare Duignan, Director of Programmes Television, Radio Telefís Éireann, (RTÉ)**

2007 saw RTÉ viewers continue to reap the benefits of on-going investment in home-production. This investment meant that RTÉ Television enjoyed impressive audiences throughout 2007, as well as reaching record commercial targets.

Between December 2006 and December 2007, RTÉ Television's total national share in peak time (18:00-23:30) held steady at 44%, equivalent to total peak-time share in 2005. This is noteworthy when you consider that in the period since 2005 the number of digital channels available has increased dramatically from 300 to 500. Moreover, just 32% of Television homes had access to digital services in 2005. In 2008, this figure stands at 52%. It is a considerable achievement that RTÉ Television's peak-time share remained virtually untouched in this period

Commercially, 2007 was a record year for revenue in RTÉ Television with annual growth of over 12%. This performance was particularly strong in the context of continued increased competition for advertisers' spend and was facilitated by the quality of the programme schedule, which resulted in both client and viewer loyalty to RTÉ Television.

Once again in 2007, nine of the top ten programmes aired in Ireland were on RTÉ Television. And once again, and most satisfyingly, all nine programmes were home-produced. The breadth of these was directly attributable to resources dedicated to producing indigenous programming. The overall spend on home-produced programming in 2007 was 52% higher than five years previously (€182 million in 2007 v €120 million in 2003), while the spend on acquisitions over the same period increased by only 6% - less than inflation (€24 million in 2007; €22.7 million in 2003).

More than 40% of the home-production spend was dedicated to the independent sector. RTÉ continued its significant investment in commissioned programmes in 2007 with expenditure incurred on commissioning activities of €79.5 million (inclusive of RTÉ attributable organizational overhead). When this figure is set against RTÉ's statutory obligation for 2007 of €31.4 million, the continued direct benefits to the sector of the latest Licence Fee increase and related strengthening of our schedule and commercial income are obvious. As a result of this increased spend, a total of 1,022 hours of programming was approved for commissioning and completion across a wide range of programme areas.

Among RTÉ highlights for 2007 were the significant and award-winning feature-length documentaries *At Home With The Clearys* and *Bloody Sunday: A Derry Diary*, which followed the long proceedings of the Saville Inquiry. Other highlights included *The Hospice*, which journeyed with hospice patients during the last days of their lives, while the award-winning *Arts Lives* returned with documentaries on Paul Durkan, Donal Lunny, Michael Colgan, Eileen Grey, Lady Powerscourt, and the arts patronage of Charles J Haughey.

In 2007 viewers gained an insight into a diversity of stories abroad. *No Place Like Home* and *Faraway up Close*, as well as *Storybook* and *Tall, Dark and O'hAilpín* covered differing aspects of the diversity theme both at home and across the world. RTÉ drama highlights in 2007 included *Damage* and the critically acclaimed *Prosperity*, with *Fair City* and *The Clinic* retaining huge audiences.

As RTÉ's commercial income is threatened in the current economic climate, and we become increasingly reliant on public funding to maintain both production volume and quality, we remain steadfastly resolute to maximise home-production, and thereby, our relevance to our key stakeholder – the viewing public. As we head into tougher times, our skills and our imaginations face new challenges that we all share. However, the combination of committed and creative RTÉ staff working in tandem with a committed independent production sector leaves RTÉ strongly positioned to weather the many challenges facing all of us in 2009.

## Pól Ó Gallchoíir, Príomhfheidhmeannach, TG4

Bhí an bhliain 2007 thar a bheith dúshlánach do thionscal na teilifíse in Éirinn. Tháinig imreoirí nua ar an bhfód, sa mbaile agus ón iasacht agus leanadh den mhéadú ar líon na dteaghlach atá ag íoc síntiúis le córas digiteach glactha teilifíse, ar chábla nó ar shatailít, rud a chuireann ar a gcumas na scórtha cainéal teilifíse a ghlacadh.

Bliain stairiúil ab ea í do TG4 mar gur ar 1 Aibreán 2007 a bunaíodh muid mar eintiteas reachtúil neamhspleách tar éis aon bhliain déag déag tosaigh na seirbhíse faoi chúram reachtúil RTÉ.



TG4, established by Government as an independent entity on 1 April 2007 under a newly appointed board chaired by Peter Quinn, had a good year in 2007, in terms of viewing figures, prizes and awards for its programmes and personnel, public and viewer confidence in the channel. The channel's annual national share of viewing for 2007 was 2.7%. The viewing figures for the Christmas 2007 period were particularly strong, when we achieved a viewing share of 4.7% for Christmas week 2007, one of the most competitive weeks in the television calendar.

Among the programmes that drew most acclaim for TG4 during 2007 were the historical documentary series *Uachtaráin*, the wonderful film versions of *Cré na Cille* and *Kings*, the comedy political drama *The Running Mate*, a second series of the acclaimed teenage drama series *Aifric* and the crime history documentary series *Mobs Mheiriceá*.

The channel continued in 2007 with the priority it gave to Irish sport and to Gaelic games in particular. We introduced a new weekly sports magazine and preview programme and the channel broadcast its first ever live Gaelic football match from outside Ireland from the newly refurbished Gaelic Park in New York.

TG4 relies on the independent television production sector to supply most of its Irish language programming needs. The channel functions as a partnership with the independent companies and supports and encourages schemes and initiatives that seek to encourage and strengthen the sector, particularly in the Gaeltacht areas. In 2007, in conjunction with Údarás na Gaeltachta, we established a new project to provide help and advice to Gaeltacht production companies.

So that it can maximise the impact of the Exchequer monies it receives, TG4 strives to avail of every external and third party funding opportunity for its projects. In 2007 we were pleased with the support that TG4-commissioned projects received from the Sound and Vision funding scheme operated by the Broadcasting Commission of Ireland and from the Northern Ireland Irish Language Broadcast Fund administered by Northern Ireland Screen. Other TG4 productions were produced with funding from Bord Scannán na hÉireann or availed of the tax and other supports provided to the audiovisual industry by the Irish Government.

We continue to be encouraged and gratified by the number and range of prizes and awards garnered by our programmes and personnel. Among the highlights of 2007, were IFTA (Best Youth Programme) Award for the teenage drama *Aifric* and the prestigious Spirit of the Festival Award at the Celtic Media Festival for the documentary *Fear na nOileán*.

Ours is now a worldwide service as is clear from another huge increase of traffic in 2007 on the channel's website [www.tg4.ie](http://www.tg4.ie) and from the increasing number of people who avail of our broadband webcasts and catch-up service on [www.tg4.tv](http://www.tg4.tv). The Website had over 41.5 million hits in 2007, a daily average of 121,000 hits a day.

Tá an iomaíocht ag géarú ach tá caighdeán na gclár ag ardú cáil an chainéil fosta. Is le misneach a thabharfaidh TG4 aghaidh ar na dúshláin amach romhainn.

**Eibhlín Ní Mhúngaile, Co-ordinator, MEDIA Antenna Galway**  
**Siobhán O'Donoghue, CEO, Media Desk Ireland MEDIA PROGRAMME**

With 31 European countries now participating in the MEDIA Programme, accessing MEDIA funding has become increasingly challenging and competitive. The distribution infrastructure in Ireland allows for only a very small take-up of Theatrical Distribution funds, which form the largest part of the MEDIA 2007 budget. The TV Distribution scheme has become increasingly difficult to access due to the high numbers of applications for a limited amount of money.

Nevertheless, Development finance continues to be an important resource for Irish audiovisual companies accounting for almost €700,000 in awards in 2007 (six Single project and two Slate Funding awards).

Tá lúchair orainn a fhógairt gur ghnóthaigh trí chomhlacht Gaeltachta airgead MEDIA d'fhorbairt thógraí nua scannán agus teilifíse i 2007, rud a chruthaíonn go bhfuil Clár MEDIA na hEorpa ag freastal ar gach uile ceantar agus teanga Eorpach.

Early results for 2008 include Development finance for two Irish fiction projects, Training support for Screen Leaders EU - a strategic company development programme co-ordinated by FÁS/Screen Training Ireland and i2i Audiovisual support (support for film financing costs) for Subotica Entertainment's latest feature film, Daisy Chain.

As the annual budget levels for the MEDIA 2007 Programme are to increase in the coming years, we are confident that Ireland can build on this success despite the many challenges facing Europe's audiovisual industry.



**Kevin Moriarty, Managing Director, Ardmore Studios**

In 2008 Ardmore Studios hosted Series 3 of *The Tudors* for Showtime and the first series of *Raw* for RTÉ. This represented a large percentage of the production activity in the studio and reflects the increasing dependence on television.

The last significant international feature film in Ardmore was *King Arthur* in 2003. In the intervening period Ireland has not been in a position to compete effectively for feature films. Government support has driven competition in the international marketplace. The Irish Government has been very supportive in the past but incentives introduced or enhanced by Governments in other countries have left Ireland in a non competitive position. While the Government extension of Section 481 to 2012 is welcome, enhancements are necessary to restore competitiveness.

The application of the current legislation maintains competitiveness for television production and without this the viability of Ardmore, other facility companies, and the industry itself would have been called into question.

Ireland's infrastructure needs to maintain its capability of meeting the demands of production from low budget indigenous to big budget international. However for the necessary ongoing investment and development to take place the industry must be viable. This requires a level playing field in international competition for feature films.





**Cathal Gaffney, Managing Director, Brown Bag**

Over the past number of years, the Irish animation sector has transformed itself. It is now comprised of a number of companies of scale, producing high profile children's programmes for the international market. As a result, the animation sector is now the largest provider of full time and permanent employment in the Film and Television sector.

Recently, Kilkenny based Cartoon Saloon won the prestigious 'Best European Production Company' at the Cartoon Forum in Germany. Jam Media have developed their Frameworks short film '*Badly Drawn Roy*' into a major live action/animation drama for the RTÉ/BCI/BBC. Monster Animation's GAA based animation soap for RTÉ/BCI, '*Ballybradden*', is nearing completion, while Galway based Magma Films have pre-sold their forthcoming feature film '*Niko and the Way to the Stars*' to 120 territories. In Brown Bag Films, we secured the remake of Enid Blyton's '*Noddy in Toyland*' which will air in time for its 60th birthday in 2009. And other studios like Boulder Media and Kavaleer all have similar high profile productions underway.

Making cartoons is not all fun and games! Animation studios maintain large overheads and significant payroll 52 weeks of the year, regardless of how busy production is. The rising Euro and increasing business costs see studios strain to remain competitive internationally. Animation studios have to continually invest in staff training, technology and their slate of projects in development.

While the Film Board, RTÉ and BCI contribute to the sector, there are limited opportunities for broadcast commissions. Irish children should have as much right to quality home produced programmes as their parents do.

Animation producers are resourceful entrepreneurs and can use a small piece of domestic financing to trigger multiple amounts from international sources. Section 481 tax incentives remain the most vital part of the financing jigsaw for Irish productions and is central to the success of the sector.

The worldwide children's broadcasting landscape is going through a renaissance. Boundaries between television, mobile, games and web have been blurring for years and the old buzzword 'convergence' has become a reality as animation producers prepare business plans on their programmes to exploit the various screen platforms. Unfortunately, exploiting the property on multiple platforms does not translate into more income for the producer. It just makes the exploitation of copyright all the more complex. Such huge changes in technology and broadcasting are not entirely bad but are challenges we face to reach our audience. As a sector, we embrace the new technology and remain passionate as ever about producing children's programmes for Irish and international audiences.



*"It is with enormous pride that I have been entrusted to Direct the new series of Enid Blyton's '*Noddy in ToyLand*' which is due to be aired in the UK in time for his 60th birthday in 2009. It is very satisfying to know another generation of children around the world will grow up watching Noddy and his wonderful cast of toy friends. The series has being given a complete makeover bringing it back to the look of the original Enid Blyton books. All the creative work is being done here in Ireland and is a recognition of the world class animation talent that exists in Ireland today."*

**David McCamley**

Director, Noddy in Toyland



Noddy in Toyland

**Michael O’Keeffe, Chief Executive, Broadcasting Commission of Ireland**

The total allocated in 2007 from the Sound & Vision fund is further testimony of the substantial injection of funding to the industry over a period of two years. Features, drama series, entertainment, sport, children’s, and documentaries continue to receive funding. Other funding bodies and broadcasters have been participating widely in the scheme.

The Sound and Vision Scheme has as its core objective, the provision of high quality television and radio programmes to viewers and listeners in the State. The BCI is delighted that programmes are being made at a national, local and community level and that the themes of culture, heritage, experience, adult literacy, and the development of such programmes in the Irish language, are being adhered to. The involvement of both the independent production sector and broadcasters on such a large scale is extremely positive.

Further rounds of the scheme continued to be launched during 2008-2009 and Autumn 2008 saw a review of the scheme. The review examined the operation, effectiveness and impact by measuring the success of the scheme against its objectives. This it achieved by analyzing the application and assessment procedure, the level of demand according to programme theme and type, and the overall level of demand from applicants. The success of the scheme and the quality of programmes funded was also reviewed. A stakeholder survey and key-stakeholder consultation were carried out during the summer of 2008 and results showed an overall high satisfaction rate of over 75%. The review outcomes will be forwarded for Ministerial consideration in December 2008, and a full report on recommendations for a new Scheme from 2010 onwards will be forwarded in first quarter of 2009. The BCI remains confident that the continuation of the Scheme will be strongly endorsed at that stage.

**David Collins, Chair, Screen Producers Ireland**

Screen Producers Ireland (SPI) represents the interests of over 170 Irish production companies, active in all genres from feature film, documentary, TV drama, animation to factual, entertainment and lifestyle programming.

As can be seen from this report, our business both at home and abroad is facing significant challenges across the full range of production. Despite this our film and television production gains significant international recognition, and our programmes now account for a large portion of the prime time schedule of our broadcasters, particularly RTÉ and TG4.

Creativity and innovation have been the key to our success. The challenge now is to build on this in a world where funding comes under more pressure and international competition intensifies. This will require a determined focus on our part to exploit our intellectual property both at home and abroad and in turn maximise revenue opportunities across all media platforms.

SPI will remain at the forefront of these debates, seeking to influence a wide range of government policy in such areas as broadcasting and telecoms, terms of trade, tax incentives, rights retention, employment law and working practices. Our challenge is to ensure that the achievements of the people who are directly employed in the sector (see Appendix I) and its related supply chains can develop within the new economic climate, build on the success they have achieved in recent years and contribute significantly to Ireland’s economy and culture.



**Michael Cantwell, Manager, Telecoms, Internet, Media & Edutainment, Enterprise Ireland**

Enterprise Ireland's (EI) support of the Media & Entertainment Industry continues with a key focus on international growth. EI's key goal is to assist our client companies to scale their businesses globally.

In addition to customised development for key clients, EI industry supports continue across a range of management development, business acceleration programs and identification of new business opportunities with client / buyer introductions on a global level through our network of 36 international offices.

During 2008, Enterprise Ireland continued to present knowledge sharing events. Enterprise Ireland investments in Media & Entertainment companies particularly targeted ongoing financial support including initial R&D funding for start ups, ongoing R&D funding support and business expansion for established SMEs.

Mobile World Congress (Barcelona), KidScreen (New York), MIPs (France), Edinburgh TV Conference and CTIA (San Francisco) are a few of the key international events across various sub sectors which Enterprise Ireland supported and led client delegations to attend. Leading Irish Media & Entertainment companies met key global players at these international events. EI's support of participation at these events enabled Ireland to showcase its best of breed companies on an international stage.

EI's overseas offices organised numerous inward buyer missions during the year. High level contacts, including telcos, broadcasters, production studios and key industry people visited Ireland to meet our leading companies. A direct result was that a number of significant deals were signed by EI client companies.

The new media and entertainment era is truly underway with the onslaught of Internet TV, improvements in mobile offerings and rapid global uptake of social networking. Consumers have evolved from being passive viewers to becoming active and willing participants. The good news is that broadcast will survive and may even be boosted as clip site audiences seek more.

The quality of innovation happening in Ireland has allowed a number of companies to position themselves as thought leaders in the new emerging 360° multiplatform solution/services market. EI is continuing to promote these companies and assisting them in scaling their business internationally.

While the current world economic climate is challenging for most industries, the Entertainment & Media sector is forecast to not be as significantly affected as other sectors.





**Jim Devine, President, IADT, Dun Laoghaire - Film School**

The Film School [NFS] at IADT offers a highly integrated course portfolio, spanning Film and Television Production, Animation, Screenwriting, Production Design, Modelmaking and Digital Effects, and Make-up and demand for places continues to be strong. Recent research has shown that a high percentage of our graduates not only quickly find employment in the media industries but remain there for the long haul.

Our students have had a highly successful year, gaining prizes at home and abroad. Perhaps the most prestigious was Vincent Gallagher's win at the RTS's Student Awards in London in the Undergraduate Drama section. IADT/NFS graduates secured 11 nominations for the 2008 IFTA Awards.

The NFS, with Donald Taylor Black, as Creative Director, successfully achieved its targets in phase one of its fundraising campaign. 78 companies and individuals from the media industries have become Founding Sponsors and a Scroll of Honour listing them all was unveiled by Stephen Rea and Jim Sheridan in May 2008. Next year we are looking forward to builders coming on site to commence work on the new NFS Building

As part of our remit to industry, we organise a series of NFS Lectures each year. With financial support from Bord Scannán na hÉireann/the Irish Film Board, the 2007/08 series included directors, Stephen Frears, John Sayles, Krzysztof Zanussi and John Landis; production designer, Luciana Arrighi; and costume designer, Deborah Nadoolman.

MediaCube, the IADT campus incubator for digital media start-ups, celebrated its first birthday in March. It is at full capacity and residents include independent production companies, Campbell Ryan and Icebox Films, as well as a variety of emerging media-enterprises.

At the beginning of the academic year 2008/2009 two new postgraduate courses were introduced: a masters level programme MA/MSc in Digital Media, which was developed in consultation with the Digital Media Forum, and an MA in Radio Broadcasting joined the existing MA in Screenwriting.





**Sarah Glennie, Director, Irish Film Institute**

2008 has been another successful year for the Irish Film Institute. Attendance to our Dublin base has remained high at over 125,000 until the end of September and we have maintained the balance between achieving solid box office returns and providing our audience with a diverse, challenging and unique programme. Our bar and restaurant continues to provide the Institution with a significant income which, combined with the box office, is reinvested in the institutions three areas of core activity – archive, education and exhibition. The Irish Film Institute receives valuable funding from the Arts Council but the majority of its income is earned and the scope of our programming in Dublin, regionally and internationally is dependant on our ability to generate income. The Irish Film Institute's success at generating income places it in a strong position in comparison to other arts organisations as we move forward into a period of reduced public subsidy.

Particular highlights of 2008's programme include *Light's Out*, the first National Children's Film Festival which took place at the IFI in July and was followed by a regional tour to six venues across the country. The Festival introduced young audiences to a range of cultural cinema, including the new Irish feature *32a*, and was augmented by a vibrant programme of workshops produced in collaboration with RTE Children's Programmes. Our annual French Festival took place in November and surpassed all previous box office records with many films selling out with advance bookings. 2008 has seen a focus on new Irish cinema in the programme with the start of new monthly strand, *Ireland on Sunday* which aims to introduce our audience to a wide breadth of Irish film-making, much of which does not have distribution and so is not accessible to a general audience. *Irish Shorts@IFI* is a new ongoing programme also started in 2008 through which Irish Film Board funded Short Shorts will be screened on a monthly basis before selected features.

Our Education Department continues to provide schoolchildren across Ireland with direct access to cultural cinema, with over 12,000 participating in our 2008 programme. A combination of screenings, talks and support resource material provides children with the opportunity to engage with cinema that they might not otherwise experience. *Reel Ireland*, supported by Culture Ireland, brings Irish film to new audiences worldwide and has worked in collaboration with over 40 international partners during 2008. An active programme of screenings in Dublin and touring curated programmes ensures public access to the rich holdings of the Irish Film Archive at the IFI. A new departure in 2008 was *Seoda*, an eight-part series on TG4 showing eleven films from the Archive.

2009 will see a period of exciting redevelopment for the IFI with a major refurbishment planned for the IFI Centre in Dublin which will include a new third cinema, giving the IFI much needed programming flexibility and scope to further broaden the range of its activities and develop new audiences. We look forward to the participation of the filmmaking community in this exciting time for the IFI as it moves forward and develops its central aim of promoting the art of film.

**David McRedmond, Chief Executive, TV3**

For the period 2006 – 2008 has seen TV3 increase the number of independent commissions by approximately 300%.

TV3's Irish content has also increased to almost 30% of its schedule.

As the only commercial national TV station in Ireland, TV3 is wholly dependent on advertising revenue. TV3 must, therefore, give the audience what it wants. It is a tribute to both TV3's in-house production staff and the independent producers that we partner with, that in 2007 into 2008 TV3 delivered some of the biggest programming on Irish television in that time.



- *Nightly News with Vincent Browne*  
Over 230,000 people tune in to Nightly News with Vincent Browne at 11.00pm. It is Ireland's only late night News and Current Affairs television programme which takes a look at the following day's papers.
- *Dirty Money*  
A ground-breaking documentary on Irish organised crime. This programme averaged 302,000 viewers per episode.
- *Me and the Big C*  
This series focused on the lives of Irish people who are dealing with cancer. Shot over six months it examined all aspects of Ireland's biggest killer through personal testimony and experience. *Me and the Big C* averaged 175,000 viewers per episode.
- *Diary of... the Series*  
After the hugely popular *Diary of a Debutante*, TV3 commissioned a 6-part series each week featuring an event or life experience that resonated with Irish viewers. Three very different characters were profiled representing three very different communities in Ireland. Some of the programme titles included, *Diary of a Groom*, *Diary of a Beauty Queen* and *Diary of a Wannabe*.
- *The Apprentice*  
Dublin plays host to Ireland's most exclusive and intensive job interview, when 14 of the business world's most promising candidates battle it out to become Bill Cullen's Apprentice. The self-made, rags to riches millionaire, Bill Cullen will challenge the aspiring tycoons as they compete in the toughest challenge of their lives. *The Apprentice* has averaged 266,000 viewers and to date over 1.9 million Individuals have tuned into the series of *The Apprentice* on TV3 (first run episodes).
- *Championship Live*  
This year TV3 became the first independent broadcaster to show live GAA in the Country. This showcased TV3's commitment to sport that really appeals to our audience at a county as well as national level.

TV3 must also acknowledge the input of the Broadcasting Commission of Ireland which has made independent production possible through its Sound & Vision Fund. It is the hope that this Fund evolves and grows through the Broadcasting Bill 2008. 2009 and onwards will be tough for Irish broadcasting, given the reality of digital terrestrial broadcasting and it is to be hoped that broadcast regulators from this point on reflect European practice and as such, recognise the contribution of the independent Irish broadcaster sector to Ireland's broadcasting economy.

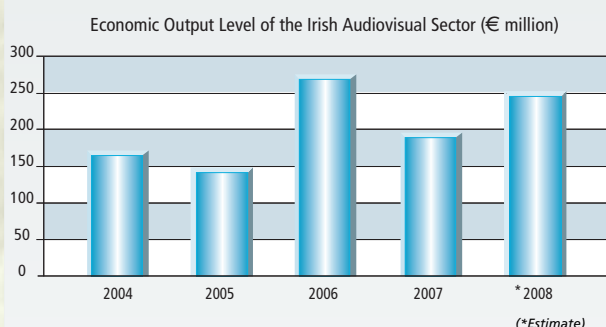
## Chapter Two

### Overview of the Sector in 2008

Indicative Audiovisual Output 2008	Overall Output €m	Irish Exp. €m
All Productions	246	159
Feature film	64	35
Independent TV incl Major TV Drama	145	113
Animation	37	11

The indicative figures above for 2008 have a total output value of €246 million. Indigenous features in 2008 include *Ondine* and *Perrier's Bounty*. The Independent TV sector has maintained its output and noted commissions from RTÉ; IPU are *The Clinic Series 6*, *Killinaskully Series 5* and TG4's *Ros na Run* and *Aifric 3*. In addition *The Tudors* series 3 a major Canadian/Irish co-production TV drama was produced for Showtime TV in Ireland.

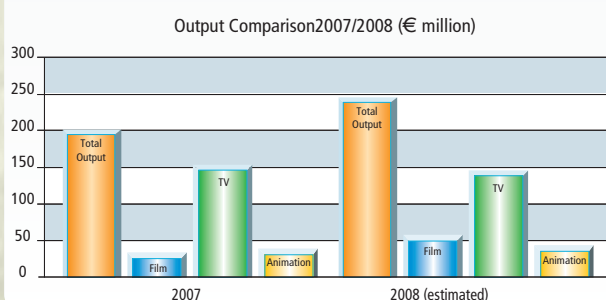
In terms of economic output in 2007 and an estimate for 2008, the chart below shows a welcome increase in production within the sector.



### Economic Analysis of Productions in 2007

This section summaries economic analysis (appendices I - V) covering 265 productions completed in Ireland in 2007. The projects examined represent a good spread both in scale and type of production and include a number of film productions such as *Eden* and *Dorothy Mills*, indigenous TV production *Single Handed 2*, *Prosperity*, *Aifric 2*, and the animated production *Lifeboat Luke*. These productions represented a total production value of €195.7million.

The following chart compares the outputs for 2007 and 2008. The difference in overall output reflects the lack of volume in medium sized productions and a major inward production activity. However, the strong performance of the independent TV sector continued in 2007 and 2008 (estimated).



### Benefits of Section 481 to the Exchequer

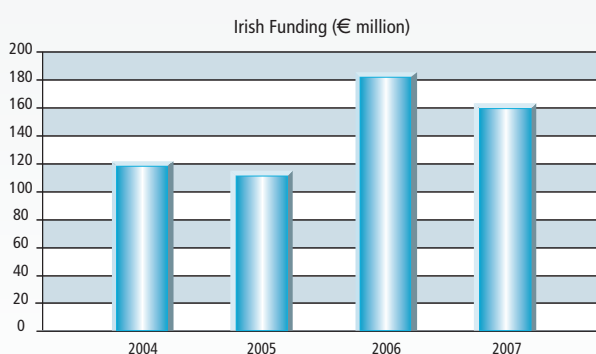
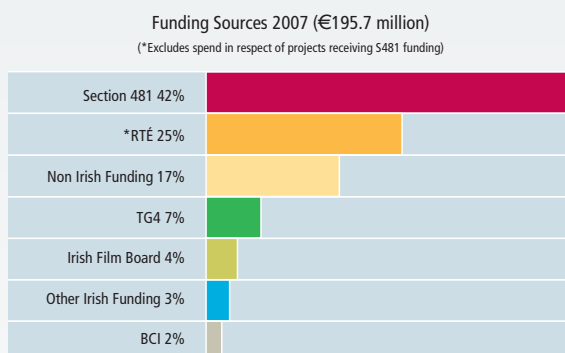
(see appendix II & V)

The gross gain to the exchequer is estimated to have been €49.1 million in 2007. This includes direct benefits in terms of PAYE, PRSI, schedule D and corporation tax, and indirect benefits in other forms of tax, including VAT and excises. The indirect benefits are taken into account by the multiplier effect of investment in audiovisual production. The cost to the Exchequer of Section 481 is the tax foregone on the €81.6 million, which was invested under the scheme and is estimated to have been €31.1 million. This results in a net benefit to the state of €18 million in 2007.

Calculation of Net Benefit (€ million)	2004	2005	2006	2007
Tax Return to Exchequer	34.5	31.9	55.7	49.1
Tax Foregone to the Exchequer	22.3	15.1	36.2	31.1
Net Benefit to the Exchequer	12.2	16.8	19.5	18.0

### Funding

Total funding for the sector in 2007 amounted to €195.7 million (see Appendix I for breakdown). Estimates for 2008 indicate an increase of inward investment with the number of features.

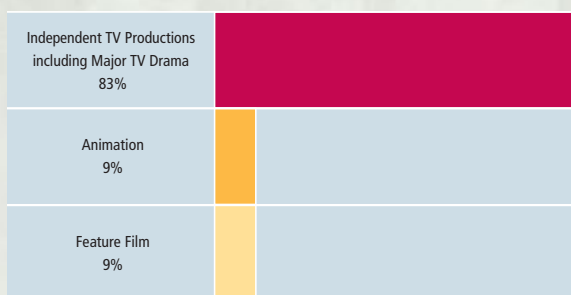




## Expenditure 2007 (see appendix I)

Overall Irish expenditure in the economy, the key driver for domestic employment and income, amounted to €143.2 million for the 265 productions analysed. As part of this figure, expenditure from independent TV production including major TV drama stood at €118.6 million representing 83% of Irish expenditure. Feature films and animation accounted for 9% of the total respectively.

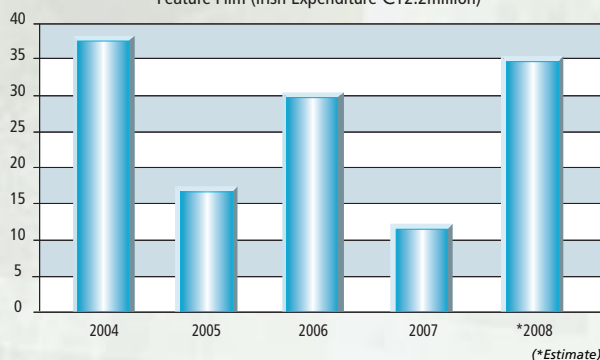
Irish Expenditure (€143.2 million)



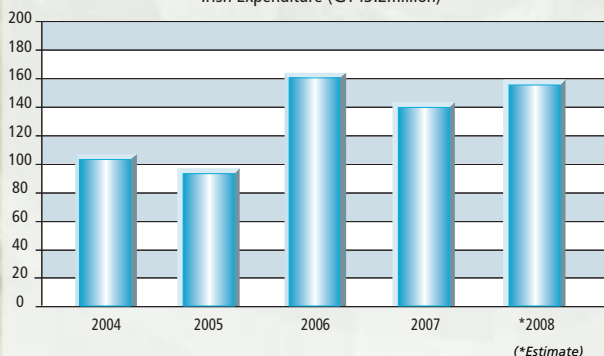
## Feature Films 2007

In 2007, the production of feature film accounted for 10% of the total cost of productions within the State. Of the €19.3 million spent on productions, €12.2 million was spent on Irish goods and services. These productions generally draw on Irish and non-Irish funding. The main sources for Irish funding were section 481 (€8.7 million) and the Irish Film Board (€3.9 million) and BCI (€0.9 million).

Feature Film (Irish Expenditure €12.2million)



Irish Expenditure (€143.2million)



The analysis examines the performance of the three mainstream Feature Films, Independent TV Productions including Major TV Drama and Animation over the last four years.

Filming in Ireland was a wonderful experience. The Inishowen Peninsula, County Donegal is one of the most unspoiled and beautiful places in the world, its unique landscape became a defining character in our film. The people of the area were enthusiastic, welcoming and supported our production whole heartedly. The Irish talent and crew were first rate.

We take home a beautiful film and fond memories.

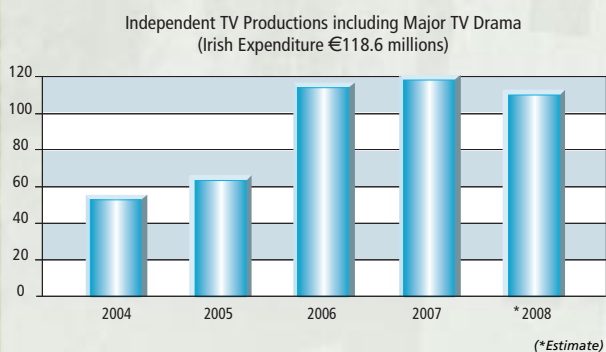
We look forward to our next opportunity to film in Ireland.

**Tina Pehme, Canadian Producer of “A Shine of Rainbows”**



## Independent TV Production (including Major TV Drama) 2007

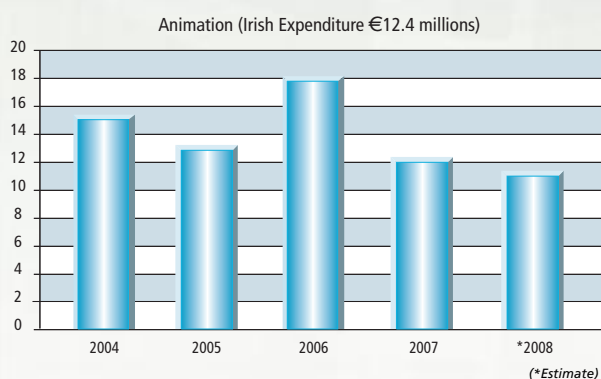
The output for independent TV productions in 2007 was €154 million a 7% increase on 2006. Of that €118.6 million was spent within the Irish economy, exceeding last year's amount by €4.8 million. The main sources of TV commissions continue to be RTÉ and TG4.



Kisses

## Animation 2007

The growth in the Irish animation industry shows a slight drop, but with a large number of productions spread over a couple of years, the industry is continuing to grow. With creations such as *Skunk-Fu* and *Lifeboat Luke* all featuring in this year contributed to the total output of €22.4 million. Irish expenditure amounted to €12.4 million in 2007.



Funky Fables



Old Curoisity Shop

## Employment (see Appendix I)

Employment in 2007 showed a slight decrease in all areas, with job placements down from 15,143 to 12,727. The number of full time equivalent jobs totalled 1,735 in 2007.

## Chapter Three

The international filmed entertainment sector is expected to experience strong growth over the coming years with PriceWaterhouseCoopers Global Entertainment and Media Outlook estimating the compound annual growth rate at 5.3%, with the worldwide industry reaching \$111.2 billion in 2012. Europe is expected to increase from \$25.1 billion in 2007 to \$31 billion in 2012, growing at a 4.3% compound annual rate.

The principal drivers for this growth are:

- Digital cinema expansion and 3-D releases that will increase the box office market;
- High-Definition DVDs that will reinvigorate the home video market;
- Faster broadband speeds and enhanced subscription rental services that will fuel on-line distribution.

This will provide a worldwide platform to increase film and television production, as the revenues generated from these markets will flow back to the content creators. However, key factors that are likely to affect the outlook in any given year is the quality of content and its appeal to consumers.

Cinema admission figures across Europe have fallen back slightly from 932 million in 2006 to 919 million in 2007, representing a decrease of 1.3%. However, this is expected to bounce back strongly in 2008. A positive trend to note from a European perspective is the fact that there seems to be increasing demand for European cinema. European films increased their market share in 2007 largely due to strong national performances in Italy and Poland and an increase of films produced in Europe benefiting from incoming US investment which rose from 5.2% to 6.3%.

European film production levels continue to show growth year on year with the European Audiovisual Observatory estimating a total of 921 films that were produced in the EU in 2007, representing a 1.1% increase on the previous year. This growth was primarily driven by large increases in production volume in France, Spain and Italy. It was also a good year for production in

the UK, 2007 being their 4th highest production year on record. Domestic production increased from 55 films in 2006 to 60 films in 2007, however the area of co-productions fell significantly reflecting the shift to calculating the UK's tax relief on eligible spend rather than the whole budget of the film.

With regard to Ireland's competitiveness as a viable location for incoming film production, our desirability has steadily declined over the past five years. The introduction of new international tax incentives, improvements to existing schemes and exchange rate fluctuations worldwide (most notably with the UK & US) have severely affected our competitiveness. There are three notable imbalances that this has created:

- A decrease in medium and larger budget films coupled with an increase in low budget film production levels;
- A decrease in incoming film productions and an increase in indigenous film;
- A decrease in feature film expenditure and an increase in TV drama expenditure.

Through recent improvements to the Irish tax incentive, Section 481, the Government hopes to have addressed these imbalances and improved Ireland's competitiveness going forward.

Ireland continues to be competitive as a location for international TV production. There has been a notable increase in International TV production levels over the last two years that can be attributed to the continuing Section 481 eligibility of TV production, the Irish Film Board's International Production Fund, and Irish talent behind the camera. Recent productions include season three of *The Tudors* and *George Gently* which is returning for the third time to Ireland.

Ireland is also involved in numerous international animation co-productions that avail of Section 481, and this is an area which has matured in recent years and has now reached a point of sustainable production levels. Recent international animation projects that have carried out work in Ireland with Irish co-producers and have availed of Section 481 include *Noddy in Toyland* and *Niko and the Way to the Stars*.



*Living The Wildlife*



A notable trend with regards to incoming productions across the genres of film, TV and animation is the increasing use of co-production structures either under the European Convention on Cinematographic Co-production or the Ireland and Canada Co-production Treaty. Whereas previously, an Irish co-producer was essentially servicing an incoming production, it is now far more likely that the Irish producer is a creative partner in the production that will share in the project's copyright and revenues. With Ireland recently signing a co-production treaty with New Zealand, and treaties with South Africa and Germany set to be launched in the coming months, this trend is expected to continue.

In terms of international awards, the sector again performed above expectations. The highlight being an Academy Award for Best Original Song for the feature film *Once*. The film also picked up the award for Best Foreign Film at the Independent Spirit Awards. *Hunger*, which was funded by the BCI won the Camera D'Or in Cannes this year, making it a remarkable three years in a row that Irish films have walked away with a prize from the world's most prestigious film festival. Other awards of note for the industry included the feature film *Eden* and short film *New Boy* picking up awards at the Tribeca Film Festival, and the short film *Frankie* winning top prize at the Berlin Film Festival. Animation projects that achieved international recognition included *Niko* and *the Way to the Stars* which picked up two prizes at Cinekid and *Skunk Fu!* which was recently nominated for a BAFTA.

In terms of international distribution, Irish film, TV and animation is selling well worldwide. The feature film *Kisses* has recently been picked up for international distribution by Focus Features, one of the leading indie distributors, while *Eden* and *How About You* have just been released theatrically in the US. Indigenous independent television drama, factual and lifestyle production has also performed well internationally over the last year with RTE commissioned programmes such as *The Clinic*, *Damage*, *No Experience Required*, *I Want a Garden* and *How Long Will You Live* being among those that have been successfully exported abroad. Animated feature film *Niko* and *the Way to the Stars* has sold to over 100 territories with The Weinstein Brothers picking up rights for all English speaking territories and *Skunk Fu!* is currently airing on the BBC in the UK and the Warner Brothers network in the US, and has also been sold to over 100 territories with a timeline being released in time for Christmas.



Dorothy Mills



The Escapist



Alarm



Operation Transformation



Diarmuids Pony Kids



## Appendices

- Appendix I: Economic Analysis 2007
- Appendix II: Production Details – Summary 2000 - 2007 Comparison
- Appendix III: Production Details – By Type of Production – 2007
- Appendix IV: Funding Details – By Type of Production - 2007
- Appendix V: Contribution of the Irish Film Sector to the Irish Economy 2007
- Appendix VI: Clarification Notes
- Appendix VII: Section 481 Investment
- Appendix VIII: Agencies Involved with the Audiovisual Production Industry in Ireland
- Appendix IX: List of Productions included in the Report 2007 and 2008

## Funding

In 2007, the 265 productions had combined budgets totalling €195.7 million. Funding from Irish sources amounted to €162.7 million, 83% of the total funding.

### Funding by Type of Production

	Feature Films €m			Independent TV Productions including Major TV Drama €m			Animation €m			Total €m		
	2005	2006	2007	2005	2006	2007	2005	2006	2007	2005	2006	2007
<b>Irish Funding</b> <i>of which:</i>												
• Section 481	13.9	21.1	8.7	12.2	50.8	62.2	12.6	16.4	10.7	38.7	88.3	81.6
• Irish Film Board	3.8	6.0	3.9	1.1	3.3	3.0	0.8	1.0	0.9	5.7	10.3	7.8
• BCI	-	1.6	0.9	-	4.1	3.1	-	0.7	0.4	-	6.4	4.4
• RTÉ	0.1	0.2	0.2	46.7	53.5	48.2	0.2	1.0	0.3	47.0*	54.7*	48.7*
• TG4	0.1	0.3	-	11.0	11.6	13.6	-	0.1	0.2	11.0*	12.0*	13.8*
• TV3	-	-	-	-	-	-	-	-	-	0.1	-	-
• Other	1.4	4.4	0.8	1.7	1.3	2.2	6.3	6.6	3.4	9.4	12.3	6.4
<b>Total Irish Funding</b>	<b>19.3</b>	<b>33.6</b>	<b>14.5</b>	<b>72.7</b>	<b>124.6</b>	<b>132.3</b>	<b>19.9</b>	<b>25.4</b>	<b>15.9</b>	<b>111.9</b>	<b>184.0</b>	<b>162.7</b>
<b>Non-Irish Funding</b>	<b>14.2</b>	<b>51.2</b>	<b>4.8</b>	<b>1.4</b>	<b>19.1</b>	<b>21.7</b>	<b>24.9</b>	<b>25.6</b>	<b>6.5</b>	<b>40.5</b>	<b>95.9</b>	<b>33.0<sup>+</sup></b>
<b>TOTAL</b>	<b>33.5</b>	<b>84.8</b>	<b>19.3</b>	<b>74.1</b>	<b>143.7</b>	<b>154.0</b>	<b>44.8</b>	<b>54.1</b>	<b>22.4</b>	<b>152.4</b>	<b>279.4</b>	<b>195.7</b>

\* Excludes RTÉ/TG4's spend in respect of projects receiving S481 funding

<sup>+</sup> Excludes non-Irish funding in Section 481

## Expenditure

Of the €195.7 million combined budget, €143.2 million was spent in the Irish economy.

Type of Production	Total Expenditure €m (See (1) Below)			Of Which Irish Expenditure €m		
	2005	2006	2007	2005	2006	2007
Feature Films	33.5	84.8	19.3	17.5	29.8	12.2
Independent Productions & Major TV Drama	74.1	143.7	154.0	66.3	113.8	118.6
• RTÉ*	57.8	72.8	64.5	52.9	61.2	56.3
• TG4*	16.1	22.4	25.9	13.2	19.1	20.7
• Other TV Productions	0.2	48.5	63.6	0.2	33.5	41.6
Animation	44.8	51.4	22.4	13.1	17.6	12.4
<b>TOTAL</b>	<b>152.3</b>	<b>279.9</b>	<b>195.7</b>	<b>96.9</b>	<b>161.2</b>	<b>143.2</b>

1. These Independent TV productions are classified by the organisation which was primarily involved with the various productions. Therefore, although for example TG4 are shown to have a total expenditure of €25.9m, some of this expenditure arose from other sources of funding for TG4 productions e.g. private finance. Similarly for RTÉ – other sources of funding contributed to this expenditure of €64.5million.

\* Includes RTÉ/TG4's spend in respect of projects receiving S481 funding. The figures for RTÉ and TG4 are based on the completed projects for which economic database forms have been received. See clarification notes in appendix VI.

"I love coming home to Ireland to work not just because we have some of the best actors, directors, cinematographers and crew in the English-speaking world, we also share a short-hand and a creative approach to the work. Combine that with the warmth of the Irish people and the simple pleasures of knowing you're home & there is nowhere else I'd rather be doing what I do !

**Jonathan Rhys Meyers**



## Employment

A total of 14,711 people were directly employed in relation to these 265 independent productions, of which 87% were Irish. This figure excludes direct employment generated through the expenditure of €64.9 million on Irish Goods and Services and indirect employment generated through the multiplier effects of the total Irish expenditure €143.2 million in the economy. A total of 3,060,777 work hours were generated, which translates to the equivalent of 1,735 full-time jobs (see (2) below).

### Employment by Type of Production - Direct Employment - Irish/Non Irish

Type of Production	Total Employment	Of which: Irish Employment	Non-Irish Employment
Feature Films	1,502	1,251	251
Independent Productions & Major TV Drama	12,625	11,114	1,511
• RTÉ*	5,124	4,820	304
• TG4*	2,750	2,007	743
• Other TV Productions	4,751	4,287	464
Animation	584	362	222
<b>TOTAL</b>	<b>14,711</b>	<b>12,727</b>	<b>1,984</b>

### Employment by Type of Production - Equivalent Full-time Jobs

Type of Production	Total Irish Work Hours	Full-Time Equivalent Jobs
Feature Films	570,887	324
Independent Productions & Major TV Drama	2,276,455	1,290
• RTÉ*	997,727	566
• TG4*	533,298	301
• Other TV Productions	745,430	423
Animation	213,435	121
<b>TOTAL</b>	<b>3,060,777</b>	<b>1,735</b>

2. Based on a 38 hour week and a working year of 232 days. The 38 hour average is taken from a 39 hour week average for manual workers and a 37 hour week for clerical, professional and technical workers. The 232 day working year is derived as follows: 365 minus 104 days weekends minus 9 public holidays minus 20 days average annual leave days = 232.

## Exchequer

### **Exchequer Returns and Receipts from the Audiovisual Sector**

The cost to the Exchequer of Section 481 is the tax foregone on Section 481 investments. The derivation of tax foregone on Section 481 is discussed in Appendix V. For 2007 Section 481 finance was €81.6 million and the tax foregone on this was €31.1 million (see Appendix V).

As mentioned above, returns to the Exchequer are derived from incomes and expenditure generated directly and indirectly by the audiovisual industry. In 2007 direct tax receipts were €20.1 million, comprising €7.3 million from PAYE/PRSI, €11.4 million from schedule D and €1.4 million from VAT and Corporation Tax (see Appendix III). Indirect tax receipts are estimated to have amounted to €29.0 million, giving a total of €49.1 million in receipts.

Thus the net benefit to the Exchequer in 2007 was receipts of €49.1 million less the tax foregone of €31.1 million yielding a net gain of €18.0 million.

The effect of 'Government' on the multiplier may be added if it is assumed that Government responds fully all income received, with full interaction between Government current outgoings and all economic activities. If this assumption is invalid and the Government decides its expenditure before its revenue is clearly known, the additional Government effect on the multiplier becomes less certain. As a result, the Government effect on the multiplier has been omitted with the result that the multiplier effects shown are, if anything, understated.

## Production

Production Details	2000	2001	2002	2003	2004	2005	2006	2007
Total Funding €m	209.5	259.0	19.09	320.2	169.8	152.3	279.9	195.7
Irish Funding €m	116.4	114.4	109.8	108.8	118.9	111.8	184.0	162.7
Non-Irish Funding €m	93.1	147.6	81.1	211.4	50.9	40.5	95.9	33.0 <sup>+</sup>
Total Expenditure €m	209.5	259.0	190.9	320.2	169.8	152.3	279.9	195.7
Irish Expenditure €m	129.3	141.6	122.6	151.4	106.7	96.9	161.2	143.2
Non-Irish Expenditure €m	80.2	117.4	68.3	168.8	63.1	55.4	118.7	52.5
Total Numbers Employed	18,328	17,435	16,424	12,238	13,221	9,299	17,476	14,711
Total Irish Employment	15,750	17,079	10,978	11,515	12,355	8,468	15,143	12,727
Total Non-Irish Employment	2,578*	356	5,446*	723	886	831	2,333	1,984
Total Irish Work Hours	3,071,108	2,646,714	2,111,560	2,629,824	1,699,872	1,863,131	3,198,066	3,060,777
Equivalent Full-time jobs	1,742	1,501	1,198	1,492	963	1,058	1,814	1,735
Total Irish Labour Costs €m	67.3	67.9	59.6	64.4	40.3	39.8	87.0	76.2
Irish Labour Costs – Subject to PAYE €m	23.7	23.4	21.2	29.4	16.8	13.4	24.5	24.2
Irish Labour Costs – Other (Schedule D) €m	43.6	44.5	38.4	35.0	23.5	26.4	62.5	52.0
Gross Return to the Exchequer €m	45.1	47.8	42.8	52.6	34.5	31.9	55.7	49.1
Tax Foregone to the Exchequer via Section 481 €m	28.8	24.2	21.6	22.6	22.3	15.1	36.2	31.1
Net Gain to the Exchequer €m	16.3	23.6	21.2	30.0	12.2	16.8	19.5	18.0

1. See appendix V for calculation

\* Specialised requirements of inward productions in 2000 & 2002

<sup>+</sup> Excludes non-Irish funding in Section 481

*"Working on a series of live dramas with TG4 proved to be yet another great experience. Producing television drama and broadcasting it live for the first time in 50 years on Irish television would prove daunting to most broadcasters, but in typical fashion TG4 supported the programmes wholeheartedly, realizing it was an opportunity to try something different. The station's willingness to embrace something risky and daring never ceases to amaze me and I look forward to working with them on equally innovative projects in the future."*

**Brian Reddin, Producer - Seomra a Sé**



## Production

Production Details	Feature Films €m	Independent TV Productions €m	Animation €m	All Productions €m
Total Funding €m	19.3	154.0	22.4	195.7
Irish Funding €m	14.5	132.3	15.9	162.7
Non-Irish Funding €m	4.8	21.7	6.5	33.0 <sup>+</sup>
Total Expenditure €m	19.3	154.0	22.4	195.7
Irish Expenditure €m	12.2	118.6	12.4	143.2
Non-Irish Expenditure €m	7.1	35.4	10.0	52.5
Direct Returns to the Exchequer - Net Vat €m	0.1	1.1	-	1.2
Direct Returns to the Exchequer – PAYE €m	0.2	3.3	0.5	4.0
Direct Returns to the Exchequer – PRSI €m	0.2	2.7	0.4	3.3
Direct Returns to the Exchequer – Corp Tax €m	-	0.2	-	0.2
Direct Returns to the Exchequer – Schedule D €m	1.1	9.7	0.6	11.4
Direct Returns to the Exchequer – Total Tax €m	1.6	17.0	1.5	20.1
Total Irish Labour Costs €m	6.5	64.2	5.5	76.2
Irish Labour Costs – Subject to PAYE €m	1.4	19.9	2.9	24.2
Irish Labour Costs – Other (Schedule D) €m	5.1	44.3	2.6	52.0
Total Numbers Employed	1,502	12,625	584	14,711
Total Irish Employment	1,251	11,114	362	12,727
Total Irish Work Hours	570,887	2,276,455	21,435	3,060,777
Equivalent Full-time jobs	324	1,290	121	1,735

<sup>+</sup>Excludes non-Irish funding in Section 481

## Funding

Source of Funding	Feature Films €m	Independent TV Productions €m	Animation €m	All Productions €m
<b>IRISH</b>				
- Bord Scannán na hÉireann/Irish Film Board	3.9	3.0	0.9	7.8
- Broadcasting Commission of Ireland	0.9	3.1	0.4	4.4
- Radio Telefís Éireann*	0.2	48.2	0.3	48.7*
- Telefís na Gaeilge (TG4)*	-	13.6	0.2	31.8*
- TV3	-	-	-	-
- Section 481 (total amount raised)	8.7	62.2	10.7	81.6
- Other (including Art Council, Deferments, Private Equity, Sponsorship etc.)	0.8	2.2	3.4	6.4
<b>Sub Total Irish</b>	<b>14.5</b>	<b>132.3</b>	<b>15.9</b>	<b>162.7</b>
<b>NON IRISH</b>				
- Broadcasters	0.3	13.8	0.4	14.5
- Eurimages	0.2	-	0.6	0.8
- MEDIA Programme	-	-	-	-
- Other UK Sources	1.0	4.4	-	5.4
- Other EU Sources	2.2	0.1	0.4	2.7
- US	-	0.1	4.6	4.7
- Other	1.1	3.3	0.5	4.9
<b>Sub Total Non-Irish</b>	<b>4.8</b>	<b>21.7</b>	<b>6.5</b>	<b>33.0<sup>+</sup></b>
<b>Total</b>	<b>19.3</b>	<b>154.0</b>	<b>22.4</b>	<b>195.7</b>

\* See appendix VI for clarification

\*\* Exclude RTÉs and TG4's spend in respect of projects receiving S481 funding

\* Excludes non-Irish funding in Section 481

"It really does feel like coming home when I work in Ireland.  
There is the highest level of crew and technicians available, but the atmosphere  
and the warmth are the things that always strike me most."

**Cillian Murphy**

## Contribution

This section of the report sets about measuring the contribution of the film production sector to the Irish economy. This contribution is measured both in terms of tax revenue generated and the impact on GNP and employment.

### Returns to the Exchequer

As noted in Section 4, the total tax revenue directly attributable to productions is €20.1 million; the bulk of this revenue is in the form of payroll taxes. This amount somewhat understates the tax return from productions, as it excludes both the tax revenue generated by the contracting out of goods and services €67 million and the tax revenue generated through the expenditure of the net income (€76.2 million - €18.8 million) of Irish employees in the film industry. Using a tax multiplier of 25% and applying it to the amount spent on goods and services, IBEC calculates the direct and indirect tax revenue generated from this activity to be  $(0.25 * €67 \text{ million}) = €16.8 \text{ million}$ . Using a tax multiplier of 25% and allowing for 15% of an employee's net income to be saved (a marginal propensity to consume of 0.85), IBEC calculates the tax contribution of the spending of Irish employees in the film industry to be  $(€76.2 \text{ million} - €18.8 \text{ million}) * 0.85 * 0.25 = €12.2 \text{ million}$ . Thus the total indirect tax revenue attributable to productions is €29 million, giving a total tax revenue, direct and indirect, of €49.1 million.

It is important to weigh these Exchequer benefits from audiovisual production activity against the cost to the Exchequer, in terms of tax revenue foregone through Section 481 relief.

Under Section 481, individuals and companies may write off a portion of their tax liability by investing in a production up to specified limits. Companies discount their investment against a 12.5% (in tax year 2007) rate of corporation tax and individuals against the 42% rate of income taxation. According to the latest figures from the Revenue Commissioners, the average tax rate foregone on investments availing of Section 481 went from 41% in the tax year 2006 to 38.1% in the tax year 2007.

On balance then, 38.1% of Section 481 funding for audiovisual production activity is tax foregone by the state. This amounts to €31.1 million in the period covered by the report.

### GNP and Employment Multipliers

The data collected is largely based on the production accounts of a 'standard' TV, film or animation production. This provides information of numbers directly employed on a production, but not the numbers employed due to the purchase of goods and services. Thus, for example, the numbers employed in Catering are known only if provided internally by a production and not if contracted out. In order to capture this additional direct employment, and indeed to capture the wider output and employment activity generated by film production, the concept of the multiplier is utilised.

The multiplier captures the overall impact of what might be termed the ripple effects of an economic activity. For example, a film distributes its budget amongst various suppliers of Irish goods, services and labour. Each of these individuals will, in turn, spend a proportion of this additional income on suppliers of Irish goods, services and labour in a ripple effect expanding throughout the economic system, far beyond that of the film industry. A GNP and Employment multiplier captures the sum of all successive ripples, in terms of both output and employment, respectively. The concept of the multiplier is used by amongst others, IDA Ireland, Teagasc and Bord Fáilte.

The multipliers used in the analysis are based on the work carried out by Professor Eamon Henry at the ESRI, applying Input-Output analysis to a 41 NACE sector model of the economy. The multipliers relate specifically to the Other Market Services sector of the Irish economy in 1993.

Henry divides the multiplier effect of a given level of expenditure into a direct, an indirect and an induced effect - see following table. An indirect effect results from the purchase of 'upstream' inputs of goods and services. These are goods and services that are not directly purchased by an audiovisual production. The induced effect arises out of the increase in personal incomes through an injection from outside the economy (foreign investment). Expenditure, which is domestically financed, does not have an induced effect as the money has already been circulating within the economy. As a result the multiplier for foreign-funded expenditure in Ireland is greater than for domestically funded expenditure. Finally, it is important to note that by applying the multiplier solely to expenditure on Irish goods, services and labour, the estimate of the activity generated by film production in Ireland is understated by the amount spent by overseas employees whilst in Ireland.



In order to allow for the impact of both domestically funded and foreign-funded expenditure, a composite multiplier is generated comprising the Direct + Indirect multiplier and the Direct + Indirect + Induced multiplier weighted by the proportion of domestic and foreign-funded expenditures respectively. For example, the GNP multiplier is calculated as follows:

$$(0.7354 * 0.83) + (0.9284 * 0.17) = 0.7682$$

By applying the composite GNP multiplier of 0.7682 to the Irish expenditure of €143.2 million, we estimate the final contribution of this expenditure to the Irish economy to be €110 million. Similarly, by applying a weighted employment multiplier of 36.08 to the expenditure of €143.2 million in Ireland, we estimate the final contribution of this expenditure to Irish employment to be 5,166 full-time jobs.

## Methodology

The multiplier estimates are taken from a report for Bord Fáilte by Professor Eamon Henry “Estimated Irish 1993 GNP and Employment Multipliers by Input-Output Modelling”, tables 6 and 8. The multiplier impact of audiovisual production activity on the economy was calculated, using the Henry multiplier for the NACE sector Other Market Services and allowing for the proportion of domestic and foreign-funded expenditure. The multiplier data for this sector are shown in the table below.

### GNP and Employment Multipliers for the Other Market Services Sector, 1993

Multiplier	Direct	Direct + Indirect	Direct + Indirect + Induced	Direct + Indirect + Induced + Government
GNP	0.5064	0.7354	0.9284	1.2558
Employment	24.01	35.60	41.96	56.91

Source ESRI/Bord Fáilte



George Gently



Charity You're A Star

## Clarification

### N1 Certification

A significant number of the feature films and major television dramas in this report were subject to terms of Section 481 (previously Section 35) Certification (introduced under section 20 of the Finance Act, 1994). Certification ensures that each proposed qualifying film project is analysed by the Department of Arts, Sport and Tourism for specific contributions in three key areas; creation of employment, return to the Exchequer in terms of value added and the enhancement of the national culture through the medium of film and television.

### N2 Bord Scannán na hÉireann/Irish Film Board

The Board's budget is voted annually by Dail Eireann and in 2007 the Board received Capital Grant-in-Aid of €17 million of which €1.271 million was allocated to FAS/Screen Training Ireland. The Irish Film Board was also allocated supplementary funding of €2.5 million and an administration grant of €2.659 million. The figures in Appendix 1 represent the full amount of the IFB's commitment to a project and do not take into account timing differences and closing balances at the year end on projects. The figure for TV includes schemes and documentaries.

### N3 Radio Telefís Éireann

A total of 137 RTÉ Independent Television Productions are analysed in this report reflecting an RTÉ investment of just under €59 million in 2007. As pointed out in previous reports, RTÉ expenditure is confined to productions for which Economic Database Input Forms were provided by independent producers.

### N4 TG4

A total of 90 productions in this report fall under the umbrella of TG4. For those productions TG4 contributed just under €14 million of the €25.9 million total budget in 2007.

### N5 Exchequer Costs

It should be noted that in addition to tax foregone, Exchequer support flows to the audiovisual industry through a number of structures including the Irish Film Board, TG4 and Screen Training Ireland. The Irish Film Board and TG4 have extensive public service as well as commercial objectives. Outlays by Screen Training Ireland, which receives some Exchequer support, are specifically aimed at the industry, but all other industries also benefit from Exchequer support for training programmes (e.g. through FÁS), so that the audiovisual industry is not uniquely favoured in this respect. In the light of these considerations, it was decided to continue the practice of confining the comparison to taxes foregone on Section 481 (previously Section 35) investments and taxes generated by film industry activity.



Being John Banville



Celebrity Bainisteoir



## Section 481 Investment

### Introduction

The scheme of tax relief was introduced in 1987 (Section 35), to promote the Irish film industry, by encouraging investment in Irish made films, which make a significant contribution to the national economy and Exchequer and/or act as an effective stimulus to the creation of an indigenous film industry in the State. The scheme was broadened in 1993 to include individual investors. The details of the scheme are contained in Section 481 of the Taxes Consolidation Act, 1997 (as amended). The scheme has been extended to 31 December 2012. The Finance Act 2008 increased the overall ceiling on the investment in any one film from €35 million to €50 million.

Since 1 January 2005, the Revenue Commissioners is responsible for the certification process of projects, having obtained an authorisation from the Minister validating the project of its cultural content.

### Summary of the Scheme

- The scheme provides tax relief towards the cost of production of certain films. The maximum amount which can be raised under the scheme is 80% of the production budget.
- Tax relief on 80% of their investments is available to individual investors and to corporate investors on amounts invested.

- Tax relief on amounts invested is not allowed until principal photography of the film project has commenced. If an application is made after principal photography has commenced, then the application is void.
- The production company must be an Irish incorporated and resident company, or a company incorporated or resident outside the State but which is carrying on a trade in the State through a branch or agency.
- The production company must be established for the production and distribution of only one qualifying film.

### Qualifying Film

A qualifying film is a film in respect of which The Revenue Commissioners has given a certificate.

### Qualifying Company

A qualifying company for the purposes of the scheme is an Irish incorporated and resident company or a company, which is carrying on a trade in the State through a branch or agency. The company must exist solely for the production and distribution of one and only one qualifying film.

Under Revenue Rules, to qualify for the tax relief, a risk requirement must attach to the investment, i.e. a return cannot be guaranteed to the investor.



21st Century Child



## Agencies

### (a) Steering Committee Organisations

#### **An Roinn Ealaíon, Spóirt agus Turasóireachta/Department of Arts, Sport and Tourism**

The Department of Arts, Sport and Tourism, has, since June 2002, overall Government policy responsibility for the future development of both the film and television production industry in the State. Since the Finance Act of 1994, the Department (and its predecessors) has had an active role in the Section 35 (now Section 481 of the Taxes Consolidation Act 1997) investment incentive scheme, through the certification process.

Since 1 January 2005 the Revenue Commissioners is responsible for the certification process, having obtained an authorisation from the Minister validating the project in terms of its cultural content and ensuring that the main aim of the Section 481 relief remains focused on promoting the growth of the indigenous film industry.

The Department provides Bord Scannán na hÉireann/the Irish Film Board with grants-in-aid for its current and capital operations. Since 2007, the Board's capital operations are being funded by the Exchequer, under the National Development Plan 2007 - 2013.

#### **Audiovisual Federation (AF)**

The Audiovisual Federation was established in September 1992 to promote the development of Ireland's audiovisual production and distribution industry. Its membership comprises firms ranging from broadcasters RTÉ, TG4, UTV and independent producers to corporate video producers, animation studios, facilities, legal and financial firms involved in the audiovisual sector and video rental companies. Affiliated member organisations include Screen Producers Ireland, Bord Scannán na hÉireann, Film Base, The Film Institute of Ireland, Enterprise Ireland, Udaras na Gaeltachta and BCI.

#### **Bord Scannán na hÉireann/Irish Film Board**

Bord Scannán na hÉireann/the Irish Film Board was reconstituted in April 1993 by the Department of Arts, Heritage, Gaeltacht and the Island under the Film Board Act, 1980. The Irish Film Board promotes the creative and commercial development of Irish filmmaking and promotes Ireland as a location.

Bord Scannán na hÉireann provides loans and equity investment to independent Irish filmmakers to assist in the development and production of Irish films. The Board also acts in cooperation with other Irish semiState agencies to improve the marketing, sales and distribution of Irish films and to promote training and development in all areas of filmmaking. Employment of Irish crew and the use of ancillary Irish services is a vital factor in the Board's consideration of applications.

### **Eurimages**

Eurimages, founded by the Council of Europe, provides production finance for European coproductions. The Irish Government has participated in the scheme since 1992. In 2007, Bord Scannán na hÉireann/the Irish Film Board paid Ireland's contribution of €283,654. Brendan McCarthy was the Irish representative, and Ireland received €1,100,000 in production funding from the fund in this year.

### **Radio Telefís Éireann (RTÉ)**

RTÉ Independent Productions is RTÉ's interface with the independent sector. RTÉ's primary responsibility is to its audience, and the quality and range of commissioned programmes plays a key role in helping RTÉ to deliver the most successful schedules in Ireland. RTÉ achieved this with almost 77% home production on its peak-time schedule on RTÉ One and 37% on RTÉ Two during 2007. RTÉ Television's total national share in peak time (18.00 to 23.30) in 2007 remained steady at 44%, despite intense competition, reflecting the strength of home production. This was in the context of a decline in the share of all of RTÉ's terrestrial competitors during the same period. The key driver in this success is home production, with Irish news, stories, entertainment and drama for the Irish audience. RTÉ's independent commissions (alongside its in-house production) are what deliver this strong performance. Commissioned Irish content satisfies viewers, underpins RTÉ's Public Service remit, and meets the commercial and creative aspirations of the Irish independent sector. The volume of hours and the actual spend on independent production have increased enormously since the first year of operation of the IPU in 1993. RTÉ's increased expenditure incurred on commissioning activities inclusive of attributable organisational overhead (€79.5 million in 2007 in respect of 1,022 hours of commissioned programming) continues to underpin the growth of the Irish independent sector, and assisted in job creation, economic growth and creative expression in this dynamic sector.



Eden

## Agencies

### TG4

TG4 is the national Irish language television service and broadcasts on its own terrestrial channel. It is also carried on all cable services in the country and by subscription satellite in the Republic and in Northern Ireland. It broadcasts 24 hours a day with an average of six hours of Irish language programming.

The channel came on air in late 1996 and operated under the aegis of the RTÉ Authority for the opening decade of its existence, including the opening quarter period under review in this publication. It was established as a separate statutory entity on 1 April 2007.

The core remit is to broadcast a comprehensive range of high quality, relevant, Irish language programming to the national audience as a public service. TG4 is funded by the Exchequer. During 2007, TG4 received €30.98 million Grant-in-Aid of current funding from the Department of Communications, Marine and Natural Resources.

TG4 functions primarily as a publisher broadcaster, sourcing most of its original Irish language content from the independent production sector. It is also in receipt of the equivalent of one hour a day of programming from RTÉ, at no cost to TG4, as laid down in Section VI of the Broadcasting Act 2001.

### Screen Producers Ireland (SPI)

Screen Producers Ireland (SPI) is the representative body for over 170 independent film, television and animation production companies in Ireland.

On behalf of its members the organisation seeks to create an improved environment for producers, which will assist growth in the industry. SPI reflects members' concerns on a variety of issues affecting the current and future working environment of the independent film, television and animation sector. It represents these views to the appropriate state, semistate and international bodies.

### b) Other Agencies

#### Údarás na Gaeltachta

Údarás na Gaeltachta's remit is to develop the economy of the Gaeltacht and to encourage the preservation and the extension of the Irish language as the principal language of the Gaeltacht community/people.

The organisation took proactive steps at the beginning of the 90's to encourage growth and development of the audiovisual sector in the Gaeltacht. Údarás na Gaeltachta's continuing commitment to this sector is evident through its support of independent production companies, production and post production facilities, training initiatives and a willingness to cooperate/liase with organisations that are responsible for the promotion of the sector both nationally and internationally. The Gaeltacht audiovisual sector had another successful year in

2008 with producers/production companies getting recognition at events such as The Celtic Media Festival, The IFTA's, The Emmy and BAFTA Awards. Furthermore, a number of Gaeltacht producers/production companies were successful in obtaining MEDIA funding and in receiving commissions from the NIFTC's Irish Language Broadcast Fund.

The BCI's Funding Scheme 'Sound and Vision' continued to bring increased activity to the Gaeltacht throughout the last year, with further projects in production at the moment and this is very much welcomed by Údarás na Gaeltachta.

Údarás na Gaeltachta in conjunction with TG4 launched a new initiative focusing on development in 2007/2008 and based on the success of the nine Gaeltacht based production companies who participated in the programme for 2007/2008, it was decided to run the programme for another year. For the 2008/2009 programme ten companies were selected to participate. The objective of the programme was that the production companies would recruit a development executive for a year's duration, whereby this individual would be responsible for the development of new content/formats/programme ideas and present them to the commissioning department in TG4 initially and subsequently to other broadcasters if appropriate. The development executives are offered training/mentoring in their development capacity according to their identified needs. This initiative is a pilot programme with a view to encouraging production companies address their strategic development.

### BCI

The BCI's Sound & Vision broadcasting funding scheme continued its strong allocation to film and TV production in Ireland during 2007. €82.5 million was requested this year from the Fund for 252 different television and film projects. 98 were awarded funding to a total value of €17.7 million. This would indicate a success rate of approx 40%. All genre were included including documentary, animation, Irish language, adult literacy, children's, feature film, and drama series. The total allocation since the beginning of the scheme to television and film production up to end 2007 now stands at €37.3 million

Results for two television rounds were announced in 2008 where funding was allocated for a further €7.8 million for 53 programmes. This was lower than the previous year as the backlog of funding has been cleared. Allocations are therefore likely to remain at the level of approx €10 million per annum or 5% of the total television license revenue.



## Agencies

### **Media Desk Ireland/Media Antenna Galway**

MEDIA Desk Ireland (supported by the European Commission's MEDIA Programme, the Film Institute of Ireland, Film Makers Ireland, Dublin City University, Film Base, Bord Scannán na hÉireann and RTÉ) and MEDIA Antenna Galway (supported by the European Commission's MEDIA Programme, Údarás na Gaeltachta, Bord Scannán na hÉireann, TG4 and the Galway Film Centre) are information offices for the MEDIA Programme of the European Union. The MEDIA Desk and Antenna provide advice, technical assistance and consultancy for audiovisual professionals in international and national markets and festivals, as well as facilitating the integration of the Irish audiovisual industry within Europe. Along with providing information on the MEDIA Programme, the MEDIA Desk and Antenna also provide information on Eurimages and on EU Audiovisual Policy in general.

The fourth edition of the MEDIA Programme – MEDIA 2007- commenced in January 2007 and will continue until December 2013. The budget for the seven-year programme is €755 million.

During the first year of the MEDIA 2007 programme, it is estimated that the Irish audiovisual industry received €0.84 million for the development of projects, distribution, exhibition, and festival and market access support.





*Class Act*



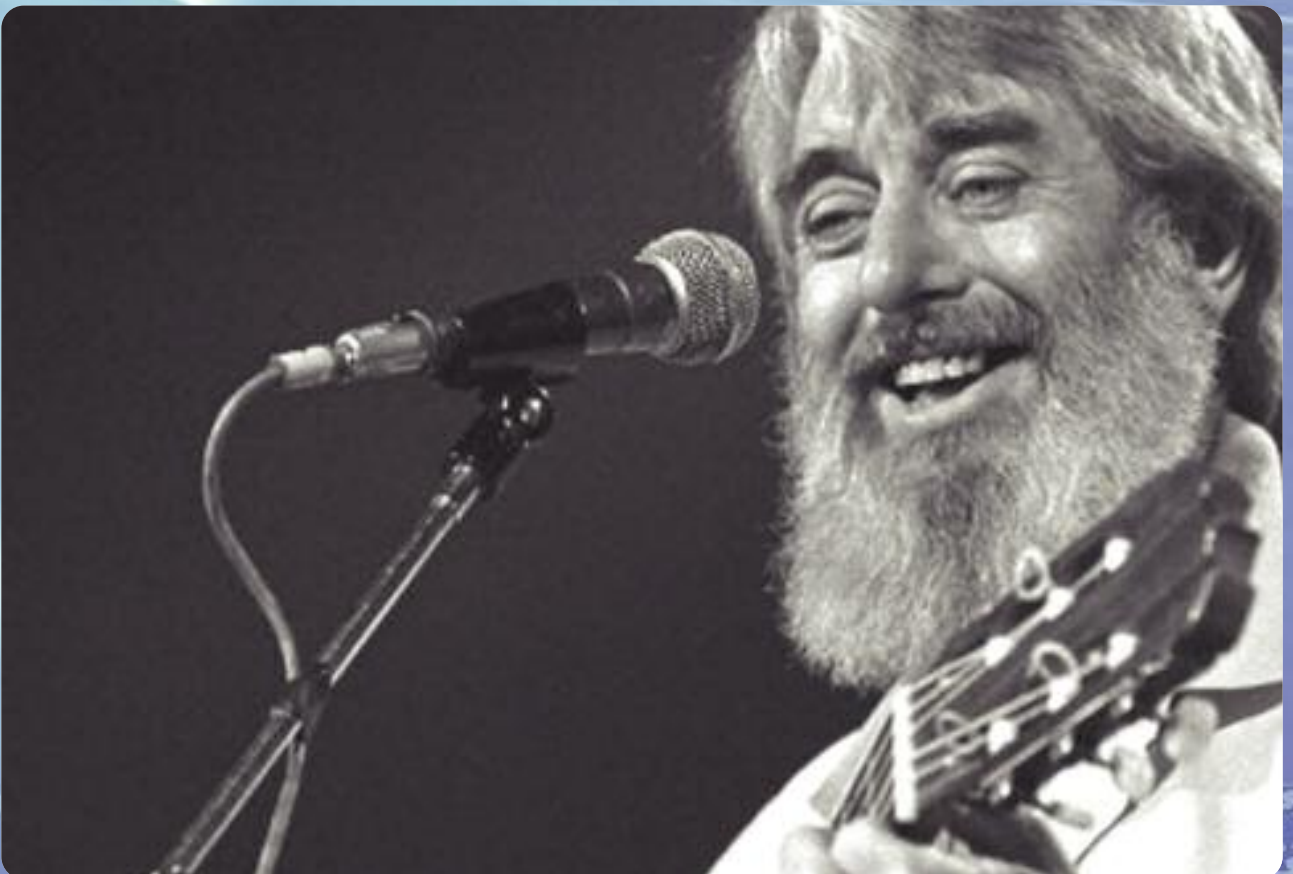
*Consuming Passion*



*Jam The Musical*



*Hollywood Trials*



*Ronnie Drew*

## Productions

### 2008

#### Film

Savage  
One Hundred and One Outsiders  
Happy Ever Afters  
Occi versus the World  
Ondine  
Ramush  
Horses  
Wake Wood  
Table Manners  
Eamon  
The Race  
Triage  
The Hanged Man  
Love & Savagery  
Cracks  
Five Minutes of Heaven  
The Investigator  
Vasha - Kid & Killer  
Little Foxes  
Cherry Bomb  
A Shine of Rainbows  
Zonad

#### Independent TV including Major TV Drama

Galway Races  
Single Handed 3  
Ros na Run 13  
The Clinic 6  
Killinaskully  
Raw  
School Run  
Aifric 3  
Desperados  
The Tudors 3  
Ganglands  
George gently  
The Take

RTÉ (not available at time of printing)  
TG4 (not available at time of printing)

#### Animation

Ballybradden  
Fado Fado  
Garth  
Badly Drawn Boy  
Abbi's Circle  
Noddy  
Bunny Maloney  
Ms Remarkable  
Bones  
Olivia  
Niko & the Way to the Stars

### 2007

#### Film

32A  
Alarm  
Dorothy Mills  
Eden  
Helen  
Kisses  
Seaview  
Summer of the Flying Saucer  
The Daisy Chain  
The Undertaking  
Tonight Is Cancelled  
Waveriders

#### Independent TV including Major TV Drama

George Gently  
Murphy's Laws  
Rock Rivals  
The Old Curocity Shop  
The Tudors - Season 2  
Uncle Max - Series 2

#### RTÉ

How Was It For You?  
20 Moments That Shook Irish Sport  
21st Century Child  
A Missing Generation: Aids in Africa  
Afternoon Show 4  
Aingeal sa Chistin  
All At Sea  
An Evening Prayer  
Anonymous Series 3  
Arts Lives - Michael Colgen  
Baby on Board  
Beyond Endurance  
Bittersweet  
Celebrities Go Wild  
Celebrity Bannisteoir  
Celebrity Jigs & Reels  
Celebrity Jigs & Reels Series 2  
Charity You're a Star  
Charlie Bird Explores the Ganges  
Chasing the Blues With Hector and Risteard  
Class Act  
Class Clowns  
Colin & Graham's Excellent Adventure  
Consuming Passions Series 1  
Cracking Crime - Series 6  
Crime Call 4  
Cromwell In Ireland  
Dealers 2  
Diarmuid Gavins Pony Kids  
Ear to the Ground 2007/2008  
Election 2007

Empire  
Fair City Sings  
Festival of World Cultures 07  
Figure of Hate  
Fleadh Cheoil 07  
Forbidden Love  
Future Shock Fat Nation  
Get Collins  
Getting High / Coming Down  
Go On, Go On, Go On  
Go Stop Go - Series 1 - 2007  
Guerrilla Gourmet  
Here to Stay  
Highly Recommended  
Hollywood Trials  
House Hunters  
House Hunters in the Sun Revisited 4  
How Long Will You Live - Series 2 Revisited  
How Long Will You Live - Series 3  
How Low Can You Go - USA  
How Low Can You Go  
I Dare Ya  
I Want a Garden  
I Want a Garden Revisited  
In the Name of the Fada  
Ireland's Top Earners  
It's My Show  
Jam - The Musical  
Just For Laughs Series 6  
Killinaskully Series 4  
Langerlan TV  
Limelight  
Living in the Dream  
Living the Dream Special  
Making Histroy - The Irish Historian  
Making Jake  
Miuntir na Mara  
No Bearla 2  
No Experience Required - Transition  
No Frontiers Series 10  
No Place Like Home Series 3  
Noisemaker - A film About Jinx Lennon  
Of Best Intentions  
Operation Transformation  
Other Voices Series 6 & Interface  
Paul Muldoon - Atlantic Man  
Prank it Up - ICE  
Pressure Cooker  
Prosperity  
Quizzone Series 3  
Radio Garda  
Road to Croker  
Road to Croker Christmas Special  
Room to Improve 2  
RTÉ Horseracing 2007  
Ryan Confidential Series 5  
Science Friction



Science Kids, The Incredible Cows of  
Wisdom, Celebrity Camper Van,  
Molly Murphy.  
Science Works  
Scor 07  
Seed Hunter  
Seoige & O'Shea Series 2  
Show Me The Money  
Show me the Money III Revisited  
Showhouse  
Single Handed  
So you want to be Famous  
Soupy Morman Christmas Special  
Surgeons 2  
The Clinic  
The Dubliner  
The English Class  
The Full Set  
The Generation Game  
The Importance of Being Irish  
The Living Bridge  
The Panel 6  
The Panel Christmas 2007  
The Panel Election Series  
The Panel Uncut  
The Restaurant Christmas Special  
The Restaurant Season 5  
The Roaring Twenties  
The State of Us  
Till the Tenth Generation  
Tua Nua VI  
Ultimate Guide to Everything  
Use it or Lose it  
Valentia to Vegas - Series 1  
Voice at the edge - Noirin Ni Riain  
What Am I Worth  
What in the World  
Where's My Job Gone  
Whistleblower  
Who's Afraid of China  
Who do You Think You Are  
Xmas Den Inserts  
You're a Star Series 6  
YPP Ice Star Search Inserts  
YPP Telethon Inserts  
YPP Young Scientist Inserts

#### TG 4

Aifric - Ar Chúil an Cheamara  
Aifric Sraith II  
Alexander Nimmo  
Amharc  
An Chaille Bhrídeoige  
An Domhan dar le Neelo  
An Teanga  
An Tóstal  
Aonach Tailteann: Olympiad na nGael

Ar Ais Le Chéile  
Ar Lorg Shorcha  
Athghuthú  
Bábóg go Babe  
Bradán Feasa  
Beidh Aonach Amárach  
Big Jack  
Cailleach Cill Chainnigh  
Cártaí Poist (Series 2)  
Cé Leis Thú  
Ceart is Coir  
Ceolchuart  
Ciotógach  
Claíocha Cloiche  
Clann as Dobhar  
Cluichí na nGael  
Comórtas Ceirde  
Corn Uí Riada / Steip 2007  
Cúla Cairde  
Dáithí ar Highway 61  
Dáithí ar Route 66  
Dáma Chnoc Mhuire: COGAR  
Death of an Icon  
Deis Roc  
Deoraíocht in Ifreann/Exile in Hell  
Dubáil 2007  
Éagsúil  
Feast of the Dying Sun/Halloween  
Fotheidealú  
Geantraí '07  
Ghosts Along the Blind Road  
Glór Tíre - Sraith 4  
Gradam Ceoil '07  
Gradam Ceoil  
Gradam na Gaeltachta  
Hector san UK  
Hollywood Blockbusters  
Inis Airc - Bás Oileáin  
(Inishark - Death of an Island)  
Íobairtí  
Kosovo - Misean Thar Lear  
Lámh Chuidigh  
Marú - Series 2  
Mise Sean Ó Riordáin  
Mo Honda Beag  
Mobs Mheiriceá  
Na Duganna  
Nead an Dreoilín  
Nollaig Shona  
Ollsoláthar Spóirt TG4  
On Another Man's Wound, Scéal Ernie  
O'Malley  
Paddywhackery  
Paisean Faisean 4  
Pop 4 07 / 05  
Pop 4 an tSamhraidh 07  
Rí na gCnoc

Rince ar Phár  
Ros na Rún 12  
Rua  
Saibhir Ach Salach  
Scaoil Seol  
Scéalta Sráide  
Sciáil sna Sléibhte  
Scil 2007  
Scoil an tSolais  
Seacht  
Seacht  
Séiplínigh na nImirceach  
Seo Spóirt 1  
Seomra a Sé  
Slán a Bhéas Me  
Slí na Fírinne  
Snú car Beo 2007  
Survivor 13  
Teach Glas 2  
Teitheadh Na nIarlaí  
The History of the Devil/ Stair an Diabhail  
Three Hundred Years of Vice  
Tóraíocht Taisce  
Trí Shúile an Chait 2  
Turas I mBaol - Trasna na Himiléithe  
Underdogs 2007

#### TV Other

A Film from my Parish, 6 Farms  
About Beauty  
Colour Contamination  
Creative Chaos: Round One  
Gabriel Byrne - Stories from Home  
Lowland Fell  
No Regrets In The West  
Red Mist  
Sensation Pilot  
Spaceman Three  
Stone Pastures  
The Invisibles  
The Rooster, the Crocodile and  
the Night Sky

#### Animation

Blinky Bill's White Xmas  
Blinky Bill 27 - 52  
Cosmic Quantum Ray  
Crap Rap Xmas Special  
Funky Fables  
Granny O'Grimms Sleeping Beauty  
Lifeboat Luke  
Fado Fado  
Sandpiper  
Skunk Fu  
Staines Down Drains  
Teenology





*Whistle Blower*

*Living The Dream*





Olivia



Living With Lucy



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