

# Film & Television Production in Ireland

Audiovisual Federation Review 2010



IBEC Audiovisual Federation is a business sector within IBEC

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# IBEC Audiovisual Federation Review 2010

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 sector within the Irish Business and Employers Confederation (IBEC).

Chair:

Andrew Lowe, Element Pictures

Vice Chair:

Anne O'Connor, RTÉ

Secretariat:

Tommy McCabe, Director

Emer Condon, Executive

Carolyn Doumeni, Personal Assistant

Tel: 01-605 1528 Fax: 01-638 1528

Email: [audiovisual.fed@ibec.ie](mailto:audiovisual.fed@ibec.ie)

Web: [www.ibec.ie/avf](http://www.ibec.ie/avf)



## 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



# IBEC Audiovisual Federation Review 2010

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 2009. It also gives an overview of productions to date in 2010. 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 eighteenth report on the audiovisual sector, which was drawn up under the auspices of the following organisations – members of the Audiovisual Federation Database Steering Committee and the AF Digital Content SubCommittee:

Chairman AF Database Steering Committee	Kevin Moriarty, Ardmore Studios
Bord Scannán na hÉireann/Irish Film Board	Teresa McGrane Patrick O'Neill
Raidió Teilifís Éireann	Michael Hyland John Dunne
TG4	Pádhraic Ó Ciardha Máire Uí Chadhain Sile Bhreathnach
An Roinn Turasóireachta, Cultúr agus Spóirt/ The Department of Tourism, Culture and Sport	Declan Brennan
Screen Producers Ireland	Barbara Galavan Lorraine Morgan
Facilities	Kevin Moriarty, Ardmore Studios
Animation Sector	Cathal Gaffney, Brown Bag Films
Broadcasting Authority of Ireland	Ciaran Kissane

Audiovisual Federation of IBEC	Tommy McCabe (Director) Emer Condon (Executive) Eoin Keogh (IBEC Research Unit) Carolyn Doumeni (Personal Assistant)
AF Digital Content SubCommittee:	
Brown Bag Films	Cathal Gaffney (Chair)
The Digital Hub	Philip Flynn (Vice Chair)
Bord Scannán na hÉireann/Irish Film Board	Patrick O'Neill
Telefónica O2 Ireland	Karl Aherne
Raidió Teilifís Éireann	Múirne Laffan
Enterprise Ireland	Eileen Bell

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

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Prepared by the Audiovisual Federation of IBEC

IBEC Audiovisual Federation,  
Confederation House, 84/86 Lower Baggot Street, Dublin 2  
E-mail: [audiovisual.fed@ibec.ie](mailto:audiovisual.fed@ibec.ie) Website: [www.ibec.ie/avf](http://www.ibec.ie/avf)

## International Awards for the Sector

### **British Animation Awards – Best European Feature**

*The Secret of Kells*

### **Celtic Media Festival – Best Animation**

*The Secret of Kells*

### **Royal Television Society Awards, London – Best Children's Drama**

*Roy*

### **Cartoons on the Bay Film Festival, Italy – Best Short Film**

*Granny O'Grimm's Sleeping Beauty*

### **Dam Short Film Festival, US – Audience Award**

*Granny O'Grimm's Sleeping Beauty*

### **Silverdocs Festival, US – Audience Award for Short Film**

*Bye, Bye Now*

### **WorldFest-Houston Independent International Film Festival – Platinum Remi**

*Dental Breakdown*

### **Dresden International Short Film Festival – Best Soundscape Award**

*Mr. Foley*

### **Annecy Animation Film Festival – Fipresci Award**

*Miss Remarkable and Her Career*



The Secret of Kells



# Awards

## Academy Award® Winner:

**Best Visual Effects:** *Avatar* - Richard Baneham

## Academy Award® Nominations:

**Short Film (Live Action):** *The Door* - Juanita Wilson and James Flynn

**Best Animated Feature Film:** *The Secret of Kells* - Tomm Moore

**Best Short Film Animated:** *Granny O'Grimm's Sleeping Beauty* - Nicky Phelan and Darragh O'Connell

**Best Sound Mixing:** *Star Trek* - Peter J Devlin

## Emmy® Award Winners:

**Outstanding Art Direction for a Single-Camera Series** - *The Tudors*  
Tom Conroy, Colman Corish and Crispian Sallis

**Costume Design and Wardrobe Supervision** - *The Tudors*  
Joan Bergin and Susan Cave

## Emmy® Award Nominations:

**Outstanding Hairstyling for a Single Camera Series** - *The Tudors*  
Dee Corcoran

**Outstanding Supporting Actor In A Miniseries Or A Movie** - *Emma*  
Michael Gambon

**Outstanding Music Direction** - *Celtic Woman: Stories from the Heart*  
David Downes



4 Irish Nominees (Left to Right): Nicky Phelan, Tomm Moore  
Richard Baneham, Darragh O'Connell



Joan Bergin

## RTÉ Awards

**New York Festivals Television + Celtic Media Festival** (*“Seamus Heaney – Out of the Marvellous”*) **Doc. Award**

**New York Festivals Television** (*“The House”*) **Doc. Award**

**New York Festivals Television** (*“Single Handed 3”*) **Drama Award**

**Celtic Media Festival** (*“If I should fall behind”*) **Short Film Award**

**Cinema Tous Écron** (*“Love Hates”*) **Best Series**

**The Accolade Competition** (*“Single Handed 3”*) **Drama Programme / Series: Award of Excellence**

\* **Crossroads Film Festival, Mississippi** (*“The Last Confession of Alexander Pearce”*) **Best Narrative Feature**

\* **NewportInternational Film Festival** (*“The Last Confession of Alexander Pearce”*) **Special Jury Prize**

\* **European Independent Film Festiva** (*“The Last Confession of Alexander Pearce”*) **Best Non-European Dramatic Feature**

\* **Inside Film Awards (Australia)** (*“The Last Confession of Alexander Pearce”*) **Best Documentary Award**

\* **Screen Music Awards (Australia)** (*“The Last Confession of Alexander Pearce”*) **Best Music for a Telemovie**

\* **Tregor International Film Festival** (*“The Last Confession of Alexander Pearce”*) **Best Film under 60 minutes**

*\*Co-funded by RTÉ*

# Awards

## TG4 Awards

**Celtic Media Festival – Entertainment** - *Ceolchuaire*

**Celtic Media Festival - Young People** - *Seacht*

**WorldFest-Houston - Remi Award** - *Ernie O'Malley*

**WorldFest-Houston - Remi Award** - *Kennedy's Cadets*

**WorldFest-Houston - Remi Award** - *Mobs Mheiriceá*

**WorldFest-Houston - Remi Award** - *Críostaíocht*

**WorldFest-Houston - Remi Award** - *Ceolchuaire*

**WorldFest-Houston - Remi Award** - *Faoi Lán Cheoil*

**Circom - Best Magazine Programme** - *Pobal*

**Circom - Silver Medal Sports Programme** - *Na Báid*

**International Youth Festival, Rimouski, Canada - Jury Award** - *An Créatúr*

**Shane O'Neill, Chief Strategy Officer,  
Liberty Global**

"Our cultural arts are world class. They are our calling card abroad. Television and film is an increasing important part of this legacy".

**John McColgan, River Productions Limited  
*From fireside to Facebook***

Imagination, vision, innovation, hope and confidence – in times of trouble, resilient, creative and passionate people make myth and magic, open new possibilities, seeding indelibly embedded memories through courage and skill: We can be the very best. We just have to believe it.  
Irish story tellers all.  
From fireside to Facebook.

**Mary Hanafin TD, Minister for Tourism,  
Culture and Sport**

Irish films showcase the best of Irish talent, creativity and culture in an innovative way. As a viewer and as a Cabinet Minister, I take great pleasure in supporting the industry.

# Ireland in their own Words

## **Ciaran Donnelly, Director of episodes of *The Tudors* and *Camelot***

"The tax incentive has helped create a situation where Irish talent can now work on large scale international projects at home as well as helping keep the more individualistic and culturally driven talents in production. Writers get to write, directors get to direct and producers produce. It's the creative economy at work".

## **Steven Soderbergh, Director of *Knockout* (and *Ocean's 11*, *Traffic*, *Out of Sight*)**

"Visually arresting locations that haven't been overused in movies? Check.  
Highly skilled and experienced crews? Check.  
Financial incentive program that actually works? Check.  
Fond memories and great footage? Check.  
In other words, if you're a filmmaker, Ireland rocks".

## **Nicky Phelan, Director, *Granny O'Grimm's Sleeping Beauty***

"The nomination of *Granny O'Grimm's Sleeping Beauty* and attending the Academy Awards® was a real privilege. It is very satisfying to work in animation here in Ireland, and even more so when our projects receive such recognition on a global stage".



### My Brothers

Over the Halloween weekend of 1987 three young brothers embark on an epic quest: to win and bring back to their dying father a replacement for his beloved watch.



### Snap

This carefully constructed film depicts three generations of a family, all in denial about events in which they were undeniably implicated. Their journeys towards confrontation with the truth and with their own motives reveal the humanity behind seemingly inhuman actions.



### The Runway

Inspired by the true story of a South American pilot who crashed his plane in a field near an Irish town in 1983, the film is seen through the eyes of nine-year-old Paco who believes his absent father is Spanish and working as a NASA astronaut.



### Outcast

As Mary and her teenage son, Fergal, move to yet another new home, it becomes clear that they are living their lives on the run, hiding from someone or something, terrified of being found.



### Sensation

When his father dies, Donal, who has no interest at all in the family farm, strikes up a relationship with an antipodean escort girl called Kim. At first they are client and call-girl, then evolve into lovers, and finally - making use of Donal's inheritance - become business partners.



### Leap Year

A woman who has an elaborate scheme to propose to her boyfriend on February 29, faces a major setback when bad weather threatens to derail her planned trip to Dublin. With the help of an innkeeper, however, her cross-country odyssey just might result in her getting engaged.



## A Kiss For Jed Wood

Nineteen year old Orla from County Antrim wins 'Follow a Star' on an Irish national TV station. Her prize is a quest - to find Country & Western star Jed Wood, give him a kiss, and report on her adventure on the following week's show.



## All Good Children

After the death of their mother, Irish youngsters Dara and Eoin are moved to Franceto stay with their aunt. There the boys befriend the children of an English couple who have bought a dilapidated chateau, where Dara instantly falls under the spell of their young daughter, Bella.



## As If I'm Not There

Samira, a young teacher from Sarajevo assigned to a Bosnian village school in the early '90s, finds her life turned on its head the day a young soldier walks uninvited into her kitchen and tells her to pack a bag.



## Between The Canals

Like many others of his age in Dublin's north inner city, Liam is a small-time criminal whose life consists of dealing drugs, getting into fights and sticking by his friends. But now his girlfriend is pregnant and he wants to change all that to become a provider for his new family.



## Pyjama Girls

It's a phenomenon that began in Dublin and spread far and wide. Yet the girls who wear pyjamas as daywear, all day everyday, aren't interested in grabbing attention. Pyjama Girls traces the intense and explosive micro-dramas of teenage life against the bleak backdrop of Dublin's inner city flats.



## The Fading Light

As their mother slips into the last stages of a fatal illness, her three children gather under the same roof in Dublin for the first time in a long while.



# The Guard





## CASE STUDY - Film

John McDonagh's debut feature film *The Guard* starring Brendan Gleeson (*In Bruges*, *Gangs of New York*), Don Cheadle (*Ocean's 11*, *Hotel Rwanda*) and Mark Strong (*Kick-Ass*, *Sherlock Holmes*) filmed in autumn 2009 in Galway and Wicklow. The film was produced by Ed Guiney and Andrew Lowe of Element Pictures (*Garage*, *Wind that Shakes the Barley*), Chris Clark, and Flora Fernandez Margengo.

*The Guard* tells the story of Sergeant Gerry Boyle, a small-town Irish guard with a confrontational personality, a subversive sense of humor, a dying mother, a fondness for prostitutes, and absolutely no interest whatsoever in the international cocaine-smuggling ring that has brought straight-laced FBI agent Wendell Everett to his door.

The film had a total budget of almost €5 million, the majority of which was spent on Irish labour, goods and services. *The Guard* received Irish funding from the Irish Film Board and Section 481, with nearly 60% (almost €3 million) being raised from International sources.

The film has provided a great opportunity for established Irish cast such as Brendan Gleeson and Liam Cunningham to work at home as well as providing a platform for up and coming talent such as Rory Keenan and Sarah Greene. Irish creative personnel were employed across the filmmaking process including production designer J.P. Kelly and costume designer Eimer Ni Mhaoldomhnaigh. Their work will now be showcased to a significant audience on the International stage.

In total, there were 263 cast, crew and crowd extras employed throughout the production and post-production period, the vast majority of which were Irish. There were also a large number of trainee positions on the production, many of whom were sourced locally for positions across production, location and the art department.

The film availed of the IFB's Regional Support Fund in order to help offset some of the costs incurred with filming regionally in Ireland. *The Guard* has led to substantial inward investment in Galway city and Connemara, where the film received huge support throughout filming last year, in particular from the newly formed Screen West. *The Guard* filmed for six weeks in Ireland, the majority of which were on location with a substantial local regional budget spend of over €500,000 on cast, crew and services in the Galway area. The post-production work was carried out in Screen Scene in Dublin.

*The Guard* will be released in Spring 2011.



### All Ireland Talent Show

Is billed as Ireland's biggest-ever talent contest and is set to uncover the most engaging, exciting, impressive and entertaining talents this country has to offer.



### Music Changes Lives

A groundbreaking and inspirational four-part observational documentary series about the transformative power of music.



### Mattie

Pat Shortt's 'Mattie' was the top rating entertainment programme across all Irish television channels on Christmas Day, with an average audience of 602,000 viewers



### Charity Lord of the Rings

This four-part week-long series will follow 10 well known personalities on an emotional journey as they prepare physically and mentally for the challenge of their lives.



### Crimecall

The programme plays a valuable role in Gardaí investigations into high profile cases along with keeping the public informed about crime trends and crime prevention.



### The Bloody Canvas - Artist Sean Scully

Sean Scully embarks on an idiosyncratic journey into the world of the ring.

# Television RTE



## Quizzone

Quizzone is a game of intellect, speed and physical ability. It's a game played on many levels where only one team can top the Quizzone League Table and take home their own personal laptops at the end of the series.



## Health of the Nation

Dr Mark Hamilton and Dr Nina Byrne travel around the country to look at a range of medical problems and help the nation face up to improving their health.



## Love Hate

Reflecting life in modern gangland Dublin, the story for the four x one hour drama is written by Stuart Carolan (Raw, Little White Lie) and will be directed by David Caffrey (Divorcing Jack, Raw).



## Life after Dell

Spends twelve months with four very different families as they brace themselves for an uncertain future, witnessing the highs and lows as they come to terms with their new circumstances.



## Ryan Confidential

The eighth season of "Ryan Confidential" is marked by a new international dimension.



## Living the Wild Life

Emmy-Award winning wildlife cameraman Colin Stafford-Johnson is back with a third series of RTE's very popular nature programme Living the Wildlife.

# Operation Transformation “Series 3”

## Background

In 2010, series 3 of *Operation Transformation* marked a new departure for RTÉ Lifestyle. Originally commissioned by RTÉ in 2008 *Operation Transformation* was RTÉ's first 360 degree, cross-platform commission which sought to fully harness the potential of the rte.ie website and the audience reach of both its radio and television broadcast arms. Vision Independent Productions (VIP) were commissioned to produce *Operation Transformation* in all three years and the series is fully funded by RTÉ.

The first two series of *Operation Transformation* attracted strong audiences. However for the third season a decision was made to expand the duration from a thirty-minute show to a full hour. An hour-long, pre-watershed format was a first for RTÉ.

The rationale was to build on the success of the two previous series and grow series three into a national campaign, encouraging debate around the public health implications of the population's trend towards obesity. This campaign was founded in the knowledge that Ireland is facing an epidemic of diabetes and clinical obesity. We now have the fattest children in Europe. If we continue as we are now, over half of the population will be obese within 20 years.

For 2010 Vision Independent Productions therefore set about the task of reaching a new level with *Operation Transformation*. Success in previous series gave VIP the confidence to build this into national campaign.

## Pre - Production

The production was run from VIP's head office in Finglas, and had a pre-production time of three months, with a further three months of production and concurrent post-production. The number of crew working for VIP on the series was 48 with Irish work hours totaling 16984. Further to this a number of RTÉ personnel were engaged full time on the series across all three platforms and others on the studio finale filmed in RTÉ.

A national search for potential leaders was launched through the Gerry Ryan Show on 2FM. Six members of the production team then took part in a countrywide trawl, meeting and interviewing potential leaders across the country. The final part of this process was to hold an audition day for short listed candidates, where they met with each of the four Experts who would assist and support them over the eight weeks.

The new duration allowed us scope to include new strands in the programme. One of these was the decision to involve three different groups of 15 people in following the plan. The groups were TDs and Senators in Dáil and Seanad Éireann, Taxi Drivers from Galway and “Mumstown” (a parenting internet group) from Meath. The groups build on the concept of accessibility, that everybody can take part in the plan.

We also included a public information item, which ranged from informing the nation about the significance of labeling on food packaging to the more serious health consequences of obesity. We were assisted with this by Dr Donal O'Shea, a Consultant Endocrinologist and physician based in St Vincent's Hospital, Dublin.

## Production

Working within an agreed budget, VIP had to do a radical re-think of the production process. One producer could not run the whole production, so we decided to break down the production into different sections, with each section having a lead producer.

We also had to re-examine the shooting process and see how we could film our Leaders on a daily basis within the available budget, and our solution was the “Preditor”.

A “Preditor” is a researcher with the skills to interview, shoot and edit a package.

During the production period we had 5 Preditors on the road, living in close quarters to each of the 5 leaders.

We also put in place a dedicated team with three members to film material around the various Groups involved in the series. This team would hit the road with an industrial weighing scales on a weekly basis and film at all three locations.

Other teams were dedicated to the production of the weekly Army Challenge and public information/campaign elements of the series.



# CASE STUDY - Television RTÉ

## Post- Production

For eight weeks an entire floor of Screenscene became home to a five person edit team, along with an Executive Producer, Post- Producer, Directors, and Scriptwriters.

Rushes were fed to the facility electronically via their high-speed 100Meg internet line, along with file based rushes arriving on drives. The window for editing was very tight. Four avid edit suites worked at broadcast resolution, which in turn integrated with the online and sound mix suites.

The offline edit finished on Tuesday night, with the Online and Voiceover scheduled for Wednesday. The hour long broadcast master was delivered to RTÉ for TX each Wednesday evening.

## Web Site

Alongside the programme production team we had a separate WEB team consisting of a Producer, DV Director/Editor and a researcher.

The web team also monitored the facebook element of the show, which had attracted almost 13,000 participants by the end of the series. Facebook also provided a mutual support community for followers of the plan and gave followers of the plan an interface in which to interact with the show's Experts.

The core internet content, exercise and diet plans were carried on the [rte.ie/ot](http://rte.ie/ot) website which was a huge success, building on the traffic of previous years with over 2 million unique hits and a new high of 3.3 million pageviews.

## Appeal

Series three of *Operation Transformation* hit a ratings high of 550,000 viewers - a 32.5% share.

Levels of uptake of and interest in the diet and fitness programmes on the web were significantly up.





**PONC**  
Máire Treasa Ní Dhubhghaill & Colmán  
Mac Séalaigh



**An Jig Gig**  
Labhrás Sonaí Choilm Learraí, Derbhla  
Lennon, Róisín Ní Thomáin & Breandán  
de Gallaí



**Ar Bharr na dTonn Galway Hooker**  
Association regatta held in various locations around  
Connemara.



**Peil na mBan**



**Ceol Daniel**  
Daniel O'Donnell



**Ceol na nOileán**  
Lasairfhiona Ní Chonghaile

# Television TG4



**Diabhal ag an Damhsa**



**Dáithí ar Thóir...**

biographies of some of the biggest country music stars



**Fáiscthe as an Talamh**

farming life in Connemara which is in decline



**Bóthar go dtí an Whitehouse  
John F Kennedy.**



**Feirm Factor**

12 farmers who will showcase the best of Irish farming today for a chance of winning an outstanding prize.



**Geantraí**

**Méabh, Clíodhna & Emer Buckley.**



## Rásaí na Gaillimhe





# CASE STUDY - Television TG4

"Beautifully shot, sharply scripted and nicely acted by all concerned"

*Sunday Tribune*

"Dark, funny and clever"

*Paddy Murray, Sunday World*



## Overview

*Rásaí na Gaillimhe* is a seven part comedy drama series shot during 2008 and broadcast on TG4 during 2009.

The series was developed and produced by Great Western Films for TG4. The project stemmed from an initiative of TG4 Commissioning Editor, Micheál Ó Meallaigh, who ran a pitch competition which would combine the seven days of the Galway Races with the Seven Deadly Sins. That competition was won by writer James Phelan, who ultimately wrote the series *Rásaí na Gaillimhe*. The premise was to flaunt the excesses of the Galway Races as a metaphor for modern Celtic Tiger Ireland in search of personal gratification of various types and to various degrees. The irony of oblique reference to the seven deadly sins in an era when sins had just about been abolished would be an integral part of the concept. An Ireland that was unimaginable thirty years before when the Pope visited would be revealed with humour and some excess but would be wary of crossing the boundaries of credibility into farce. It would be entertainment with subtext, entertainment with a sting.

The series was shot entirely in and around Galway and a well planned shoot ensured that shooting at and during the race meeting was edited seamlessly with the material shot during the subsequent six weeks of the production. The unique atmosphere of Race Week and the thousands of punters attending the races added to the credibility of the series as did the script which mostly in Irish did combine elements of bilingualism in pursuit of linguistic credibility.

The entire series was produced by Eoin Holmes and Niamh Fagan, with Trish Perrott handling the shoot and post for GWF. The series was directed by Robert Quinn and starred Don Wycherly, Tomas O'Suilleabhain, Ruth Bradley and Owen Roe.

## Development and Funding

The development was funded initially by TG4 and GWF for submission to the Sound and Vision funding scheme and was ultimately successful in securing production funding support from the fund as well as production and regional funding from the Irish Film Board. Although originally conceived as 7 x 1 hour format it was ultimately produced as a 7 x 40' which best served the tone and pace of the scripts.

The production was funded by TG4, BAI, IFB and S481.

## Production

The unit was based in Galway for prep and shoot featuring mostly local crew and local talent where possible. In general the local crew turned out to be excellent, skilled, flexible and professional. Accessing facilities and equipment was not a problem and the management of the Galway Races could not have been more accommodating.

## Post Production

Post was handled with their usual professionalism by Screen Scene and Ardmore Sound in Dublin and Telegael in Galway

*Rásaí na Gaillimhe* has the distinction of being the most popular home produced comedy drama series ever broadcast on TG4, acclaimed by both viewers and reviewers



### The Octonauts

A new band of heroes come splashing onto TV taking viewers on exciting underwater journeys of discovery and rescuing sea animals. The *Octonauts* dive into action with their fleet of aquatic vehicles, rescuing sea creatures and triumphantly saving the oceans from danger is all in a day's rather wet work.



### Olivia

Based on the award-winning books written and illustrated by Ian Falconer, *Olivia* invites young children into the life of an adventurous, imaginative and lovable 6  $\frac{3}{4}$  year old girl.



### Old Fangs

A young wolf decides to confront his father. He had not seen him since he was a child.



### Thor

In the fight against the forces of the underworld, our hero Thor faces an impossible choice: to save his father's kingdom or the life of his best friend.



### Donkey

Donkey is sick of his minimum wage job at the beach.



### Trolley Boy

Trolley Boy's frustration with his work builds up into a giant monster made of shopping trolleys. He realises there's more to life than pushing trolleys into stacks.

# Animation



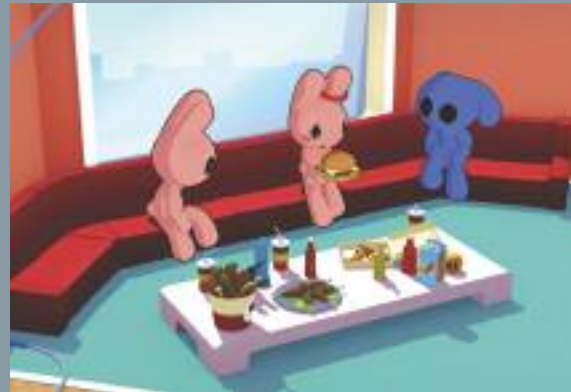
## Roy

Roy is an eleven year old cartoon boy growing up in the real world. He is an 'every-kid', loveable, amiable and fallible, with the same aspirations and dreams as any young child. He lives in an ordinary house, on an ordinary street and inside he feels just like an ordinary kid, the only trouble is he doesn't look like one! Roy truly is a fish out of water.



## Garth & Bev

Time-travelling siblings Garth and Bev live in harmony with Nature in their village long ago. When they solve a problem, they are transported to another time and place by the Time Spiral with a little help from Grandfather Lir, who likes to remind them - NATURE HAS ALL THE ANSWERS!



## Bunny Maloney

Amidst the neon signs and the pulsing rhythms of Bunnyville, you will find four very unlikely friends: Bunny Maloney, Candy Bunny, Jean- François and Stan Ookie. At their worst, they are a conflicted band of self-absorbed neurotics. At their best, they are the self-appointed Superhero Crime Fighters of PROTECTEAM who combat the daily diabolical threats of the evil scientist Professor Debilouman.



## Maryoku Yummy

Maryoku Yummy, which translates loosely as "magical delicacy", is all about wish fulfillment. This preschool series was inspired by the art of Japanese silk screening and centres around elements of magic and the creation of a universe where children's wishes are nurtured until they're ready to be granted. Watching over these fledgling wishes, which take living shape in the underground world of Nozomu, is a group of magical creatures called the Yummy.



## Chloe's Closet

Welcome to the magical world of an adorable, imaginative little girl named Chloe, who embarks upon fantastical adventures during her dress-up play. Chloe's adventures involve the audience and encourage viewers to celebrate how delightful it is to be a little kid and how exciting it is to explore preschool math skills.

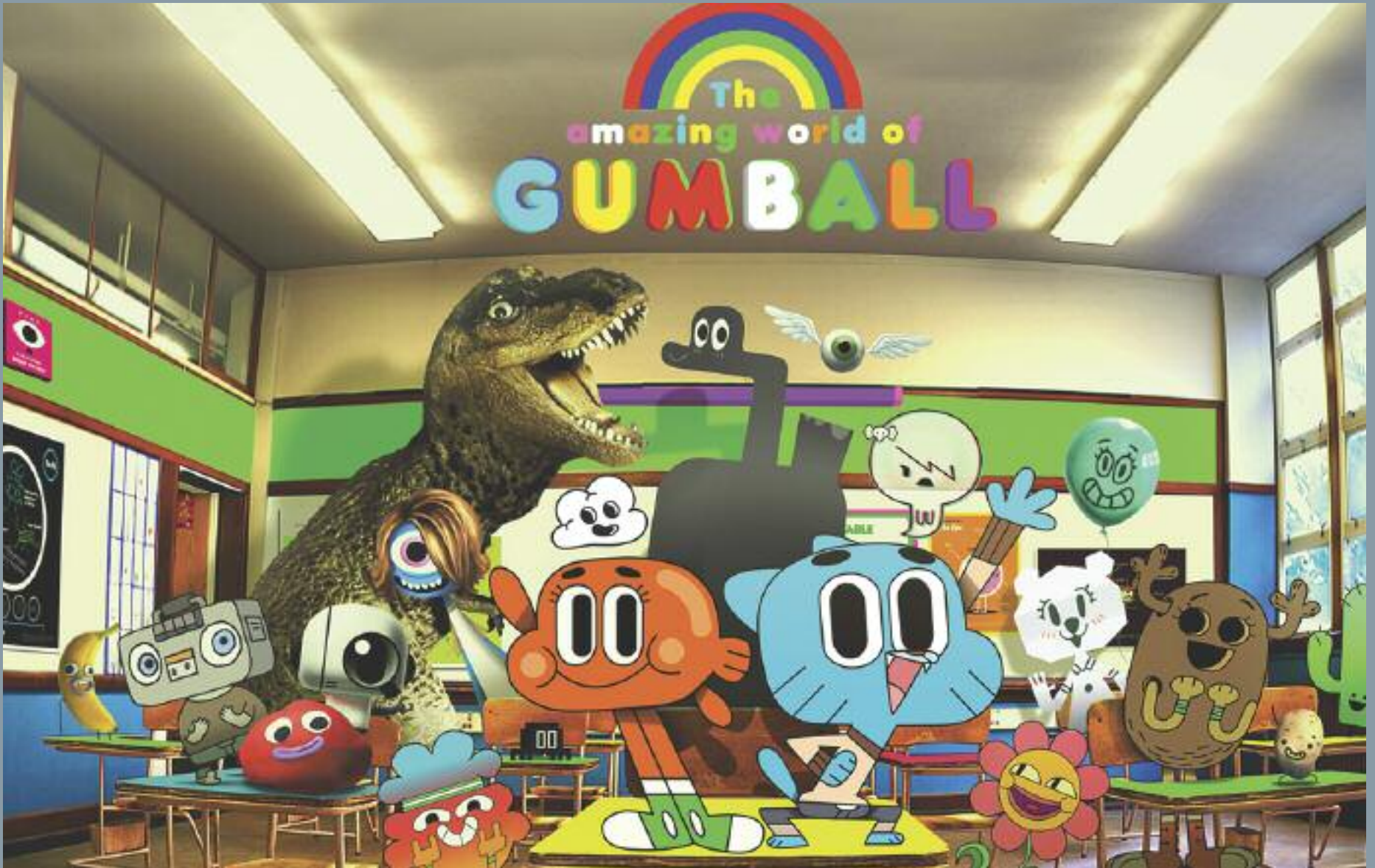


## Zoo Factor

Tap dancing elephants and snakes, bell-ringing pelicans, tightrope walking penguins, cheerleading leopards and a bush baby with stage fright are among some of the characters lining up each week to try and impress the panel of judges headed by Clive a vain lazy lion who quite literally eats acts for breakfast!



# The Amazing World of Gumball



# CASE STUDY - Animation

## Boulder Media

In 2009, Boulder Media was successful in securing the contract for production services for the Turner International series, *The Amazing World of Gumball*.

Created by Ben Bocquelet and produced by Joanna Beresford with Daniel Lennard as Executive Producer, the 40 x 11' series is an ambitious and innovative project combining 2D and 3D animation with live-action/ 3D rendered sets and photographic backgrounds. It was the first long form series commission for Cartoon Network London Development Studio.

To date, the project has created 43 full time jobs for some of the best animation artists based in Ireland; the majority of the crew is Irish. Section 481 investment played a key role in being able to close the deal. In the past, Boulder has worked mainly as a service studio for the large networks in the US on big series such as *"Fosters Home for Imaginary Friends"* (CN, USA) and *El Tigre* (Nickelodeon). This track record provided the initial interest for the producers to come to Boulder but the cooperation may not have been possible without the S481 contribution.

The Project is a wholly European affair with three companies involved in the production of the project overall. The lead studio is Dandelion Studios in London, headed up by Joanna, where the pre-production materials we receive at Boulder are produced (scripts, storyboards, character designs, voice recordings and animatics). Studio Soi in Ludwigsburg, Germany, build and set up the characters and 3D sets that we use for the animation and the backgrounds. Boulder is then responsible for the main production elements (principally animation and composite). The Post Production will take place back in London.

With a combination of the expertise from all the companies involved, this show is going to be something very new and

special. It is a TV show of the highest quality, testing the programmess we are using and brings TV animation into a new realm. Expectations are high but early reactions have been fantastic.

One great thing for Boulder on this project is that it has also allowed us to build up our 3D unit, something we have been looking to do for a number of years. The experience gained on a production like this is second to none and both our original seasoned crew and the new blood we have been able to bring in all directly benefit, hopefully, leading to the studio and its services being even more in demand.

The Irish part of the show is being produced by Anne Tweedy, Peter Lewis and Robert Cullen. Robert is part of the direction team guiding this project from the moment it lands in the studio through animation to final composited scenes and is one of Boulder's founders. He is also Emmy nominated for his work on *Foster's*.



Gumball

# Film & Television Production in Ireland

Audiovisual Federation Review 2010

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 2009 shows a production value of €243.3 million (2008: €246.8 million). This production value, while a slight decrease on 2008, is significantly higher than projected which, because of the economic environment, had been estimated to be €217 million. The non Irish funding for the sector in 2009 was €127.7 million. This is up 119% on 2008 and is the highest level since 2003. Furthermore, the estimated Irish expenditure of €225 million for 2010 is a record amount for the sector. The Government continues to provide significant support and endorsement for both the Irish Film Board and the Irish Audiovisual sector by ensuring that the capital budget for the Irish Film Board in 2011 will be €16 million, only a small decrease of €0.5 million from 2010.

The ability of the industry to maintain this level of activity despite economic circumstances has been made possible by the decision of the Government to provide the necessary amendments to the Section 481 film tax relief scheme in the Finance Act 2008 to restore competitiveness. This did not come into effect until March 2009 and it is estimated that the impact of this for the full twelve month period in 2010 will result in a total production value of €367 million, a significant increase on recent years.

The effectiveness of the enhanced Section 481 is dependent on the complementary role of the Irish Film Board's funding policy. This combination will 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. The profile of Irish indigenous production is currently very high (see awards on pages 6-9).

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 2009 amounted to €58.6 million, a reduction on the 2008 level of €71.9 million. The Government amendments to the Section 481 film tax relief scheme only became effective in March 2009 and it is predicted that these, combined with the Irish Film Board support, will facilitate a return to growth. It is estimated that the level of production activity for feature films will increase to €101 million in 2010.

Indigenous production activity has maintained continuous growth over this period as a result of funding made available through the Irish Film Board but Ireland, however, 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 a serious negative impact on the level of experienced personnel and infrastructure which in turn would have been a significant restriction on indigenous development. Government support, through Section 481 and the Irish Film Board, continues to be essential.

## Independent TV including Major TV Drama

Production activity in 2009 amounted to €127.1 million, a reduction on the 2008 level of €136 million. Again, it should be noted, the impact of the Government amendments to Section 481 only became applicable from March 2009. The projection for 2010 is a significant increase to €206 million. Unlike incentives in other jurisdictions Section 481 is applicable to television as well as film. This fact, and the Irish Film Board's International Production Fund, enables Ireland to attract many international television productions which have an important impact on the sector.

Domestically, the funding by RTÉ, TG4, TV3 and the BAI continues to play an integral role in the development of the Independent Television Sector.

## Animation

Animation in Ireland has shown consistent growth in recent years and the sector is now a very large provider of full time and permanent employment in the Film and Television independent sector. Total output in 2009 was €57.6 million which, despite the economic environment, was a significant increase on the 2008 level of €38.9 million. The estimate for 2010 is a further increase to €60 million. The adequacy of tax incentives, funding opportunities and commissions will all play an essential role if the growth in this sector is to be continued.

The Film and Television industry continues to have great potential, economically and culturally, and the Government is to be congratulated on being willing to respond to the changing international competitive landscape by taking the necessary measures to maintain competitiveness and enable Ireland to continue to participate in the huge growth internationally of the industry.

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. The Audiovisual Content Production Review prepared for the Irish Film Board established the 2007 value of the audiovisual production sector in Ireland at over half a billion euro with direct employment at 6,000. In 2008 18% of tourists cited film as a reason for visiting Ireland. This resulted in tourist expenditure of €369 million which can be directly attributed.

In addition to the regular content, this year's review includes a new section on Digital Media, reflecting market trends. The PWC report "Global Entertainment and Media Outlook 2009-2013" concluded that "over the next five years, digital technologies will become increasingly pervasive across all segments of entertainment and media.."

## Kevin Moriarty

Chairman, Audiovisual Federation Database Steering Committee, December 2010



# Achoimre Feidhme

Déanann an tuarascáil seo anáil is ar thionchar eacnamúil 257 léiriú closamhairc, ar leiríodh a bhformhór in Éirinn i 2009, ag a raibh luach iomlán léiríocháin €243.3 milliún. Léiríonn an tuarascáil go raibh laghdú ar léiriú scannán agus san earnáil neamhspleách léiríocháin, mórtograí drámaíocht teilifíse san áireamh ach gur tháinig méadú suntasach ar léiriú anamúlachta. Tá laghdú beagnach 1.5% ar na figiúirí iomlána sa tuarascáil do 2009 ach tá méadú suntasach, 50% á thuar againn sna meastacháin do 2010.

## Caiteachas na hÉireann

€157.2 milliún de chaiteachas iomlán ar earraí agus ar sheirbhísí Éireannacha atá tuairiscithe do 2009, laghdú €10.6 milliún (6%) don earnáil. Is de thoradh an laghduithe 50% ar chaiteachas Éireannach i 2009 san earnáil Mórsannáin agus Mórtograí Dramaíochta Teilifíse (Feic Appendix I) é seo ach cé go bhfuil laghdú beag ann i mbliana, táimid ag tuar ardú 40% do 2010, an méadú bliantúil is mó riamh.

## Fostaíocht

Tháinig méadú ar an fhostaíocht iomlán Éireannach i ndáil le socrúcháin i 2009 go 14,198 in (le hais 12,660 i 2008). Laghdaigh an líon postanna coibhéis lánaimseartha freisin ó 1,631 i 2008 go 1,368 i 2009.

## Cuidiú Fioscach

I Márta 2009 chuir athruithe ar mhaoiniú faoi Alt 481 faoi IR Uimh 97 de 2009 [Acht Airgeadais (Uimh 2) 2008 (Tús le Mír 28(1) )] Ordú 2009, ar chumas infheistoirí faoiseamh cánach 100% a fháil (seachas faoiseamh 80% mar a bhíodh). Ar bhonn tairbhe costais, lean Earnáil Chlosamhairc na hÉireann de bheith ag cur go suntasach le heacnamaíocht na hÉireann i 2009. Mar a tharla i mblianta eile, bhí na haischur chuig an Státhchiste i 2009 ó ioncaim agus caiteachais níos mó ná an cháin nár gearradh trí Alt 481. Thug seo glanhnóthachán €11.8 milliún d'Eacnamaíocht na hÉireann i 2009.

## Foinsí Maoinithe

Tháinig €115.6milliún den mhaoiniú as Éirinn. Chuir Alt 481 ollmhaoiniú €106.6milliún ar fáil. Ar na foinsí tábhachtacha eile bhí RTÉ, TG4, Bord Scannán na hÉireann agus Fuaim agus Fís Choimisiún Craolacháin na hÉireann

\*Cúlra na Tuarascála:

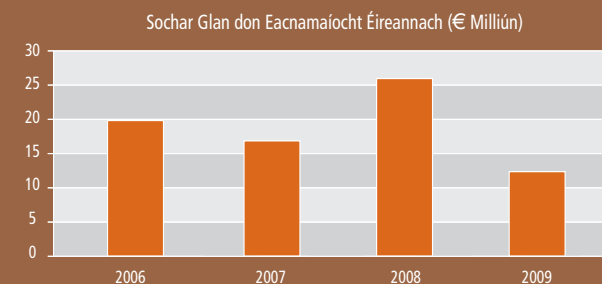
Tionsaíodh an tuarascáil seo agus tuarascálacha a foilsíodh roimhe seo 1993-2009 ó staitisticí a fuair Cónaidhm Chlosamhairc IBEC. Ag tráth a scríofa, ní raibh fáil ar fhigiúirí iniúchta do léiríocháin iomlána 2010. Dá thoradh sin tagraíonn an phríomhanailís eacnamaíoch do 2009. Léiríonn na figiúirí do 2010 tuairisceáin neamh-iniúchta nach raibh dian go leor le go bhféadfaí anailís mhionshonraithe a dhéanamh orthu.

Aschur Closamhairc	2006	2007	2008	2009	2010*
	€ milliún				
Mórsannáin	84.6	19.3	71.9	58.6	101
Teilifís Neamhspleách (Mórdhrámaí san áireamh)	143.8	154.0	136.0	127.1	206
Beochan	51.4	22.4	38.9	57.6	60
Aschur Iomlán	279.8	195.7	246.8	243.3	367

\*Measta

Caiteachas Éireannach	2006	2007	2008	2009	2010*
	€ milliún				
Mórsannáin	29.8	12.2	35.4	27.8	28
Teilifís Neamhspleách (Mórdhrámaí san áireamh)	113.8	118.6	114.6	104.3	167
Beochan	17.6	12.4	17.8	25.1	30
Caiteachas Éireannach Iomlán	161.2	143.2	167.8	157.2	225

\*Measta





# Executive Summary

This report analyzes the economic impact of a total of 257 audiovisual productions, the majority of which were completed in Ireland in 2009, comprising a total production value of €243.3 million. The report shows a drop in the production of feature films and independent TV, including major TV drama, but animation production shows a significant increase. Figures for 2009 show an overall decrease of almost 1.5% on the previous year, but our estimates for 2010 are showing a significant increase of 50%.

## Irish Expenditure

The total expenditure on Irish goods and services arising from the audiovisual productions for 2009 was €157.2 million which shows a decrease of €10.6 million (6%) for the sector. This decrease reflects the drop in the Irish spend within the Feature Film and the Independent TV production sector (see Appendix I). Although 2009 shows a slight drop in expenditure we estimate an increase of over 40% for 2010, which is a record for Irish expenditure.

## Employment

The total number of Irish employees, in terms of placements, increased from 12,660 in 2008 to 14,198 in 2009, but the number of full-time equivalent jobs decreased from 1,631 in 2008 to 1,368 in 2009. This shows that more people were working in the sector but for a shorter time.

## Fiscal Contribution

In March 2009 changes to Section 481 funding, SI No 97 of 2009 [Finance (No 2) Act 2008 (Commencement of Section 28(1))] Order 2009, enables investors to claim 100% tax relief as opposed to 80% in previous years. On a cost benefit basis the Irish Audiovisual Sector continued to make a significant contribution to the Irish economy. The returns to the exchequer in 2009, derived from incomes and expenditure generated, again exceeded tax forgone through Section 481. This yielded an €11.8 million net gain to the Irish Economy in 2009.

## Sources of Funding

The proportion of funding originating in Ireland was €115.6 million. Section 481 contributed gross funding of €106.6 million. Important sources of Irish funds were RTÉ, TG4, Irish Film Board and the Broadcasting Authority of Ireland.

\*Background to Report:

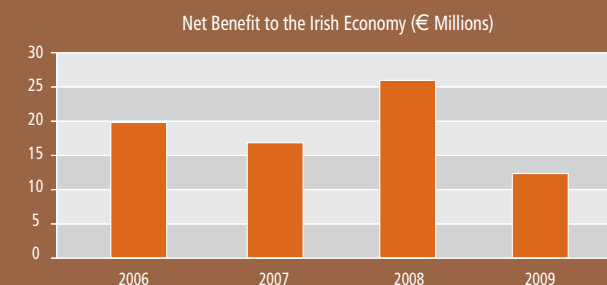
This report and previous reports published in 1993-2009 have been compiled from statistics obtained by the IBEC Audiovisual Federation. At the time of writing, audited figures for all 2010 productions were not available. As a result the main economic analysis refers to 2009. Figures for 2010 represent non-audited returns that were not sufficiently rigorous to allow detailed analysis.

Audiovisual Output	2006	2007	2008	2009	2010*
	€ million				
Feature film	84.6	19.3	71.9	58.6	101
Independent TV Incl. major TV Drama	143.8	154.0	136.0	127.1	206
Animation	51.4	22.4	38.9	57.6	60
<b>Total Overall Output</b>	<b>279.8</b>	<b>195.7</b>	<b>246.8</b>	<b>243.3</b>	<b>367</b>

\*estimate

Irish Expenditure	2006	2007	2008	2009	2010*
	€ million				
Feature film	29.8	12.2	35.4	27.8	28
Independent TV Incl. major TV Drama	113.8	118.6	114.6	104.3	167
Animation	17.6	12.4	17.8	25.1	30
<b>Total Irish Expenditure</b>	<b>161.2</b>	<b>143.2</b>	<b>167.8</b>	<b>157.2</b>	<b>225</b>

\*estimate





**Mary Hanafin TD,  
Minister for Tourism,  
Culture and Sport**

I am pleased to be writing this for the Audiovisual Federation Review for 2010. The Review has an important part to play in gathering together statistics that are very useful in analysing the economic benefit of

film and television production in Ireland and also making interesting comment on those statistics.

The last couple of years have been difficult economic ones for this country and the audiovisual industry has not been immune to those difficulties. However, I have been heartened since I was appointed Minister with responsibility for the film sector to notice the wonderful talent and energy of the people who work in the industry. This talent was very strongly shown earlier this year with the five Oscar nominations and the wonderful Oscar success for Richard Baneham.

It is this type of talent that is an integral part of creativity and innovation. Creativity is one of the fundamental resources required in the knowledge, cultural and smart economy. The creative industries, whether they take the form of visual and performing arts, audiovisual, publishing, design, advertising or architecture leads to innovation, and towards the production of both ideas and products.

In "Building Ireland's Smart Economy" the Government acknowledges that Ireland needs to build the "ideas" component. It recognises that this is to be done through the use of the knowledge, skills and the creativity of her people. The audiovisual industry is a very important part of this creativity sector. This was underpinned at the Farmleigh Conference last year where speaker after speaker emphasised the fundamental role of the arts, creativity, film-making etc. in portraying a positive image of Ireland and in helping to attract inward investment to Ireland.

The industry is a very important one with substantial levels of employment and significant inward investment. The Irish Audiovisual Content Production Sector Review prepared for the Irish Film Board

and published in December of 2008 established the 2007 value of the audiovisual production sector in Ireland at over half a billion Euro with direct employment at 6,000. An earlier survey in 1992 identified that in 1992, direct employment was 1,000. This palpably demonstrates an industry that has grown very significantly and with the potential to grow even further with the correct nurturing and support.

All that I have already mentioned underlines the benefits to Ireland of having a vibrant film industry and audiovisual sector, and the Government recognises this. This was recognised last year in the Renewed Programme for Government with a commitment to continued Government support for the Irish Film Board.

The audiovisual industry is "smart". It combines tradition with the advent of each new technology – it is in fact about tradition, translation and transmission. The sector provides natural alliances between education and culture. It is therefore, uniquely positioned, to lead, to contribute to and enhance the smart economy.

Crucial to any recovery and to that recovery being sustained is the willingness to improve and pursue new opportunities. Ireland is ideally placed with its reputation for creative thinking to ensure what we offer, more than anywhere else - is a diverse and different experience.

Our cultural and artistic identity as a nation gives us a competitive advantage that now more than ever must be exploited. The benefits of high levels of film and television production in Ireland will include increased international investment in the economy, increased employment in this sector, positive spin-off effects for promoting Ireland as a tourist location and the improvement of Ireland as an industrial location for all aspects of creative endeavors.

Finally, I want to wish the audiovisual industry well for the future and I look forward to its future growth and to it achieving its full potential.

# Audiovisual Production in Ireland 2009-2010



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

Since the first broadcasting legislation more than fifty years ago, the social, cultural, political and economic environment in Ireland have changed significantly. The audiovisual sector, as an expression of such developments, has undergone changes too.

That first legislation, though amended over the years, dated back the 1960's. A new framework that would account for these huge changes, and that would be truly relevant to this new broadcasting world, was required.

To that end, the Broadcasting Act 2009 was enacted last summer. Repealing and replacing all previous legislation, the Act could be considered a departure for Irish broadcasting. Not only does it take account of the challenges and the changes of the past, but it facilitates future developments.

This is timely and it is appropriate.

Technology drives media – we saw it with the invention of the printing press and the telegram, the first radio and the television. These were new creations that preceded a huge spike in the amount and frequency of information disseminated to the public.

Today we are at one of the most exciting and unprecedented junctures in Irish broadcasting, since Raidió Teilifís Éireann first started transmitting. Impressive advances in digital technology are underway, and the line between traditional and new media is becoming increasingly blurred.

A convergence of print, television and the internet is now beginning to happen. From a public policy viewpoint, we need question how we can maintain good quality, accurate and fair broadcasting across a range of different platforms.

In terms of the regulation, I believe it should be independent, but engaged and watchful, but innovative. We have in the Broadcasting Authority of Ireland, such a model. Comprised of both Government and Oireachtas nominees, the Authority is well-equipped to deal with the challenges and to facilitate the developments that lie ahead.

At such an exciting time, we need to be careful from a public policy side, that we are neither too heavy-handed nor too immediately restrictive. It will be important that we embrace new technologies and seek to develop a regulatory system that doesn't stymie their development.

Clearly, there are issues that may need addressing.

It is for this reason that later this year, I will appoint a team of independent analysts, expert in the fields of not just broadcasting, but finance, sociology and technology too. This Media Review group will examine the possibilities for, and the implications of, this ever-expanding audiovisual sphere in Ireland.

In broadcasting, throughout Europe and the rest of the world, a digital revolution is taking place. Since the last Audiovisual Review, the BAI process was unfortunately unsuccessful in delivering a commercial digital television operator in Ireland. Yet commercial services, while beneficial, are not an essential element in providing for the transition from analogue to digital.

RTÉ's plans for the national 'free-to-air' digital service are advancing. RTÉ is required to launch its digital television service to approximately 90% of the population by 31st October this year and I have informed RTÉ that the date for the provision of a full national digital terrestrial television service is 31st December 2011.

The development of Ireland's national digital terrestrial television network is an important goal. It will secure the future of public service broadcasting and ensure that we adequately utilise our "digital dividend" – a real driver of economic and social growth in any country.

On the European front, the Audiovisual Media Services Directive was recently transposed into Irish law and contains new provisions to address the challenges of converging media. It amended and renamed the Television without Frontiers Directive, providing less detailed but more flexible regulation.

The Directive provides that Member States of the European Union may designate certain sporting and cultural events as being of major importance to society and that events so designated should continue to be available on a free television service.

The legislation requires that the list of events be reviewed every three years, a

process which is currently underway. Consultation is ongoing with stakeholders and members of the public and I hope to bring proposals back to Government in autumn this year.

The last year has been unquestionably difficult for Ireland's audiovisual sector. Yet despite the set-backs our radio, television and film makers continue to excel and to deliver the types of creative broadcast productions for which Ireland is renowned.

The Sound and Vision scheme is designed to support high quality television and radio programming based on all genres of Irish culture, heritage and experience and is funded from the allocation of 7% of the net television licence fee receipts.

Since this scheme began, it has allocated a total of up to €63 million in funding.

Last year, three funding rounds were completed - two television and one radio. Over the two television rounds, €8.5 million was allocated to 58 television projects. The radio round supported 89 projects with a total value of €960,000. Sound and Vision II, which was recently announced, will provide a total of €21 million for new television programmes, and €4.5 million for new radio programmes, in the year ahead.

Independent broadcasting and film in particular, reflects the diversity and culture of modern Ireland, and it is right that Government continues to provide it with investment and support.

Irish society is multicultural and diverse, and our audiovisual sector must take account of this. We must ensure that not only do our broadcasters adequately represent our society, but that they do so in a fair, impartial and honest manner.

I think we have achieved this in Ireland. At the heart of Irish broadcasting sector lie the fundamental principles of integrity and honesty.

So, for all the advances we make, this truthfulness must remain. The audiovisual sector, which engages deeply and directly with people, must be unbiased and responsible.

It is an exciting time. As we continue to forge a new path for Irish broadcasting, viewers and the industry alike can look forward to a more dynamic, more creative and more inventive sector.



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

2009 started quietly while improvements to Section 481, the Irish tax incentive for film and television production, came into legislation in April. But production soon picked up and by the end of the year, the IFB had a total of 13 Irish features, five co-productions, three animated projects (including two features) and a dozen feature length documentaries go into production.

The improvements to Section 481 meant Ireland became more competitive as an international film and television location as well as boosting indigenous production. While the US feature film *Leap Year* shot in various locations around the country and the final series of *The Tudors* shot in Dublin and Wicklow in 2009, 2010 kicked off with the filming of the major US feature film *Knockout*, directed by Steven Soderbergh and starring Ewan McGregor and Michael Fassbender.

International production has continued during the year with the popular ITV series *Primeval* shooting in Ireland for 30 weeks and the US drama *Camelot* green lit to follow in the footsteps of *The Tudors* to shoot in Ardmore. Such incoming productions translate to increased international investment in the economy, increased employment, positive spin-off effects for promoting Ireland as a tourist destination and as an industrial location for all aspects of creative endeavours.

Indigenous projects produced in 2010 included *Parked*, *The Last Furlong*, *The Other Side of Sleep*, and *Stella Days*, with many productions using film locations outside the Dublin area, providing local spend and jobs in regional areas. It was a record year in term of cinema releases, as a number of indigenous Irish films reached Irish audiences in 2010, including *Eamon*, *Ondine*, *Perrier's Bounty*, *Zonad*, *The Fading Light*, *His & Hers*, *Savage* and *The Pipe*.

Throughout the last year Ireland has continued to build on its excellent international reputation for film talent and as a centre of cultural excellence winning awards, being nominated for some of the international industry's highest accolades and being selected for some of the highest profile festivals in the world.

Highlights include the Irish film industry receiving five Academy Award® nominations, three of which for the Irish films *The Secret of Kells*, *Granny O'Grimms Sleeping Beauty* and *The Door* while Irish animator Richard Baneham and his team picked up the Oscar for the Best Visual Effects for his work on *Avatar*.

Other highlights include eight Irish films being selected for the highly regarded Toronto International Film Festival, four Irish films being selected for the prestigious Tribeca Film Festival, an official selection in the celebrated Directors Fortnight at the Cannes Film Festival, two films in the SXSW Film Festival and *His & Hers* picking up the Excellence in Cinematography Award at the Sundance Film Festival.

A special programme of Irish features and short films was coordinated to screen at the Shanghai International Film Festival and the Beijing International Movie Festival. The programme was supported by Culture Ireland and was presented in association with the IFI's Reel Ireland and the IFB. Both *Zonad* and *Ondine* were nominated for the Golden Goblet Awards (the Asian equivalent to the Oscars) at Shanghai. The inclusion of a programme of Irish film at these two major Chinese film festivals is hugely important to promote Irish talent and raise Irelands profile in China to encourage enterprise, trade and investment.

Although 2010 promised to be a difficult year in terms of public funding cutbacks, IFB remained ambitious in its goals for the industry. Following from the results of the recent PwC report which recognized significant economic growth potential for the industry, the Department of Arts, Sport and Tourism engaged with the IFB in a strategic plan to enable the domestic audiovisual content production sector to develop into an internationally traded sector for products and services, over a five year period 2010 – 2015. The growth potential of the industry, as an essential component of the Smart Economy strategy, represents strong prospects of employment for young people seeking jobs in the future.



## Steve Carson, Director of Programmes, Television, RTÉ

2009 was a challenging year for the industry in general. As a public service broadcaster reliant on commercial revenue for more than half of our income, our strategy has been to reduce costs and

refine production models in order to maintain the quality, range and depth of the home-produced programming in our schedules. As the largest creative organisation in this country, our viewers expect this and deserve no less.

This year's schedule is testament to the commitment, innovation and sheer talent of our programme-makers who delivered over 4,600 hours of distinctively Irish programming: a huge achievement in the turbulent financial environment. Against increasing digital migration and the sharp fall in advertising revenue, RTÉ Television's performance in 2009 was absolutely robust: RTÉ's total adult share in peak time (18.00-23.29) was 42.5%. In multi-channel homes, RTÉ's adult share was 37.4%.

Since 2005, facilitated by a buoyant economy, RTÉ's expenditure on commissioned television programmes has been significantly in excess of the required statutory spend. The statutory obligation for 2009 increased to €39.5 million (€32.8 million in 2008) in the wake of the new broadcasting Bill. RTÉ again exceeded this requirement this year by + 44%, with total expenditure incurred on commissioning activities of €57.1 million (incl. RTÉ attributable organisational overhead).

RTÉ Television continued to dominate the 50 most watched programmes of the year: 45 of the top 50 most watched programmes in 2009 were on RTÉ and 93% (42 out of 45) of these RTÉ programmes were home-produced Irish programmes. RTÉ One's peak-time schedule contained 75% home production in 2009 while RTÉ Two had 36%.

The year was book-ended by the *All Ireland Talent Show*, which

debuted in January 2009 and rang-in 2010 to huge popular acclaim. The most-watched programme of the decade (2000-2009) was the *Late Late Toy Show*, presented by new host Ryan Tubridy with an average 1.38 million viewers\*. *The Frontline* was also launched in 2009, and it proved an award-winning format with Pat Kenny at the helm.

RTÉ's commitment to topical and penetrating factual programming continued unabated. In *I See A Darkness* and *The Rutland*, a spotlight was shone on two taboos in contemporary society: suicide and mental health. The vagaries of the economic climate, on a national and a global scale, were explored in *Addicted to Money*, and *How We Blew the Boom*, while *The Sheriff and Me* told compelling personal stories as part of the timely *My '09* season. Drama highlights included a poignant reunion with the award-winning *Pure Mule: The Last Weekend*, while *Storyland*, the innovative talent-development web-based drama competition, attracted 2.7 million hits. *Fair City* celebrated its 20th birthday with high-rating storylines across four episodes per week. *Arts Lives* covered a range of artistic endeavours, the apex of which was the cross-media celebration of Seamus Heaney's life and work on his seventieth birthday.

New faces were introduced across innovative entertainment programming on RTÉ Two including Maeve Higgins and Dave McSavage, to critical acclaim, and Young People's programming, also on RTÉ Two, was a hub of creative energy and innovation. Two brand new animation series were launched; *Ballybraddan* and *Garth & Bev*. These complemented in-house produced programmes such as *Kazoo*, *Ice* and *RED* – the cross-platform 'home of Irish alternative comedy'.

Our focus for 2010 is again very firmly on home-production. In autumn 2009, we launched over 55 brand new home-produced series and documentaries, and over 45 returning home-produced series, and we look forward to continuing to deliver such high-quality, distinctive, resonant programming across the full genre range into the future.

\* source: AGB Nielsen Media Research



## **Pól Ó Gallchóir, Ardstiúrthóir TG4**

Bliain chrua dhúshlánach ab ea 2009 do TG4 agus dá sholáthraithe clár. D'fhág an cúlú ginearálta eacnamaíochta agus mórdheacrachtaí an Rialtais le hioncam agus caiteachas poiblí gur laghdaiodh maoiniú Státhchiste na seirbhíse faoi dhó sa

dá Bhuiséad a fógraíodh i rith na bliana, giorrú €5m inár maoiniú poiblí anuas ar an 35% de laghdú inár n-ioncam tráchtála.

Despite the tough environment, TG4 performed strongly in fulfilling our commitments in 2009 in addition to maintaining the quality of our programming and output. Highlights of the year include TG4's national audience share growth; delivery of new attractive Irish language programming which drove significant audience levels to the channel and attracted many awards; positive developments in our schedule including a new young adult's programming slot. We output an average of 4.58 hours of original / new Irish language programmes per day, representing a total of 1,672 hours which were commissioned / acquired and broadcast during the year.

The strength of TG4's programming schedule over the 2009 year was clearly reflected in our viewing performance. In a very competitive and challenging market, TG4 achieved a national audience share of 2.6%, representing a 4% increase on the 2008 year, a very positive result.

TG4 received 41 awards in 2009 across our programming, our personalities and our marketing/branding. They included major national and international awards such as IFTA, Celtic Media Festival, Sharks, CIAKs, WorldFest-Houston and many others.

We continued to play a central role in the development of the Irish independent production sector, commissioning original programmes produced in Irish and sourcing most of our programmes from in particular, production companies in the Gaeltacht areas and the western seaboard.

TG4 is concerned that Ireland has fallen a year behind from the original Digital Terrestrial Television (DTT) rollout plan. If the delays are not urgently addressed, it may be too late for the development of a successful DTT service in the Irish market.

Tugann Straitéis 20 Bliain an Rialtais don Ghaeilge, a foilsíodh ag deireadh 2009, ábhar misnigh agus dóchais dúinn mar gur léir ann go bhfuil béim nua le leagan ar ról na meán agus na teilifíse ach go háirithe i gcur chun cinn na teanga.





**Siobhan O'Donoghue,**  
**CEO, Media Desk Ireland**



**Eibhlín Ní Mhunghaile,**  
**Co-ordinator, MEDIA**  
**Antenna Galway**

With a budget of €755 million for the 2007-2013 period and with 32 European countries now participating in the Programme, competition for MEDIA funding continues to be keen.

Ireland continues to perform strongly, however, particularly given the challenges of a limited distribution infrastructure, averaging €2 million per annum in direct MEDIA support.

MEDIA finance has a strong knock-on effect in terms of investments in the audiovisual sector: every €1 from the EU budget generates about €6 in private investment from industry. MEDIA, therefore, leverages considerable private sector investment.

The MEDIA Programme also provides indirect support by subsidising professional training and by providing access to the international markets at preferential rates.

In Éirinn, tá an Clár MEDIA ag tacú le heagraíochtaí traenála, comhlachtaí ciosmahairc, margadh Scannán, féilte Scannán, Dáilitheoirí agus amharclanna scannáin.

Development finance continues to be an important resource for Irish audio-visual companies accounting for €312,030 in awards in 2009 (one Single project, one Interactive project and two Slate Funding.

awards) with €230,000 being awarded on the first 2010 deadline (two Single projects, one Interactive project)

European Distributors received more than half a million Euro to help defray the distribution costs of two Irish Films *Happy Ever Afters* and *Triage* while Irish Distribution companies Access Cinema, Eclipse Pictures and the Light House received support to distribute European films.

There has been a welcome increase in the number of Irish applications for the MEDIA TV Broadcasting scheme. There were three Irish awards in 2009 totalling €329,000 - *Broken Tail's Last Journey* (Crossing The Line Films), *An t-Éireannach Fáin* (Léirithe Le Macdara Ó Curraidhín Teo.) and *Jack Taylor* (Magma Films). Two projects - *Tilly & Friends* (Jam Media) and *I am a Monster* (Monster Distributes) have been supported to so far in 2010 for a total amount of €448,000

Seven Irish films received €232,309 in i2i Audiovisual support (support for film financing costs) in 2009. Three Irish films- *The Guard*, *The Runway* and *Parked* - received i2i support totalling €104,978 in 2010.

Two Irish training projects - Screen Leaders EU and 3D Cinema in Europe - received a total of €328,898 in 2009 and €333,337 in 2010. Both programmes are co-ordinated by FÁS/Screen Training Ireland.

The Galway Film Fair received Promotion support while the Cork and Dublin Film Festivals were supported under the Audiovisual Festivals support scheme.

In total €2.007 million has been awarded to Ireland in 2009. An additional €100,000 was awarded to the Huston Film School by the MEDIA International Programme. Over €1.1 million has been received to date in 2010. The complete figures for 2010 will be available for the next Audiovisual Federation Report.



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

The increasing dependence on television production by Ardmore Studios in recent years has continued into 2010. Season 4 of *The Tudors* for Showtime in 2009 was the final series. The ending of this series

related to the natural ending of the storyline as the series had maintained popularity with television audiences worldwide. 2010 sees the commencement of a new series called *Camelot* based on the King Arthur legend. The stages at Ardmore and the surrounding countryside in County Wicklow are no strangers to filming based on this subject. Over thirty years ago John Boorman produced and directed the feature film *Excalibur* here which introduced both Gabriel Byrne and Liam Neeson to the big screen. In 2003 Jerry Bruckheimer produced *King Arthur* at Ardmore with Clive Owens and Keira Knightley.

Other television shows hosted by Ardmore in 2009 included *Raw* for RTÉ, Endemol's *Deal or no Deal* for TV3 and Tyrone Productions' *The All Ireland Talent Show* for RTÉ. It is anticipated that this trend for television production will continue through 2010.

The application of the financial incentive known as Section 481 to television has enabled Ireland to compete internationally for high profile series such as *The Tudors* and *Camelot*. This has been essential to the ongoing viability of Ardmore and other facility companies and a significant generator of employment. Section 481, however, on its own is not sufficient to enable Ireland to compete in the international marketplace for feature production. Government support has driven competition in the international marketplace. Incentives introduced or enhanced by Governments in other jurisdictions had left Ireland in a non competitive position.

Fortunately the Irish Government has followed its decision to extend Section 481 to December 2012 by providing enhancements to Section 481. These enhancements came into effect in March 2009.

This proactive support by the Irish Government is very welcome given the level of Government support being made available in other jurisdictions.

The last major feature film in Ardmore had been *King Arthur* in 2003. In early 2010 Ardmore hosted some of Steven Soderbergh's *Knockout* which was shooting in several countries. Also the Irish-French coproduction *The Last Furlong* directed by Agnes Merlet was based at Ardmore. Irish Film Board funding was involved in both productions.

The complementary support provided by the availability of an effective financial incentive such as Section 481 and the funding policy of the Irish Film Board is essential to the ongoing viability of the Irish film industry. This viability will enable the necessary ongoing investment and development to take place so that Ireland's infrastructure and skills base maintains the capability of meeting the demands of production from low budget indigenous to big budget international.





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

The Irish animation sector is primarily an export focused business that remains a leading employer of full time permanent staff within the audiovisual sector. Since 2007 the sector has increased its turnover

by 157% and is now the same size as the Feature Film sector. Post production on animation is included within these figures and represents a significant contributor to the total animation turnover.

Now in its 15th year, the 'Frameworks' animated short film scheme funded by the Film Board/RTÉ and the Arts Council is a shining example of how investment in animation is worthwhile. It has delivered hundreds of international awards, two Oscar® nominations, and has helped to launch numerous careers. It has played an important role in developing the sector.

The animation sector is successful for a number of reasons, not least its creativity. Despite this, animation is considered as being mostly for children and thus less important than Film or Entertainment. Excluding Section 481, the animation sector only receives less than 4% of all available funding from local broadcasters and state funding agencies. Section 481 remains the principal tool in securing international productions.

If broadcasters and funding agencies made a greater effort towards financially supporting animation, it would see an increase in full time employment, and the sector would leverage this increased funding to attract even more international work. But the real beneficiaries would be Irish children who deserve the same quality of home produced programmes as their parents do.

Across all the colleges, there remains a significant gap between the skills of animation graduates and the skills required by the studios. The principal 3D animation software taught by the colleges is inconsistent with the requirements of local studios and the

international workplace. More structured cooperation between all the colleges and the industry needs to happen.

Irish animation producers continue to co-operate with one another and make efforts to develop Ireland as a destination for international production and co-production. Enterprise Ireland support this activity through the animation CEO forum and our website [www.animationireland.com](http://www.animationireland.com).



## **Michael O'Keeffe, Chief Executive, Broadcasting Authority of Ireland**

The BAI is responsible for the development and administration of schemes to support a range of broadcasting related activities as set out in Part 10 of the Broadcasting Act 2009.

7% of the net receipts from the television licence fee can be disbursed through these schemes. In 2009, almost €11.9 million in licence fee income was provided for the Broadcasting Fund.

Currently one scheme, Sound and Vision, has been approved to allocate Broadcasting Fund income. This supports new television and radio programmes and a revised version of this scheme, Sound and Vision II was launched in Spring 2010. Sound and Vision II will provide a total of €21 million for new television programmes, and €4.5 million for new radio programmes, in the 2010-2011 period. This funding will be allocated over three competitive rounds and the closing dates are on the BAI website. A second scheme to support archiving of broadcast material has also been developed and this has been submitted to the DCENR for approval. This will also require EU approval.

The core objective of Sound and Vision II is to increase public access at national, local and community level to high quality television and sound broadcasting programmes in English and Irish which explore the themes of Irish culture, heritage and experience in contemporary or historic contexts. There is a requirement of all supported television programmes to be broadcast on a free television service with near universal coverage in the state or on a community channel licensed by the BAI. Radio programmes must be broadcast on sound broadcasting services licensed by the BAI or RTÉ radio services.

In 2009, three funding rounds were completed, two television and one radio. Over the two television rounds, €8.5 million was allocated to 58 television projects to be produced by 50 different

independent production companies. In terms of broadcasters, €3.3 million was awarded to 15 projects that will be broadcast on TG4, €2.6 million was awarded to 13 projects that will be broadcast on RTÉ, €1.4 million was awarded to six projects that will be broadcast on TV3 and €620,000 was awarded to six projects that will be broadcast on Setanta. A total of €450,000 was awarded to 14 projects that will be broadcast on community channels and €135,000 was awarded to three projects that will be broadcast on BBC Northern Ireland. The overall value of these projects to the audiovisual sector will be much greater as the BAI does not provide all the funding for any project.

The single radio round supported 89 projects with a total value of €960,000. 55% of the funding went to 48 community radio projects, 25% was allocated to 20 RTÉ radio projects with the remaining 20% allocated to 21 local and national commercial radio projects.

In terms of actual funding released in 2009, the BAI paid out over €10.9 million to successful television and radio applicants.



## **Gaby Smyth, Chair, Screen Producers Ireland**

Screen Producers Ireland (SPI) represents the interests of over 150 Irish production companies, active in all genres from feature film, documentary, TV drama, animation to factual, entertainment and lifestyle programming.

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, industrial relations 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.

The current economic climate has seen a significant reduction in funding available for Film, TV and Animation production yet despite this Irish produced content continues to gain significant recognition. With eight films showing at the prestigious Toronto Film Festival in 2009, and five Oscar nominations at the 2010 Academy Awards®, along with a nomination for the Directors' Fortnight at the Cannes Film Festival, Irish film, animation and TV production has shown a signal capacity to impress internationally. Our programming remains a large portion of the prime time schedule of our broadcasters, particularly RTÉ and TG4. We have also seen a significant increase in TV3 productions over the last year.

Earlier this year, Screen Producers Ireland signed a protocol with the Producers' Guild of America, the most influential producers' organisation in the industry. The agreement allows Irish producers access to the support and facilities of the guild: mentoring programmes with US producers, attendance at industry workshops and conferences in the US, shared databases of US and Irish production teams, and the opportunity to develop enhanced relationships with co-producers in the US.

Creativity and innovation remain key to our success and we are a core part of the knowledge and smart economy. 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 combined with seeking co production and funding opportunities outside the island of Ireland.



**Jim Devine, President,  
IADT, Dún Laoghaire –  
The National Film School**

The National Film School [NFS] at IADT offers a highly integrated course portfolio, spanning four-year undergraduate programmes in Film & Television Production; Animation; Modelmaking and

Digital Effects; and Design for Stage and Screen; as well as taught MAs in Screenwriting; Broadcast Production; and our MA/MSc in Digital Media. Demand for places is as high, if not higher, than it has ever been. Research has shown that an extremely impressive percentage of our graduates not only quickly find employment in the media industries but remain successfully there for the long haul.

IADT's position as the pre-eminent producer of graduates for the Irish film industry has been reflected in the research carried out by the Irish Film Board and PWC and published in the Irish Film Board's Irish Audiovisual Content Production Sector Review in December 2008. The report states that 80% of those who undertook "formal industry education or training" prior to entering the industry were aged between 20 and 40 years of age. This indicates "the more recent recognition of the significance of achieving a relevant qualification before entering the sector". Of those who received education or training the highest number, 14%, studied at IADT and only one other college was in double figures.

The NFS, with Donald Taylor Black as Creative Director, successfully organised its sixth series of NFS Lectures, again with generous support from Bord Scannán na hÉireann/the Irish Film Board. Participants in 2009/2010 were Terence Davies (writer/director); John Canemaker (animator); Ciarán Hinds (actor); Mark Tildesley (production designer); Barry Ackroyd BSC (cinematographer); John Boorman (director); and Gemma Jackson (production designer). Industry professionals are welcome to attend along with IADT students, staff and graduates.

In 2009/2010 we welcomed our first NFS Visiting Fellow, Academy

Award® winning animator, John Canemaker. Professor Canemaker is Chair of the Animation programme at New York University (NYU) and is author of nine books on the history of animation; he was resident on campus in Dún Laoghaire in November 2009 and inspired students and staff alike. The fellowship was supported by Bord Scannán na hÉireann/the Irish Film Board, the Academy of Motion Picture Arts and Sciences, and Enterprise Ireland.

Our students have had another highly successful year, gaining prizes at home and abroad. At the RTS Student Awards (Ireland section), they won both awards in the Fiction and Animation categories. These entries also progressed to the overall UK and Ireland RTS Awards final nominees list at the Barbican in London. IADT/NFS graduates secured a record 22 nominations for the 2010 IFTA Awards.

Our new NFS Building is on schedule and will be completed and ready for the 2011/2012 academic year.



**Colm Mac Fhionnlaoich,  
Manager, Telecoms,  
Internet, Media &  
Entertainment, Enterprise  
Ireland**

There is strong evidence that many world markets are emerging from recession,

indicating that now is the time to look at expanding sales on the export market. During 2009, many of the key companies in Ireland from the Telecoms, Internet and Media & Entertainment sectors grew their sales on the international markets despite the difficult trading conditions they faced.

Industry forecasts for the future are positive and there is an opportunity for the sector in Ireland to position itself firmly on the international stage. The quality of creativity in Ireland has been recognised by the number of international awards and nominations achieved during the past year. Continued development of strategic, business and sales development skills must be a priority for the industry in order to achieve the commercial success created by this international standing.

The continued rapid development of the internet as a place for providing product and developing new business models, in addition to the introduction of new platforms of delivery such as tablets and mobile, offer potential opportunities for the sector. Social media offers a new way for increasing audience size and the level of participation for Ireland's outstanding content. It is vital that Irish companies maximise these opportunities. With greater access to a global market, content can now be developed from a global perspective.

Enterprise Ireland assists key Media & Entertainment clients to scale their businesses globally, through customised development plans and with targeted financial support. This support can include R&D funding for the development of technology, support for management development, support for Business Accelerators in key markets and

support for Market Research in new markets. Through our many overseas offices, Enterprise Ireland makes introductions to key buyers in target companies. In addition, Enterprise Ireland has enabled visits by high level contacts and key industry people to meet with companies in Ireland. As a result, there were a number of significant deals signed by Enterprise Ireland client companies during 2009.

Enterprise Ireland supports and leads groups of clients from the Media & Entertainment sector at international events and exhibitions where they avail of the opportunity to meet key global players. This enables Ireland to showcase its world class companies and products in a global environment, which leads to real business over time.

The digital world is evolving rapidly. This continues to provide a significant opportunity for the Irish Media & Entertainment industry to serve global markets with world class products and services. Enterprise Ireland remains committed to promoting and assisting key Media & Entertainment companies to scale their businesses by winning sales internationally.





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

The Irish Film Institute is Ireland's national cultural institution for film. It aims to exhibit the finest in independent, Irish and international cinema, preserve Ireland's moving image heritage at the Irish Film Archive and encourage engagement with

film through its various educational programmes.

2009 was a landmark year for The Irish Film Institute (IFI) as we underwent significant development comprising an additional cinema of 60 seats, new public facilities and significant development to the Irish Film Archive research facilities. The redevelopment, made possible by funding from the DTCS ACCESS II scheme, will ensure that we have the necessary facilities to grow into our next phase of development and to continue our core mission to exhibit, preserve and educate.

In 2009 our core mission was delivered through the following IFI programmes:

### **Exhibition**

The IFI continued to bring a challenging and diverse cinema programme, bringing the best of international film culture to Dublin, delivered through a programme of first-runs, curated seasons, festivals and events. Although the cinemas ran a very restricted programme from July to November as a result of the redevelopment, the audience numbers remained high and 140,000 people attended films at the IFI during 2009.

### **IFI Irish Film Archive**

In 2009 the Irish Film Archive continued to acquire Irish interest material from a variety of sources including production companies, distributors, amateur filmmakers, film collectors, and a variety of organisations. Acquisitions of note include the Vincent O'Brien, Sean McMahon, Overend collections, the Radharc tape collection, and Neil Jordan's paper archive. The Archive was involved in a number of

research projects with outside agencies in 2009 including UCC (Irish Home Movies, 1930-1970) and UCD (the Radharc Archive). In a new departure for the Archive artist Sarah Pierce was commissioned to make a new work in response to the Archive film and document collections.

### **IFI Education**

The schools screening programme provides primary and secondary level students with direct access to film culture. It is run through our Dublin base and also in collaboration with regional partners and over 11,000 children attended screenings in 2009. This figure was slightly reduced from 2009 as a result of IFI cinema closures during the autumn in order to facilitate the redevelopment. The screenings outside of the classroom provide school children with essential access to film culture albeit within the Education service.

### **IFI National**

Throughout 2009, Irish Film Programming department coordinated screenings around the country which brought the collections of the IFI Irish Film Archive to new audiences. Highlights of the year included specially curated programmes for the Kilkenny Arts Festival, Cork Film Festival, National Museum and Knock Museum.

### **IFI Reel Ireland**

The IFI's international touring programme of Irish film which is funded by Culture Ireland is now in its sixth year. In 2009 IFI Reel Ireland coordinated and facilitated screenings of Irish films in 68 venues in 27 countries and arranged travel for eight guests to present their work. Highlights included projects in Finland, Italy, Cuba and USA.



### Helen McMahon, Project Advisor, FÁS Screen Training Ireland

In 2009, FÁS Screen Training Ireland (FSTI) conducted research into training needs for the audiovisual industry given the rapidly changing economic environment. The response to online questionnaires and

selective interviews was overwhelmingly positive; many felt that the training offered by FSTI had already done much to enhance the competitiveness and skills base of the industry.

In analyzing the feedback from industry respondents, key training priorities have emerged: Technology, Business and Enterprise, Career and Personal Development, Creative Training/Project Development, Bursaries, Work Placement and Mentoring, and Upskilling, Cross-skilling and Multi-skilling.

Current economic conditions present challenges for Ireland, and the audiovisual industry is no exception, but such conditions also present opportunities. It is important that in this environment FSTI, supported by the Irish Film Board/Bord Scannán na hÉireann (IFB), provides innovative training focusing on areas such as new business models. FSTI, through analyzing the current training needs of the audiovisual industry, intends to address the new landscape through leading edge training that is responsive to the most current industry realities.

One of the key programmes aimed at facilitating change and innovation in the industry is *Through the Looking Glass*: 3D Cinema in Europe. We are delighted to announce this programme in partnership with the MEDIA Programme of the European Union and the Irish Film Board/Bord Scannán na hÉireann. The participants on the 3D Cinema in Europe programme will be among the first producers in Europe to explore the full process of 3D development, production, post production and exhibition, and as such, will have an opportunity to become leaders in the format in Europe.

FSTI is delighted to again have support from the MEDIA programme of the EU for Screen Leaders EU, our leadership and strategic company development programme.

FSTI continues to support individual opportunities for professionals through the Bursary Scheme. The Bursary Award Scheme assists Irish industry professionals to enhance their career through international training opportunities. The bursary scheme also allows individuals to design an international work placement programmes which gives individuals the opportunity to observe best international practice firsthand.

Other key training programmes in 2010 include a Cross Media seminar, which will explore content across all platforms; Leadership and Management for audiovisual professionals, a course that will give participants an opportunity to hone their business and leadership skills with a particular focus on developing soft skills; Writing for Multi-platform, a course that aims to enhance participants' skills in developing and writing content for online broadcast; Digital Camera Operations & Workflow (including RED Camera); character animation, a course aimed at the animation sector focusing on the creation of memorable characters both from a visual and a scripting perspective; and advanced script development, a modular course aimed at honing the skills of experienced writers. These programmes seek to address the training needs that emerged in FÁS/STI's research in 2009: by cross-skilling and multi-skilling the audiovisual community across the areas of Business & Enterprise, Technology and Creativity, we can maximise the competitiveness of Irish content creators.



## Aine Moriarty, Chief Executive, Irish Film & Television Academy

The Irish Film & Television Academy is a not-for-profit organisation, with its core mission being the stimulation of original and creative production work and the encouragement of excellence through

recognition, education and leadership in film and television.

The Academy is achieving this by; celebrating excellence through the annual Awards Ceremony; raising the profile of Irish talent and production, by actively promoting Irish excellence and ensuring that achievements are recognised and respected worldwide.

The Academy is growing each year and has 1,000 members of industry professionals across 14 individual 'Chapters of Discipline' ie; Actors, Producers, Directors, Writers, Cinematographers, Animators, etc.

As with other international Academies, the Academy, although in its early years, is building a year-round educational programme of events, working closely with Academy peers worldwide to bring leading expertise to Ireland (AMPAS, BAFTA, American Film Institute, SAG etc, along with the Film Academies Network of Europe (FAN-E), co-founded by IFTA, which has Academies from 19 European countries who work together effectively.

Academy events include the annual IFTA Forum focusing on a chapter of discipline, ie; in 2009 the inaugural IFTA Music Forum 'Music for the Moving Image' welcomed international guests ie. Oscar winning composer Dario Marinelli (*Atonement*) along with leading Music Publishers and Agents. Other activities include: Monthly Film Screenings & Q&A's (Jim Sheridan), Masterclasses/'In Conversation With' (Terry George, Ciarán Hinds) and television events ie; Dearbhla Walsh (Directing for Television) and Graham Linehan (Writing for Television).

## Irish Film & Television Awards (IFTA)

The Academy's annual Irish Film & Television Awards (IFTA) have become the high-profile showcase to the general public, giving recognition to the broad range of quality Irish production being achieved by our industry. IFTA is the annual Industry Gathering; the 7th IFTA Awards Ceremony was held on 20th February 2010 when 39 Awards were presented for Achievements across film and television for 2009. There were 266 individual titles submitted for consideration; voted for by their peers along with international jury panels (chaired by filmmaker Peter Jackson) throughout the Awards Voting Season.

The IFTA Awards Ceremony has become a powerful marketing tool (for the Irish industry) both to the Irish and international markets. Stimulating the public's interest in the shortlisted Irish titles (positively impacting on box office/viewing figures, etc) is a key objective for IFTA, the IFTA publicity campaign for Nominees in 2010 generated a media valuation in excess of €3.5 million in 12 weeks across all mediums. Over 240 Irish/International Press attended the Awards event. The IFTA Awards Ceremony is broadcast LIVE primetime on RTÉ ONE with an average audience share over the years of 43%. News highlights from the Awards are also made available to 320 international channels worldwide. The Awards Ceremony contracts/employs 460 people across production/event/media in the six months lead up.

In February 2010, John Boorman was honoured with the Lifetime Achievement Award for his life's work and contribution to the Irish Film Industry. The Academy's esteemed Lifetime Members now include; Maureen O'Hara, Neil Jordan, Pierce Brosnan, Nuala Moisele, Gay Byrne, George Morrison, David Kelly and John Boorman, acknowledging their legacy to the Irish Film & Television industry.



## Overview of the Sector in 2010

The indicative figures above for 2010 have a total output value of €367 million reflecting a 50% increase on 2009 figures. Indigenous features in 2010 include *The Other Side of Sleep* and *Parked*. The Independent TV sector is forecasting an increase of over 50% in 2010. Noted commissions from RTE include *Mattie*, *Single Handed 4* and *Love Hate* and TG4's *An Crisis* and *1916 Seachtar na Cásca*. In addition *Camelot* a US-funded television series for the US Starz channel and GK-TV is being produced in Ireland.

In terms of economic output in 2009 and the estimate for 2010, the chart below shows a slight decrease in production within the sector for 2009 over 2008, but the estimates for 2010 are showing a strong recovery with an increase of 50%.

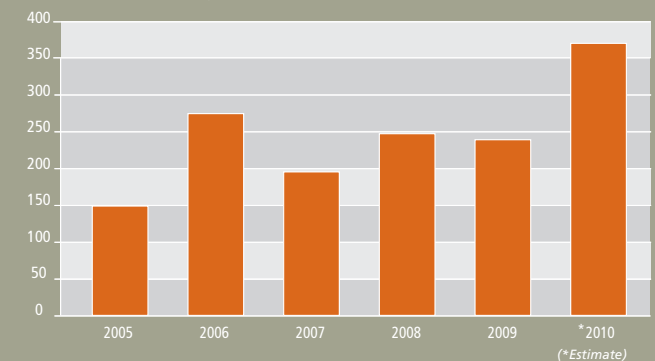
Indicative Audiovisual Output 2010	Overall output € million	Irish expenditure € million
All Productions	367	225
Feature Film	101	28
Independent TV Incl. major TV Drama	206	167
Animation	60	30

## Economic Analysis of Productions in 2009

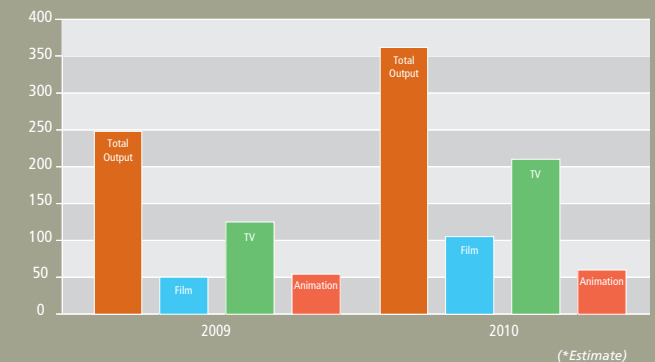
This section summarises economic analysis (Appendices I - IV) covering 257 productions completed in Ireland in 2009. The projects examined represent a good spread both in scale and type of production and include a number of feature films such as *Leap Year* and *A Kiss for Jed Wood*, indigenous TV productions such as *Raw*, *All Ireland Talent Show* and *The Afternoon Show*, *Na Cloigne* and *Rásaí na Gaillimhe*, and the animated projects *Chloe's Closet*, *Gumball* and *The Octonauts*. These productions represented a total value of €243.3 million.

The following chart compares the outputs for 2009 and the estimated output for 2010.

Economic Output Level of the Irish Audiovisual Sector (€ million)



Output Comparison 2009/2010 (€ million)





# Economic Analysis 2009

## Benefits of Section 481 to the Exchequer (see Appendix II & IV)

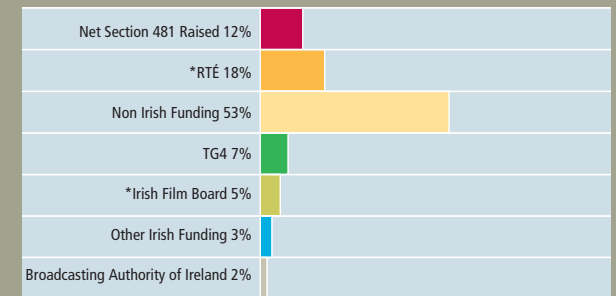
The gross gain to the exchequer is estimated to have been €55.5 million in 2009. This includes direct benefits in terms of PAYE, PRSI, schedule D and corporation tax, and indirect benefits in other forms of tax, including VAT and excises. The indirect benefits are taken into account by the multiplier effect of investment in audiovisual production. The cost to the Exchequer of Section 481 is the tax foregone on the €106.6 million, which was invested under the scheme and is estimated to have been €43.7 million. This results in a net benefit to the state of €11.8 million in 2009.

Calculation of Net Benefit (€ million)	2006	2007	2008	2009
Tax Return to Exchequer	55.7	49.1	58.5	55.5
Tax Foregone to the Exchequer	36.2	31.1	32.8	43.7
Net Benefit to the Exchequer	19.5	18.0	25.7	11.8

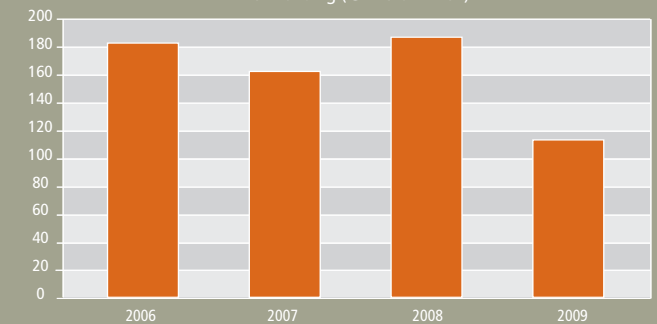
## Funding

Total funding for the sector in 2009 amounted to €243.3 million (see Appendix I for breakdown).

Funding Sources 2009 (€243.3 million)  
(\*Excludes spend in respect of projects receiving S481 funding)



Irish Funding (€ 115.6 million)



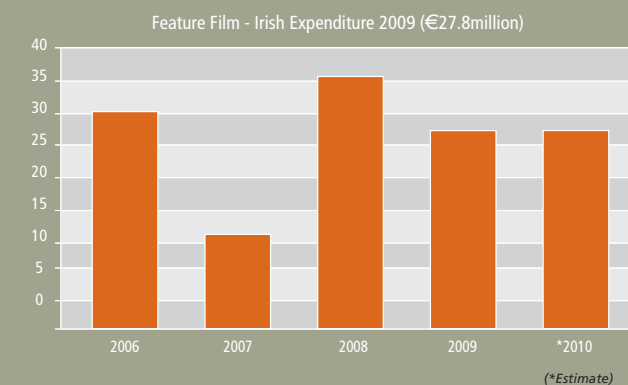
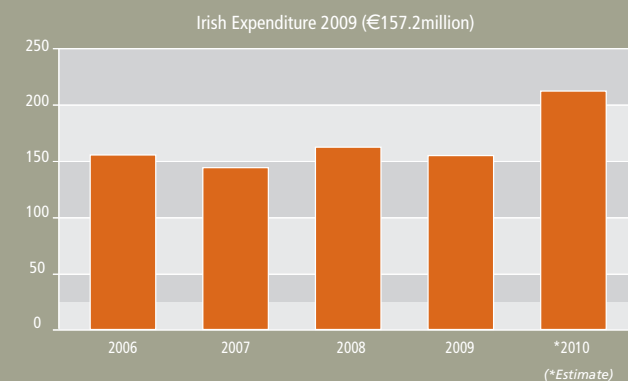
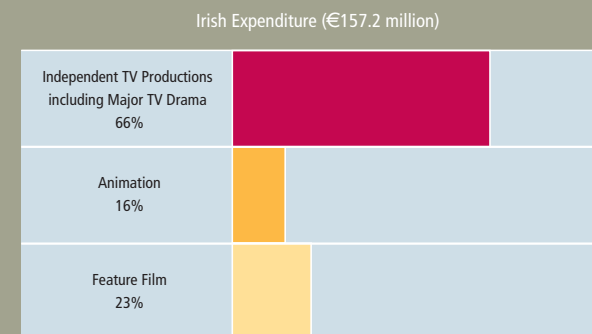
## Expenditure 2009 (see Appendix I)

Overall Irish expenditure in the economy, the key driver for domestic employment and income, amounted to €157.2 million for the 257 productions analysed. As part of this figure, expenditure from independent TV production including major TV drama stood at €104.3 million representing 66% of Irish expenditure.

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

## Feature Films 2009

In 2009, the production of feature film accounted for just under a quarter of the total cost of productions within the State. Of the €58.6 million spent on productions, €27.8 million (47%) 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 (€6.6 million), the Irish Film Board (€8.3 million), BAI and RTÉ (€0.2 million) combined.



## Independent TV Production (including Major TV Drama) 2009

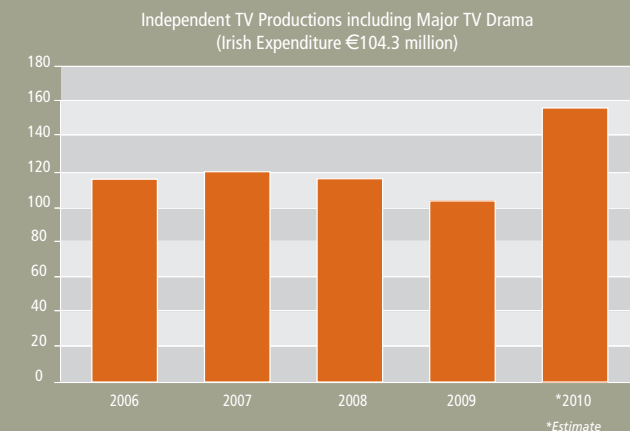
The output for independent TV productions in 2009 was €127.1 million a 6.5% decrease on 2008. Of that €104.3 million was spent within the Irish economy. The main sources of TV commissions continue to be RTÉ and TG4.

## Animation 2009

The growth in the Irish animation industry shows a significant increase on last year with creations such as *The Octonauts* and *Gumball* all contributing to the total output of €57.6 million, of which Irish expenditure amounted to €25.1 million.

## Employment (see Appendix II)

The total number of Irish employees, in terms of placements, increased from 12,660 in 2008 to 14,198 in 2009, but the number of full-time equivalent jobs decreased from 1,631 in 2008 to 1,368 in 2009. This shows that more people were working in the sector but for a shorter time.



*“Over the next five years, digital technologies will become increasingly pervasive across all segments of entertainment and media, as the migration seen to date continues to expand and accelerate” Global entertainment and media outlook 2009*

## Introduction

The annual IBEC Audiovisual Review has set out to capture the data of the Audiovisual Sector and this new section on Digital Content production seeks to reflect the wider content industry beyond just Feature Films, Television and Animation production. It could be argued that previous Audiovisual Reports may have had too narrow a focus as so much activity that impacts the industry has changed. Audiences have shifted from traditional ways of consuming content and it seems obvious now that we should include an overview of other areas of digital content production and content distribution to reflect the trend to digital which is now evident everywhere.

The reality now is that we exist in an increasingly pervasive digital economy and society which facilitates the creation of new and enriching experiences for consumers and citizens both commercially and culturally. It also facilitates more widespread transmission and engagement with these commercial or cultural products or services both at a local/regional level and at the same time, presents the opportunity of unlimited reach globally.

*“Over the next five years, digital technologies will become increasingly pervasive across all segments of entertainment and media, as the migration seen to date continues to expand and accelerate....The entertainment and media landscape that emerges from the downturn will be one in which some segments have reshaped themselves successfully for the digital future. However, others will undoubtedly face significant challenges as they continue to find their place in the digital world”. This is a quote from the ‘Global entertainment and media outlook 2009 – 2013’ published by PWC and they estimate the digital spending in the entertainment and media industry overall amounted to 21% vs 79% for non-digital with this proportion forecast to change to 31% vs 69% in 2013.*

This is a massive shift which is already evident to all of us in our daily lives. The success of the iPhone and in particular the huge explosion in ‘Apps’ where \$4.2billion was spent last year with Apple gaining 99% of this market is a huge driver of this change. The recent release of the iPad which sold three million units within 80 days of its release in the U.S. is further evidence of this trend.



For many in the Western World, the internet is an essential utility like water or electricity and the greater the usage the more it drives demand for content. For many years, Ireland has struggled with a slow and expensive internet infrastructure. The internet lies at the heart of content distribution and exploitation, and as an island nation the speed and availability of the internet should be considered as important an

infrastructural issue as our road network. Any government supported policy on Digital Content will have to be combined with a policy that improves the speed and footprint of the internet and provides affordable and easy access to all citizens.

For Ireland this is game-changing moment and its Audiovisual Industry can benefit hugely from the opportunities that present itself. We find ourselves working through the eye of an exciting revolution in technology where consumers of content do not differentiate how or where they consume media. There is also a generational gap with digital media that some commentators refer to digital natives and digital adapters. This disruptive innovation has fundamentally changed how we communicate with one another and consume content. It has changed business strategies of the most established organisations and created new opportunities and business models that previously did not exist.

According to World Internet Stats, Ireland had 2.8 million internet users by the end of 2009 equal to a 67% penetration of the population – globally the number for internet users was 1.8 billion representing a penetration of 26.6% and a staggering 400% growth over this first decade of the new millennium. More time is also being spent online with recent reports indicating that individuals now spend 52 minutes online daily, a 40% increase since 2007.

The mindset of producing programmes exclusively for television is increasingly being replaced with producing content for all screen platforms. Yet television consumption still remains very strong, in Europe alone there are five thousand television channels growing at a rate of two hundred per year. The real opportunities lie for producers who focus on the export of their content internationally.

The challenges for producers are immense and they need to remain agile with their business models embracing the change.

The following section in this chapter will cover the key domains and drivers of Digital Content production and consumption in the Audiovisual sector.

- ▶ Online Video and broadcasting
- ▶ Wireless and Mobile content
- ▶ Computer Games

It is our intention that this chapter of the Audiovisual Review will give a wider perspective on the sector beyond just Film, Television and Animation. It is expected that future versions of the Audiovisual Review will see this section of the report develop as the digital content sector grows.

# Digital Media



## The Future of Online Video

There is increasing convergence between traditional broadcast, internet and mobile technologies, which is driving the increase in new outlets for video distribution. The potential exists to deliver video content to new audiences across multiple distribution platforms for consumption on a broad range of consumer devices. In many cases different versions of video content will be produced for delivery to multiple devices e.g. small, mid, large, and extra large screen versions.

## Catch-up TV and Connected Devices

Increased broadband penetration, new IPTV enabled devices and Catch-up TV services have broken down barriers for people accessing content online, as people seek to access TV programmes on any given device or platform. 21% of Irish Internet users claimed to be watching video online by the end of 2009. The consumption of video on the web is a key trend and is expected to account for 50% of web

usage globally by 2012. An increase in online video revenue is expected in parallel with this growth, with online video revenue projected to reach \$19 billion by 2012 globally (it is currently valued at \$3.5 billion).

Catch-up TV services are being developed by broadcasters and aggregators alike to reflect changing media consumption patterns and protect against piracy. Partnerships are also developing amongst content providers to make video-on-demand available to audiences e.g. FOX, NBC Universal, MGM, Sony Pictures Television, Warner Bros. and Disney have joined forces under the Hulu brand, with 10,000 hours of programmes available to viewers at any time. A similar trend is emerging in the UK with plans for partnerships between broadcasters (BBC, ITV, Channel 4, Channel 5) and BT and Talk Talk for an open TV service entitled project 'Canvas'. The business model for most of these services is ad-funded, although payment options for premium content are being explored, from these devices, with "big-screen" user interfaces with larger fonts and graphics, designed for navigation using handheld remote controls.

Connected devices give programme makers the opportunity to build viewer interactivity and loyalty. Consumers will be able to use one box with one remote in the form of a one-stop-shop for all their needs. Connected TVs will guide via an Electronic Programme Guide, offer Video on Demand and web applications such as Facebook, YouTube, and News content.

## New Video Devices

HBBT which is Hybrid Broadcast, Broadband TV (over Open TV) is being positioned as the new standard for broadcast and broadband delivery of entertainment to the end consumer through connected TVs and set-top boxes.

2010 is something of a breakout year for sales of connected

devices with internet enabled television and DVD players finally gaining traction. It is expected that by 2011/12 the majority of television sets sold will have internet capability. It is likely that this point will be reached earlier for Blu Ray DVD players. Currently all three seventh generation games consoles (Playstation 3, Xbox360 and Wii) are connected devices capable of displaying video content. Ireland is a big market for games consoles, coming second to Japan in penetration.

Market growth of laptops and new mobile tablet devices is overtaking traditional PCs as a video platform. One in three Irish people already have a laptop in their home, more than have a PC. Mobile is predicted to account for more than 50% of global online video by 2015.

In Ireland ComReg has issued proposals for a mobile TV licence. This will cover the main urban areas of Dublin, Cork, Galway, Limerick and Waterford. The licence is expected to go out to tender by the end of 2010.

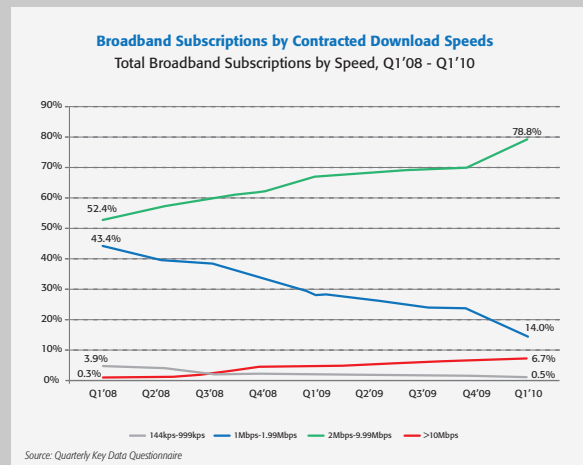
From this it is clear that the opportunity for delivering Audiovisual content via online is increasing.





## Broadband and Technology rollout

Increased broadband penetration, coupled with developments by ISPs to increase download speeds has lead to significant growth in the number of people accessing online video content. While Ireland still lags behind other European nations in internet usage, the market for Irish digital products is both national and international. By Q4 2009 63% of Irish households had broadband access and this figure has been increasing rapidly in recent years.



The quality of broadband being delivered will become more important as consumers use the internet to access more data rich content. Video, HD and 3DTV are all best viewed over high quality broadband. While improving, Ireland still lags behind competitor countries.

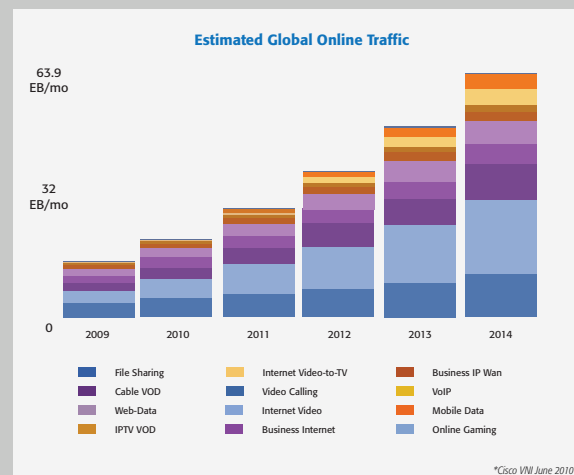
Currently only 0.6% of connections are fibre contrasting with 21% for Sweden to 51% in Japan. The OECD average is 11.3%. Q1 2010 saw a significant jump in broadband connection speed with 79% of subscriptions now falling within the 2-9.99 MBps range.

## Online Video Traffic set for dramatic growth

Cisco projects that global internet traffic will increase more than fourfold by 2014 to 767 exabytes equivalent to ten times the entire traffic traversing Internet Protocol networks in 2008.

This growth will be driven by video (TV, VoD, Internet Video, and Peer to Peer) which will constitute 91% of global consumer IP traffic by 2014. Driving the demand for video will be improvements in network bandwidth capacity, internet speeds, and the increasing popularity of HDTV and 3DTV. 2010 is expected to be something of a tipping point with internet video traffic surpassing peer to peer traffic as the largest internet traffic type. File sharing has held the number one spot for the last ten years. The global online video community will include more than one billion users by the end of 2010. By 2014 two years of video will cross the internet every second.

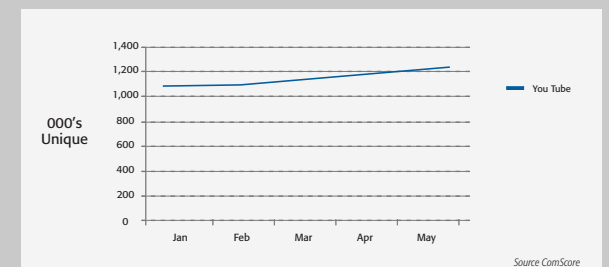
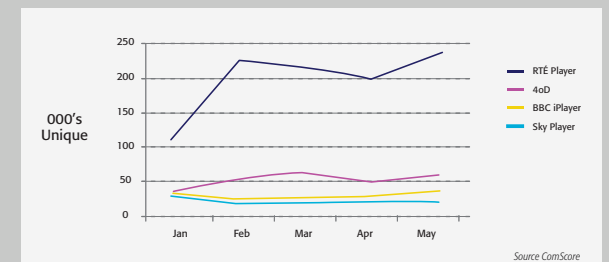
3D and HDTV is expected to see an exponential increase between 2010 and 2014, and by that date will constitute 42% of total consumer internet video traffic.



## Demand for video is high, and usage patterns are close to traditional TV

There is no universal industry measurement of Irish video sites. In Ireland Comscore tracks some Irish and international video player sites. RTÉ.ie is streaming more and more video across the site – over three million streams are now delivered each month. RTÉ Player recorded over two million streams in June 2010, up from 450,000 in June 2009. 15% of RTÉ Player traffic is international. BBC's iPlayer in May delivered 130 million streams across a variety of platforms. 73% were via PC, 16% Virgin Media, 6% PS3 and Wii and 5% mobile. Of the total streams 75% were for video.

Daypart patterns for RTÉ's Player are broadly similar to traditional TV, with usage peaking between 9pm and 10pm. The rollout of internet enabled televisions and other devices is likely to increase usage of Players and shift more streams from PCs to the living room television.



## Commercial Models

There is currently no definitive measurement of online spend in the Irish market. There are however, two initiatives in progress, which are anticipated will deliver top line advertising and brand spend for the Irish online market from 2009 onwards.

1. Internet Advertising Bureau (IAB) Ireland Online Adspend Survey  
This IAB Online Adspend Survey is a census of online media owners active in the Irish market. It will cover advertising spend across search, display and classified categories and will be carried out on a half yearly basis.

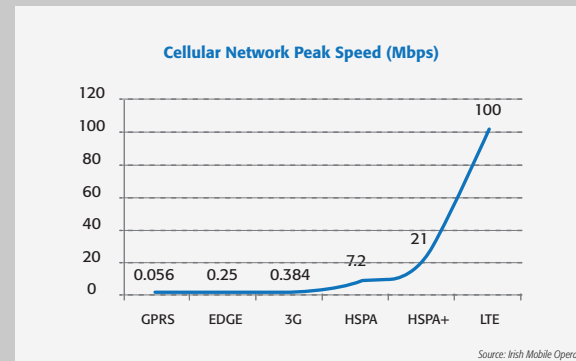
2. Nielsen Adspend Report  
Nielsen Adspend report will generate at top level brand spend across the online industry including display and search. It is anticipated that this will be produced on a monthly basis.

Both initiatives will have the full backing from industry bodies.

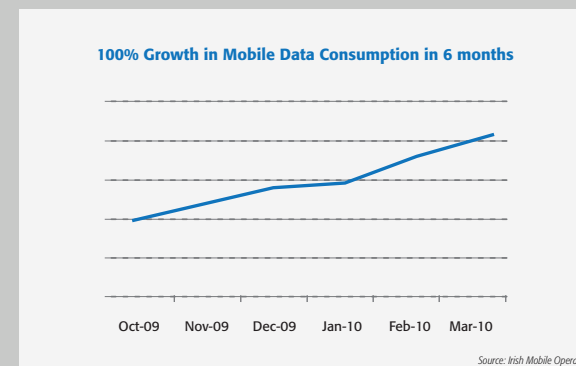
## Mobile Content - The Wireless Network

The mobile device market continues to experience significant changes in every aspect of its ecosystem. In fact these shifts are becoming more frequent and radical driven by the increased pace of developments in data networks, processing power, user interfaces and operating systems. The disintermediation of traditional value chains is leading to new and evolving business models. Network and device developments are enabling consumers to enjoy a high quality, rich media content experience. To deliver a quality rich media content experience, the bandwidth offered by mobile networks has increased exponentially, from a peak

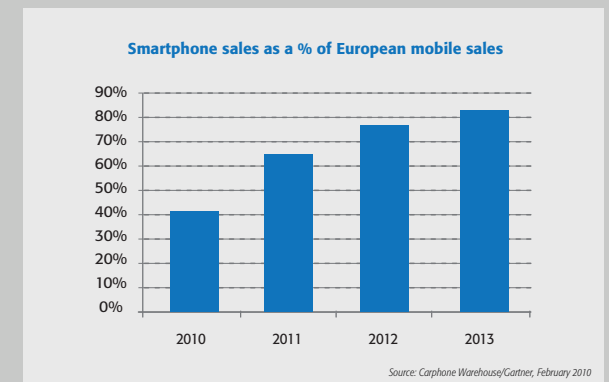
rate of 56Kbps with GPRS in 2002 to 21Mbps with HSPA+ in 2010. LTE is next on the technology roadmap and will likely offer peak speeds in excess of 100Mbps from 2012/2013.



Originally designed for voice and text services, the evolution of high speed data networks has enabled a new and increasing range of mobile content services. Consumers are clearly demanding these services as even on traditional, non-smartphones; phone users are consuming twice as much data as six months ago.



The increasing penetration of smartphones, e.g. the Apple iPhone, will continue the growth in data consumption due to their larger screens, improved user interfaces, increased memory and faster processors. The average iPhone user in Ireland consumes ten times more content per month than a traditional handset user. Most mobile device manufacturers are now producing smartphones and therefore the addressable base of consumers who can more effectively consume rich media content will continue to grow. Global smartphone sales have increased by 50% from Q1 2009 to Q1 2010 and now account for over 40% of European mobile sales (source: Gartner Smartphone Report, May 2010).



## Content

Mobile content originally focused on ringtones, games and images but a significant opportunity for expanding the range of content services into rich media formats is emerging from text based services to video, from sophisticated productivity tools to hi-resolution entertainment and games. Smartphones are providing new content platforms primarily driven through mobile applications. Mobile applications are downloaded to smartphones through 'App Stores' and deliver content and services directly to the customer without the need to search for, or access content through an internet browser on the mobile phone. Device manufacturers and mobile operators are developing 'App Stores' for their customers to provide a new distribution channel for both free and premium content. The commercial model for the content provider is normally based on revenue share with the content provider retaining circa 70% of revenue with 30% going to the App Store operator.

The average iPhone owner uses his or her iPhone to make a phone call only about 45% of the time. **The other 55% is used for Internet, applications**, games, music, email and SMS (source: Mary Meeker Report, Morgan Stanley, April 2010). The largest app store is currently the Phone Application Store which contains over 200,000 applications

However, this volume of consumer choice creates a different problem for content owners, namely - how do customers discover your content? Reports indicate that only 10% of application suppliers are making enough money to be viable. Clearly there is a role for co-operation between the content owner, application developer and mobile operator in order to enhance the promotion, search, discovery and purchase of mobile content.

## What does the future hold for mobile content?

There is no doubt that mobile content, including games, music and video will be a significant growth area for the foreseeable future. Technology enablers including high speed mobile data networks, powerful and user friendly devices, combined with the reduced cost of ownership for consumers is creating a ready and willing market for all types of content.

Consumer behaviour is supporting this view and is demonstrated through increased data traffic, the take up of data subscriptions and the increased consumption of premium content including music, games and video.

However, questions remain as to how mobile content will be commercialised in the medium and long term. Unlike commercial TV, where an established business model exists, the mobile content ecosystem is in its infancy.

The content industry continues to make significant investments in developing, producing and promoting content. In parallel, the mobile operators continue to commit significant investment into their data networks in order to deliver the required capacity and bandwidth to the increasing numbers of mobile users consuming rich media content. In addition to capital network investment, each megabyte transferred across a mobile network incurs a cost on the mobile operator. Consumers typically pay a flat-rate monthly fee, therefore, as usage increases the data networks lose profitability and potentially may be forced to reduce future network investment.

Growth in content consumption on a mobile is a certainty. Mobile content is entering a new phase of its evolution and it is likely that companies with different roles within the value chain, from creative to post production, aggregation to distribution, network delivery to billing, will need to co-operate to drive sustained value and market success.

## Computer Games

With regard to Computer Games, PWC's 'Global entertainment and media outlook 2009 – 2013' noted that this was the fastest growing segment in Entertainment & Media (E&M) delivering 18.2% growth in 2008 and projecting a further compound annual growth rate of 7.4% which will take the industry worldwide from \$51 billion in 2008 to \$74 billion by 2013. This compares to Filmed entertainment overall which was flat in 2008 at €84 billion and which they forecast to grow by 4% p.a. to \$102 billion in 2013. Country level figures by segment were not available but Ireland's total E&M market was reported as \$5.1 billion in 2008 and forecasted to contract by 3.5% in 2009 but to return to growth in 2010 and to reach \$5.9 billion by 2013 a CAGR of 2.7%.

The three largest producers of and markets for computer and video games (in order) are North America (US and Canada), Japan and the United Kingdom. Other significant markets include Australia, Spain, Germany, South Korea, Mexico, France and Italy. Both India and China are emerging as fast growing markets in the computer game industry.

The predominant market segment for computer game consumption is the 18 to 34 year old demographic with the average age of gamers now approaching 30. As these consumers continue to play games into their 30's and 40's it is to be expected that the industry will develop new genres and achieve much broader reach in line with this maturing audience.

Even more notably, as an indicator of future direction, a Survey commissioned by Disney, as cited in "Next generation Media", Intelligence, Aegis Media, January 2010, stated that "70% of Children from Europe claim that gaming is their most common online activity".

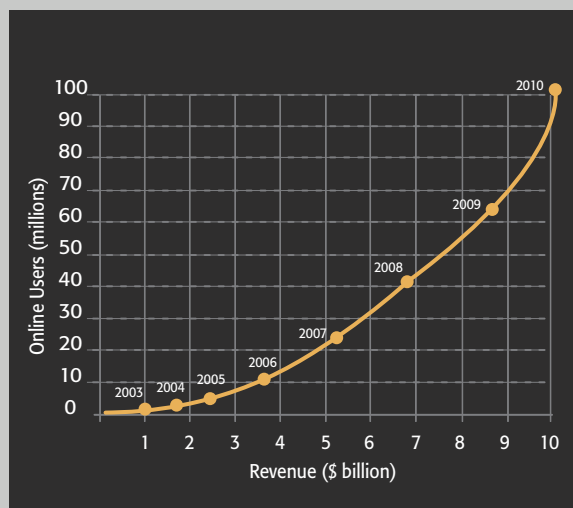
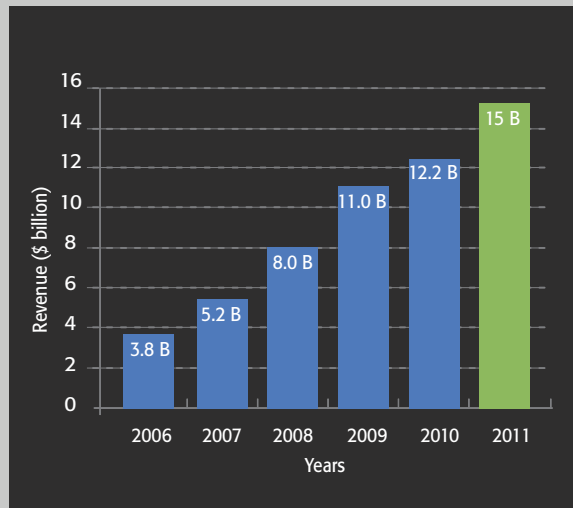
Budgets for Game Production can now easily run to millions of dollars and most professional games require one to three years to develop. Like movies the risk is great – the game may not grab audiences, and investors may lose money. But like movies, Games can be successful globally, and the profit margin can be much greater than that for movies. Like movies, games often feature well known franchises and blockbuster sequels which greatly enhance the commercial success of the sector.

Computer Games have a major impact on the economy through the sales of major game titles and systems. In November 2009, first-day sales of Call of Duty: Modern Warfare 2, published by ActivisionBlizzard, demolished entertainment industry records, selling 4.7 million copies and taking in an estimated \$310 million in North America and United Kingdom alone which equated to 4.7 million copies in those regions. This release overran the former champion Grand Theft Auto 4 published by Rockstar Games which sold 3.6 million.

More significantly, Call of Duty even overran Hollywood - the largest opening in movie history was Warner Brothers' "The Dark Knight," which by comparison, grossed only \$158.3 million over its first three days. Of particular note is that Call of Duty uses technology from Demonware and Havok both developed in Ireland.

Computer Games now represent a \$50 billion market worldwide which has surpassed Hollywood in revenue.

Online Gaming is the fastest growing segment of this market and there are now 500 million players online:



## The Irish Games Industry

The Irish games industry is still a relatively small industry, but one that has considerable growth potential. Dr. Aphra Kerr, National University of Ireland, Maynooth, and Dr. Anthony Cawley, University of Limerick, conducted a survey over the summer of 2009, which explores the demographics and functions of game companies on the island of Ireland and traces their geographical spread. The full survey is available from <http://www.gamedevelopers.ie/features/IrelandGames2009.pdf>

They identified 33 companies in all comprising categories such as Game Developers, Localisation, Publisher/Distributor and Tools/Middleware with a combined workforce of 1469. Compared to an earlier study in 2002 which identified 300 jobs in total at that time, this demonstrates a significant growth of 400% over the last seven years. Some of the more established names now operating in Ireland are Havok, Jolt, PopCap, Activision/Blizzard/Demonware, Big Fish, Gala and GOA – five of these are based in Dublin with three of them located at the Digital Hub. Since this report was published, Electronic Arts (EA), one of the biggest names in the global games industry, announced in May 2010 that it was bringing 200 jobs to Galway, where it plans to locate a European operations centre for its BioWare online publishing division. Gala have announced planned growth of 100 jobs and PopCap Games have forecast that their workforce will double from 50 to 100 in the next two years. Zynga the publisher of Farmville which has 87 million users on Facebook and Los Angeles based Riot Games have also decided to set up in Dublin.

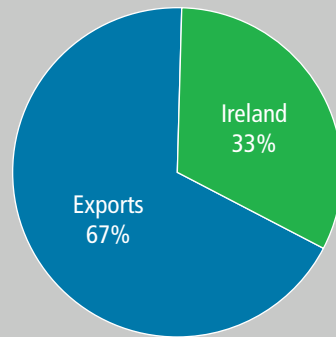
Ireland is now well positioned to capitalise on the growth of browser-based games particularly to capture a greater share of global business and to bring a further step-function increase in employment in the industry. This presents a huge opportunity for new jobs across the full range of audiovisual skills and careers and provides a new business channel for many existing service providers to the film and TV industry as there is considerable overlap in the nature of the work and the production models.

## Enterprise Ireland (EI) support for TIME (Telecom Internet Media and Edutainment)

Enterprise Ireland (EI) has labelled the sector TIME (Telecom Internet Media and Edutainment). EI's TIME sector has grown its international footprint over the last six years. Ireland has a strong indigenous industry providing content and services to international markets. The sector consists of over 300 Enterprise Ireland client companies and is growing.

**Figure 1: Breakdown of TIME/Software Total Sales in 2009: Irish sales versus Export Sales**

In 2009, exports accounted for 67% of the total sales of Enterprise Ireland's TIME/Software sector.



**Table 1: Percentage % Change in Exports and Sales 2009 for TIME/Software**

	2009
Exports	5%
Sales (Domestic & Export)	1%

In spite of the global economic downturn, Enterprise Ireland TIME/Software clients strongly grew exports by 3% between 2007 and 2008 and by a further 5% in 2009.

Irish created digital content is viewed by millions in over 130 territories worldwide. Leading Irish Media and Entertainment companies are export focused closing significant deals (greater than €200,000) with internationals such as Endemol, Sony International, Nickelodeon, CBBC, Disney.

Enterprise Ireland supports companies to attend key international market events (Mobile World Congress, Kidscreen Summit, MIPTV, MIPCOM, Future of Web Apps, Web 2.0 Summit, Games Developers Conference, CTIA).

Many Irish media and entertainment companies have proven track records in talent development and management and are creating high quality content for national and international broadcast platforms and audiences. In Ireland, there is a growing cluster of companies creating original television formats with universal appeal.

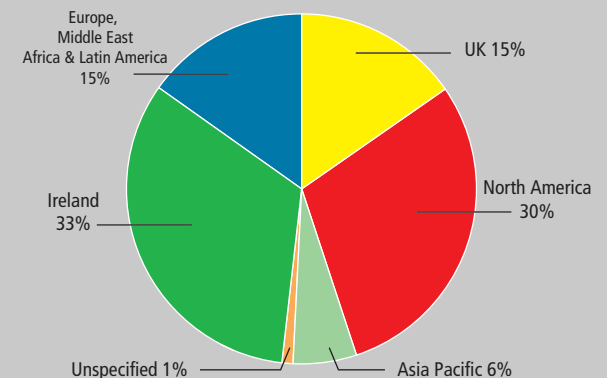
Irish companies are innovating as investment in R&D activity is increasing in the digital content space. Companies are undertaking projects developing software applications that enhance the viewing experience, address productivity improvements and increase efficiency.

Enterprise Ireland digital related High Potential Start Ups clients accounted for 50% of software start-ups. The emergence of a cluster of Web 2.0 companies offers the potential for additional export growth for 2010-2012. An example of a start up offering is company developing a complete social broadcast and multicast platform, combining interactive mobile TV with social networking.

Investment in management development is recognised as strategically critical towards growing a business. Aimed at CEOs of companies who are committed to leading their company to a strong international market position, Enterprise Ireland supported a selection of Media and Entertainment related CEOs on the world-renowned Stanford Graduate School of Business Leadership 4 Growth programme providing new business insights and building leadership capability at international levels. Developed by Enterprise Ireland in association with the Internet Growth Alliance the new IGAP Programme recently concluded providing thirteen high potential companies with the tools and skills to develop

and execute aggressive international growth plans and scale their businesses. Ernst & Young's elite Entrepreneur of the Year programme seeks out the best business talent in Ireland. In recent years competing with chosen peers several Irish digital content leaders have been recognised and selected as E&Y Entrepreneur of the Year Finalists in the emerging and international categories.

**Figure 2: Total Sales of TIME/Software by Market in 2009**



In 2009 North America was the most important exporting market for Irish owned TIME/Software companies accounting for 30% of total sales. The UK accounted for 15% of total sales. Europe, the Middle East, Africa and South America combined accounted for 15% of the total sales of TIME/Software companies.

Reflecting the growing importance of the Asian market to Irish companies, Asia Pacific accounted for 6% of the total sales of TIME/Software companies in 2009 up from 5% in 2008 and 4% in 2007.



# Aisling's Diary - Case Study

## Aisling's Diary – Transmedia the new digital revolution

As this Chapter has already declared, we are in the middle of a new revolution – the cross media revolution. Content can now be consumed anywhere, anytime, Entertainment content needs to be able to play on all platforms. It calls for both the content producer and technology provider to work together to create different entertainment experiences for the mobile, TV, Internet, print and iPod user. For CampbellRyan Productions, the company which produced *Aisling's Diary* and indeed all Irish producers operating in a global market this, collaboration of creatives and technologists and, the ability to produce on a budget, provides the competitive edge to drive us forward internationally.

*Aisling's Diary* serves as a great example of the above, a transmedia project which was designed to work on multiple platforms from its inception. First commissioned by RTÉ Young People's programming in 2008 as a series of 40 short 3-minute interstitials. RTÉ Young People's also subsequently commissioned a one off Holiday Special in the autumn of 2008 and a second series of 30 short 3-minute episodes (*Aisling's Summer Diary*) in 2009. The series was 100% shot in Ireland with local talent and crew and has since been bought and screened by ABC Australia, and SVT Sweden. Additionally the series has spun out into books through a deal with Penguin Books, and CampbellRyan has sold an option on the US Format rights to Mio.tv in Los Angeles (where it is being re made for the Latino community).

The story centres on Aisling – a first generation Irish American teenager growing up in Boston who thinks that being 'Irish' is all about Irish dancing and plastic shamrocks. Needless to say this does not help her fit in when her parents decided to move her and her little brother back to

Dublin. The series is a fish out of water story, mixing teen romance, hip-hop, Irish dance and comedy. At its heart season 1 was an exploration of what it really means to be Irish in modern Ireland, while season 2 centered on entrepreneurship and a Romeo and Juliet style summer romance between two rival businesses.

The transmedia elements of the series come from learning's in setting up and producing the cross media smash hit series *Sofia's Diary UK* for Sony Pictures and Television International which earlier in 2008 created UK broadcasting history by becoming the first internet series to cross from online to Television when it transferred to Channel 5.

With *Aisling's Diary*, a character was created (Aisling) who existed in a daily Monday-Friday teen soap that could a) play as an interstitial on RTÉ's two tube b) play online on [www.rte.ie/tv/tvtv/aislingsdiary](http://www.rte.ie/tv/tvtv/aislingsdiary) and c) work as a traditional TV half hour in a weekly round up / catch up episode which aired on Saturday mornings. Subsequently, seasons 1 and 2 were cut into two "movie of the week" style movies to air on RTÉ over the 2009 Christmas period. In addition, a Bebo profile was launched where fans could interact with the character and the story was also expanded to books creating a ghost written Diary ("*Aisling's Diary*" written by 'Aisling' and published by Penguin Ireland) to accompany the series. It sold out on its first print run.

Investment / International Appeal and success:

In terms of investment the series created 75 contract jobs in Ireland. This crew are now skilled in how to create transmedia content and, it is hoped, will become a creative cluster driving further growth in this sector. In addition, the series is now returning funds to RTÉ through its international sales (which are being handled by CR Entertainment). The content created is being sold internationally both to online platforms, and mobile operators as well as to traditional broadcasters.



## Theatrical

The Box Office for the Republic of Ireland remained in a healthy state in Ireland in 2009, despite the economic downturn, and was worth approx. €131 million. This was comparable with 2008, and the omens for 2010 are very positive with blockbusters such as Avatar and the increasing proliferation of digital and 3D screens likely to increase it further. In an EU context, the overall Box Office has been growing year on year, and was worth an estimated €6.28 billion in 2009.

Ireland is still one of the highest cinema going countries per capita, with Irish people visiting the cinema on average four times a year, this is more than double the EU average of 1.9.

The transition to digital and 3D projection is still overcoming obstacles in this transition phase, but it is a game changer for the industry. There are currently over 130 digital screens in Ireland, 90 of which are 3D. This transition will allow cinemas to deliver more diverse film programming, not only to multiplex audiences, but also art-house, and at a fraction of the cost.

If the trends seen in the US develop here, as well as feature film, we may soon be visiting our cinemas to watch live sporting events in 3D and participate in on-line gaming. Already, many digital cinemas are screening live Opera from the Met in New York. While private financing schemes using the Virtual Print Fee model is preferred by studios and large multiplex chains to convert to digital projection, the smaller independent and art-house cinemas have found it more difficult, some of these screens have been digitised through the Arts Council and Irish Film Board's Cultural Cinema Consortium's cinema digitisation scheme.

# The Audiovisual Market in Ireland

## DVD and Video on Demand

The DVD market is one that is facing some of the toughest Industry challenges, as the acceleration of technological innovation in hardware and software, and the increasing proliferation of broadband and Video on Demand providers (including the newly launched iTunes movie store, and existing Xbox Live service), represent DVDs greatest threat, that could well severely damage the market share of the DVD format.

In 2009, the video retail market in Ireland was worth €152.6 million, declining from €200.3 million in 2007 and €192.4 million in 2008. This trend is reflected throughout most International markets. The decline is softened somewhat by the emergence of the higher resolution Blu-ray format, but this still represents a small percentage of the overall market as price is still an issue, and many observers doubt whether the format will ever get a chance to gain a foothold in the market, especially considering the recent launch of the Digital Entertainment Content Ecosystem (DECE) and UltraViolet platform, an on-line content locker that will store and play film and TV shows on a variety of devices.

The DVD market is primarily retail driven, which represents 74% of the market, compared to rental which is 26%. The rental market is particularly in jeopardy, as the traditional "rental window" is quickly disappearing. Add to this the high profile bankruptcy of Blockbuster Video, the announcement from UPC that they will be launching a Video on Demand service straight into homes, and the existing near Video on Demand services from SKY, and it is easy to see why rental chains such as Xtra-Vision are adjusting their retail offering to include mobile phones and games consoles.

Illegal downloading, primarily through peer to peer file sharing websites, is currently causing the industry severe damage. A recent survey showed that movie piracy cost the film industry \$6.1 billion and nearly 150,000 jobs. Recent research has indicated over 100,000 movies per week are illegally downloaded in Ireland alone, with 50% of all new DVDs sold being illegal, valued at approx. €80 million. Ireland has become the first country in the EU to take active steps in this area, with Eircom implementing processes that will lead to cutting off broadband customers found to be repeatedly file sharing on-line illegally.

## Television

The Irish television market consists of a strong public service broadcaster RTÉ, alongside a number of smaller national and local broadcasters. RTÉ (RTÉ One and RTÉ Two) has a combined national market share of 34.5% and a national peak share of 41.2%. It is financed by the licence fee, advertising and other commercial activities. The strongest commercial station is TV3, which has 98% penetration and a national market share of 11.7%, while the Irish language broadcaster TG4 has a market share of 2.5%.

In certain border areas of Ireland, and on the pay TV services, UK channels are available, but this will cease for the analogue viewers in 2012 as the analogue switch-off programme is completed.

In Ireland, there is a very high take-up of digital and pay TV services, compared with international benchmarks. The main Irish pay TV providers are Sky, which has nationwide coverage via its satellite network, and UPC Ireland, which is limited to urban areas via its cable and MMDS networks. Both services offer "standard" services as well as add-ons that include digital recording, multi-room viewing, HD content etc.

Although Digital Terrestrial Television (DTT) has not yet launched in Ireland, RTÉ is mandated under legislation to establish a national DTT service in direct replacement of the present analogue service. The Broadcasting Authority of Ireland (BAI) is responsible for licensing commercial DTT. On 18th May of this year, the BAI announced that the licensing process had concluded without the award of a commercial DTT licence. The BAI now considers that it will not be feasible to introduce commercial DTT as originally intended until after the Analogue Switch Off in 2012. DTT services have been launched already in most European countries, with Analogue Switch Off having been completed in 8.

The new EU Audio Visual Media Services Directive (AVMSD) replaced the Television Without Frontiers Directive. The AVMSD sets down standards for linear (scheduled) and non-linear (unscheduled) audiovisual content. At the end of 2009, IBEC facilitated the establishment of a new body ODAS (On Demand Audiovisual Services Group) which has developed a code of practice for non-linear services.

# Appendices

Appendix I: Economic Analysis 2009

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Appendix VIII: List of Productions included in the Report 2009

# Appendix I: Economic Analysis 2009

## Funding

In 2009, the 257 productions had combined budgets totalling €243.3 million. Funding from Irish sources amounted to €115.6 million, 48% of the total funding. Please note that the IBEC data collection method for Project Financing information has changed this year in order to more accurately reflect the benefit of the Section 481 Tax incentive and other funding, thus direct comparison with previous years' data in this field is not advised.

	Feature Films €m	Independent TV Productions incl Major TV Drama €m	Animation €m	All Productions €m
<b>Irish</b>				
- Bord Scannán na hÉireann/Irish Film Board	8.3	2.2	1.4	11.9
- Broadcasting Authority of Ireland	0.1	4.9	0.8	5.8
- Raidió Teilifís Éireann*	0.1	43.4	0.3	43.8
- Telefís na Gaeilge (TG4)*	-	17.2	0.6	17.8
- TV 3	-	0.1	-	0.1
- Net Section 481	6.6	15.4	7.3	29.3
- Other (including Art Council, deferments, private equity, sponsorship etc.)	2.4	1.2	3.3	6.9
<b>Sub Total Irish</b>	<b>17.5</b>	<b>84.4</b>	<b>13.7</b>	<b>115.6</b>
<b>Non Irish</b>				
- UK Sources	4.4	14.7	21.6	40.7
- Other EU Sources	4.9	1.1	-	6.0
- US	30.6	26.9	13.9	71.4
- Other	1.2	-	8.4	9.6
<b>Sub Total Non-Irish</b>	<b>41.1</b>	<b>42.7</b>	<b>43.9</b>	<b>127.7</b>
<b>Total</b>	<b>58.6</b>	<b>127.1</b>	<b>57.6</b>	<b>243.3</b>
- Gross Section 481(total amount raised)	25.5	58.0	23.1	106.6

\* See Appendix V for clarification



## Expenditure

Of the €243.3 million combined budgets, €157.2 million was spent in the Irish Economy.

Type of Production	Total Expenditure €m (See (1) Below)			Of which: Irish Expenditure €m		
	2007	2008	2009	2007	2008	2009
Feature Films	19.3	71.9	58.6	12.2	35.4	27.8
Independent Productions & Major TV Drama	154.3	136.0	127.1	118.6	114.6	104.3
• RTÉ	(64.5)	(70.7)	(49.8)	(56.3)	(64.3)	(44.5)
• TG4	(25.9)	(22.1)	(25.7)	(20.7)	(19.0)	(22.8)
• TV3	( - )	( - )	(1.7)	( - )	( - )	(1.4)
• Other TV Productions	(63.6)	(43.2)	(49.9)	(41.6)	(31.3)	(35.7)
Animation	22.4	38.9	57.6	12.4	17.8	25.1
<b>TOTAL</b>	<b>195.7</b>	<b>246.8</b>	<b>243.3</b>	<b>143.2</b>	<b>167.8</b>	<b>157.2</b>

(1) These Independent TV productions are classified by the organisation which was primarily involved with the various productions. Therefore, although for example TG4 is shown to have a total expenditure of €25.7 million, 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 €49.8 million.

# Appendix I: Economic Analysis

## Employment

A total of 17,013 people were directly employed in relation to these 257 independent productions, of which 84% were Irish. This figure excludes direct employment generated through the expenditure of €75.3 million on Irish Goods and Services and indirect employment generated through the multiplier effects of the total Irish expenditure €157.2 million in the economy. A total of 2,413,170 work hours were generated, which translates to the equivalent of 1,368 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	3,898	2,693	1,205
Independent Productions & Major TV Drama	11,609	10,532	1,077
• RTÉ	(4,436)	(4,307)	(129)
• TG4	(2,636)	(2,440)	(196)
• TV3	(259)	(254)	(5)
• Other TV Productions	(4,278)	(3,531)	(747)
Animation	1,506	1,506	1,506
<b>TOTAL</b>	<b>17,013</b>	<b>14,198</b>	<b>2,815</b>

### Equivalent Full-time Jobs

Total Irish Work Hours	Full-time Equivalent Jobs <sup>2</sup>
293,583	166
1,718,557	975
(669,948)	(380)
(499,404)	(283)
(67,056)	(38)
(482,149)	(273)
401,030	227
<b>2,413,170</b>	<b>1,368</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 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 2009 gross Section 481 finance was €106.6 million and the tax foregone on this was €43.7 million.

As mentioned above, returns to the Exchequer are derived from incomes and expenditure generated directly and indirectly by the audiovisual industry. In 2009 direct tax receipts were €30 million, comprising €14.6 million from PAYE/PRSI, €9.7 million from schedule D and €1.1 million from VAT and Corporation Tax (see Appendix III). Indirect tax receipts are estimated to have amounted to €25.4 million, giving a total of €55.5 million in receipts.

Thus the net benefit to the Exchequer in 2009 was receipts of €55.5 million less the tax foregone of €43.7 million yielding a net gain of €11.8 million.

# Appendix II: Production Details

## Summary 2005-2009 Comparison

### Production

Production Details	2005	2006	2007	2008	2009
Total Funding €m	152.3	279.9	195.7	246.8	243.3
Irish Funding €m	111.8	184.0	162.7	188.8	115.6
Non-Irish Funding €m	40.5	95.9	33.0 <sup>+</sup>	58.0 <sup>+</sup>	127.7
Total Expenditure €m	152.3	279.9	195.7	246.8	243.3
Irish Expenditure €m	96.9	161.2	143.2	167.8	157.2
Non-Irish Expenditure €m	55.4	118.7	52.5	79.0	86.1
Total Numbers Employed	9,299	17,476	14,711	15,147	17,013
Total Irish Employment	8,468	15,143	12,727	12,660	14,198
Total Non-Irish Employment	831	2,333	1,984	2,487	2,815
Total Irish Work Hours	1,863,131	3,198,066	3,060,777	2,877,978	2,413,170
Equivalent Full-time jobs	1,058	1,814	1,735	1,631	1,368
Total Irish Labour Costs €m	39.8	87.0	76.2	85.6	77.2
Irish Labour Costs – Subject to PAYE €m	13.4	24.5	24.2	33.5	33.3
Irish Labour Costs – Other (Schedule D) €m	26.4	62.5	52.0	52.1	43.9
Gross Return to the Exchequer €m*	31.9	55.7	49.1	58.5	55.5
Tax Foregone to the Exchequer via Section 481 €m	15.1	36.2	31.1	32.8	43.7
Net Gain to the Exchequer €m	16.8	19.5	18.0	25.7	11.8

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

\* See Appendix IV for calculation

# Appendix III: Production Details

## By Type of Production - 2009

### Production

	Feature Films €m	Independent TV Productions incl Major TV Drama €m	Animation €m	All Productions €m
Total Funding €m	58.6	127.1	57.6	243.3
Irish Funding €m	17.5	84.4	19.4	115.6
Non-Irish Funding €m	41.1	42.7	38.2	127.7
Total Expenditure €m	58.6	127.1	57.6	243.3
Irish Expenditure €m	27.8	104.3	25.1	157.2
Non-Irish Expenditure €m	30.8	22.8	32.5	86.1
Direct Returns to the Exchequer - Net Vat €m	0.1	0.6	0.1	0.8
Direct Returns to the Exchequer – PAYE €m	4.0	3.4	1.1	8.5
Direct Returns to the Exchequer – PRSI €m	2.1	2.8	1.2	6.1
Direct Returns to the Exchequer – Schedule D & Corp Tax €m	1.2	7.3	1.5	10.0
Direct Returns to the Exchequer – Total Tax €m	7.4	14.1	3.9	25.4
Total Irish Labour Costs €m	11.8	51.1	14.3	77.2
Irish Labour Costs – Subject to PAYE €m	6.5	19.4	7.4	33.3
Irish Labour Costs – Other (Schedule D) €m	5.3	31.7	6.9	43.9
Total Numbers Employed	3,898	11,609	1,506	17,013
Total Irish Employment	2,693	10,532	973	14,198
Total Irish Work Hours	293,583	1,718,557	401,030	2,413,170
Equivalent Full-time jobs	166	975	227	1,368



# Appendix IV: Contribution

## Contribution of the Film and Television Sector to the Irish Economy 2009

### Contribution

This section of the report sets about measuring the contribution of the film production sector to the 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 Appendix III, the total tax revenue directly attributable to productions is €25.5 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 worth €75.3 million and the tax revenue generated through the expenditure of the net income (€77.2 million - €24.3 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  $(0.25 * €75.3 \text{ million}) = €18.8 \text{ million}$ . 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  $((€77.2 \text{ million} - €24.3 \text{ million}) * 0.85 * 0.25) = €11.2 \text{ million}$ . Thus the total indirect tax revenue attributable to productions is €30.0 million, giving a total tax revenue, direct and indirect, of €55.5 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 2009) 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 32.4% in the tax year 2008 to 41% in the tax year 2009.

On balance then, 41% of Section 481 funding for audiovisual production activity is tax foregone by the state. This amounts to €43.7 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.<sup>1</sup> 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.



# Appendix IV: Contribution

## Contribution of the Film and Television Sector to the Irish Economy 2009

### Contribution

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:

$$(0.7354 * 0.48) + (0.9284 * 0.52) = 0.8358$$

By applying the composite GNP multiplier of 0.8358 to the Irish expenditure of €157.2 million, we estimate the final contribution of this expenditure to the Irish economy to be €131.4 million. Similarly, by applying a weighted employment multiplier of 38.91 to the expenditure of €157.2 million in Ireland, we estimate the final contribution of this expenditure to Irish employment to be 6,117 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

*1 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.*

# Appendix V: Clarification

## Clarification Notes

### Certification

A significant number of the feature films and major television dramas in this report were subject to the certification terms of Section 481 of the Taxes Consolidation Act, 1997 (as amended). Certification ensures that each proposed qualifying film project is analysed by the Department of Tourism, Culture and Sport to meet three of the following cultural test criteria:

- The project is an effective stimulus to film making in Ireland, and is of importance to the promotion, development and enhancement of creativity and the national culture – through the medium of film, including, where applicable, the dialogue/narration is wholly or partly in the Irish language or the production of a full Irish-language version of the film is included as part of the total budget for the film.
- The screenplay (or, in the case of a documentary film, the textual basis) from which the film is derived is mainly set in Ireland or elsewhere in the EEA.
- At least one of the principal characters (or documentary subjects) is connected with Irish or European culture.
- The storyline or underlying material of the film is a part of, or derived from, Irish or European culture and/or heritage; or, in the case of an animation film, the storyline clearly connects with the sensibilities of children in Ireland or elsewhere in the EEA.

- The screenplay (or textual basis) from which the film is derived is an adaptation of an original literary work.
- The storyline or underlying material of the film concerns art and/or an artist/artists.
- The storyline or underlying material of the film concerns historical figures or events.
- The storyline or underlying material of the film addresses actual, cultural, social or political issues relevant to the people of Ireland or elsewhere in the EEA; or, in the case of an animation film, addresses educational or social issues relevant to children in Ireland or elsewhere in the EEA.

### Bord Scannán na hÉireann/Irish Film Board

The Board's budget is voted annually by Dail Éireann and in 2009 the Board received Capital Grant in Aid of €17,317,000. The Irish Film Board was also allocated supplementary funding of €1,500,000 and an administration grant of €3,099,000. The figures in Appendix I 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 Irish Film Board schemes and documentaries.

### Raidió Teilifís Éireann

A total of 118 RTÉ Independent Television Productions are analysed in this report reflecting an RTÉ investment of over €43 million in 2009. As pointed out in previous reports, RTÉ expenditure is confined to productions for which Economic Database Input Forms were provided by independent producers.

### TG4

A total of 69 productions in this report fall under the umbrella of TG4. For those productions TG4 contributed over €17 million of the €25.7 million total budget in 2009.

### 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.

# Appendix VI: Section 481 Investment

## 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).

Amendments in the Finance Acts in 2008 extended the scheme for a further four years until the end of 2012, increased the overall ceiling on qualifying expenditure from €35 million to €50 million, increased the individual investor cap for those wishing to invest finance in film in Ireland to €50,000 per annum from the previous limit of €31,750 and increased the relief on that investment to 100% from 80%.

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 100% 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

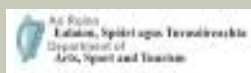
A qualifying film is a film in respect of which The Revenue Commissioners has given a certificate.

### 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.

## Agencies



### **An Roinn Turasóireachta, Cultúr agus Spóirt/Department of Tourism, Culture and Sport**

The Department of Tourism, Culture and Sport has 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.

The Government continues to provide significant support and endorsement for both the Irish Film Board and the Irish Audiovisual sector by ensuring that the capital budget for the Irish Film Board in 2011 will be €16 million, only a small decrease of €0.5 million from 2010.



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

The IBEC 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, Údarás na Gaeltachta and BAI.



### **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 Islands 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 co-operation with other Irish semi State 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.



### **Raidió Teilifís 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 75.4% home production on its peak-time schedule on RTÉ One and 36.2% on RTÉ Two during 2009. RTÉ Television's total national share in peak time (18.00 to 23.30) in 2009 remained steady at 42.5%, despite intense competition, reflecting the strength of home production. 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 expenditure incurred on commissioning activities inclusive of attributable organisational overhead (€57 million in 2009 in respect of 878 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.



# Appendix VII: Agencies

## Agencies involved with the Audiovisual Production Industry in Ireland



### Broadcasting Authority of Ireland (BAI)

The BAI Sound and Vision Scheme continues to provide significant support for the television sector. In 2009, over €8.5 million in new grants was awarded to 58 projects covering 50 different production companies. These covered a range of genres and formats with the majority of the programming being made available on Irish terrestrial broadcasters. In 2009, almost €11 million in funding was actually disbursed to support new television and radio programmes. Sound and Vision II will make over €25 million available over the 2010 and 2011 period, €21 million for new television programming and €4.5 million for new radio programming.



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.

TG4 is a public body whose directors are appointed by the Minister for Communications, Energy and Natural Resources following selection procedures laid down in the Broadcasting Act 2009.

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's principal

source of funding is provided through Grant-in-Aid from the Department of Communications, Energy and Natural Resources. During 2009, TG4 received €35.23 million of current funding from the Department.

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 120 of the Broadcasting Act 2009.



### Screen Producers Ireland (SPI)

Screen Producers Ireland (SPI) is the representative body for over 150 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.



### 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 1990'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.

National and global economic conditions created challenges for Gaeltacht companies across all sectors in 2010 and the audiovisual sector was not immune to these difficulties. However, despite the unprecedented changes in the economic climate the audiovisual companies have largely managed to sustain their employment figures but they are acutely aware of the necessity to reduce the dependency on the home market to remain viable.

The BAI's Funding Scheme 'Sound and Vision' continued to be an important source of funding for Gaeltacht companies in 2010, bringing increased activity to the Gaeltacht throughout the year and allowing production companies undertake larger and more challenging productions.

Employment in this sector in the Gaeltacht is very important and Údarás na Gaeltachta will endeavour to support companies in this sector in whatever way possible.



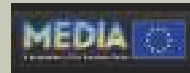
# Appendix VII: Agencies

## Agencies



### 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 2009, Bord Scannán na hÉireann/the Irish Film Board paid Ireland's contribution of €291,669. Brendan McCarthy was the Irish representative, and Ireland received €1,496,002 in production funding from the fund in this year.



### MEDIA Desk Ireland and 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 MEDIA International/MEDIA Mundus, 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.

In 2009 it is estimated that the Irish audiovisual industry received €2.007 million for the Development of projects, Training, Distribution, Exhibition, Festivals and Market access support. An additional €100,000 was received from the MEDIA International Programme.

**Animation**

23 Degrees 5 Minutes  
Athghuthú  
Chloe's Closet  
Dive Ollie Dive 2  
Fluffy Gardens Series 2  
Garth & Bev, Series 1 PartB  
Gumball  
Maryoku Yummy  
Octonauts  
Old Fangs  
Olivia II  
Paperman  
Peidhleacán Solais (Butterfly Light)  
Read Lead  
Roy  
Santapprentice  
The Brainy Kids and the History of.....  
The Monk and the Fly  
The World of Foley  
Thor - The Edda Chronicles  
Trolly Boy  
Zoo Factor

**Film**

A Kiss for Jed Wood  
All Good Children  
As If I'm Not There  
Between the Canals  
Circus Fantasticus  
Leap Year  
My Brothers  
Outcast

Seaside Stories  
Sensation  
Snap  
Some Other Stories  
The Fading Light  
The Guard  
The Last Word  
The Looking Glass  
The Runway  
The Wake Wood

**RTÉ**

A Time of War  
Aisling's Summer Diary  
An Cór  
Animal Clinic  
Artaud on Aran  
At Your Service - Series 2  
At Your Service Revisits - Series 1  
Back to the Noughties  
Ballybrando  
Band From School  
Band of Brothers  
Baz Extreme Worlds  
Boys of St. Columb's  
Brides of Franc: The Anniversaries  
Buyer Beware 2  
Celebrity Bannisteoir  
Ceol Sna 70's  
Charity Lords of the Ring  
Charlie Bird's American Year  
Crime Call 6  
Designs for Life

Dragons Den Series 2  
Ear to the Ground  
The School  
Fergal Quinn's Retail Therapy  
Find me a Family  
Fleadh Cheoil 2009  
Florida Priests  
Gavin Friday  
Glas Vegas Year 3  
Go Go Stop  
Googled  
Growing up Gay  
Hands On  
Health of the Nation  
Higher Ground  
Horses  
Hotpress  
How Long Will You Live Revisits - Series 4  
I Witness  
Ice Star Search Inserts YPP 08/09  
If Lynch Had Landed  
Inside the Crystal Ball  
Life After Dell  
Living Lightly  
Living Lightly Christmas  
Living the Wildlife  
Love-Hate  
Masses/Service 2008/2009  
Mattie 'We've Only Just Begun'  
Battle of the Sexes  
Mountbatten: Return to Mullaghmore  
Muintir na Mara 4  
Music Changes Lives

My Showhouse  
No Frontiers Series 12  
O'Reilly  
On God's Mission  
One Weekend in September  
Operation Transformation Season 3  
PJ's Big Ride  
Prank it up 2009  
Pure Mule - The Last Weekend  
Quizone Season 5  
Raw  
Return of the Raptors  
Road to Croker 2009  
Room to Improve 3  
Room to Improve 4  
RTÉ Horse Racing 2009  
Ryan Confidential  
Scor 09  
Scrap Metal  
Seahorseman  
IF I Should Fall Behind  
Skippers  
St. Patrick's Festival 2009  
Stone Cold Sober  
Sweded TV Series 2  
Teens in the Wild  
Test The Teachers  
The 11th Hour  
The Afternoon Show  
The All Ireland Talent Show Series 2  
The Big, Big Street Bazaar  
The Byrne Ultimatum  
The Clinic 7

## Appendix VIII: Productions 2009

The Drums  
The Fields of Athenry  
The Greatest Irish Sportsman Ever  
The Guitar  
John Connolly - Of Blood and Lost Things  
The Mill  
The Panel - Series 8  
The Restaurant - Season 7  
The Restaurant "Christmas Special"  
The Savage Eye  
The Sheriff and Me  
The Shrinks  
The Variety Show  
The Writing in the Sky  
This is Me 2  
Tommy and Hector's Craic House  
Top 10 Recession Proof Business  
Transatlantic Sessions 4  
Tua Nua ix  
Twelve Rounds with Sean Scully  
Val Falvey T.D.  
Victoria & Shane's Secret Garden  
Welcome to my World  
What Went Wrong  
When Under Ether  
Young Scientist Inserts 2010  
Your Bad Self  
YPP Christmas Links 2009  
YPP ICE Quirky Sports Challenges 2009  
Yuletide Fancy Vittles

### TG4

Na Coisithe - Ar Thóir Mo Sheanathar

Amhrán na Phaidí St Isidore's (Rome)  
An Piopa / The Pipe  
An Portach  
An Puball Gaeilge  
An Crisis  
Atógáil Sráid Bombay  
Barr an Ranga  
Big Jack Cearta  
Bothar go dtí an Whitehouse 2009  
Cailini Carhracha Tuaithe  
Ceart & Coir III  
Ceol Daniel  
Chéad Seans  
Clann Lughaidh  
Cowboys  
Craic de Staic  
Dáithí ar Thóir  
Diabhal ag an Damhsa  
Dónal's Band  
Dubáil 2009  
Dubbing  
Ealú 2  
Fag an Bealach  
Farragí na hÉireann  
Feirm Factor - Sraith a Do  
Fó-theidealú  
Garrai Glas  
Geantraí 09  
Glor Tire - Sraith 6  
Gradam Ceol TG4  
Horslips - Rotha Mór an tSaoil  
Idir Mna II  
Imeall 2

John 3:7  
Lámh Fhada Dan Donnelly  
Máirtín  
Maru 4  
Mí Na Meala 3  
Na Cloigne  
Na Zimmers  
I GCoiscéim na Naomh  
Séamus Goodman - Caomhnóir Ceoil  
Oireachtas 2009  
Ollsoláthar 2008/2011  
Pop 09/10  
Raiftearaí an file  
Rapairí  
Rasai Na Gaillimhe  
Rocket Boy and Toro  
Rós na Rún 13  
Scéal an Airgid Molly Keane - Faobhar ar a Guth  
Seacht Series 3  
Seachtar na Cásca  
Seó Spóirt 3  
Sharon Shannon - Beo on inec Killarney  
Caillte i nGarraí na Iascaire  
Siar sna nEideanna Anam an Amhráin  
Síol Sceal  
Solas  
Tarraingt Tarracóirí  
Taicse na Tuaithe  
TK Whitaker - Seirbhíseach an Stáit  
Tragóid KLM  
Vital Signs  
Volvo Ocean Race 2009

### Other TV Productions

A Clowns Requiem  
Alibi  
Tachran Gan Todhchai  
Apples of the Green  
As the Light Leaks In  
Bad Robot  
Behind the Desert Wall  
Burma Soldier  
Bye Bye Now  
Circus Man  
Dental Breakdown  
Donkey  
Flatbed  
George Gently - Series 3  
Headspace  
If These Walls Could Talk  
Jack Taylor - The Guards  
Jericho  
Lola Ya Bonobo  
Pyjama Girls  
Runners  
Separation Agency  
The Irish Dog Whisper  
The Louis Vuitton Bag  
The Parting  
The Quiet Man - A Milestone or a Millstone  
The Silence  
The Tudors 4  
Today is Better Than Two Tomorrows  
TV Dinner  
Moore Street Masala





#### IBEC AUDIOVISUAL FEDERATION

Confederation House 84/86 Lower Baggot Street Dublin 2

PHONE + 353 (0)1 605 1528 FAX + 353 (0)1 638 1528

EMAIL [audiovisual.fed@ibec.ie](mailto:audiovisual.fed@ibec.ie) [www.ibec.ie/avf](http://www.ibec.ie/avf)

IBEC Audiovisual Federation is a business sector within IBEC



[www.ibec.ie](http://www.ibec.ie)

#### CORK

Knockrea House  
Douglas Road  
Cork

PHONE + 353 (0)21 429 5511  
EMAIL [info@ibec.ie](mailto:info@ibec.ie)

#### SOUTH EAST

Confederation House  
Waterford Business Park  
Cork Road Waterford

PHONE + 353 (0)51 331 260  
EMAIL [southeast@ibec.ie](mailto:southeast@ibec.ie)

#### MID-WEST

Gardner House  
Bank Place  
Charlotte Quay Limerick

PHONE + 353 (0)61 410 411  
EMAIL [midwest@ibec.ie](mailto:midwest@ibec.ie)

#### WEST

Ross House  
Victoria Place  
Galway

PHONE + 353 (0)91 561 109  
EMAIL [galway@ibec.ie](mailto:galway@ibec.ie)

#### NORTH WEST

3rd Floor Pier One  
Quay Street  
Donegal Town

PHONE + 353 (0)74 972 4280  
EMAIL [northwest@ibec.ie](mailto:northwest@ibec.ie)

#### IBEC EUROPE

Avenue de Cortenbergh, 89  
Boite 2 1000 Bruxelles,  
Belgium

PHONE + 32 (0)2 512 3333  
EMAIL [ibec.europe@ibec.ie](mailto:ibec.europe@ibec.ie)  
[www.ibec.ie/europe](http://www.ibec.ie/europe)