

# CREATIVE CAPITAL

## Building Ireland's Audiovisual Creative Economy

A report prepared for the Minister for Arts, Heritage and the Gaeltacht  
by the Audiovisual Strategic Review Steering Group – April 2011

*Creative Capital 'is the intrinsically human ability to create new ideas, new technologies, new business models, new cultural forms and whole new industries that really matter.'*

RICHARD FLORIDA, 2006



# Preface

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The PricewaterhouseCoopers (PwC) report on the audiovisual content production industry was published in December 2008.

The report looked beyond those working solely in feature film production to include everyone involved in all forms of audiovisual content production in Ireland.

Following presentation of the PwC report to the Department of Arts, Heritage and the Gaeltacht, a Steering Group was established with Brendan Tuohy ( former Secretary General at the Department of Communications) as its Chairperson. The Steering Group was asked to examine and recommend new enterprise policies to maintain and develop the industry's growth.

Members of the Steering Group were drawn from sectors of the audiovisual industry with export experience ( film, TV drama, animation and entertainment television) as well as representatives from the Department of Arts, Heritage and the Gaeltacht, the Department of Communications, Energy and Natural Resources, the Department of Enterprise, Jobs and Innovation and Bord Scannán na hÉireann/the Irish Film Board (IFB).

The task of the Steering Group was to consult with stakeholders in the audiovisual industry to identify what opportunities exist to generate further sustainable growth – nationally and internationally – and also what policies and initiatives are now needed to facilitate and support future growth and increased employment in the industry.

## Members of Audiovisual Strategic Review Steering Group

<b>Brendan Tuohy</b>	Chair of the Audiovisual Strategy Steering Group
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# Preface

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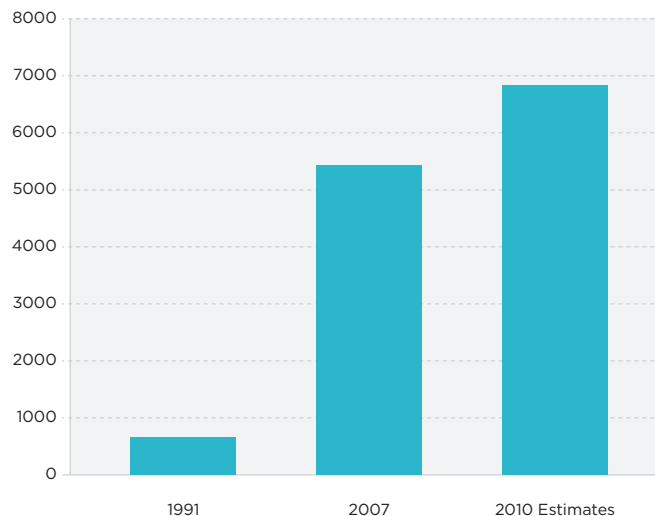
# Introduction

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In 1993 the Irish Government introduced three pieces of legislation that laid the foundation for the creation of an Irish audiovisual content production industry.

- An amendment to the **Broadcasting Act** that required RTÉ to spend a minimum amount of the annual licence fee on independently commissioned programmes.
- An amendment to **Section 481 of the Finance Act** to provide for a competitive tax incentive to encourage Irish and international film making in Ireland.
- And the reconstitution of Bord Scannán na hÉireann /the Irish Film Board (IFB) under the **Irish Film Board Act (1980)** as a dedicated agency with a mandate and funding to assist in the development of Irish film making and in the development of an industry in Ireland for the making of films.

The number employed full-time in the industry in 1991 was established to be 694<sup>1</sup>. By December 2007, the numbers working full time in the industry had grown to 5,440 and the annual economic value of the industry reached over €550 million, a substantial part of which is represented by foreign direct investment<sup>2</sup>.



*Graph 1: Full-time Equivalent Employment in the Irish AV Sector.*

1 Report on Indigenous Audiovisual Production Industry, Coopers and Lybrand, 1992

2 Irish Audiovisual Content Production Sector Review, PwC, 2008

Today there are in the region of 500 Irish-owned companies involved in a diverse range of audiovisual content production activities mainly working on film, television, animation and video content for all platforms. This level of production activity in turn produces further substantial indirect employment in the Irish economy at a ratio of 1:1.25 according to IBEC<sup>3</sup> figures. A key feature of the industry is that production expenditure in Ireland is spread throughout the country.

In a recent EU report on building the European digital economy it states that ‘Creative and cultural industries are a powerful motor for jobs, growth, export earnings, cultural diversity and social inclusion representing 4.5% of the total European GDP in 2008 and accounting for 3.8% of the workforce’<sup>4</sup>.

The global market for creative audiovisual content is growing and is estimated to reach \$1.7 trillion by 2013 and is projected to grow at a rate of 30% over the next five years<sup>5</sup>.

The opportunity and the challenge for the Irish industry is to build on the substantial progress of the last 15 years into this global market.

The purpose of this report is to identify the strengths and weaknesses of the Irish industry and to recommend to government specific policies that will equip the industry to successfully enter the next phase of its growth from a predominantly domestic platform into international markets.

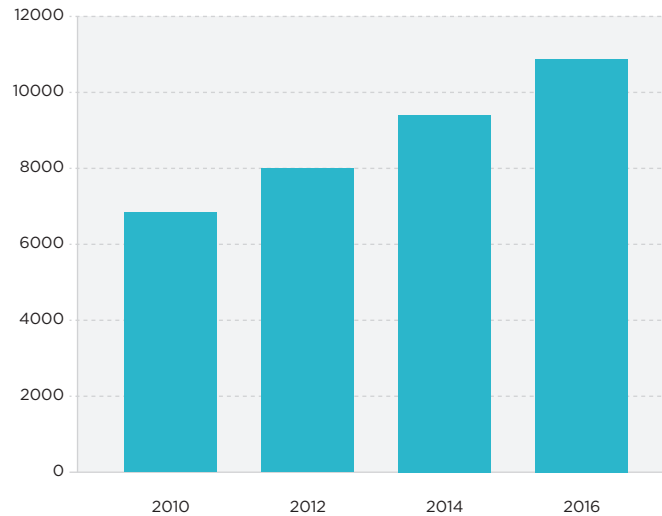
Just as clear government policy introduced in the 1993 legislation led to an overall increase of ten times the number employed in the industry, so the policies recommended in this report will underpin the next phase of growth for the next five years and should lead to an increase in the numbers employed directly in the industry by an average of 8% per annum over the next five years.

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3 Film and Television Production in Ireland, IBEC, 2010

4 Building a Digital Economy: The importance of saving jobs in the EU’s creative industries, TERA Consultants, March 2010.

5 Global Entertainment and Media Outlook, 2010 – 2014, PricewaterhouseCoopers, 2010.



*Graph 2: Estimated Full-time Equivalent Employment Growth in the Irish AV Sector*

Developing the people and the skills to meet this demand is fundamental to the growth strategy for the industry. Policies to develop people and skills form a major part of the report's recommendations.

With the convergence of media and technology, the landscape of production internationally – and also in Ireland – has changed, and continues to change dramatically. The international demand for quality content has never been greater and the traditional lines of division within the industry have blurred, and in some areas even disappeared entirely. Today, the majority of those working in film also work in TV production, on-line content and animation. This is the context in which we have addressed the issues for the future.

The policy recommendations in this report should enable the audiovisual industry to continue to develop with a distinctive and creatively-led Irish film, TV and animation industry while, at the same time, fulfilling its potential as a key pillar of Ireland's creative economy and emerging creative industries.

The recommendations in this report are not an a la carte menu. They are designed as an integrated set of proposals that will only deliver if delivered in an integrated manner. They are cost neutral in their effect.

Finally, I would like to take this opportunity to thank all those on the Steering Group and all the industry stakeholders who have engaged with the consultations on which our conclusions are based. I would also like to thank in particular Teresa McGrane and Mags O'Sullivan from the IFB who have provided tremendous support and back-up to the Steering Group.

Brendan Tuohy  
April 2011

*“How can the Irish audiovisual content production industry continue to develop and grow over the next five years?”*





# Objectives

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1. To recommend a framework of policies and initiatives for government that will stimulate growth over a five-year period and:

- Double the value of the Irish audiovisual industry to over €1 billion;
- Increase direct employment in the industry from 5,440 to over 10,000;
- Increase exports of Irish audiovisual production.

2. To recommend policies that are **achievable, cost neutral** and that **maximise the employment potential** of the audiovisual content production industry.



# Executive Summary

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**Following an extensive consultation process, the Audiovisual Strategic Review Steering Group conclusion is that meaningful and sustainable growth can only take place by expansion into international markets through Irish content companies and content creators exporting successfully, and by Ireland expanding as a centre for international content production.**

The Steering Group has identified the key areas that Government should prioritise in order to achieve the stated growth objectives of the report within a five year timeframe.

In each priority area, the Steering Group is also making specific recommendations designed to achieve the stated growth objectives of the report within a five year timeframe.

The consultation process identified the key priority areas as:

## Develop the Industry and Build Strong Companies

Innovation and entrepreneurial drive led by Irish-based companies of scale will open up new markets and develop new products and services for all markets. The summarised recommendations of the report are:

### Develop the Industry

- Section 481 to be extended to 2020;
- Introduce annual international TV co-production fund with high economic return;
- The Minister for Arts, Heritage and the Gaeltacht to convene industry-wide industrial relations consultation with a view to concluding comprehensive agreements;
- Establish Piracy Prevention and Policy Group;
- Continue broadband roll-out and investment in digital sites.

## Build Strong Companies

- Target innovation funding from Innovation Fund Ireland;
- Extend Research and Development Tax Credit to include content development, supporting convergence between the audiovisual content industry and the gaming industry;
- Employment and Investment Incentive Scheme to be extended to audiovisual content production companies;
- Rights ownership to vest in production companies and content creators to drive export growth;
- Multi-project development funding to be made available to the industry;
- Multi-annual commissioning to be a feature of broadcast commissions;
- Develop Irish banking facilities to support audiovisual exports and trade;
- Build access to angel investors and private equity;
- Incentives to be made available which will promote scale through consolidation;
- Build new partnerships in the convergence space.

## Build Exports

Ireland is a highly successful exporting country and the transfer of this know how via existing State channels will greatly benefit the audiovisual content industry in the next phase of its growth from predominantly domestic markets to predominantly international markets. The summarised recommendations of the report are:

- A strategic plan concentrating on audiovisual exports (sales and promotion) to be developed by the relevant agencies (Enterprise Ireland, Irish Film Board, Culture Ireland and the Irish Film Institute) in consultation with the industry. This plan will include metrics to measure cultural exports.

## Develop Skills and Talent

The audiovisual content industry is dependent for its success on the quality of talent and skills available to it. The employment targets will depend on a significant increase in the numbers and quality of people available to the industry. The summarised recommendations of the report are:

- The IFB to take full responsibility for determining the essential creative and

technical skills necessary to sustain growth and development;

- Develop Screen Training Ireland to ensure skills training is aligned with industry growth plan targets;
- Develop and plan for the existing and future skills needs of the industry and update the Forfás reports on 'Future Skills Needs';
- Develop 'on the job' training initiatives;
- Develop apprenticeships and graduate placements;
- Develop retraining opportunities from other sectors;
- Establish business mentoring and export focused programme;
- Develop digital and media literacy programmes for primary and post-primary education delivering the ambitions of '21st Century Schools';
- Establish an Industry and Education Forum to assist in rationalising specific training and education at third level to eliminate duplication and waste;
- Introduce high-level international mentoring.

## A Strong Domestic Industry

A vibrant domestic industry with the dynamics to raise quality of output and develop skills is an essential requirement from which to build sustainable export markets for the Irish content industry. The summarised recommendations of the report are:

- IFB policies to increase the Irish audience for Irish film and develop early stage marketing and audience plans;
- IFB to encourage the development of a local distribution market;
- IFB and local broadcasters to identify mutual opportunities to co-fund Irish cinema and television drama;
- IFB and each of the local broadcasters to agree a Memorandum of Understanding (MoU) setting out common ground for feature film, TV drama, animation, documentary production and industry training;
- Protect and develop small, niche content companies and content creators driven by innovation and creativity;
- Increase the percentage of locally produced children's programming;
- Establish the Irish Film Channel;
- Create a single content funding agency by merging the funds of the Sound and Vision fund with those of the IFB while preserving their individual remits.

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## Mobilisation of the Industry and the Whole of Government

The objectives set out in this report require a coordinated response from the industry and the relevant state agencies if they are to be achieved. Success will require organisation through co-ordination and action from the various constituent sections which make up the audiovisual industry working together – the Irish Film Board (IFB), Enterprise Ireland (EI), the Industrial Development Authority (IDA), industry guilds, trade unions, Screen Training Ireland (STI), the Higher Education Authority (HEA), broadcasters and all elements of the industry. The summarised recommendations of the report are:

- An updated mandate for the IFB so that it can act as an effective integrated screen agency for the whole of the audiovisual industry and can drive forward the recommendations in this report;
- Resources are provided to develop a Business / Enterprise Development Unit within the IFB;
- An MoU between IFB and EI to enhance export growth;
- An MoU between IFB and IDA to coordinate FDI opportunities across the audiovisual industry;
- IFB to focus on enhancing existing key relationships across culture and all-island opportunities;
- IFB to develop a regional policy to assist local film commissions and digital industry initiatives to develop;
- Expanding international networks with a particular emphasis on the Diaspora;
- Align national policy with emerging EU policy and support for the content industry through the Creative Industries, Cultural Agenda and Digital Agenda frameworks.

The implementation of the recommendations in this report will be overseen by an Inter-Departmental Steering Committee comprised of representatives of the Department of Arts, Heritage and the Gaeltacht, the Department of Communications, Energy and Natural Resources and the Department of Enterprise, Jobs and Innovation together with industry representatives.

**The growth objectives set out in the report will only be achieved within the five year timeframe if the full body of the recommendations is implemented through a managed and integrated action plan supported by all stakeholders in the industry and the enabling government departments and agencies.**

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*“Ideas don’t fall from the sky; they come from people. People write the software. People design the products. People start the new businesses. People create the music and images that come streaming at us out of devices that other people create.”*

*The Flight of the Creative Class  
R. Florida*



# Develop the Industry and Build Strong Companies

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## Developing the Industry

Continuous high quality production emanating from Ireland and attracted into Ireland is the necessary environment in which to develop the industry as a whole. In the international markets for film, television and animation those countries that have an internationally competitive financial incentive, cost base and proven expertise in all aspects of creative production will be in the best position to compete.

**Continuous and increasing levels of quality production provide the environment for long term planning and investment on which growth will depend.**

## Production Incentive - Section 481 (TCA 1997)

Many countries including the United Kingdom, France, Germany, Hungary, Canada, Australia, New Zealand and many states in the United States have production incentives designed to attract international film and television projects. In the context of this international situation it is an essential requirement that Ireland has an attractive and competitive tax incentive targeting the audiovisual industry.

The audiovisual industry is defined by mobility with significant competition for productions between different jurisdictions. Section 481 remains vital as a key part of the competitive offering in the international marketing of Ireland as a location for investment. The Steering Group acknowledges that the recent extension of Section 481 will be an important cornerstone for further growth. However, long term growth of inward investment for international production is likely to require a longer term horizon and commitment if real gains are to be made.

## International TV Co-production Fund

Over the last number of years, Ireland has successfully attracted major event TV series such as 'The Tudors', 'Camelot', 'Primeval', 'Neverland', and 'Game of Thrones'. In order to capitalise on this initial success at a time when the success of these large scale TV productions are expanding internationally, the creation of a new and specific €2m per annum fund is

recommended to assist in increasing the flow of these productions into Ireland. The fund would aim to generate additional annual production to the value of €40m representing substantial inward production funds and generating a substantial number of new jobs.

## **Industrial Relations**

The audiovisual industry in Ireland operates in a complex industrial relations environment, which has not been perceived as internationally-competitive in the past and has led to negative comment from international trade press about Ireland.

Ireland's film making talent and skilled workforce are recognised the world over and are central to the strategy for expanding Ireland as an international centre of excellence for content production. In the interests of the workforce and both international and Irish based producers it will be essential for the industry to develop progressive industrial relations that match flexibility and competitiveness with fair and transparent terms and conditions for the Irish workforce.

In order to expedite fair, flexible, transparent and internationally competitive labour agreements across the industry, the Steering Group recommends that the Minister for Arts, Heritage and the Gaeltacht convene an industry wide consultation for all stakeholders to conclude a new set of agreements as a matter of urgency.

## **Piracy Prevention**

Piracy is as great a challenge for the audiovisual industry in Ireland as it is to the rest of the world. Over 100,000 movies are illegally downloaded each week in Ireland according to figures produced by INFACT, the industry body which monitors piracy. The industry needs to play a greater role in policy formation in this area and needs to agree a coordinated approach to the protection of content creators work.

Content creators are entitled to the same protection as the owners of any other asset.

Ireland's failure to protect the rights of content creators is very damaging for Ireland's credibility as a potential intellectual property hub and for the growth of indigenous content industries.

It is recommended that the industry establish an Industry Piracy Prevention and Policy Group to formulate a comprehensive and coordinated approach to the issue.



## Broadband and Digitisation

The continued development of the broadband network including nationwide high-speed coverage and digitisation of sites and screens are key priorities for the audiovisual industry. These policies are essential for stimulating local demand, increasing global access and ensuring that audiovisual content companies throughout Ireland function effectively.

The availability of a sophisticated broadband infrastructure in urban and rural areas also presents opportunities for content creators to stimulate local demand and find global audiences. According to Analysys Mason, 'although Ireland lags behind other countries in broadband speeds and price, initiatives are underway to remedy this including major public sector projects: the National Broadband Scheme and the Metropolitan Area Networks <sup>6</sup>. Wider availability of faster broadband will make an enormous contribution to the development of the audiovisual industry on a regional basis.

It is recommended that there be continued investment in broadband and the expansion of investment in digital sites.



## **Building Strong Companies**

Building strong substantial Irish based companies capable of developing international markets and exploiting ancillary areas of opportunity around content creation will result in high value employment and achieving industry sustainability. The consultation process identified a number of initiatives that would create an environment for Irish companies to develop and grow.

### **New Innovation Funding**

Given the dramatic changes happening within the audiovisual content industry, the Steering Group recognises the need for on-going industry innovation and development. There is need for a new source of funding to support development and innovation in companies.

As outlined in the *Programme for Government, 2011-2016* a focus needs to be placed on technological innovation in the creative industries. The Steering Group is recommending that support is provided by Innovation Fund Ireland to promote innovation and convergence in the audiovisual industry.

### **Content Development Tax Credit**

The audiovisual industry is no different to any other industry – it relies on quality research and development. The quality of projects depends upon the quality of its initial development. Project development can be the creation of great narratives but in the digital world it is model making, character creation, digital effects, visualisation and prototypes, format creation and pilot development. This is high-end, value added activity – and this is where ideas and concepts are visualised and created.

Consideration should be given to extending the current Research and Development Tax Credit to include audiovisual content development, where an intellectual property (IP) value is created that can be exploited from Ireland.

This initiative would promote innovation and enhance high-end creative development in Ireland, and would contribute to the value chain of activities being undertaken here, from development through production and exploitation. This would assist Irish companies to have meaningful creative international partnerships and would create high value employment through the concentration of creative development in Ireland.

In particular this initiative will drive the natural convergence of the audiovisual industry and the video games industries.

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## **Employment and Investment Incentive Scheme**

The revised Business Expansion Scheme (BES) allows investors to invest in companies and obtain a relief of tax for their investment. It is a stimulant to private investment in small to medium size enterprises. As the audiovisual industry evolves from being project-based to a company phase of development, access to investors equity is vital to support the growth of small companies.

It is recommended that companies producing and exploiting audiovisual content for international markets are allowed to qualify for the revised BES incentive scheme.

## **Rights Ownership**

For audiovisual content companies and content creators revenue streams come from the ability to sell and exploit the intellectual property rights of content. If companies have no rights and rely only on fees they earn as part of the production process, they have no intrinsic or lasting value in the work they create.

A fundamental principle of content creation is that ownership is vested in the creators. If content creators have greater ownership of the IP in their work, they can exploit those rights through licensing in national and international markets and on new platforms. By retaining and realising the value of their own rights, companies and individuals can create lasting value. This creation of long term asset value will in turn encourage re-investment in new content and investment in building companies of scale.

The overall principle of content creator's ownership of the rights in the work they create is recognised in the recently published Guidance for Public Service Broadcasters<sup>7</sup>. The Steering Group welcomes the BAI guidelines as potentially creating a key building block for successful Irish content companies to develop the scale and expertise to expand into export markets.

The experience in the United Kingdom suggests that before the change to the broadcast terms of trade regime which enshrined the rights of the content creators to ownership of the content they created, the industry was fragmented and lacked the scale to grow. Recent reviews have shown that, following the change in regulation, the benefits in the UK flowed both to the producers and the broadcasters through reinvestment, new co-production partnerships and enhanced quality.

## **Importance of Early Stage Project Development**

Project development is critical to successful content creation and is the R&D driver in the industry. Project development relies on good creative skills, instincts and access to sufficient project development funding. Development funds currently provided through the IFB are essential to the delivery of high quality content. A commitment to multi-annual commissioning would also help television companies to escalate development with the certainty of commissioned work.

Development is underpinned by strong creative teams and, in some cases, the involvement of key international talent.

The Steering Group recommends the following actions:

- IFB to instigate multi-project development funding for companies and individual content creators;
- Broadcasters to initiate multi-annual commissioning of programmes.

## **Finance – Banking Facilities, Angel Investors and Venture Capital Engagement**

Access to banking facilities is a key challenge in the audiovisual production industry. The type of funding generally available to companies is project-based, and companies rely on production fees in budgets for sustainability. Business supports have traditionally been limited.

The current economic climate is obviously impacting on national production funding. In this challenging environment, greater emphasis must be placed on international sources of funding, and in this regard lines of credit from Irish credit institutions for guaranteed export sales are not only essential, but will enhance the overall appeal and competitiveness of Ireland as a centre for international production.

To date the industry has not been seen as attractive to third party investors and/or venture capitalists. The combined effect of the measures proposed in this report will change the profile of the sector, and in the longer term, the underlying commercial viability of companies trading in the sector will attract private investment and this in turn will greatly enhance the long term viability of the sector.

To this end there are a number of interventions which would greatly help content companies including:

- Contract discounting facilities with Irish based financial institutions;
- BES availability to encourage private investment in the sector;

- Improved access to equity funding and venture capital funds.

The industry needs ongoing access to working capital to maintain expansion and continuity of production. Strong relationships with the banking sector are important and should be a key function of enterprise development.

The Steering Group is also recommending initiatives with Enterprise Ireland (EI) and the Industrial Development Authority (IDA) to broker relationships between content companies with international partners, and private equity and venture capital funds as part of an overall growth strategy.

## Promote Companies of Scale

Companies of scale are better equipped to compete internationally and the Steering Group recommends that incentives could be introduced to promote and encourage local industry consolidation. The objective of this process would be to assist individual companies achieve sustainable economics of scale to order to facilitate the internationalisation of the local industry.

## Building New Partnerships in the Convergence Space

Who are the new partners for Irish content companies and individual content creators? They are platforms, content aggregators, telecommunication companies, multi-nationals, advertisers, web developers and gaming companies. The presence in Ireland of many of the major media multi-nationals is a resource Irish content producers have not yet used to full advantage.

It is recommended that mechanisms are put in place by government agencies to enable the audiovisual content industry to develop new networks and partnerships between Irish and multinational content aggregators, telecommunication companies, advertisers, web developers and gaming companies.



# Build Exports

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International and domestic market conditions are currently difficult. The shift from linear schedule based television to digital on-demand and internet based services, as well as digital cinema and Video-on-Demand platforms have disrupted traditional business models. Extracting value from content in these new environments has not been fully realised, with various models such as pay-per-play, micro transactions, and subscription models still being tested. Alongside dealing with these challenges, the industry is also battling the reality of piracy.

In order to build successful exports, producers must produce high quality content with the ability to appeal to international audiences, while retaining rights that allow them to effectively exploit and repatriate the value of their work. Actions to help build exports include:

- Foster a ‘make-to-sell’ culture by encouraging a proactive engagement with market partners and audiences from early inception;
- Encourage the development of projects with international appeal;
- Retain rights and improve revenue sharing positions for producers in order to incentivise sales;
- Improve training for negotiation and sales skills in order to maximise the potential of sales and distribution deals;
- Identify and engage with key emerging markets such as Singapore, Japan, Brazil, Russia, India and China;
- Improve collective Irish presence and strategic engagement at key international festivals and markets.

Audiovisual exports rely on strong inter-personal contacts and networks of international contacts with broadcasters, distributors, co-producers, sales agents, talent agents and financiers. Brokering these relationships is important. This can be done by:

- Inward Trade Missions: Developing deeper relationships with international production companies, broadcasters and sales agents;
- Outward Trade Missions: Identifying and developing international strategic markets and organising focused trade missions;

- Establishing an international sales operation for Irish audiovisual content;
- Market Intelligence: Establishing a process of sharing market intelligence gathered at key markets to the domestic producing community.

Ireland does not have a base of companies with expertise in international sales. It is, therefore, timely to investigate the feasibility of housing more international sales and distribution companies in Ireland. This could be through the establishment of a new venture or a virtual model of sales. A safe haven digital storage and distribution hub may be a distinct possibility here, given Ireland's leading market position on data centres. EI and the industry should explore possibilities in this area.

A strategic plan concentrating on audiovisual exports (sales and promotion) should be prepared by the relevant agencies (i.e. IFB, EI, Culture Ireland and the Irish Film Institute) in consultation with the industry. This plan needs to include new metrics to measure cultural exports including audiovisual content.



# Develop Skills and Talent

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**Talent is the central driver of all aspects of the industry. Talent constitutes the quantum of creative, entrepreneurial and technical people working in the industry. The nurturing of that talent, allied to education and training are at the core of a successful industry strategy.**

Current responsibilities are divided between FÁS and the IFB through Screen Training Ireland (STI). STI is funded by the IFB in terms of its training provision and by FÁS in terms of overheads.

It is recommended that the IFB in consultation with the industry take full responsibility for determining the essential creative and technical skills necessary to sustain growth and development.

In addition, the IFB should take responsibility for coordinating the links between the industry and the second and third level education sectors, and in managing industry-wide initiatives to develop the skills and talents of individuals necessary to support growth.

## Screen Training Ireland

The development of the skill base in the industry is crucial to future competitiveness. As the development of people and skills is so important, STI should be repositioned closer to the industry so that there are clearer lines of policy evolution and delivery of training and outcomes.

Industry training should be strengthened in terms of funding and should work to a strategy that is delivered in the form of an annual business plan. The delivery of this training programme should be overseen by a strong industry advisory body.

A constant theme in the consultation process was the need for greater emphasis on individual writers, producers and directors who show exceptional talent. Work is needed on the development of initiatives focused on very promising Irish talent.

It is recommended that funding to support individual mentoring with internationally recognised leaders in their fields be made available.



The industry, in consultation with the appropriate educational and training bodies and Forfás, should develop and plan for the existing and future skills' needs of the industry and update the report on 'Future Skills Needs'.

### **'On-the-job' Training**

The audiovisual industry is about doing, creating and making. There is no better substitute for skills enhancement and talent acceleration than 'on-the-job' training and practice. Structures should be encouraged to facilitate this type of career progression through apprenticeships, graduate placement, and creators in residence programmes. The industry's growth is greatly enhanced by micro-budget and low-budget film-making to provide opportunities for this 'on-the-job' training.

### **Apprenticeships and Placements**

It is recommended that Screen Producers Ireland (SPI) and STI jointly develop specific programmes for apprenticeships alongside a graduate placement programme. This programme should also provide the opportunity for cross-industry placements and opportunities for international placements by industry professionals. Industry has committed to support this initiative and has agreed to make 100 placements available to apprentices and 100 placements available for graduates. The training programme should also provide greater involvement of international professionals in the educational sector.

### **Retraining from Other Industries and Sectors**

Relevant experience from other sectors, particularly those currently in recession, can greatly assist the industry to meet its growth targets over the next 5 years. The Steering Group recommends that research is carried out to identify retraining opportunities for skilled workers in other sectors to gain employment in the audiovisual sector.

### **Building Business Acumen**

The industry, in consultation with Enterprise Ireland, should establish a business mentoring and export-market focused programme for entrants and emerging companies so as to improve business skills and develop a stronger understanding of international markets.

## **Early Learning – Primary and Post-Primary Cycle**

Growing talent begins early in the development cycle and the education system is the way in which the skills that develop creativity are fostered. Audiovisual subjects should have a key role within the school curriculum to help in the development of a creative education and lend value to the development of the innovation economy. Ireland's cultural life has a storytelling culture based on words and music. Film and television alongside interactive content are a contemporary form of communication and, as a visual medium, benefit the curriculum as a dynamic method of education delivery. This content would play a key part in delivering the Government's objectives to build digital and media literacy.

## **Third Level Sector**

The third level sector is already providing a steady stream of graduates each year. The Steering Group consulted widely with the third level sector. From these discussions the following themes emerged:

- There are a broad variety of courses available, many of which offer practical and theoretical modules with a strong emphasis on the practical. Concerns were expressed about the proliferation of similar courses in different institutions. It was also noted that this proliferation diminishes critical mass and spreads resources thinly instead of a concerted effort to build specialisations and centres of excellence in different disciplines capable of achieving international recognition;
- Access routes to the industry were not clear and this was also evidenced in the PwC study. Programmes to facilitate access would be helpful;
- There was universal acceptance of the critical importance in students having direct contact with the industry. The exposure of students to practitioners was considered an invaluable resource;
- Diminishing resources due to education funding cutbacks was seen as a real threat to quality and, in some instances, facilities were said to be basic;
- Understanding how media is evolving as well as financing, branding, marketing (speaking to audiences and consumers), access to markets and evolving business models was seen as essential to the education curriculum.

There are no formalised accredited programmes connecting the third level sector with the audiovisual industry. Graduate placement programmes including cross-industry placements have yet to be established on a formal basis. Action is required to address these weaknesses while also examining the match/mis-match of the third level curriculum and the needs of the audiovisual industry.

## Industry and Education Forum

There are opportunities for the third level sector to strengthen links with the industry. It is recommended that industry and the third level sector establish a forum to share the needs of the industry with third level institutions and to establish cross-research and innovation links. A priority for this forum should be to establish much stronger alignment between the existing third level curriculum and current industry skills requirements. The industry also needs to build strong links with the Higher Education Authority through this forum.

## High Level Mentoring and International Benchmarking

The Irish industry and home grown talent can benefit greatly by encouraging international links with leaders in the sector from other countries. The Irish Diaspora offer many opportunities to organise such links and industry leaders in Ireland should be encouraged to help new Irish talent gain access to their own international networks. Wherever possible the quality of work produced in Ireland should be judged against the highest international standards.



*“Ireland is well placed to capitalise on the Creative Age and become a truly sustainable society, wealth is no longer about big factories but the ability to create new ideas, not just around products but in culture, entertainment and the arts.”*

*Capitalising on Culture, Competing on Difference.  
F. Bradley and J. Kennelly*



# A Strong Domestic Industry

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Innovation, originality and creativity are the core qualities that produce compelling content appealing to audiences and consumers at home and internationally. The importance of a strong and successful local TV broadcasting and theatrical market is equally important to ensuring quality of output in film, TV drama, animation and TV entertainment.

## Irish Audiences for Irish Films

In recent years the number and quality of Irish films has increased, however the Irish and international box office performance of many Irish films, although on the increase, has been disappointing. There are recognised structural barriers to Irish films succeeding theatrically due to access to cinema screens in the country, and the dominance in the Irish market of overseas distributors and imported Hollywood films. The IFB should be encouraged to develop policies to ensure that the films in which the IFB invests are clearly able to identify their target markets and Irish film makers engage with the marketing of the films that they make.

## Building the Local Domestic Market

Audiovisual exports are in the first place reliant on strong take-up in the domestic market. Ireland is weak in this area due to the lack of a strong international sales base, and an under-developed distribution circuit. Irish product is often coupled with the United Kingdom which creates additional complications for release and sales strategies. A strong local market place would instill greater market rigour when projects are being developed. It is also important that new technologies play an increased role in international distribution strategies from Ireland.

There is a real opportunity to build new models where emerging 'business-to-consumer' models across all platforms are supplanting traditional 'business-to-business' models especially in the area of distribution. Ireland should seek first mover advantage in this area.

## **Strategic Partnerships with Broadcasters**

The Steering Group recognises that the audiovisual content industry is different to the television broadcast industry and that broadcasters have specific mandates under legislation. Nevertheless, there is an acceptance of the link between a strong and successful local TV broadcasting market and the quality of output in film, TV drama, animation and TV entertainment.

The relationship between the domestic broadcasters and the audiovisual content production industry is crucial to the development of an internationally-viable audiovisual industry in Ireland. It is also crucial that local content producers make programmes with the quality and appeal to drive audiences for Irish broadcasters.

RTÉ, the national public service broadcaster, has the largest share of TV advertising in the Irish market and receives 93% of the TV licence fee. As a result, RTÉ Television is currently responsible for more than 80% of the independent television programme production in Ireland and, therefore, occupies a dominant place in the audiovisual content production industry.

A significant number of independent television producers are dependent on programme commissions from RTÉ Television and to a lesser extent on TG4, TV3 and Setanta.

It is acknowledged by both broadcasters and producers that the system of commissioning of programme production to independent producers, across a variety of genres, is a highly cost effective method of programme production. Feedback from RTÉ and independent producers has reaffirmed the importance of a strong creatively-led independent content production industry to meet the needs of local broadcasters.

The relationship between the IFB and local broadcasters is also crucial to the health of the audiovisual content industry. Priority should be given to developing new opportunities for collaboration and a coordinated strategic approach between the IFB broadcasters and independent producers:

- The IFB and the broadcasters should review their relationship and co-funding mechanisms in order to identify mutual opportunities in developing and producing original Irish cinema and TV drama. Such an approach will benefit both Irish viewers and the audiovisual content industry.
- It is recommended that a Memorandum of Understanding be established between the IFB and each of the local broadcasters setting out common ground for feature film, TV drama, animation, documentary production and industry training.
- There is also the need to protect and develop small, niche content companies and content creators driven by innovation and creativity. These companies and individuals are, in effect, the 'research and development' of the creative industry and are critical to its on-going development and, indeed, expansion. These are particularly dependent in their early stages on support from local broadcasters and the IFB.

- Broadcasters, in conjunction with industry partners, should explore the development of mechanisms to facilitate greater competition for ideas in broadcasting as a means of raising quality and also to support small innovative, creative and radical companies and individuals.
- The Steering Group has singled out the importance of 'Irish Stories for Irish Children' to be produced and transmitted within Ireland. It is recommended that broadcasters commit to move towards allocating 10% of their total independent programming spend to locally-produced children's programming. Young people are entitled to specific programming. Such a policy would develop future audience loyalty for broadcasters while also assisting industry development.
- The proposal in the Broadcasting Act 2009 to establish an Irish Film Channel should be progressed by the IFB to provide greater diversity of content for the Irish public.

## **Single Content Funding Agency**

Placing all existing independent content funding into a single content funding agency is recommended to:

- Take advantage of the benefits of policy cohesion;
- Deliver efficiencies in operating costs;
- Concentrate resources in delivering clear objectives.

The Steering Group recommends that the administration of the Sound and Vision Fund is transferred from the Broadcasting Authority of Ireland (BAI) to a re-mandated IFB in order to create a single content funding agency. The existing functions of the Sound and Vision Fund would continue in their entirety. The Sound and Vision fund and IFB funding schemes would remain separate and distinct supporting content creation.

It is also recommended that applicants be allowed to apply for funding to the scheme and in particular if approved they should be allowed approach broadcasters (with their approval for funding already received) and negotiate a deal with the broadcaster for broadcasting the content. Broadcasters may need to commit to provide a minimum number of transmission hours for supported broadcasting projects. This action would introduce greater competition for ideas in the domestic market and improve overall quality.

A review of the governing criteria and modus operandi for qualifying projects should be carried out to reflect the overall objectives of the audiovisual content industry strategy.

# Mobilisation of Industry and Whole of Government

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**The audiovisual industry is positioned at the centre of the Smart/Knowledge Economy, Creative Economy and the Technological Economy, and therefore needs a coordinated industry and state response.**

The industry is young, vibrant, attractive to young people, and has much untapped potential as identified in the recent national enterprise strategy *Making it Happen, Growing Enterprise for Ireland*:

*“Yet the contention is that the sector still has considerable untapped potential. It’s overall growth may currently be hampered by the fact that a number of government departments and agencies are responsible for particular segments, and some aspects of the sector are still considered ‘cottage industries’. The evolution of the digital era has shifted this thinking to some extent and provides the basis for significant growth opportunities”.*

Concerted action is needed to achieve the objective of aligning various national policies and initiatives that support the audiovisual industry in Ireland to assist its national and international development.

There is strong rationale in charging a single agency with the mandate of developing the audiovisual industry, and that this role should be vested in a re-mandated Irish Film Board as the existing state agency established by statute with specific responsibilities across the audiovisual industry.

Substantial benefits will flow from a realignment of the enterprise and development functions of state activity concerning the audiovisual industry. Benefits will also be delivered through a clearer understanding of specific roles and responsibilities so that each agency, in a cohesive way, plays to their respective strengths within a coordinated framework.



These recommendations are also aimed at establishing a new approach to industry partnerships. These partners will play significant roles in a new digital environment, assist in reconstructing the business environment and help build new relationships with audiences.

## **An Updated Mandate for Bord Scannán na hÉireann/the Irish Film Board (IFB)**

The IFB is the state agency established by statute with specific responsibility to develop a film industry in Ireland. The Irish Film Board Act 1980 (Section 4) states that, 'the Board shall assist and encourage by any means it considers appropriate the making of films in the State and the development of an industry in the State for the making of films'.

The core business of the IFB is the development of indigenous Irish film-making. The majority of the IFB's annual funding and its functions are dedicated to this objective.

The IFB also has a remit to develop an industry for the making of film and television in Ireland and this has been fulfilled by the film commission functions that markets Ireland internationally and provides practical assistance to all film productions filming in Ireland. The Section 481 tax incentive is the primary driver of inward international production and co-production into Ireland, particularly for international television production.

It is recommended that the organisational structure and funding responsibilities of the IFB are adapted to enable the organisation to act as a specialist development agency for the entire audiovisual industry alongside its current remit of developing the industry for the making of Irish film and television.

The establishment of a dedicated Business Development Unit within a re-mandated IFB is seen as crucial in delivering the role of specialist development agency. It is recommended that the Minister provide sufficient resources to develop such a unit within the IFB.

Training and people/talent development should be the responsibility of a re-mandated IFB.

Greater national policy coherence will be achieved by having a single content funding agency.

All of these proposals will deliver great efficiencies through the centralisation of the functions of project production and development, people/talent development, and enterprise and industry development.

A partial or full rebranding of the IFB may be required to better reflect this new role and the related functions as a development agency for the whole audiovisual industry providing seamless support and leading advocacy and policy.

It should be stressed that these proposals to enhance the mandate of the IFB are intended to

provide additional **remit and functions**. The existing legislative purpose of the IFB to build an indigenous creatively-led Irish film industry that is culturally and artistically distinct should continue as IFB's core purpose.

There are several international examples where national agencies have responsibility for industry development and support while also overseeing film and television funding. Agencies such as Telefilm in Canada (annual budget €99m) and Screen Australia (annual budget €75m) are relevant models successfully providing comprehensive supports for their national audiovisual industries.

## Relationship between the IFB and Enterprise Ireland (EI)

As the national agency for indigenous companies seeking to export, EI has a strong role to play in the development of the audiovisual content industry. EI has specific expertise in developing companies and export markets which complements the IFB knowledge of project financing and creative production.

The IFB and EI should coordinate a development plan for the audiovisual content industry with the specific objective of enhancing the scale of companies through mergers and creative joint ventures, and encouraging the capability of individual companies through prioritising leadership and sales skills, and providing support for international export development.

It is recommended that a Memorandum of Understanding is agreed by the IFB and EI to ensure a seamless and comprehensive delivery of supports so that the audiovisual content industry can develop a significant exporting dimension.

## Relationship between the IFB and the Industrial Development Authority (IDA)

Priority should be given to developing a strategic plan between the IFB and the IDA to continue to attract into Ireland foreign direct investment in the audiovisual content industry so as to enhance the Irish content creation ecosystem.

These actions will provide new opportunities for Irish companies to work with major international companies and, in that way, enhance the industry's capability and capacity, while also giving companies exposure to international markets and networks of international players. Care should be exercised that this does not impact negatively on the growth of the indigenous industry, for example, by drawing the initial limited talent to the multinational companies at the expense of the local companies.

It is recommended that a Memorandum of Understanding be agreed between IFB and the IDA to support the development of a coordinated strategy for foreign direct investment.

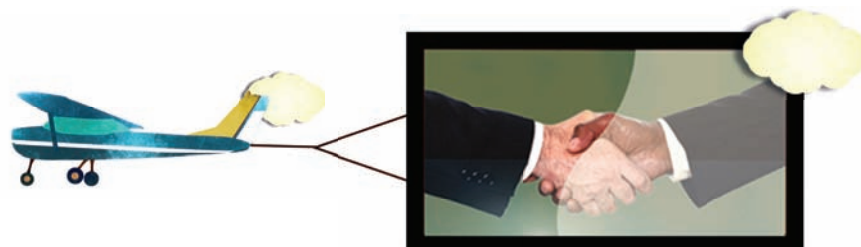
## Enhancing Existing Relationships

The industry will benefit by using a strong and coordinated partnership approach to implement its development plans and to create new opportunities as a means of developing the overall sector.

- **Cultural Relationships:** Strong relationships already exist with agencies including Culture Ireland, the Arts Council and the Irish Film Institute;
- **All-island Relationships:** It is recommended that the industry explores opportunities to encourage and develop greater all-island co-operation;
- **Building Creative Regions:** The audiovisual production industry has had a positive impact on local regional development, particularly in the Dublin/Wicklow and Galway regions. The Dublin/Wicklow focus grew out of the location of Ardmore Studios and Galway emerged following the establishment of TG4 and support from Udarás na Gaeltachta. The Steering Group recommends a regional policy to assist local film offices and digital industry initiatives develop in a co-ordinated manner and to ensure that regional and national policies for the industry are aligned.
- **International Networks:** The Global Economic Forum in Farmleigh (in 2009) noted that the Diaspora is an enormous international asset for Ireland. There is an important opportunity for the audiovisual industry to build on these networks.

## Alignment with EU Priorities and Policies

Several key European agendas including 'A Digital Agenda for Europe', 'Unlocking the Potential of the Cultural and Creative Industries' and the Cultural Programme all form part of 'Europe 2020', and provide direction for the industry in Ireland. These policy agendas underpin all the recommendations in this report. Support from Europe to the audiovisual industry through MEDIA and Eurimages have been important building blocks.



# Unlocking the Potential

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**A vibrant and growing creative audiovisual content industry is a key component of a national policy to develop Ireland as a centre of excellence for the creative industries and position Ireland at the heart of the worldwide digital content explosion.**

A healthy audiovisual industry is one in which all the sub-sectors are healthy in their own right, and one in which there will be overlap and cross-fertilisation of ideas and opportunities leading to innovation.

The Steering Group has projected specific growth targets for the next five years as the outcome of the recommendations in this report. The potential to continue to grow the industry thereafter will be further enhanced by developing the critical mass that achieving this next phase of growth will deliver.

As the recent PwC Irish Audiovisual Content Production Sector Review has demonstrated, the ingredients for achieving significant international growth for the sector already exists, and awaits to be harnessed.

## Global Demand

The medium term outlook for the global entertainment and media industry indicates robust positive growth. According to PricewaterhouseCoopers the global media and entertainment industries will increase in value from \$1.3 trillion in 2009 to \$1.7 trillion worldwide in 2014. These are global figures but they indicate a positive growth trajectory. The Irish entertainment and media industries will increase in value over the next five years to €5.6 billion<sup>9</sup>.

## Employment and Wealth Generation

The industry creates high-value employment and has the ability to grow jobs not only in direct content creation but in the related areas of video games and interactive media. It is an important element of the creative and cultural industries – and the digital economy – and contributes to national employment creation. It also has the ability to generate and exploit intellectual property rights, be a wealth generator and an important part of the productive economy.

## Creativity

Much attention is given to enterprise policies related to technology and infrastructure but more focus now needs to be on the creative content flowing through that infrastructure – this content will distinguish Ireland internationally. A more organic approach to industrial development is needed to combine the inter-related disciplines of technology, art and business.

## Cinema as an Expression of our Culture and National Identity

In an increasingly globalised world, content can become homogenous. The creation of content in Ireland must continue to contain a cultural uniqueness which helps to define what it means to be Irish, to depict cultural diversity and carry that message internationally. Indigenous feature films travel internationally and carry a strong message about our Irish identity. Films such as ‘The Wind that Shakes the Barley’, ‘Once’, ‘The Secret of Kells’, and ‘His and Hers’ all depict a unique view of Ireland to a national and an international audience.

## International Production

International television production has the ability to be a growth driver as Ireland has a distinct competitive advantage in this area – the value of international television production in Ireland in 2010 increased by over 200% from 2009. These productions make a valuable contribution to employment and investment in local companies and infrastructure as well as providing career opportunities for creative Irish talent.

## International Co-Production Treaties

Ireland has a network of international treaties including those with Canada, Australia and New Zealand, and is also a signatory to the European Convention on Cinematographic Co-production. Ireland has established a reputation as an excellent country in which to do business. On-going growth and development of these co-production relationships is vitally important. The national tax incentive scheme is central to maintaining and growing these international networks.

## Format Creation

The creation of original television content can lead to format opportunities in the international television market. Several production companies have seized these opportunities both in the import of formats and in the export of formats. According to figures from the UK trade association for producers PACT, international sales of UK format series earned a record £1.34bn for the British economy in 2009. In the same period revenues from foreign rights to formats increased by 25% to £119m.

## World Class Talent

Ireland has a strong talent base. We have major international acting stars, and also highly talented individuals who are winning Oscars®, Emmys and other awards for creative and production excellence. Talent nurturing is key to industry policy.

## Animation

Irish animation has achieved significant international recognition. The sector has proven to be highly creative and has delivered high value employment. It has also achieved high export growth. The skills in this area are also transferable to other sectors with similar export growth potential including gaming.

## Computer Generated Imagery (CGI) and Special Effects (SFX)

As production processes become more digitised the post production industry has become more central to digital production and is poised to be the engine of visual effects and high-end CGI. Post-production is a nexus of talent and technology. Digital production will be a significant growth area.

## The Games Industry

The video gaming industry in Ireland is forecast to grow by 7% annually to a national value of almost US\$647 million by 2014<sup>10</sup>. Ireland has become an attractive location for the games industry. Companies located here include Jolt,

Activision, Blizzard, Big Fish, Gala Networks and Electronic Arts. Much of the work currently done in Ireland involves localisation, publishing, distribution and middleware. In its next phase of development Ireland has to play a key role in the creative end of the games industry and, in particular enhancing the creative talent and providing new business opportunities for existing players. Convergence with the Irish audiovisual content industry will accelerate this next phase of the gaming industry's development.

## A Strong Multi-National Presence

Ireland has a strong multi-national presence with companies based here including Google, Facebook, Amazon, You Tube and Yahoo. The location of these companies in Ireland offers potential for new business relationships with the audiovisual industry.

## The Diaspora

The Irish Diaspora is a worldwide audience that is interested in Irish content. We also have a wealth of Irish émigrés who are working in all areas of the international audiovisual industry and who are recognised for their specific talent and achievements. The challenge is where possible to repatriate and harness this asset to assist in the development of a home grown industry.



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## How the industry will look like in five years

The growth targets set out in the report will be achieved;

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Sustained growth and continuity of production will ensure a more consistent throughput of work and career opportunities across the whole industry;

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Irish content companies will enhance their value through rights ownership and the ability to exploit IP. This will allow them to engage more successfully with potential new investors;

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Companies and entrepreneurs will develop diversification strategies;

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The introduction of competition for ideas between domestic TV channels will raise standards;

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The level of ambition will increase as a result of increased export trade;

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Irish-based companies will compete internationally to finance, sell and distribute content;

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More talent will be attracted into the industry;

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Stronger companies will mean greater re-investment in their own growth and the development of sustainable long-term business plans;

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The content industry will develop synergistic opportunities with distribution platforms, IT companies and international partners;

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Ireland will establish an international position as a recognized creative hub and international centre of excellence for audiovisual content production;

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New employment opportunities will increase if supported by targeted and relevant education and training schemes.

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*“The audiovisual industry is a dynamic mix of talent (human capital), creativity (ideas and innovation) and enterprise (adding and extracting value).”*



# Implementation Plan

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The implementation of the recommendations in this report will be overseen by an Inter-Departmental Steering Committee comprised of representatives of the Department of Arts, Heritage and the Gaeltacht, the Department of Communications, Energy and Natural Resources and the Department of Enterprise, Jobs and Innovation together with industry representatives.

The recommendations in this report are not an a la carte menu. The recommendations are designed as an integrated set of proposals that will only deliver if delivered in an integrated manner.

A sustained effort by the industry and enabling state agencies will deliver the report objectives within the required timeframe.

The recommendations in the report involve minimal additional costs to the Exchequer.

A half-yearly progress report on implementation will be prepared by the IFB. These progress reports will be submitted to the relevant Ministers and will be published.

## Develop the Industry and Build Strong Companies

RECOMMENDATIONS	LEAD	TIMELINE
<b>1. DEVELOP THE INDUSTRY</b>		
Extend Section 481 to 2020	DAHG/IFB	Long Term
Introduce international TV co-production fund	IFB	Short Term
Convene industry-wide industrial relations consultation	DAHG	Short Term
Establish Piracy Prevention and Policy Group	IBEC	Short Term
Continue broadband roll-out	DCENR	Long Term
Investment in digital sites	DAHG/IFB/AC	Short Term

**2. BUILD STRONG COMPANIES**

Target Innovation Fund Ireland	EI	Short Term
Extend Research and Development Tax Credit to include content development	IFB	Medium Term
Extend Employment and Investment Incentive Scheme to include audiovisual content production companies	IFB	Short Term
Rights ownership to vest in creators	Broadcasters	Short Term
Multi-project development funding	IFB	Short Term
Multi-annual commissioning	Broadcasters	Short Term
Develop Irish banking facilities	IFB	Short Term
Build access to Angel investors and private equity	IFB/EI	Short Term
Incentives to promote scale	IFB/Broadcasters	Medium Term
Build new partnerships in convergence	IFB	Short Term

**3. BUILD EXPORTS**

Strategic plan on audiovisual exports	IFB/EI/CI/IFI/ Industry	Short Term
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**4. DEVELOP SKILLS AND TALENT**

IFB to take full responsibility for essential creative and technical skills, including policy and growth alignment	IFB	Short Term
Develop plan for existing and future skills	IFB/STI	Short Term
Develop 'on the job' training initiatives	IFB	Short Term
Develop apprenticeships and graduate placements	SPI/STI	Short Term
Develop retraining opportunities	IFB/STI	Short Term
Establish business mentoring and export focused programme	IFB/EI	Short Term
Develop digital and media literacy programmes	IFB/IFI/IADT	Short Term
Establish Industry and Education Forum	IFB	Short Term
Introduce high-level international mentoring	IFB	Short Term

**5. A STRONG DOMESTIC INDUSTRY**

Increase the Irish audience for Irish film	IFB	Medium Term
Strengthen local distribution market	IFB	Medium Term
IFB and Broadcasters to identify mutual production opportunities	IFB/Broadcasters	Medium Term

IFB and each of the broadcasters to agree an MoU	IFB/Broadcasters	Medium Term
Develop small, niche content companies	IFB/Broadcasters	Short Term
Increase the percentage of children's programming	Broadcasters	Short Term
Establish the Irish Film Channel	IFB	Medium Term
Create a single content funding agency	DCENR/DAHG	Short Term

#### 6. MOBILISATION OF THE INDUSTRY AND THE WHOLE OF GOVERNMENT

Updated mandate for the Irish Film Board	DAHG/IFB	Short Term
Resources for Business Unit within the IFB	DAHG	Short Term
MoU between IFB and EI	IFB/EI	Short Term
MoU between IFB and IDA	IFB/IDA	Short Term
Enhancing Existing Relationships	IFB	Short Term
Regional AV development policy	IFB	Short Term
Expanding International networks	IFB	Short Term
Align National and EU policy	IFB	Short Term

#### Timeframe

Short Term	-	1 year
Medium Term	-	2 – 5 years
Long Term	-	5 years plus

#### Organisations

DAHG	-	Department of Arts, Heritage and the Gaeltacht
IFB	-	Irish Film Board
IBEC	-	Irish Business Employers Confederation
DCENR	-	Department of Communications, Energy and Natural Resources
EI	-	Enterprise Ireland
Broadcasters	-	RTÉ, TG4, TV3
IADT	-	Institute of Art, Design and Technology
IDA	-	Industrial Development Authority
CI	-	Culture Ireland
IFI	-	Irish Film Institute

# Appendices

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## Appendix 1 - Methodology

This strategy seeks to answer the following core question:

*'How can the Irish audiovisual content production industry continue to develop and grow over the next five years?'*

- Set out a Mission Statement for the Irish audiovisual sector for the period 2011-2016;
- Establish five macro objectives for the Irish audiovisual sector for the period 2011-2016;
- Detail the infrastructural, regulatory, legislative, public support, and private enterprise initiatives to achieve those strategic objectives;
- Engage with the wider creative and investment communities to position the Irish audiovisual content production sector as a world leader;
- Make recommendations on key international alliances, the deployment of high speed broadband connectivity and the clustering of enterprises so as to minimise overhead and maximise economies of scale, creativity and cost;
- Recommend a timescale for the implementation of the findings.

The Audiovisual Industry Strategic Review took place from September 2009 to December 2010.

The process was overseen by a Steering Group which met regularly throughout the review. These meetings were chaired by an independent facilitator.

The first phase involved desk based research and analysis of macro-economic trends, domestic and international industry reports, and a review of International policy with regards to the wider content industries.

A number of core industry groups were convened in facilitated group sessions. These groups included producers in three genres; live action, entertainment, animation and digital media; as well as directors and writers. As part of the process, feedback was sought from the post production sector, the studios, the third level sector and the games sector. State agencies and the wider International Screen industry were then consulted with, before the data was collated, and presented to the steering group in order to conclude findings and present recommendations.

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## Appendix 2 - Outcome of the Consultation Process

As part of the research for this report, the Steering Group met with key individuals and groups involved in the audiovisual industry in Ireland. The following themes emerged from these consultations:

- **Ireland has a strong talent base.**
- Ireland has a strong creative base and a rich heritage in the art of storytelling. **Storytelling is one of the most powerful forms of communication**, and the visual medium excels at storytelling.
- The industry has a credible **creative reputation internationally**. Over the last 20 years, Irish film and television productions have won every major international award.
- There is a strong view that **Irish creativity is a brand** in its own right, and the industry should use this asset to achieve even greater international recognition.
- Throughout the industry there is a widely held recognition of the **strong State support for audiovisual production** as an outlet for Irish artistic and cultural expression, and a willingness to convey a sense of an Irish national identity on the international stage.
- **The industry is marked by remarkable resilience**. While there has never been a significant boom, the industry has still enjoyed great success. Even in the current economic recession, production levels have remained strong. There has not been a reduction in production levels.
- Despite these strengths, there is **concern at overall competitiveness** given competition from low-cost economies and territories offering more attractive incentives.
- The Irish audiovisual industry is **operating in the wider media and entertainment industry**, where there is global growth driven by transformative impact of digital technologies.
- In the national arena, a change in the industrial relations environment, and an **entrepreneurial approach to rights**, are widely seen as factors impacting upon further growth.
- Throughout the consultation process, the Steering Group was repeatedly reminded that developing a more collaborative and **'joined up' approach** would bring greater benefits.

During the consultation process the Steering Group identified the main challenges facing the industry as:

### Fragmentation

- The industry is fragmented and lacks scale;
- The industry is characterised by a large freelance sector and a large SME sector which can be seen both as a strength and as a weakness;
- The industry is developed along service lines. It needs ownership of intellectual property to create value in individual production companies so as to provide them with revenue to reinvest in other projects;
- Multiple agency involvement compounds fragmentation.

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### Partnerships

- Due to the fragmented nature of the industry, strong partnerships are essential;
- There is a lack of clarity in the relationship between broadcasters, funding agencies and independent producers which has prevented the industry from realising its full potential;
- Industry leadership is fragmented. The industry needs to develop powerful advocates and more joined-up thinking between different state agencies;
- There is potential to develop new partnerships with emerging platforms and technology players.

### Domestic Environment

- The local production and distribution market is small and, in real terms, is difficult to extract value from;
- Alongside small and flexible companies the industry needs companies with sufficient scale to compete beyond Ireland and to establish strong international relationships with an ability to manage multiple projects;
- Business expertise (at all levels) is crucial to effective management of growth;
- International competitiveness is at the heart of the selling proposition;
- Sustainability is a key issue for individuals and companies – the boom/bust nature of production tends to compound this difficulty;
- There is a lack of combined content planning between RTÉ and the independent industry;
- National high-speed broadband is a key infrastructural requirement and is essential to stimulate demand and win new audiences;
- There is a lack of a domestic competitive dynamic;
- There is a lack of a rights regime which favours creators;
- Piracy is a significant threat.

### Innovation

- Innovation is vital for growth;
- The industry needs to adapt to new technologies, new content opportunities, new business relationships and various new platforms for content distribution;
- There is a strong multi-national base in Ireland but the industry has little contact with these companies. Greater cross-fertilisation will be important to future growth;
- There is a need for strengthened business acumen across the industry to create a stronger entrepreneurial culture and develop industry leadership.

## Appendix 3 - The Audio Visual Ecosystem

The content production industry is made up of many talented individuals and companies that develop, produce and exploit great content.

The industry is comprised of Writers, Directors, Producers, Actors, Technicians, Artists, Technologists, Production Companies, Post Production Companies, Studios, Commercial Production Companies, Corporate and Video Production Companies, Audio Studios, Service Providers, Gaming and Digital Content Companies, working across live-action, animation, and interactive content.

None of these individuals work independently of each other, they work within an ecosystem.

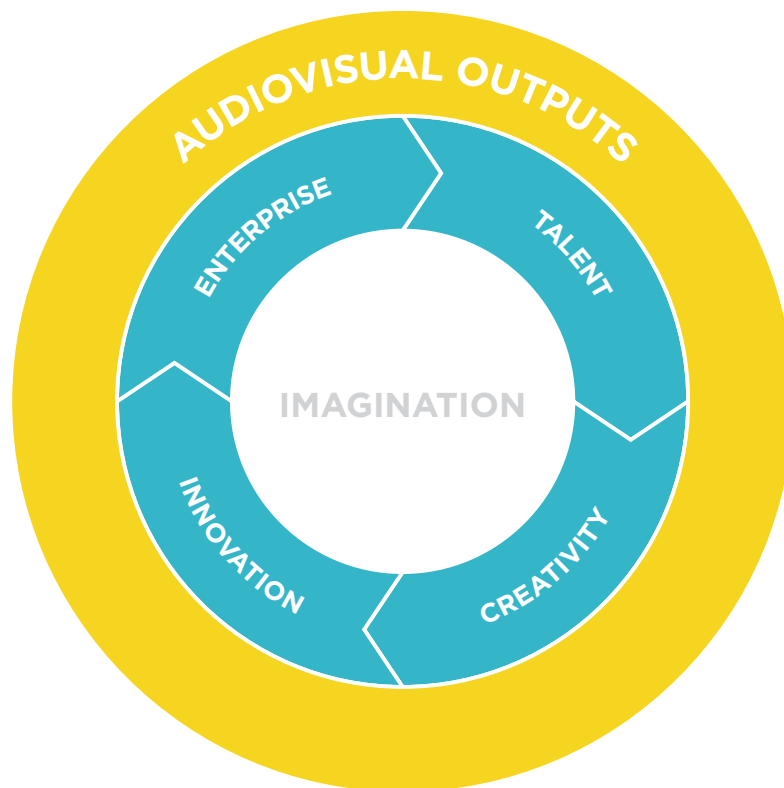


FIG 1: *Talent/Creativity/Enterprise/Innovation*



The creative outputs from the audiovisual industry provide an experience to the audience which include: Feature film (live action & animation), Television production (live action & animation), Creative documentary, Short films (live action & animation), Games, Web and internet production, Entertainment formats and global brands, CGI and visual effects.



FIG 2. *Creative Outputs*

The audiovisual industry is unique in that it is structurally organised around the production and delivery of individual projects, and there is often a long and complex process from ideas generation to content delivery to the screen, with value added at each stage of the production process. Content creators need rights ownership in order to gain downstream benefit in this value chain.



FIG 3. *Production Value Chain*

The value chain represents the activities carried out at each stage of the production process. The value chain is changing dramatically from a traditional silo series of activities to one where there is the potential for producers to control more of the activities leading to vertical integration. Vertical integration is where development production and distribution activities are carried out in one company and the value created remains in-house.

Development is the stage where audiovisual talent collaborates to create viable stories, ideas and concepts. Development includes activities from narrative screenplays to the creation of prototypes. All of these activities are based around telling a story in both visual and narrative form.

Financing of projects comes from broadcasters, equity funders, banks, tax incentives, co-production partners, pre-sales and market guarantees. Producers build a network of relationships and contacts with which they partner for finance and co-production.

The production and post-production process involves assembling a large team so as to capture the story visually and then combine the visual with editing, sound, music and effects.

A completed project is usually sold to distributors on a territory-by-territory basis and licensed to international agencies who act as sales intermediaries.

Platforms are the means by which audiences consume content which is now produced, marketed and distributed in multiple methods. Platforms will continue to evolve as devices become more sophisticated. They include Cinema Exhibition, DVD/Blu Ray, Pay and Free TV, Video on Demand, and Mobile Internet through Tablets and Hand-held devices.

As platforms change it is clear that the industry will become a multi-platform environment creating an enduring value relationship with the audience.

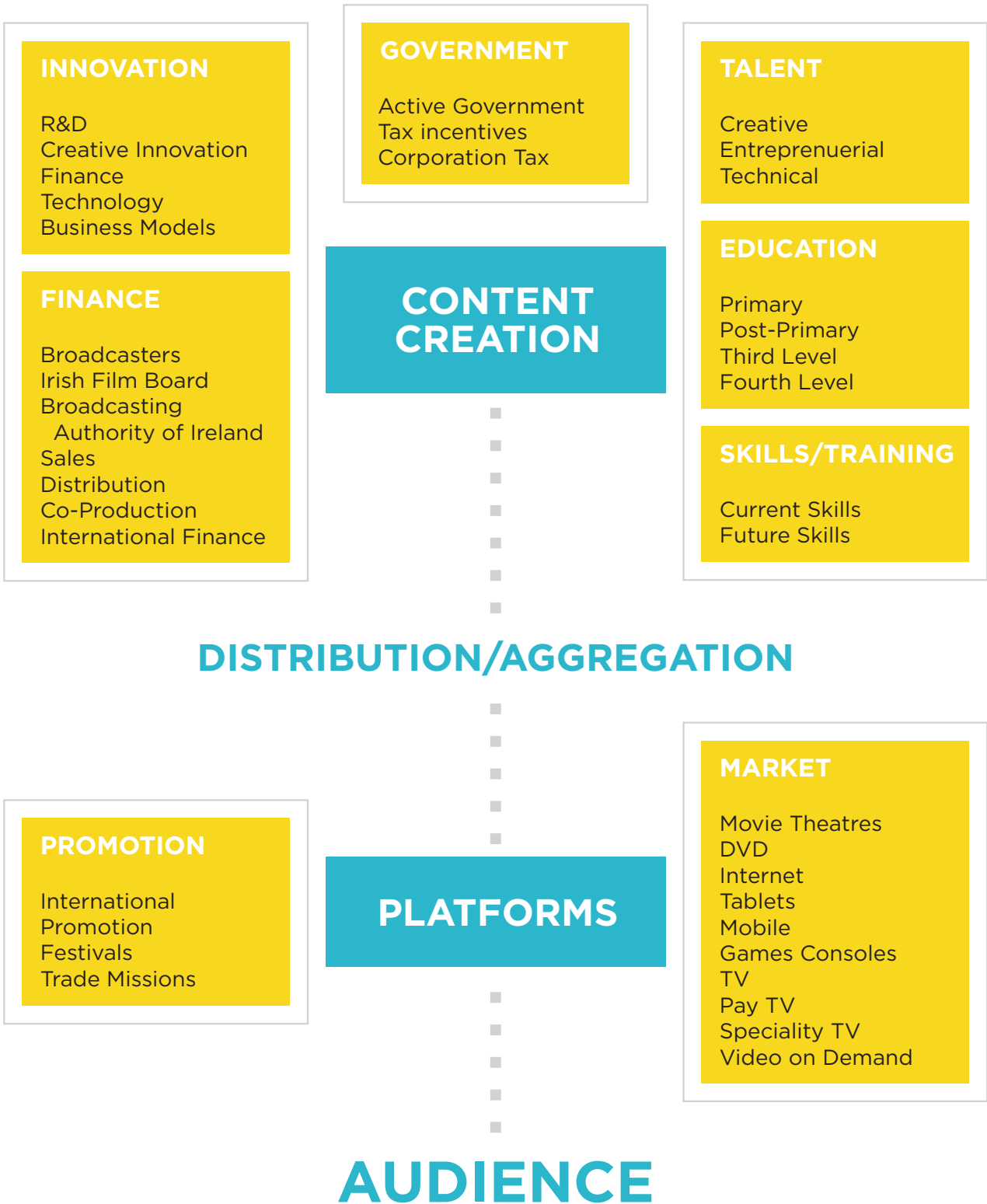


FIG 4: *The Audiovisual Ecosystem*

## Appendix 4 - Government Stakeholders

### Organisation of Government Departments

The Irish audiovisual industry is part of the cultural, creative, communications and economic sector. It interacts with a number of state agencies.

#### Department of Arts, Heritage and the Gaeltacht

- **Bord Scannán na hÉireann / the Irish Film Board (IFB)** is responsible for the development of the indigenous film industry as well as the marketing of Ireland as a film location.
- **The Arts Council / An Chomhairle Ealaíon** is the national agency for the promotion and development of the arts in Ireland.
- **Culture Ireland (CI)** is the national agency designated to promote Irish arts and artists overseas.

#### Department of Communications, Energy and Natural Resources

- **The Broadcasting Authority of Ireland (BAI)** established on October 1st 2009, as the independent regulator for radio and television broadcasters in Ireland. The BAI administers funding to the audiovisual industry through the Sound and Vision Scheme which receives 7% of the television licence fee.
- **Radio Telefís Éireann (RTÉ)** is the state-owned public service broadcaster.
- **TG4** is the state-owned Irish language television channel which invests in original Irish programming from the independent production sector.
- **The Digital Hub** is Ireland's flagship project in the digital media sector. The Digital Hub was set up to support the development of the digital media enterprises that can move the economy up the technological value chain.

#### Department of Enterprise, Jobs and Innovation

- **Enterprise Ireland (EI)** is responsible for supporting Irish businesses which have the capacity to export into international markets.
- **Industrial Development Authority Ireland (IDA)** is Ireland's inward investment promotion agency.
- **Forfás** is Ireland's national policy advisory body for enterprise, trade, science, technology and innovation.
- **FÁS** is the National Training and Employment Authority of Ireland.

#### Department of Education and Skills

- The **Higher Education Authority (HEA)** is the statutory body responsible for the funding of universities and designated third-level education institutions.
- The **National Centre for Technology in Education (NCTE)** is the national agency which provides advice, support and information on the use of information and communications technology in education.
- The **National Council for Curriculum and Assessment (NCCA)** is the national body for the development of curriculum and assessment in early childhood, primary, junior cycle and senior cycle.

#### Third Level institutions

## Appendix 5 - Review of Film and Television Incentives

### Overview of International Tax incentives for Film

Country/Region	Name	Production Type	Net Benefit	Eligible Costs	Qualifying Criteria	Pros/Cons
<b>Ireland</b>	Section 481	Feature Film, TV Drama, Documentary & Animation.	Up to 28% of eligible expenditure	Expenditure on Irish Goods & Services, EU cast & crew working in Ireland up to 80% of budget.	Projects must be an official co-production or meet 3 of 8 criteria in a cultural test.	Pays on 1st day principal photography;  Non-EU cast and crew are an ineligible cost.
<b>UK</b>	UK Tax Credit	Feature Film, Documentary & Animation.	25% of eligible expenditure on British certified films with budgets up to £20m;  20% of eligible expenditure on budgets over £20m or official co-productions.	Expenditure on UK Goods & Services, all cast & crew working in the UK up to 80% of budget.	Projects must be an official co-production or score 16 out of 31 points in a Cultural test;  Must spend at least 25% of the budget in the UK.	Non-EU cast and crew are eligible costs;  TV projects are ineligible; Penalises co-production with reduction in benefit;  Pays retrospectively.
<b>Australia</b>	Location Offset	Feature Film & Animation	15% of eligible expenditure	Australian production expenditure	Must spend US\$13.4m & 70% of budget locally.	No cultural requirements;  Pays retrospectively.
	Post, Digital and Visual Effects Offset	Feature Film & Animation	15% of eligible expenditure	Australian post, digital and visual effects	Must spend \$4.6m locally on post/VFX.	No cultural requirements;  Pays retrospectively.
	Producer Offset	Feature Film & Animation	40% of eligible expenditure	All Australian production expenditure	Must spend \$893k locally and pass a cultural (SAC) test or certify as an official co-production.	Pays retrospectively.
<b>New Zealand</b>	Large Budget Screen Production Grant (LBSPG)	Feature Film & Animation	15% of eligible expenditure	New Zealand production expenditure	Must spend US\$11m locally.	No cultural requirements;  Simple and responsive scheme.
	Post, Digital and Visual Effects Grant (PDVG)	Feature Film & Animation	15% of eligible expenditure	New Zealand post, digital and visual effects	Must spend \$2.2m locally on post/VFX.	No cultural requirements;  Simple and responsive scheme.

	Screen Production Investment Fund (SPIF)	Feature Film & Animation	40% of eligible expenditure capped at \$4.5m per project.	All New Zealand production expenditure	Must spend \$3m locally (unless an official co-production) and pass a cultural test.	Pays retrospectively;  A notional fixed amount is available.
<b>Canada</b>	Canadian Film or Video Production Tax Credit (CPTC)	Feature Film, TV Drama, Documentary & Animation.	25% of eligible expenditure not exceeding 60%	Canadian labour expenditure	Must be an official co-production and meet Canadian content and investment thresholds.	Pays retrospectively.
	Film or Video Production Services Tax Credit (PSTC)	Feature Film, TV Drama, Documentary & Animation.	16% of eligible expenditure	Canadian labour expenditure	Minimum budget is \$924k.	No cultural requirements.
<b>South Africa</b>	DTI Film and Television Production Incentive Scheme	Feature Film, TV Drama, Documentary & Animation.	15% of eligible expenditure capped at \$1.3m per project.	South African production expenditure	Incoming productions, must spend \$1.6m locally.	No cultural requirements;  Pays retrospectively.
	Film and Television Production and Co-production incentive	Feature Film, TV Drama, Documentary & Animation.	35% on the first \$766k, 25% on the remainder. Capped at \$1.3m per project.	South African production expenditure	Must spend \$319k locally. For South African films and official co-productions.	Can be paid retrospectively or in milestones.

## Appendix 6 - Case Studies

### Animation Industry: Creating High Value Employment and Exports

The animation industry in Ireland has grown significantly over the last decade, with continuous growth forecast. It is currently valued at approximately €80m, employs several hundred highly skilled and well educated creative technicians, and is regarded as a world leader in the fields of animated feature films, television series, games, short films, and commercials.

The origins of the animation industry in Ireland is based around talent that was developed in the late 1980s and early 1990s, primarily by US animation companies Sullivan-Bluth and Murakami-Wolf-Swenson. These companies helped seed a wealth of experience, expertise and business acumen that has led to the current renaissance in Irish animation.

Irish companies - progressive in the utilisation of the latest animation techniques and technologies, led by entrepreneurial capability at attracting International investment – are driving the export and effective exploitation of their intellectual property.

The output of the Irish animation Industry is more easily exported, as it can be more easily dubbed for non-English speaking countries to satisfy the demand caused by the increase of children's television stations on cable and satellite networks. There are also opportunities to generate added revenue through spin-offs such as merchandise, and additional multi-platform content.

Irish animation has also attained creative success, with two projects receiving Oscar nominations in 2010, the feature animation 'The Secret of Kells' and the short animated film 'Granny O'Grimm's Sleeping Beauty'; and Irish man Richard Baneham winning an Oscar for his Visual FX work on James Cameron's 'Avatar'.

### Film as a Cultural Export

Irish feature film is a valuable cultural export, that has the ability to reach a substantial global audience, through exposure in cinemas, on DVD, through TV broadcast and increasingly in on-line environments. It is an art form that reflects Irish society, values, and cultural forms, and exposes it to an engaged audience across different social classes, race, religion, and nationalities.

There are few international barriers for feature film, and the advent of video-on-demand platforms enabling digital delivery of feature films, reduce these barriers even further.

Film is an extremely influential form of media, usually consumed in an environment where there are few distractions ensuring an almost unique audience engagement not enjoyed by other forms of art and media.

Film provides a valuable showcase for differing Irish forms of culture, such as an adaptation of a classic piece of Irish literature – 'My Left Foot', through utilisation of contemporary Irish music – 'Once', theatre re-interpretation – 'Beckett on Film'. Film can also increase an international audience's appreciation and understanding of significant events in Irish history – 'Bloody Sunday', 'Michael Collins'. This provides significant economic and social spin-off effects for Ireland including in the tourism area where film currently accounts for 18% of tourists visiting Ireland.

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## Ireland's Competitive Advantage as a Unique Co-production Partner

Ireland is increasingly becoming one of the world's leading co-production partners for film, television and animation. This is largely due to the competitiveness of Ireland's tax incentive Section 481, the Irish Film Board, and the impressive entrepreneur skills consistently displayed by the producing community.

Section 481 being available for television drama production and animation is a unique competitive advantage. Major International drama productions and animated series now locate in Ireland, encouraging significant inward investment and expenditure on Irish labour, goods and services.

European co-production for film is supported by the Irish Film Board, Ireland's membership of the European Convention on Cinematographic Co-production, and Eurimages, a fund that supports European co-produced feature films.

The post-production sector in Ireland is also proving to be an attractive proposition for co-production. Now that digital post-production techniques are firmly established, the sector has increasing levels of activity.

## UK Terms of Trade: Rights Ownership

In 2003, the UK government amended policy, allowing independent production companies to exploit their content internationally. This move has helped the independent sector develop, and is responsible in helping generate an additional £126m to fund content (by 2008). The UK independent sector now produces half of all new UK TV programmes each year and has an annual turnover of £2bn.

Through this move, Independent producers have been enabled encouraged to exploit secondary and ancillary rights, thereby increasing availability of content to the consumer and making companies more valuable. This outcome has helped growth and a policy of building companies of scale capable of further investing in content creation.

The move has also helped to increase exports of UK content with 20% of company revenues now coming from exports. In 2008 alone, exports rose 15% to \$980m. Overall, UK TV exports have increased by 39% since the introduction of the new terms of trade.

Despite the broadcasters concerns at the time, it has not harmed the Public Service Broadcaster, with improved standards, quality and diversity of content being delivered by the independent sector.

## Emerging Opportunities for Irish Content Going Global

Many Irish companies reach global markets through international distribution deals with sales agents and distributors, largely based in the UK and the US. However, with the market shifting, opportunities do exist to increase circulation of content or for producers to distribute directly themselves to broadcasters, distributors, and content aggregators worldwide.

With the worldwide improvements in broadband infrastructure, connected televisions, video-on-demand services,



and digital cinema reducing the barriers to content access worldwide, opportunities now exist for Irish content to reach a worldwide audience more effectively and efficiently than ever before. These services and devices are greatly lowering the costs of delivering this content, and providing increased potential for multi-territory and direct worldwide distribution deals.

Ireland has a unique advantage given our strong cultural links with the Diaspora (estimated at 80m people). With emerging technologies and social media there is now an ability to identify and target audiences. Irish content has the ability to deliver to the Diaspora, and to international viewers with an interest in Ireland and Irish culture. Events associated with Ireland, such as St. Patrick's Day and Arthur's Day, offer further international opportunities to promote Irish audiovisual content to a global audience.

### Venture Capital Funding in Israeli Media

Film and television in Israel is growing rapidly. The industry generates annual exports of approximately US\$40m, and has 120 production companies, 10 production studios and 30 post production facilities. In recent years, A Law for the Encouragement of Production of Film was enacted, which is designed to encourage production of foreign films and television series in Israel, creating incentives in the form of tax benefits.

A key factor in Israel's success has been the involvement of venture capital firms in the film and television industry. Israel has the highest density of tech start-ups in the world, attracting more venture capital per person than any country, 2.5 times the United States and 30 times Europe. Many venture capital firms have specialist divisions that invest in media companies involved in film and television, new media, software, mobile internet gaming and advertising at seed stage.

### Children's Television in Australia

Children's television in the independent sector often relies on local and international broadcasters, distributor's collaboration, as well as the support of tax incentives and public funding agencies. It is an extremely competitive environment where Australia excels. This success can be attributed to local content quotas, the producer offset, Screen Australia's terms of trade, and a regular review of children's television standards, which recently adopted recommendations that maintained the number of hours of obligatory children's content, and provided broadcasters with greater flexibility to show children's content in longer scheduled 'blocks'.

As it will always be more expensive to produce original content than to import from overseas, and realising measures were needed to create television reflecting Australian identity, the Australian government imposed a local content quota system on commercial television in the late 1960s. Commercial free-to-air stations have an annual minimum quota of 55% between 6am and midnight, with an additional sub-quota relating to children's programmes that specifies 130 hours of first release children's programmes and 130 hours of pre-school programmes. In more recent years production incentives and revised terms of trade have furthered strengthened the sector. A new digital free-to-air children's channel was launched in December 2009 with the objective of broadcasting 50% Australian produced content. The channel has already captured a significant audience share and has become the top-rated channel for children between the ages of 5 to 12 years.

## Computer Gaming in Canada

Gaming now accounts for almost 60% of home entertainment sales. Many countries are becoming increasingly competitive in developing their domestic industries, and attracting multinationals. Canada has the third most successful gaming industry in the world - behind the United States and Japan - and employs approximately 14,000 people in high-value jobs. The Canadian industry is primarily focused on development, and contributes US\$1.7 billion annually to the local economy. A positive policy environment includes tax incentives and progressive IP legislation.

## Appendix 7 - Awards & Critical Recognition

### International Awards for Irish Talent

Irish film, television and animation projects and the Irish audiovisual sector, including producers, cast and crew, have also built a strong reputation worldwide, consistently winning major international awards and invitations to the world's top festivals. In doing this the Irish film sector represents Ireland in a very positive light with opportunities for Irish culture, stars, stories and images of Ireland to be communicated to audiences all over the world. Irish film and television projects have won almost every major International award available and are consistently returning to these major festivals again and again, underlining Ireland's reputation for storytelling. The award listing below provides some of the highlights where the sector has excelled.

#### Academy Awards, USA

2010	Best Animated Feature Film, The Secret of Kells (Nomination)
2010	Best Animated Short Film, Granny O'Grimm (Nomination)
2010	Best Live Action Short Film, The Door (Nomination)
2009	Best Short Film, New Boy (Nomination)
2008	Best Original Song, Once
2006	Best Short Film, Six Shooter
2002	Best Short Animation, 50 Percent Grey (Nomination)
2002	Best Short Animation, Give Up Yer Aul Sins (Nomination)

#### Emmy Awards

2010/09/08/08	Outstanding Costumes Award, The Tudors
2010	Outstanding Art Direction Award, The Tudors
2010	Outstanding Cinematography, The Tudors (Nomination)
2010/09	Outstanding Hair Styling, The Tudors (Nomination)
2009	Outstanding Cinematography Award, The Tudors
2009/07	Outstanding Art Direction, The Tudors (Nomination)
2009/08/07	Outstanding Casting, The Tudors (Nomination)

#### Golden Globes

2009/08	Best Performance by an Actor in a Television Series - Drama, The Tudors (Jonathan Rhys Meyers) (Nomination)
2006	Best Performance by an Actor in a Musical or Comedy, Breakfast on Pluto (Cillian Murphy) (Nomination)

#### Cannes Film Festival, France

2010	Official Selection Director's Fortnight All Good Children
2007	CICAE Art & Essai Cinema Prize, Garage
2006	Palme D'Or, The Wind That Shakes The Barley

2005	Official Selection Director's Fortnight (Short Film), Undressing My Mother
2001	Official Selection (Short Film), Chicken
1998	Best Director, The General

#### Sundance Film Festival, USA

2011	Official Selection, The Guard, Knuckle
2010	World Cinematography Award, His & Hers
2009	World Cinema Directing Award, Five Minutes of Heaven
2009	World Cinema Screenwriting Award, Five Minutes of Heaven
2007	Audience Award for World Cinema, Once
2002	Audience Award for World Cinema, Bloody Sunday

#### Berlin Film Festival, Germany

2010	Official Selection Generation 14Plus Corduroy
2009	Official Selection Generation 14Plus, The Secret of Kells, Cherrybomb
2008	Best Short Film, Frankie
2002	Golden Bear (Best Film), Bloody Sunday
2000	CICAE Prize, Saltwater
1998	Silver Bear (Best Director), The Butcher Boy

#### Toronto Film Festival, Canada

2010	Official Selection, As if I'm Not There, The Pipe
2009	A record seven films in Official Selection
2004	Discovery Award, Omagh
2002	Discovery Award, The Magdalene Sisters

#### Major international Animation Awards

2010	Best Drama BAFTA, Roy (Nomination)
2010	Best Writer BAFTA, Roy (Nomination)
2010	Fipresci Award, Miss Remarkable & Her Career (Annecy Animation Film Festival)
2010	Best Animated Feature, The Secret of Kells, Annie Awards (Nomination)
2010	Best Animated Short, The Rooster, the Crocodile & the Night Sky, Annie Awards (Nomination)
2010	Best European Feature, The Secret of Kells (British Animation Awards)
2009	Best Animated Feature, European Film Awards, Niko and the Way to the Stars (Nomination)
2009	Audience Award, The Secret of Kells, Annecy International Animation Film Festival
2009	Director of the Year, Tomm Moore, Cartoon Movie
2009	Producers of the Year, Cartoon Saloon, Cartoon Movie

## Venice Film Festival, Italy

- 2002 The Golden Lion (Best Film), The Magdalene Sisters
- 2002 Best Supporting Actor, Nothing Personal

## Tribeca Film Festival, USA

- 2009 Best Actor, The Eclipse
- 2008 Best Actress, Eden
- 2008 Best Short Film, New Boy
- 2004 Best Actor, Blind Flight

## Edinburgh Film Festival, UK

- 2009 Audience Award, The Secret of Kells
- 2004 Audience Award, Inside I'm Dancing
- 2003 Best Short Film, Pullin the Devil by the Tail

## European Film Academy Awards

- 2008 Best European Short Film, Frankie
- 2005 Best European Short Film, Undressing My Mother

## TV Awards

- 2010 Seoul International Drama Awards, Single Handed, Best Director, Best Writer Nom.
- 2010 Cinéma Tous Ecrans (CTE) "Love/Hate" Best Series Award.
- 2009 The Association for International Broadcasting Travellers On The Edge
- 2009 Gemini awards, Death or Canada, Four nominations
- 2009 Prix Italia At Home with the Clearys, Best Documentary Award
- 2008 Prix Europa - Six RTÉ nominations