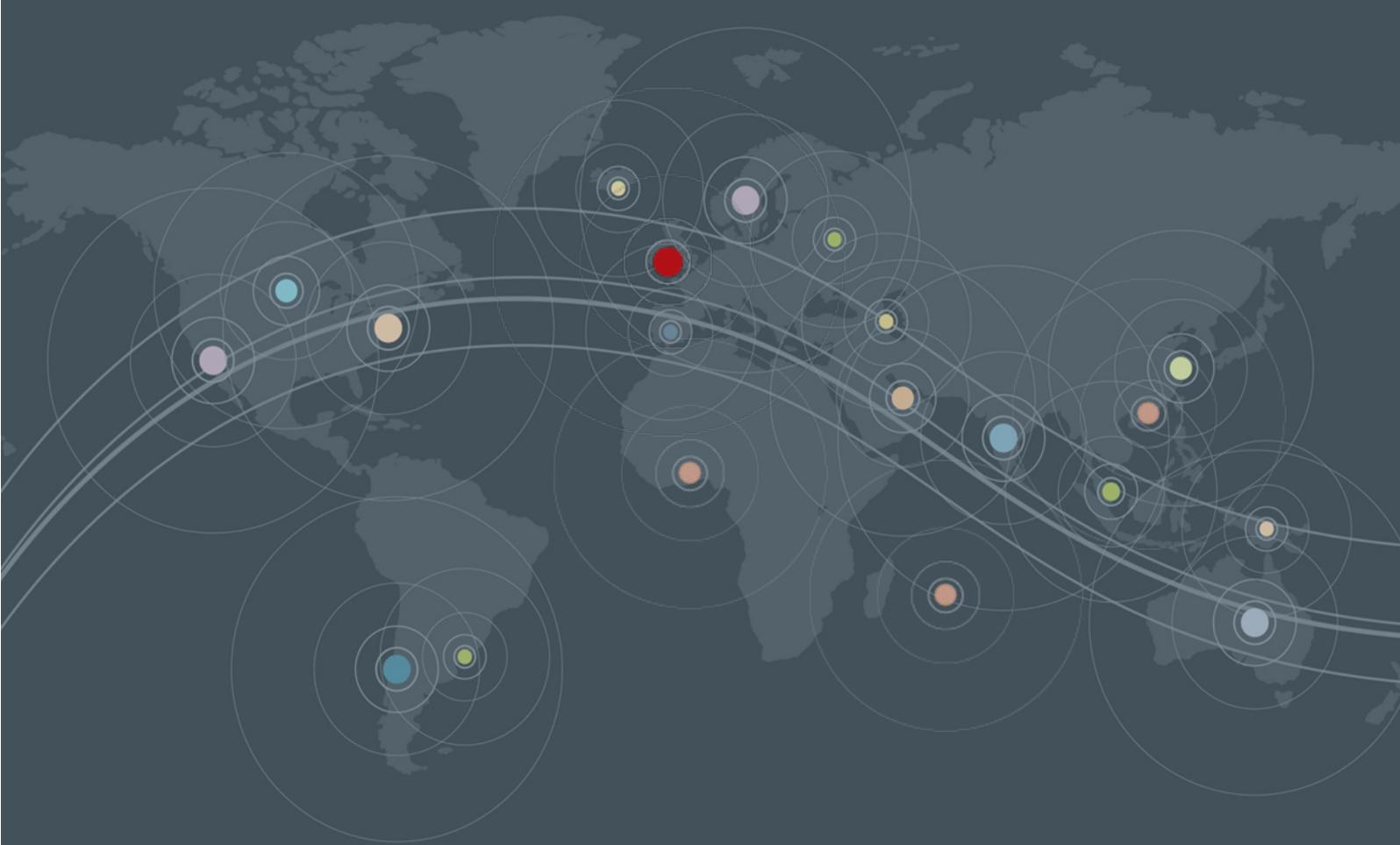


The Cultural Dividend Generated by Ireland's Section 481 Film and Television Incentive

*Report to Screen Ireland by
Olsberg • SPI*



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OLSBERG • SPI

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1. EXECUTIVE SUMMARY

1.1. Introduction

Fís Éireann / Screen Ireland ("**Screen Ireland**") has commissioned creative industries consultancy Olsberg•SPI to undertake an inaugural assessment (the "**Study**") of the value of the cultural dividend generated by the Section 481 film and television production tax credit incentive.

The cultural dividend is the collective value of the cultural impact and industry development impacts of the Section 481 film and television production tax credit incentive.

Section 481 of the Taxes Consolidation Act 1997 is a repayable tax credit to incentivise film, television, animation, and creative documentary ("**Screen**") production in Ireland.

1.2. Overview of Section 481

Administered by Ireland's Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media and by the Revenue Commissioners, Section 481 is worth up to 32% of eligible Irish expenditure. There is an additional, time-limited, uplift for projects undertaken in specific regions of Ireland outside of Dublin / Wicklow and Cork City and County. This is worth 3% in 2022 and tapers to 2% in 2023.

Applicants for Section 481 must comply with either or both culture and industry development tests. Per the Guidance Note for applications:¹

"The Minister, in considering whether to issue a certificate to the producer company in relation to a film, will examine the anticipated net contribution that the Section 481 Scheme and other State Aid Schemes will make to the project; and will consider whether the film will either or both: -

- (i) be of importance to the promotion, development and enhancement of the national culture including, where applicable, the Irish language (referred to as 'the Culture test') and
- (ii) act as an effective stimulus to film making in the State through among other things, the provisions of quality employment and training and skills development opportunities (referred to as 'the industry development test')."

This Study therefore examines both the cultural impact of Section 481 and its impacts on industry development.

1.3. Research Framework

Cultural and industry development impacts are both complex areas of analysis, particularly in relation to the creation of these impacts through a Screen production incentive.² A detailed research framework was created by Olsberg•SPI for the Study, setting out the approaches and data sources used to address the core research questions of the Study. The wording of the Guidance Note outlined in the previous section was used as the basis for defining the focus of the research across both cultural and industry development impacts.

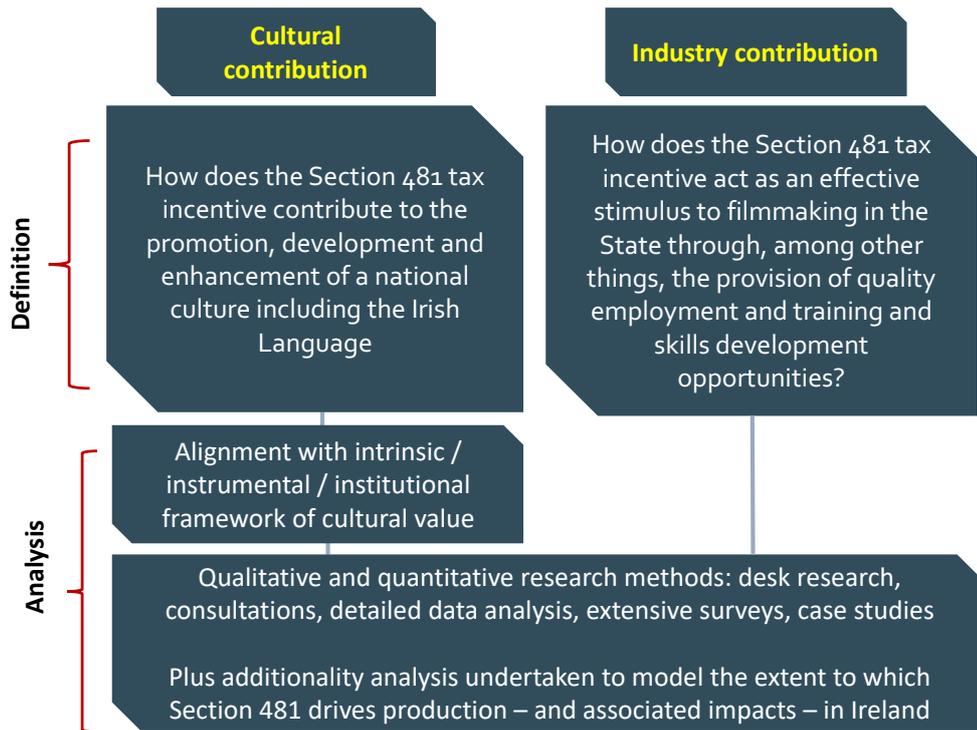
¹ *Guidance Note for application to Minister for Tourism, Culture, Arts, Gaeltacht, Sports and Media Section 481 Taxes Consolidation Act 1997*. Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, January 2021.

² This was noted by the Department of Finance in relation to a Cost Benefit Analysis (CBA) of Section 481: "Given this broad economic, social and cultural objective, it is timely to note that, while the CBA captures many benefits of Section 481 relief, it does not capture all of the ensuing benefits, particularly the social, cultural and human capital returns it provides. It is not possible to quantify these benefits, which range from increased tourism connected with film locations to the promulgation of Irish and European culture. However, this intangible cultural benefit, or 'cultural dividend', should be considered in addition to the standard CBA of Section 481." *Budget 2023 – Report on Tax Expenditures 2022*. Department of Finance, 2022. Accessible at: <https://assets.gov.ie/236353/40880d90-4a34-41e0-8692-076da43f813b.pdf>

On the cultural side, there is a lack of consensus regarding a single framework for assessing the cultural value of Screen productions. Olsberg•SPI therefore utilised an existing framework focused on three kinds of cultural value – intrinsic, instrumental, and institutional. This is explored further in Section 2.2.

A range of qualitative and quantitative methods were utilised for the Study, as outlined in the framework summary below. In addition, Olsberg•SPI also undertook an analysis of Section 481’s additionality – i.e., its effect on attracting foreign productions to Ireland, or on ensuring that indigenous Irish productions and co-productions are made.

Figure 1 – Summary of Study Research Framework



1.4. Additionality of Section 481

Additionality describes how much production expenditure – and its associated impacts – can be attributed to Section 481. This enables consideration of deadweight, which refers to the production expenditure that would still have happened in the absence of the incentive. To determine additionality, a survey was sent to Section 481 applicants, including major US producers, to explore what production companies would have done without the incentive.

The survey results indicate that the rate of additionality for Irish productions and co-productions is 82% – i.e., 82% of the expenditure by these productions can be attributed to Section 481. The additionality rate was even higher for inward investment productions, with results suggesting that 89% of incoming production expenditure can be attributed to the incentive.

Overall, Section 481 leverages very high additionality for Ireland, for both indigenous productions and inward investment productions. For incoming productions, when asked to score from 1 to 10 the importance of Section 481 as a factor in deciding to produce in Ireland, producers gave an average score of 8.33. Further, incentives were clearly identified as the most important decision-making factor for inward investment productions in Ireland, with 67% of incoming productions putting the incentive as the most important factor – above cast, crew, cost base, infrastructure, and locations.

For indigenous productions and co-productions, 85% of respondents described Section 481 as 'very important' when asked how important Section 481 was in contributing to their production being financially viable, with each of the remaining 15% of responses describing it as 'important'.

It is important to understand the international production environment in which Ireland competes. As of November 2022, there were 107 automatic incentives offered at country, state or province level, and all major international territories have mature tax incentives for film and television production – with some extending to games and interactive technologies.³

1.5. Cultural Contribution Summary

1.5.1. Overview

The Irish Screen industries have significant creative and aesthetic value and contribute to the richness of Ireland's cultural heritage – as well as enhancing well-being, helping to underpin social cohesion and delivering a more inclusive society. Irish Screen productions enrich the lives of individuals and communities across Ireland – and worldwide – and Irish society as a whole.

Projects made in the Irish language have an important cultural and educational role in helping to engage people of all ages – and especially learners – with the indigenous language of Ireland, as well as emphasising the richness of Irish heritage.

1.5.2. Intrinsic Cultural Value

Intrinsic value relates to the unique attributes of culture, and is associated with quality, aesthetic excellence, and individual enjoyment. Consumption of film and television is therefore an important metric in considering cultural value, since impacts cannot be made if content is not seen by audiences.

To measure this, an extensive representative survey of 1,000 Irish residents was designed by Olsberg•SPI and distributed by Amárach Research, examining their awareness and consumption of Irish content, among a range of other metrics.

In addition, the quality of the projects receiving Section 481 has also been considered through tracking the presence of Section 481 projects at prestigious international festivals, their success at major sectoral awards ceremonies, and how they have been rated by audiences and critics. Data provided by Usheru is also presented to outline the presence of Section 481 projects on streaming services in various markets and the extent of their international theatrical showings.

Further, the creative attributes of projects receiving Section 481 have been assessed. These attributes, which are different to the cultural test, were:

1. **Irish language:** projects entirely in the Irish language or which contain a substantial amount of dialogue in the Irish language.
2. **Irish setting:** projects which are set in Ireland and depict Ireland as Ireland rather than as a fictional or other location.
3. **Irish intellectual property ("IP"):** projects where the original IP was created by Irish creators and / or ownership of the IP by an Irish company.
4. **European story, characters or history:** projects which contain a European setting or story, including those projects that are also set in Ireland.
5. **Irish talent:** projects that have substantial Irish talent in key creative roles such as writer, director, and lead cast. For the purposes of this analysis, and due to the structure of the

³ *Global Incentives Index*. Olsberg•SPI, November 2022. Accessible at: <https://www.o-spi.com/news/november-2022-update-of-spis-global-incentives-index>

Section 481 incentive which requires an Irish producer on all projects, we excluded Irish producers from the definition of Irish talent.

6. **European partnerships:** Projects structured as either official European co-productions with European countries, made under a treaty, or with substantial finance from a European partner.
7. **Career development / quality employment:** Projects of scale where the eligible spend was over €10 million at time of application. These projects had a larger international budget, named cast, international distribution, and a longer shooting schedule.

The survey undertaken for this Study found that **knowledge and consumption of Irish film and television is strong**. Irish residents have very significant engagement with Irish television drama, with 60% watching regularly or quite often, and a further 23% watching sometimes. This level of interest and engagement creates a very strong foundation for cultural value from Irish television drama. In total, 29% of Irish residents watch Irish films regularly or quite often, and a further 51% watch sometimes. As with Irish television drama, this underlines the broad cultural value of Irish film.

Many Irish residents also demonstrated a **preference for Irish film and television**. The majority of respondents – six in 10 – were more likely to watch a film or television series if it was Irish. This demonstrates the interest in national content and shows the quality of Irish film and television and the relevance it has to Irish residents' lives.

This preference is related, in part, to the **distinctiveness of Irish film and television when compared to content from other countries**. In total, 27% of Irish residents believe that Irish film and television is totally different or highly distinctive. A further 52% believe it is fairly distinctive. This distinctiveness of Irish content is a key attraction for audiences.

Meanwhile, analysis of a sample of Section 481 funded productions showed that **well over 50% of film and television drama productions receiving the incentive between 2017 and 2021 featured an Irish setting** – a key factor for generating cultural value.

The majority of productions (57%) accessing Section 481 between 2017 and 2021 have relied on Irish IP. As with setting, Irish IP is an important factor in ensuring audiences link content with Ireland and indicates the level of influence Irish creators have in telling Irish stories. A **high proportion of projects accessing Section 481 also rely on key creative Irish talent**, with 68% of productions using Irish talent between 2017 and 2021.

1.5.3. Instrumental Cultural Value

Instrumental value describes the effects that film and television content may have on individuals and on society more broadly. For the individual, this could include impacts on areas such as awareness of Irish history or language, and personal feelings of belonging or pride in being Irish. Regarding broader societal impacts, this could include the potential of film and television to positively challenge attitudes or to increase profile of certain areas of culture – such as the Irish language.

As with intrinsic value, consumption of Irish Screen content is an important consideration since impacts cannot be made if content is not being seen. Findings related to the circulation and quality of Section 481 projects in the previous section are therefore relevant to instrumental impacts.

Irish residents were also asked about their attitudes to larger international inward productions that are produced in Ireland and are highly likely to utilise Section 481. Responses show strong recognition among Irish residents that films such as *Star Wars: Episode VII – The Force Awakens* are made in Ireland, and that such projects can have **sizeable positive impacts globally for Ireland**. This includes the areas of **showcasing Irish locations to global audiences, showcasing the work of Irish cast and crew and promoting Ireland as a tourist destination**.

Irish residents were asked about their views on the impacts of Irish content on a number of fronts. The result shows **strong recognition of the ability for Irish film and television to promote Ireland internationally, as well as keeping Irish history alive and providing a source of pride.**

Significant numbers of respondents also agreed that Irish film and television had **positive outcomes in areas like educating society, driving debate, and educating children.** This is reflected, for example, in school groups attending theatrical screenings of Irish-language productions such as *Arracht*.

Also, the large volume of animation which is produced in Ireland is primarily aimed at young to teen audiences, many with an educational value. In total, 33% of the productions analysed for this Study were aimed at these audiences and were primarily made up of animation projects.

Tourism generated by film and television drama is a key area of instrumental value. While there is a lack of national-level data about tourist motivation, there are significant individual examples that underline the substantial tourism impacts being delivered by Section 481 funded productions.

This includes such recent hits as *Star Wars: Episode VIII – The Last Jedi*, *Normal People* and *Vikings*, as well as established favourites such as films like *Harry Potter and the Half-Blood Prince*, *Brooklyn*, *The Quiet Man*, *Braveheart* and *Saving Private Ryan*.

1.5.4. Section 481 and Irish Language Production

Section 481 is a critical funding source for Irish language productions and has played a key role in the current resurgence of Irish-language filmmaking, with projects such as *Arracht*, *An Cailín Ciúin (The Quiet Girl)* and *Róise & Frank* attracting significant attention domestically and overseas.

A critical area of instrumental value for Ireland is **encouraging, promoting and preserving the Irish language.** Irish film and television performs very strongly in this regard, with **almost four in 10 Irish residents believing that Irish films and television programmes encourage pride and promotion of the Irish language.** They also make Irish residents more interested in learning the language or speaking it more frequently.

Younger Irish residents were particularly positive regarding the impacts of film and television on promoting and preserving the Irish language. Respondents under 35 were more likely to say that Irish screen content encouraged people to be proud of the Irish language and made them want to learn the Irish language or speak it more frequently.

Films produced in the Irish language are a valuable teaching resource.

From the analysed production sample, between 2017 and 2021 21 Irish language productions accessed Section 481, equating to 12% of indigenous productions.

1.6. Institutional Cultural Value

Institutional value relates to the effects that content may have on the promotion and recognition of Ireland and highlights how organisations can gain the trust and esteem of the public by user engagement.

This spans notions such as soft power. One commentator has described the soft power aspect of people around the world seeing Irish films as:

“...Impossible to quantify, but it is enormously powerful, economically. Economists, financiers, and beancounters should ignore the broader commercial impact of the Irish arts at their peril. In a world of mobile capital, investors and entrepreneurs want to invest in a country that has a vibrant cultural scene; they want to be in a country that has a distinct cultural footprint; they want to associate with a place that has a

voice. What Irish cinema does, no more than literature and music, is that it offers an Irish accent to the global art world. It is only an accent, an inflection, but it is special – and it is ours.”⁴

Within *Global Ireland 2025*, a core objective is to bring Irish culture and heritage to the wider world. Film and television production is specifically highlighted here for its ability to project a positive image of Ireland and reflect it as a creative place.

To understand routes to creating institutional value globally, and the potential scale of this impact, the global consumption of productions accessing Section 481 was analysed, using release data supplied by Irish company Usheru.

In total, **43 Section 481 productions had global theatrical release information, and these productions were screened in a median of four countries per production.** Theatrical release demonstrates a particular level of quality given the third-party investment necessary for each cinema release.

Irish Screen content is available to stream within the vast majority of territories across the globe. **Between 2017 and 2021, 50 productions were available to stream online in at least one territory outside of Ireland, with 46 being available to stream within Ireland.** *Normal People*, for example, was available to stream in 102 countries.

Section 481 funded Screen production in Ireland has supported the growth and visibility of Irish talent – and, crucially, Irish talent on the international stage – thereby delivering significant institutional value. It is recognised that Irish talent has a global reputation and Section 481 has supported the early careers of some key talent. This includes actors such as Colin Farrell, Brendan Gleeson, Cillian Murphy, Saoirse Ronan, Clare Dunne, Ruth Negga, directors such as Lenny Abrahamson, Jim Sheridan, Aisling Walsh, Nessa Hardiman, Hannah Quinn, Nora Twomey, Neil Jordan, John Crowley, and writers such as Stuart Carolan, Mark O’Halloran, Emma Donoghue, and Ailbhe Keoghan. Section 481 has therefore been vital and instrumental in building the creative screen talent base in Ireland.

Section 481 productions since 2017 were also tracked for their international exposure at major festivals and awards and nominations received. As with theatrical and streaming releases, these are a mark of quality as well as providing a benchmark for cultural impact, since festival and award wins suggest a certain level of audience attention. In total, eleven Section 481 productions have achieved major international awards or nominations between 2017 and September 2022 (see [Appendix 3 – Awards Analysis](#)).

This analysis underlines the strength of Ireland’s Screen industries.

1.7. Industry Development Contribution Summary

1.7.1. Overview

In addition to cultural development, Section 481 is also designed to act as a stimulus to filmmaking in Ireland, including through creating quality employment, training, and skills development. With significant increases in Screen production globally in recent years, Ireland has an opportunity to build impacts by attracting and retaining more production which would not be possible to the same degree in the absence of Section 481.

1.7.2. Stimulus of Industry

Research shows that production has increased steadily because of Section 481, with the Screen sector strongly aligning with government policy on attracting talent to Ireland, **increasing**

⁴ *The Oscar Trail of Success Can Be a Huge Boost to Brand Ireland Abroad*. Irish Independent, 20th January 2016. Accessible at: <https://www.independent.ie/opinion/columnists/david-mcwilliams/the-oscar-trail-of-success-can-be-a-huge-boost-to-brand-ireland-abroad-34380514.html>

participation in the labour force, encouraging the growth of clusters, cementing linkage between foreign and Irish owned businesses, and embracing technology and innovation.

With some interruptions from COVID-19 in 2020, **Irish production expenditure for Section 481 productions reached over €500 million in 2021** – significantly higher than the three years before the pandemic. While the number of Section 481 productions taking place each year has remained relatively steady, the Irish expenditure associated with these productions has shown a steady increase, due in part to the strong number of incoming productions to Ireland and the larger budgets of these.

The majority of annual Irish expenditure can be attributed to film and television drama productions, though **animation expenditure has been growing since 2019** – with the sector continuing to strengthen, as Ireland has gained **a reputation internationally for high-quality animation combined with creative storytelling** from companies including Cartoon Saloon, Brown Bag Films and Boulder Media.

Due in part to the cluster of studios and production companies in Dublin/Wicklow, this area has accounted for nearly two thirds of a sample of Section 481 productions supported between 2020 and 2021 – though **on-location shooting has taken place across Ireland from incoming and indigenous productions alike.**

The strength of the Irish industry is also leveraging investment into infrastructure. While Ireland currently has eight film studios, a number of new developments have been announced – representing almost one million ft² of proposed studio space.

The strength of Ireland’s Screen industries has also helped **forge strong links between foreign and Irish owned businesses** which have deepened as the industry continues to grow and develop.

1.7.3. Provision of Quality Employment

Ireland is home to a strong and well-regarded Screen production crew base. Employment has also expanded beyond the production hubs in Dublin and Wicklow and **clusters can be found in Limerick, Galway, and Kilkenny.** The digital nature of animation and VFX means that individual studios have also expanded into other areas of Ireland, including **Clare, Cork, and Dundalk.** Incoming production also creates a significant number of jobs in the country, with Section 481 leveraging skills development and training opportunities for local Irish workers.

To assess the provision of quality employment in Ireland’s screen industries for this Study, Olsberg•SPI drew on a range of current research, utilising a framework (Cohen, 2020) that looks at various intersecting areas to create a holistic view of quality employment. Two industry surveys were also undertaken – one looking at crew and industry and one looking at skills and development.

Attitudes of Screen Workers in Ireland’s Screen Sector

A core tenet of quality employment is the opportunity for for growth and development. In total, **86% of survey respondents believe that their role enables them, or sometimes enables them, to experience international best practice regarding skills and technology, including on-the-job learning.**

Screen Ireland has created a solid basis for on-the-job training particularly those new to the industry, however, additional time is needed to become familiar with key and speciality equipment. While lengthy access may not be possible during a shoot: courses that provide quality time with key equipment are therefore very valuable and can speed up progression.

Surveys were also used to examine the value that workers place on their roles in the Screen sector. **When asked to what extent they agree that they do meaningful work in the Screen sector, 80% of survey respondents selected either ‘agree’ or ‘strongly agree’.** As one

respondent elaborated, the work is meaningful as they are “writing stories which connect people and says something about the world we live in”.

Survey responses demonstrate that Irish crew feel their work serves a clear purpose, and that there are both cultural and social values associated with this work.

The survey also asked respondents to rate how satisfied they are with their work. In total, **80% of survey respondents stated they are either 'satisfied' or 'very satisfied' with their work.** Only 9% of respondents selected either 'very dissatisfied' or 'dissatisfied'.

According to the survey, most workers in the Irish Screen sector get an opportunity to work on a variety of productions. One survey respondent noted that “working in a 'different' industry where no two days are the same” gave them satisfaction in their work.

Survey respondents also emphasised working in teams, with other creative people and in international environments as core reasons for their satisfaction in work. In total, 72% of respondents stated that their role enables them to work with experienced international and Irish talent.

Stability of Screen Employment in Ireland

Regarding compensation, **54% of survey respondents stated that, on average, they earn between €30,000 and €74,999 annually.** Using the survey data, the estimated average annual salary for all screen workers is €57,372 and for full-time employees (both freelance and those within companies) is €65,096. **This would suggest the average annual income for screen workers is 27% higher than the average income in Ireland.**

Stability of employment was also considered. As an established production jurisdiction, Ireland offers a degree of stability and production levels have been relatively stable in recent years. In total, **54% of survey respondents have worked in the sector for more than 10 years.**

Almost 70% of respondents work **full-time in the Screen sector as either a freelancer or employee for a company**, suggesting that full-time job opportunities are available, but people are choosing to work in a freelance capacity. Consultations with industry showed that attitudes vary towards freelance and permanent work in the sector. Some workers are focused on full-time permanent positions and the level of security they provide. In doing so they tend to look to production companies or animation studios that are in a continuous production pipeline where they can go from project to project. Other workers may prefer to go from job to job, particularly in the feature film sector – looking for the next feature that they are personally interested in working on.

These results reflect a pattern of employment that is recognised worldwide in the screen industries. Because of financing, schedules and pipelines, the animation / VFX sector tend to offer continuous employment. Live action that is commissioned or financed independently tends to be a freelance sector as individual projects cannot offer continuous employment.

Most survey respondents work between 41 to 60 hours per week. In total, 16% of respondents stated that they work in excess of 61 hours. These numbers are much higher than the national average weekly paid hours of 32.2.⁵ Less than 7% of survey respondents said they work within the national range.

An indicator of stability in the crew and industry survey was whether respondents felt they had a future in the Irish Screen sector. This would suggest that they have stability of tenure, feel

⁵ *Earnings and Labour Costs Quarterly*. Central Statistics Office. Accessible at: <https://www.cso.ie/en/releasesandpublications/er/elcq/earningsandlabourcostsq42021finalq12022preliminaryestimates/>

that they are able to fit the job with the rest of their life, and want to continue working in the sector.

In total, 69% of survey respondents responded 'yes' to the question. Among those who stated they feel they have a future in the Irish Screen industries, 31% were aged 35 to 44 and 21% were aged 45 to 54. However, younger survey respondents were more likely to answer 'no' or 'don't know'. In total, 36% of 25 to 34-year-olds do not feel as though they have a future in the Irish Screen industries, while 18% of the same age bracket answered 'don't know'. When probed further, the long hours associated with work in the Irish Screen industries was one of the leading reasons for respondents not feeling as though they had a future in the Screen industries.

Long hours are a characteristic of the Screen industries internationally, and not just in Ireland. However, the long hours are a cause of concern. In 2020, Ireland's Shooting Crew Agreement in Ireland was updated and now includes a commitment to developing a Worklife Balance policy.⁶ This policy, as well as other initiatives that could address the working week, should be further explored.

1.7.4. Training and Skills Opportunities

In March 2019, Screen Ireland was asked to take on a new role to first develop and then oversee a new process for tracking training and skills development opportunities on Section 481 funded projects, which is a requirement of the tax credit. This was a new departure for the agency, providing an opportunity for Screen Ireland to introduce a more structured approach to work-based learning and skills tracking in the Screen sector.

All qualifying productions are required to submit a Skills Development Plan as a condition of access to the tax credit. For those with eligible expenditure in excess of €2 million, a comprehensive Proposal for Skills Development must be submitted to Screen Ireland for approval prior to the commencement of the production. The Screen Ireland skills team reviews each plan and may seek changes, especially in relation to specific skills deficits and priority roles that have been identified through the Screen Ireland Skills Needs Analysis report.

Since April 2019, over 161 skills development plans have been submitted to Screen Ireland for approval and over 1,719 skills participants have been tracked on those productions.

As well as the developmental aspect of the Section 481 skills plan, producers are also encouraged through the Skills Development process to introduce both sustainability initiatives and Diversity, Equity and Inclusion (DEI) initiatives on their productions. This has seen significant positive change within the sector.

Many producers have risen to the challenges of sustainability and introduced green production practices on their productions, including reducing the use of paper and plastic bottles on set and using the Albert calculator to measure the carbon footprint of productions.

1.7.5. Industry Development Survey

Both Olsberg•SPI surveys asked respondents about training and skills opportunities in Ireland. The provision of quality employment aligns closely with the delivery and availability of training and skills development opportunities.

Consultations revealed that it can be challenging on independent projects to train crew in a hands-on way, when timeframes and budgets are tight, and this can also affect training. **Higher-budget incoming productions were regarded as having more potential – because of**

⁶ Screen Producers Ireland Welcomes SIPTU Members Decision to Accept the 2020 Shooting Crew Agreement. Screen Producers Ireland, 6th December 2020. Accessible at: <https://www.screenproducersireland.com/news/screen-producers-ireland-welcomes-siptu-members-decision-accept-2020-shooting-crew-agreement-c2-ao>

budget and time – to offer more in-depth opportunities. As previously outlined, structures in the sector meant that training occurred much more informally and the introduction of formal training is relatively new.

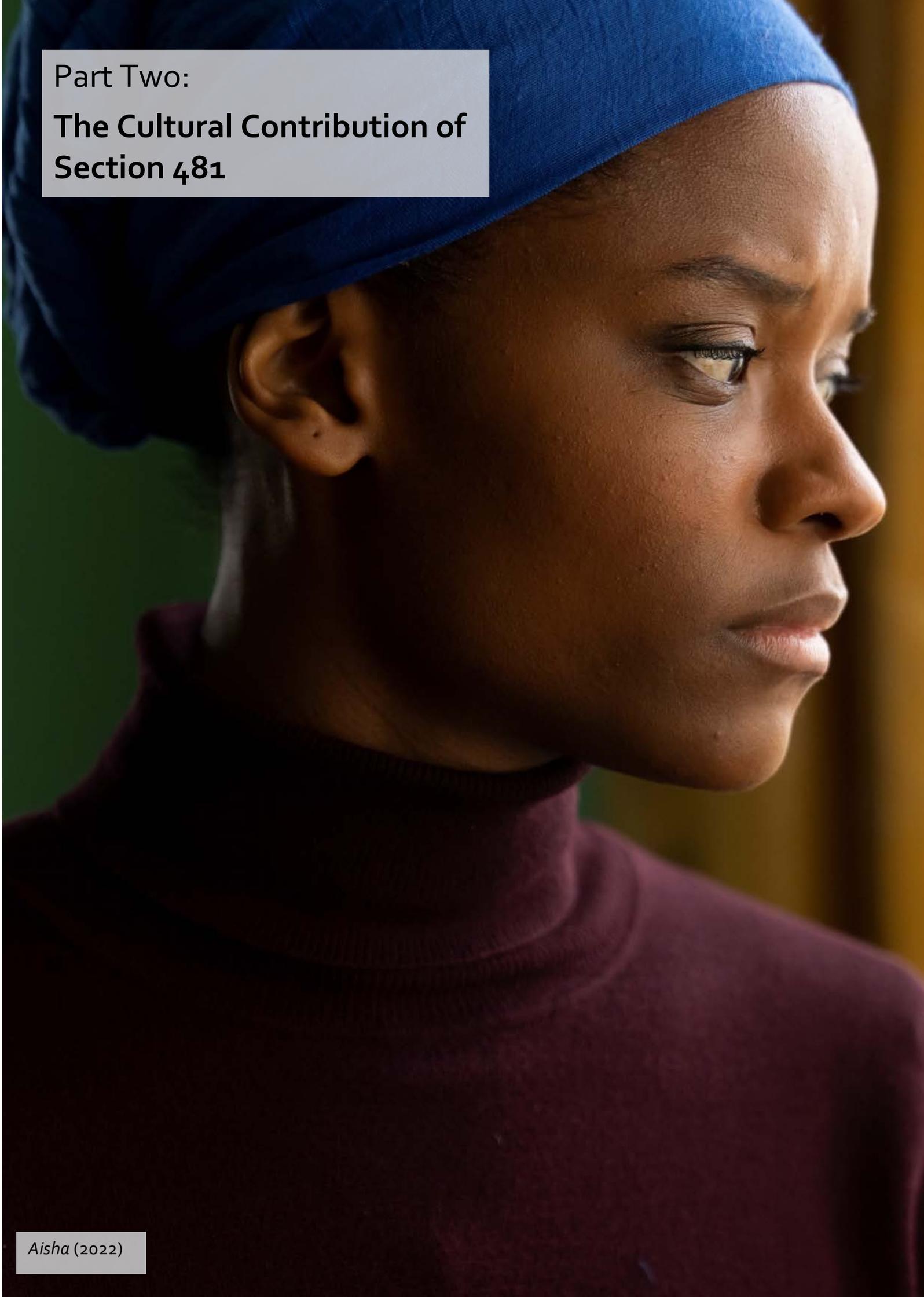
Regardless of whether they entered with some specialist training or not, **81% of survey respondents have taken part in some further training or skills development since joining the industry.**

In addition, 67% of survey respondents believe they receive either 'a great deal' or 'a lot' of informal and on-the-job opportunities to learn, develop and progress as part of their career in the Irish Screen sector.

1.7.6. Skills Development Plan

The requirement for Skills Development Plans in all Section 481 applications has ensured training and skills development will occur across production in Ireland and provide opportunities for Irish crew to engage with national and international best practice.

Around 40% of respondents in Olsberg•SPI's Skills Development survey participated in a skills development initiative as a producer or skills officer. More than half of the respondents had participated in a skills development initiative as a skills participant. Of those who had participated as a skills participant, 50% were part of the trainee category, 33% were upskillers and 14% were new entrants.



Part Two:

**The Cultural Contribution of
Section 481**

2. CULTURAL CONTRIBUTION

2.1. Overview

The Irish Screen industries are critical for cultural policy in Ireland. In addition to having significant creative and aesthetic value in their own right, and contributing to the richness of Ireland's cultural heritage, Screen productions are regarded as a vital means of enhancing well-being, helping to underpin social cohesion, and delivering a more inclusive society.

As the authors of the *Life Worth Living* report, published in 2020, put it: "Arts, culture and entertainment – all things that make life worth living – generate joy, excitement, debate, curiosity, fascination, pride, pleasure and well-being".⁷

The Screen industries play a central role in creating these collective impacts and enriching the lives of individuals and communities across Ireland and Irish society.

Films and television programmes can have a profound influence on hearts and minds and help shape the way that people see the world. They allow audiences to look beyond their own lives and to understand the point of view of others.

Projects made in the Irish language have an especially important cultural and educational role in helping to engage people of all ages – and especially learners – with the indigenous language of Ireland.

The collective nature of culture and the arts also improves health and well-being. The Art of Being Healthy and Well Symposium on the role of creativity in people's health was held in Ireland in June 2022.⁸ At this event, Minister for Health Stephen Donnelly cited evidence from the World Health Organisation noting the connection between culture and improved health, observing: "The holistic nature of these types of artistic and cultural activities fits perfectly with our vision for health and well-being. Health is not just about the absence of disease, it is about recognising the importance and interconnectedness of physical, mental and social well-being."

The strategy set out in *Global Ireland: Ireland's Global Footprint to 2025* underlines how culture helps to create soft power by connecting people across the world with Ireland and enhancing the understanding of Irish identity: "Ireland's unique culture and heritage – our art, literature, sport, language, music and dance – provide powerful ways to introduce ourselves and to express our national identity. It is often the first encounter that people from other parts of the world have with Ireland and is a powerful point of connection with our diaspora. Cultural and heritage connections have a value in and of themselves. They help us explain ourselves to others, and to reach closer understandings – but in a world of increasingly fierce global competition for investment, tourism and export markets, they also help to distinguish Ireland and to open doors in a welcoming and encouraging way."⁹

⁷ *Life Worth Living: The Report of the Arts and Culture Recovery Taskforce*. The Arts and Culture Recovery Taskforce, 2020. Accessible at: <https://www.arts council.ie/Publications/All/Life-Worth-Living-The-Report-of-the-Arts-and-Culture-Recovery-Taskforce/>

⁸ *The Art of Being Healthy and Well Symposium on the role of creativity in people's health*. Government of Ireland, 22nd June 2022. Accessible at: <https://www.gov.ie/en/press-release/94302-the-art-of-being-healthy-and-well-symposium-on-the-role-of-creativity-in-peoples-health-launched-by-ministers-martin-and-donnelly/>

⁹ *Global Ireland: Ireland's Global Footprint to 2025*. Government of Ireland, June 2018. Accessible at: <https://www.gov.ie/en/campaigns/globalireland/>

The director Martin Scorsese’s remarks at the 2020 Irish Film and TV Academy Ceremony describe the unique abilities of Irish visual storytelling to travel and to connect with people:

“Now, more than ever, we need the moving image, we need vision, creativity, and storytelling, that take us on a journey, enlighten us, and opens our hearts and our minds. There’s something about Ireland and Irish storytelling that is universal and connects with everyone in the world.”¹⁰

In this way, Screen storytelling provides new perspectives on Ireland and Irish values for audiences around the world – including potential tourists and investors – and projects an image of the country as a rich and creative place with a unique identity.

Ireland’s membership of the Creative Europe programme of the European Union (EU) also helps Irish Screen culture to flourish, just as it assists the development of the industry.¹¹ The MEDIA strand of Creative Europe provides financial support for Irish companies to develop, distribute and promote their works as well encouraging co-operation across the Screen industries in Europe and nurturing new creative talent.¹²

2.2. Cultural Contribution Research Framework

Defining and measuring the value of culture is a complex area of study and there is a lack of consensus regarding a single framework for assessing cultural value.

For this Study, Olsberg•SPI has utilised a framework proposed by John Holden of the Demos thinktank, which defines three kinds of value: intrinsic, instrumental, and institutional.¹³ This framework – which has been utilised by Olsberg•SPI in cultural value studies in other jurisdictions, including Australia – enables different types of cultural value, or impact, to be considered.

The key elements of this framework are summarised in the following figure. Such frameworks are of course open to debate, but this provides a helpful model to consider the impact of Section 481.

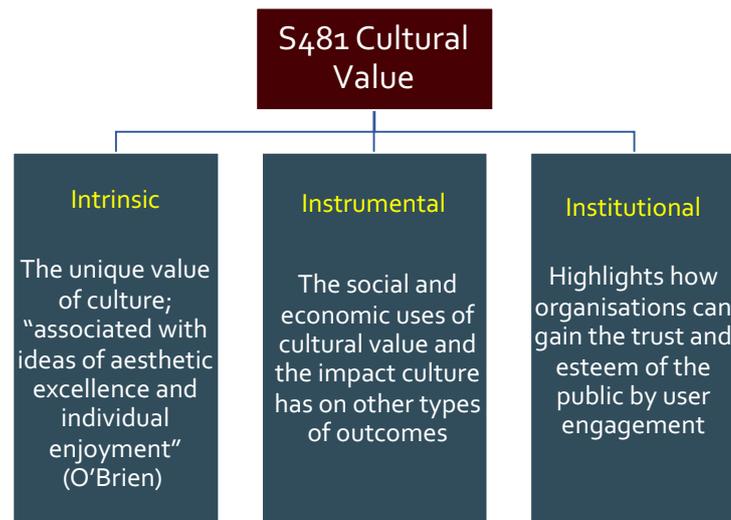
¹⁰ *Martin Scorsese says Irish Storytelling ‘Connects with Everyone in the World’*. RTÉ, 19th October 2020. Accessible at: <https://www.rte.ie/entertainment/2020/10/18/1172364-scorsese-irish-storytelling-connects-with-everyone/>

¹¹ *Creative Europe Programme*. European Commission. Accessible at: <https://culture.ec.europa.eu/creative-europe/about-the-creative-europe-programme>

¹² *Creative Europe MEDIA Strand*. European Commission. Accessible at: <https://culture.ec.europa.eu/creative-europe/creative-europe-media-strand>

¹³ As outlined in *Cultural Value and the Crisis of Legitimacy – Why Culture Needs a Democratic Mandate*. John Holden, 2006. Accessible at: <https://www.demos.co.uk/files/Culturalvalueweb.pdf>

Figure 2 – Cultural Value Framework¹⁴



The remainder of this section considers each of these areas in turn.

2.3. Cultural Contribution – Intrinsic Value

As outlined in the previous section, intrinsic value relates to the unique attributes of culture, and is associated with notions such as quality, aesthetic excellence, and individual enjoyment. Holden has described intrinsic value as “the capacity and potential of culture to affect us, rather than as measurable and fixed stocks of worth”.¹⁵

While there is an element of subjectivity in considering these types of impacts, they are highly relevant for Screen production. In a crowded content market, the uniqueness and quality of individual films or television series can be what connects them with audiences.

Consumption of film and television is therefore an important metric in considering cultural value, since there are no impacts if content is not seen by audiences. It is important to note, as a result of the pandemic and other factors, that there have been shifts in consumption patterns, especially with regard to streaming services. To measure consumption, an extensive survey of Irish residents was designed by Olsberg•SPI and distributed by Amárach Research for this Study, examining their awareness and consumption of Irish content among a range of other metrics.

The quality of the projects receiving Section 481 support has also been analysed. To consider quality, Olsberg•SPI has undertaken considerable data work to track where Section 481 projects have been selected for major international festivals, won major sectoral awards, and how they have been rated by audiences and critics. Data provided by Usheru is also presented to outline the presence of Section 481 projects on streaming services in various markets.

Specific creative attributes of projects receiving Section 481 have also been analysed in detail, including whether projects were made in the Irish language, whether the project was based on Irish source material, and whether it featured an Irish setting. Examining creative attributes is important for understanding the potential range of cultural impacts, as well as any trends.

¹⁴ *Measuring the value of culture: a report to the Department for Culture Media and Sport*. Dr. Dave O'Brien, 15th December 2010. Accessible at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/77933/measuring-the-value-culture-report.pdf

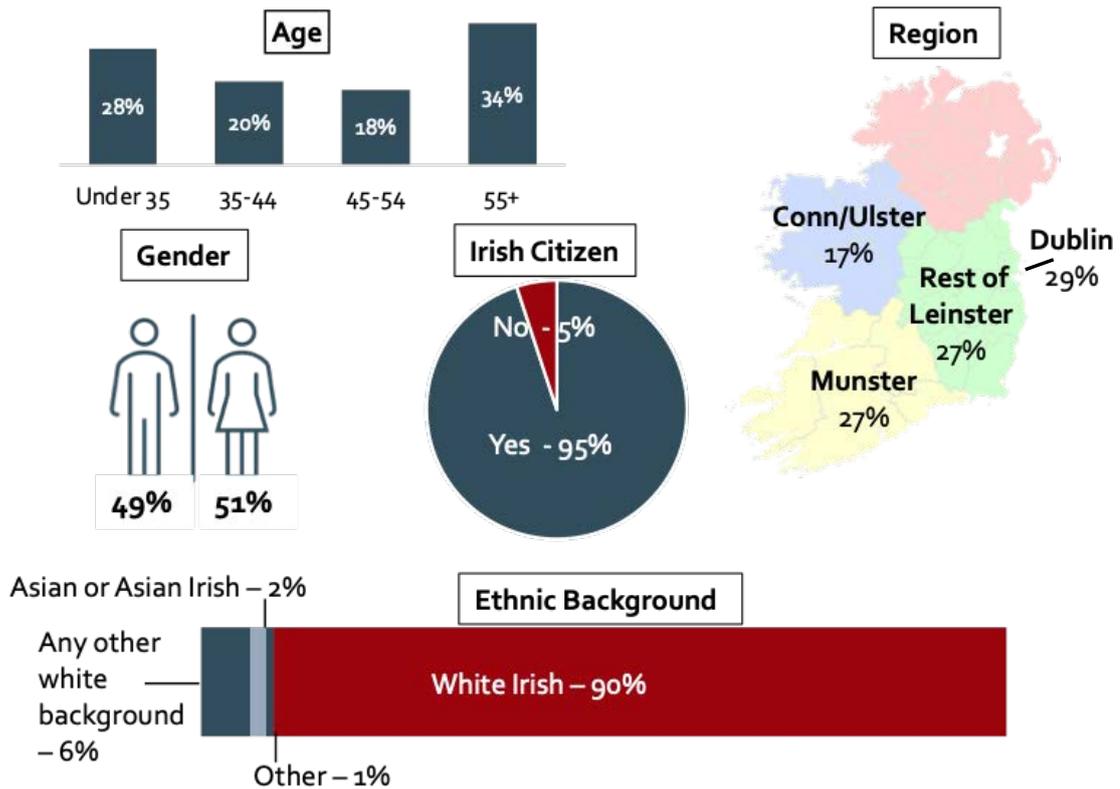
¹⁵ *Cultural Value and the Crisis of Legitimacy – Why Culture Needs a Democratic Mandate*. John Holden, 2006. Accessible at: <https://www.demos.co.uk/files/Culturalvalueweb.pdf>

The consideration of intrinsic value is relevant to both Irish residents and international audiences, as Section 481 projects will impact both.

2.4. Domestic Survey

To gather data on the impacts of Irish Screen production on Irish residents, Olsberg•SPI developed a detailed survey. This was distributed by Amárach Research, which derived a nationally representative sample of 1,000 respondents aged over 18. An overview of the survey sample is outlined in the following figure.

Figure 3 – Irish Resident Survey Sample Overview¹⁶



2.4.1. Knowledge and Consumption of Irish Film and Television

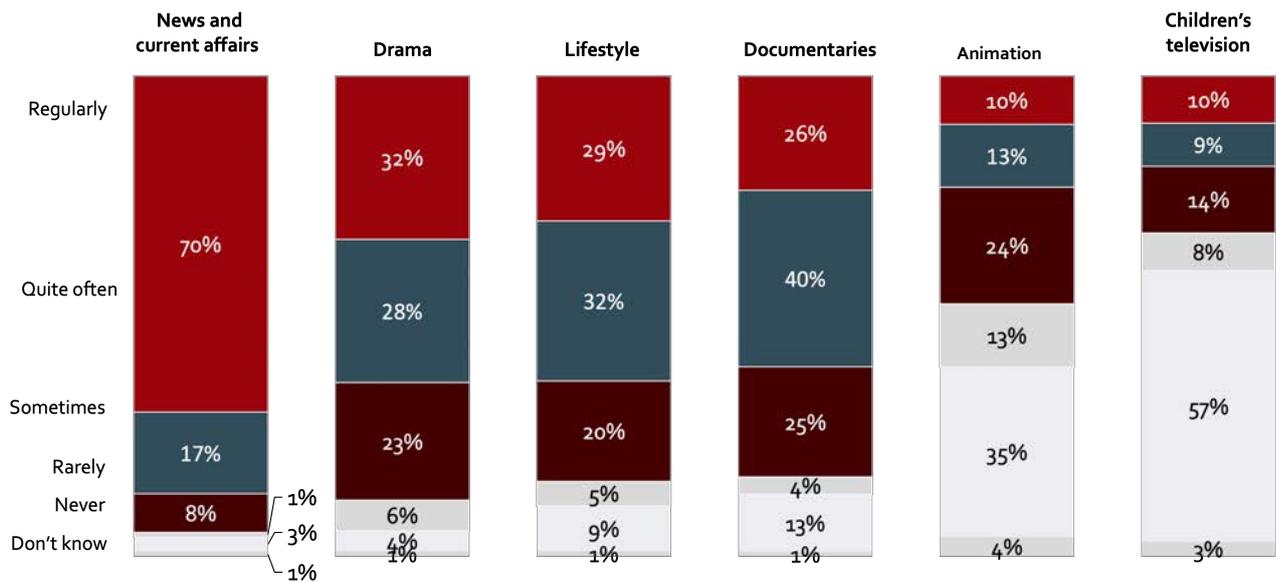
The results of the survey show that Irish residents have very strong engagement with Irish television. Unsurprisingly, 87% of Irish residents said they watched news and current affairs regularly or quite often, with a further 8% watching sometimes. Irish residents also have very significant engagement with Irish television drama, with 60% watching regularly or quite often and 23% watching sometimes. This level of interest and engagement creates a very strong foundation for delivering cultural value from Irish television drama.

Women and those aged 55+ are among the most likely to report watching Irish television drama regularly.

There is also strong interest in Irish television documentaries. Survey respondents were also asked about Irish animation and children’s programmes: it should be noted that results outlined in the following figure for these genres are highly likely to under-report audience interest, since only viewers over 18 were surveyed.

¹⁶ Ethnic background values sum to 99% due to rounding

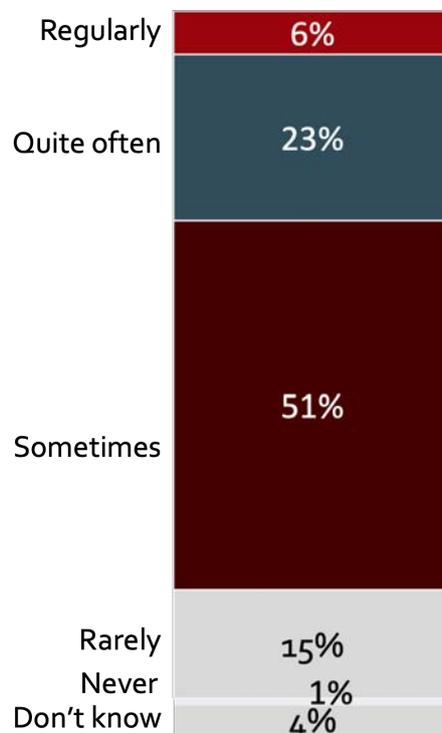
Figure 4 – “How frequently do you watch the following types of Irish television programmes?”



Source: Irish Residents' Survey (2022) (N=1000)

In addition to Irish television, survey respondents were also asked about their engagement with Irish feature films. Results also show very strong interest, with 29% of Irish residents watching Irish films regularly or quite often, and 51% watching sometimes. As with Irish television drama, this underlines the broad cultural value potential of Irish film.

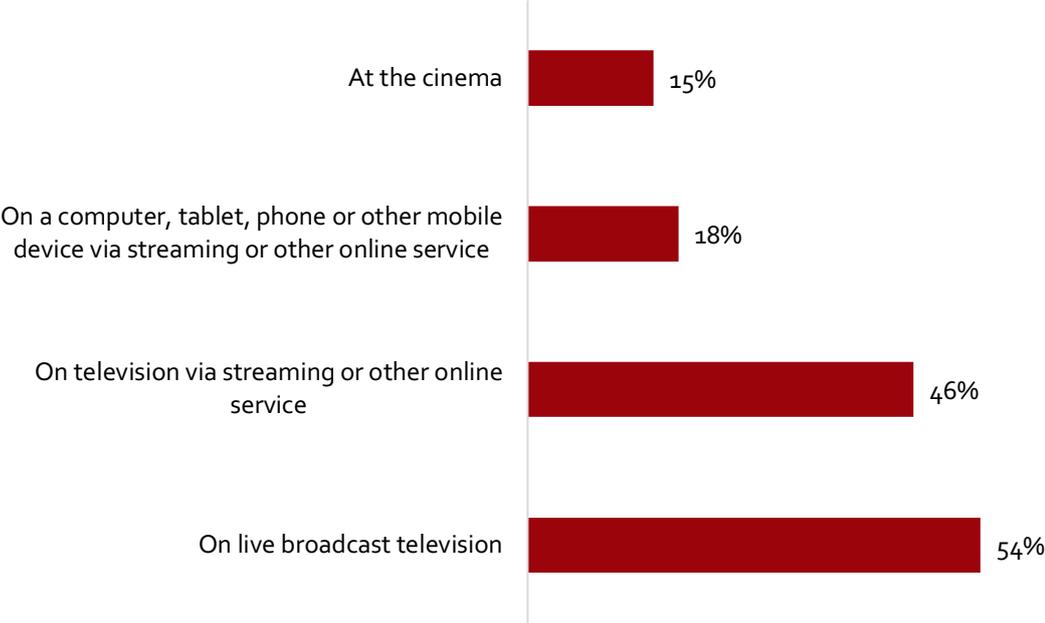
Figure 5 – “How frequently do you watch Irish films?”



Source: Irish Residents' Survey (2022) (N=1000)

Most respondents said that they watched Irish films on live broadcast television, followed by streaming or other online service on television.

Figure 6 – “What is the most common way you watch Irish films?”

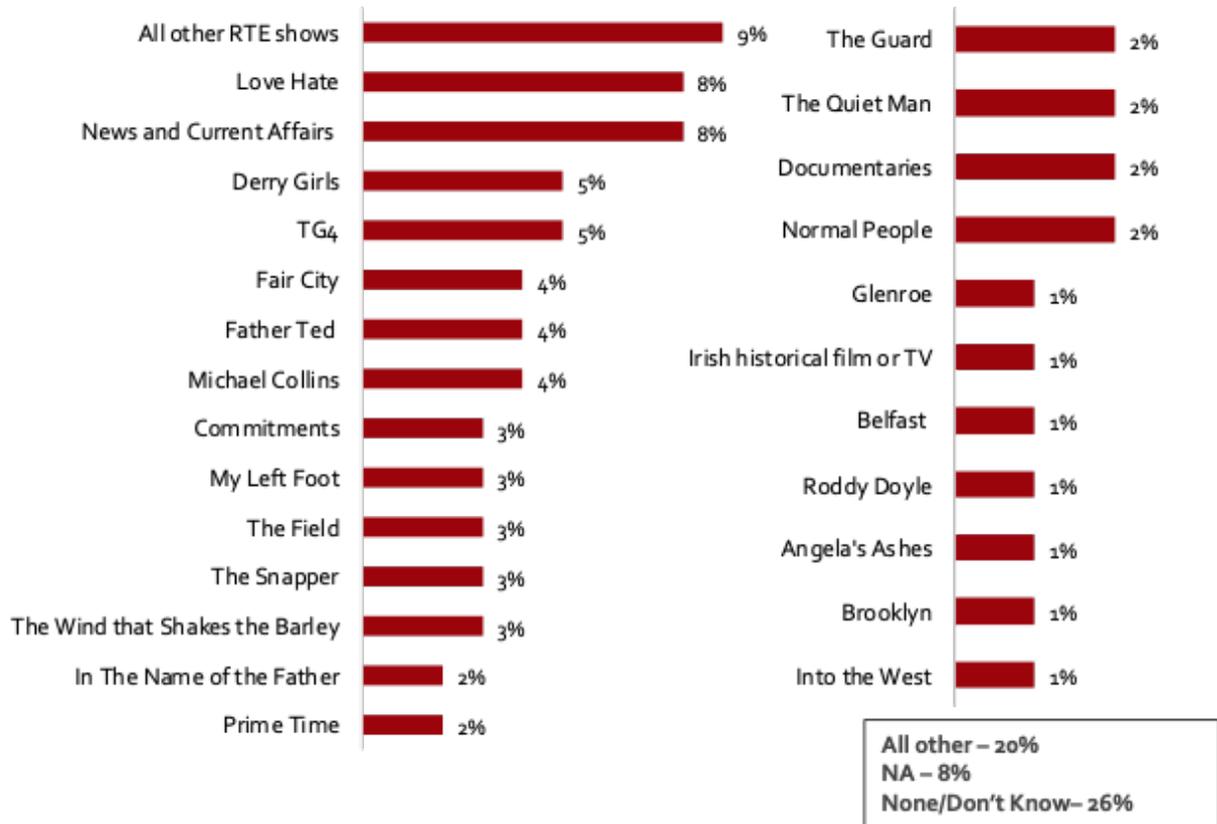


Source: Irish Residents’ Survey (2022) (N=1000)

2.4.2. Most Important Irish Film and Television Programmes

Survey respondents were also asked about the most important Irish films and television shows to their lives. The results show a wide spread of content types and genres, from older feature films like *The Quiet Man* to contemporary television dramas such as *Normal People*. It should be noted that the survey was undertaken before the release of *An Cailín Ciúin (The Quiet Girl)*, which would be expected to feature in these results given the impact of the film.

Figure 7 – “What would you say are the most important Irish films and television shows to your life?”

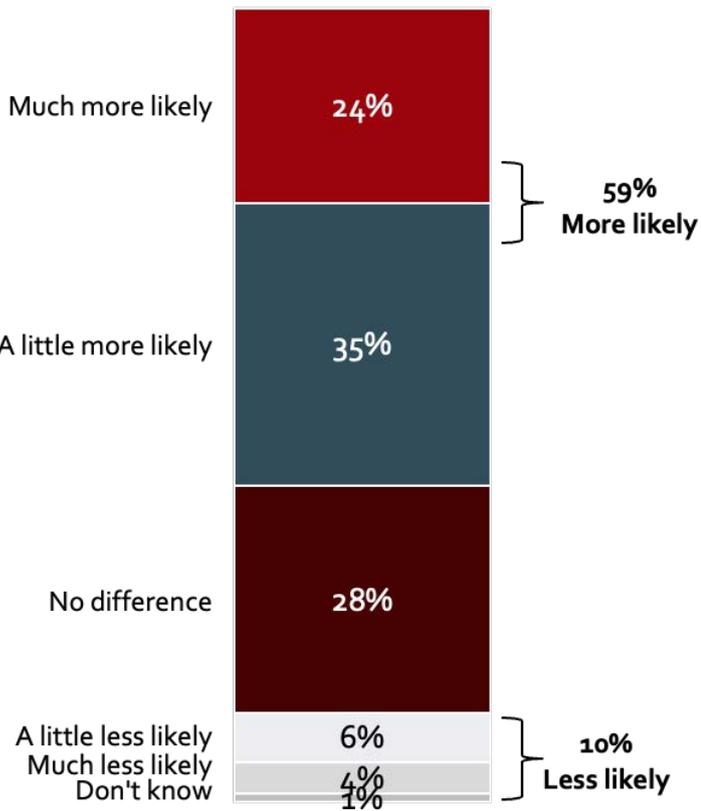


Source: Irish Residents' Survey (2022) (N=1000)

2.4.3. Preferences for and Distinctiveness of Irish Film and Television

Irish residents show a strong preference for Irish content. The majority of respondents – six in 10 – are more likely to view a film or television series if it is Irish. This demonstrates the interest in national Screen content and shows the quality of Irish film and television and the relevance it has to Irish residents' lives.

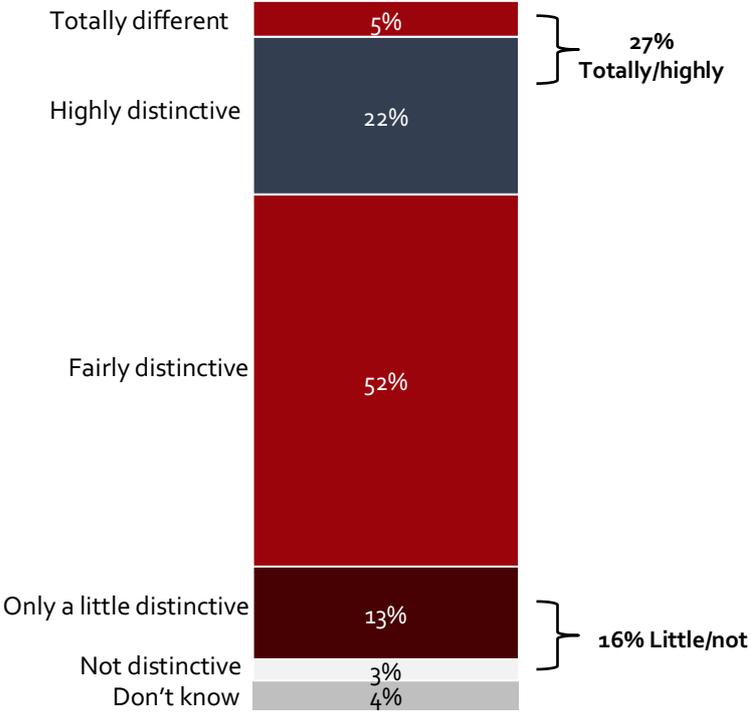
Figure 8 – “Would you be more or less likely to view a film or television series if it was Irish?”



Source: Irish Residents’ Survey (2022) (N=1000)

The preference for Irish film and television is in part related to its distinctiveness when compared with content from other countries. As outlined in the following figure, 27% of Irish residents believe that Irish film and television is totally different or highly distinctive in this regard. A further 52% believe it is fairly distinctive. This uniqueness of Irish content is a key attraction for audiences.

Figure 9 – “How distinctive are Irish film and television programmes from those of other countries?”

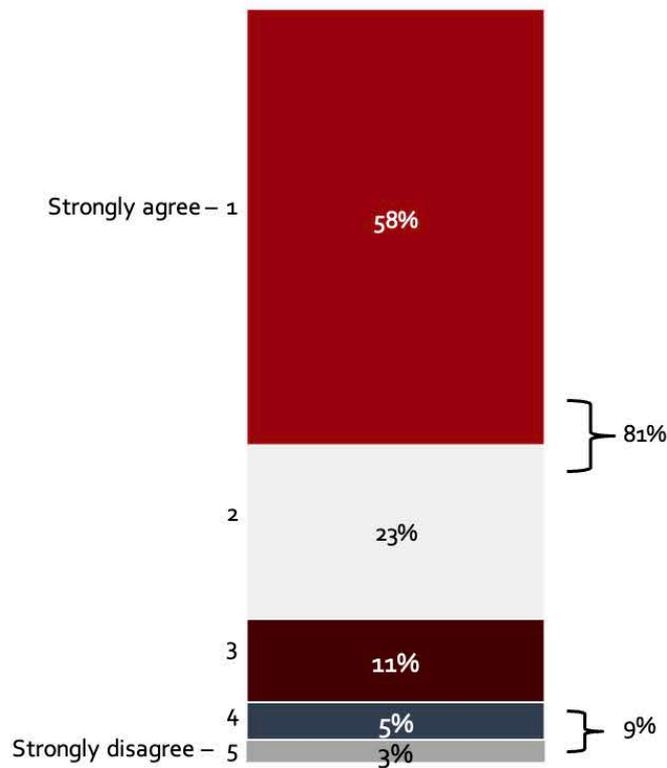


Source: Irish Residents’ Survey (2022) (N=1000)

2.4.4. Positive Cultural Effects

Irish residents also have strong recognition of the cultural impacts that Irish film and television can generate. The majority of survey respondents said that even if they did not watch a particular Irish film or television show they were glad that Irish content was being produced. This demonstrates significant appreciation and recognition among Irish residents of the cultural value and impact of Irish Screen production.

Figure 10 – “Even if I don't watch a particular Irish film or television show I am glad that Irish content is being produced”



Source: Irish Residents’ Survey (2022) (N=1000)

2.5. Section 481 Project Analysis

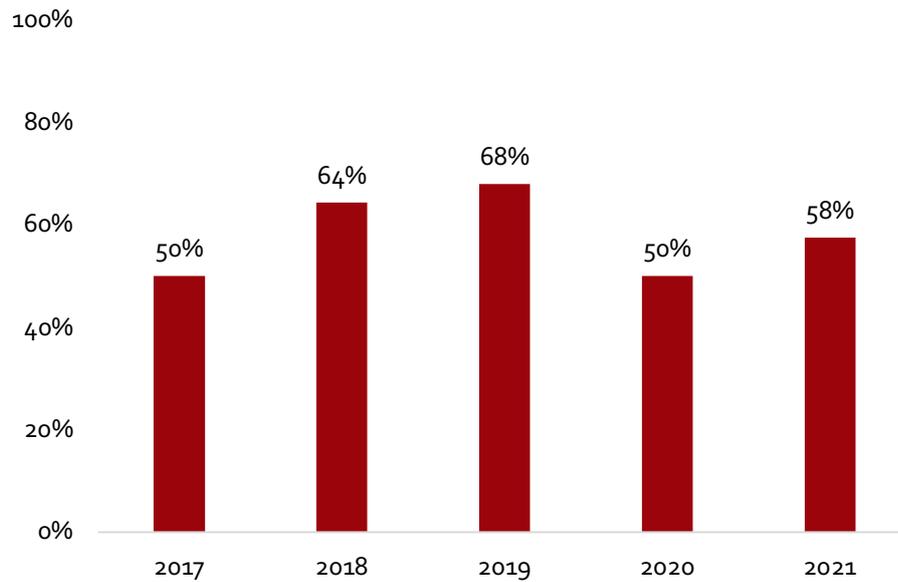
Data from a sample of Section 481 funded productions were analysed to obtain evidence relevant to the consideration of intrinsic cultural impact. The dataset analysed consisted of a sample of 286 productions receiving Section 481 funding between 2017 and 2021. Combined, these projects had a total eligible spend of €1.38 billion, accounting for 85% of the total eligible spend of all Section 481 funded projects that went into production over the time period (see Section 3.3.2 for more detail).

The projects were assessed on several indicators of cultural impact, such as use of Irish settings, use of Irish language, and reliance on Irish talent. Data on Section 481 productions was collected by Screen Ireland and was shared for the purposes of this Study, with the rest of the data coming from Olsberg•SPI’s desk research. Indicators of cultural impact were also measured against other relevant metrics, such as eligible spend band range and whether the productions were incoming or indigenous, helping to create an overall picture of cultural impact, as well as how this impact varies depending on the nature of the production.

2.5.1. Irish Setting

Well over 50% of Section 481 film and television drama productions analysed between 2017 and 2021 featured an Irish setting. This is a key factor for generating cultural value, as it demonstrates the strong potential for Section 481 projects to be identified as Irish by consumers in Ireland and globally. Projects were defined as having an Irish setting if they were set in either the Republic of Ireland or Northern Ireland. Non-Irish settings included Irish and inward productions set elsewhere but filmed using Irish locations and studios. Therefore, projects not set in Ireland may still depict recognisably Irish settings, without contributing to the count under the definition used for this Study.

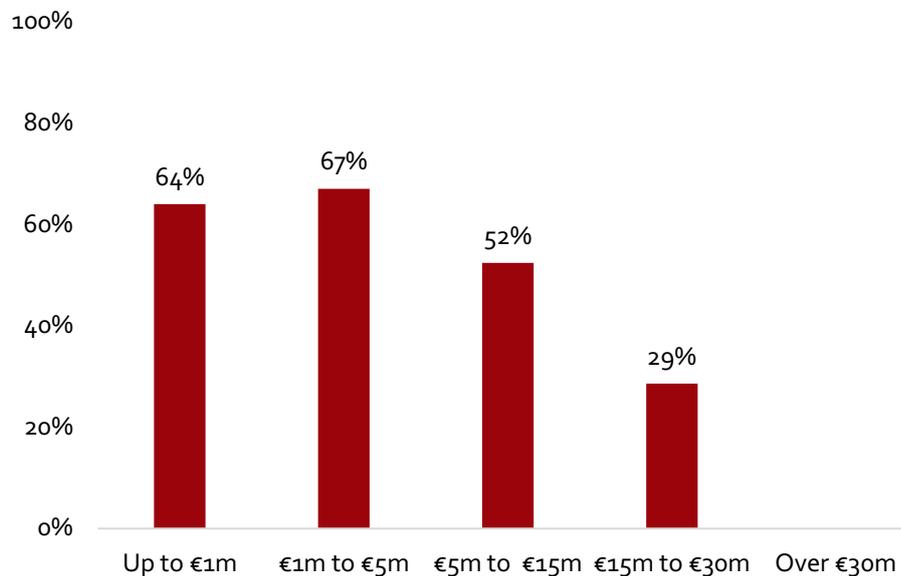
Figure 11 – Percentage of Section 481 Productions with an Irish Setting (Film and Television Drama), 2017-2021



Source: Screen Ireland (2022) (N=133)

The higher the eligible spend of a production, the less likely it was to have an Irish setting, as indigenous projects are unlikely to be made at the highest budget levels. Despite this, the proportion of productions with an Irish setting only falls below 50% from the €15 million to €30 million range.

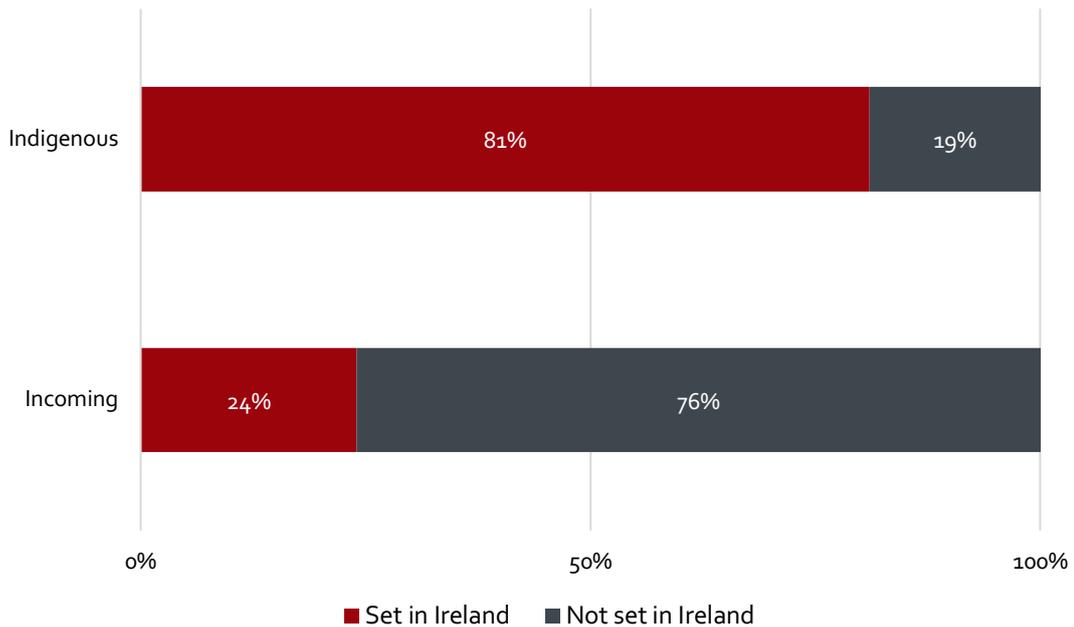
Figure 12 – Percentage of Section 481 Productions with an Irish Setting, by Eligible Spend Range (Film and Television Drama only), 2017-2021



Source: Screen Ireland (2022) (N=133)

As is to be expected, the percentage of indigenous productions with an Irish setting is high – 81% from the sample of Section 481 productions since 2017 for film and television drama. A significant number of incoming productions also had an Irish setting, equating to 24% of total productions. This suggests that inward investment projects do make a direct contribution to Irish stories being told, albeit not at the highest budgets, as shown by the previous figure.

Figure 13 – Percentage of Section 481 Productions with an Irish setting, by Incoming and Indigenous (Film and Television Drama only), 2017-2021



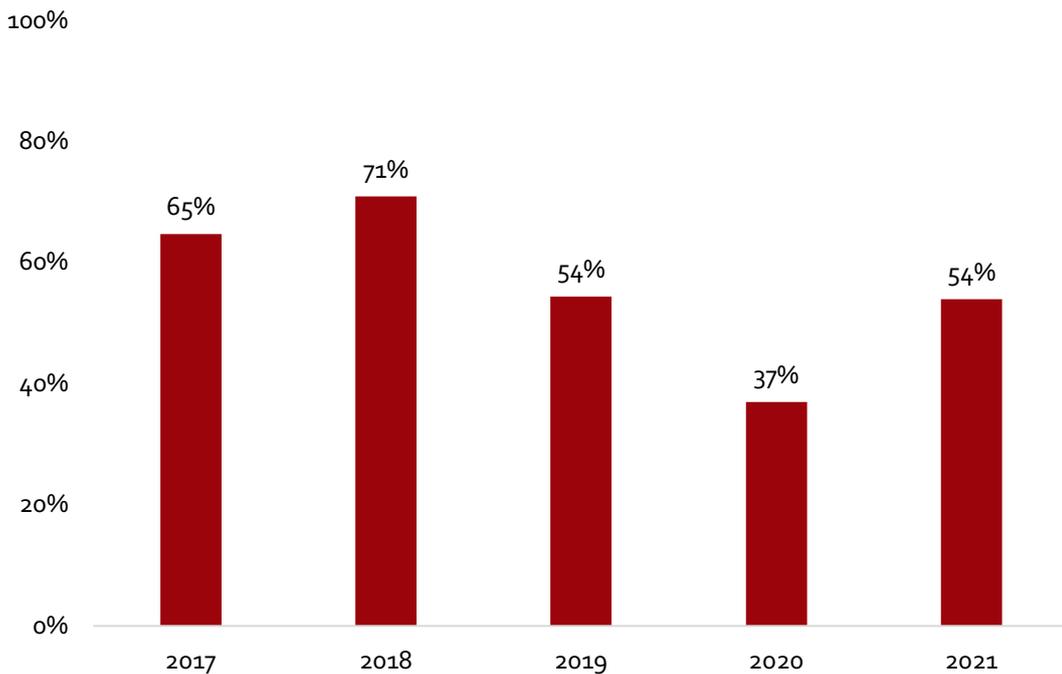
Source: Screen Ireland (2022) (N=133)

2.5.2. Irish Intellectual Property

Section 481 productions were also analysed on the basis of whether or not they were based on Irish IP – i.e., where the production’s IP was created by Irish talent and / or owned by an Irish company.

The majority of productions (57%) accessing Section 481 between 2017 and 2021 have relied on Irish IP within the definition used by this Study, with the vast majority of these being indigenous productions. As with setting, Irish IP is an important factor in ensuring audiences link content with Ireland and indicate the level of influence Irish creators have in telling Irish stories.

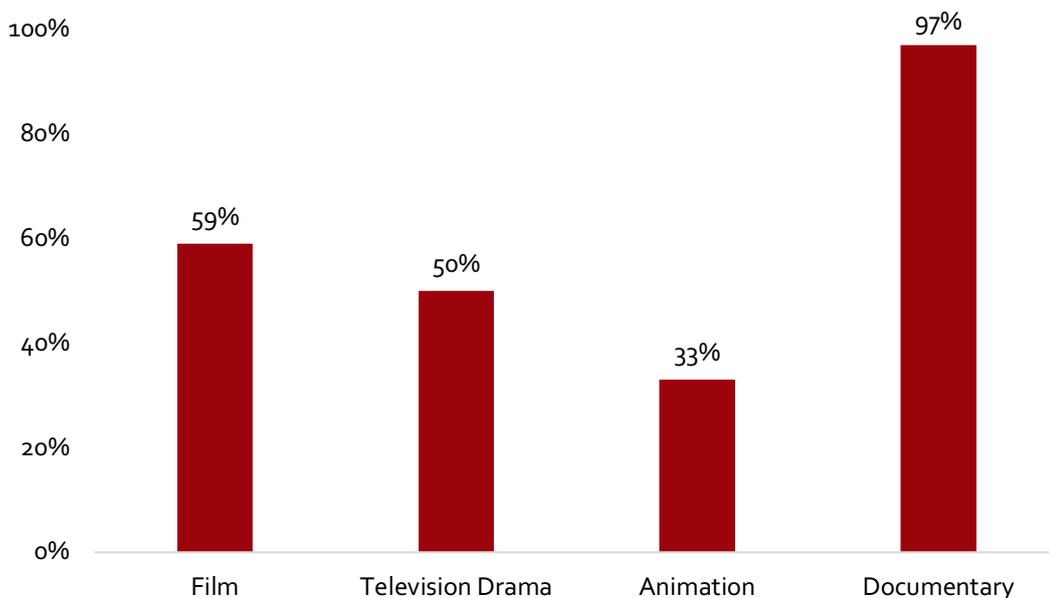
Figure 14 – Percentage of Section 481 Productions with Irish Intellectual Property, 2017-2021



Source: Screen Ireland (2022) (N=286)

Films accessing Section 481 are more likely to be based on Irish IP than television dramas or animation. This is to be expected, as films are more likely to be indigenous productions, and indigenous productions are more likely to rely on Irish IP. This similarly explains the high proportion of documentaries with Irish IP, given their very high likelihood of being indigenously produced.

Figure 15 – Percentage of Section 481 Productions with Irish Intellectual Property, by Type, 2017-2021

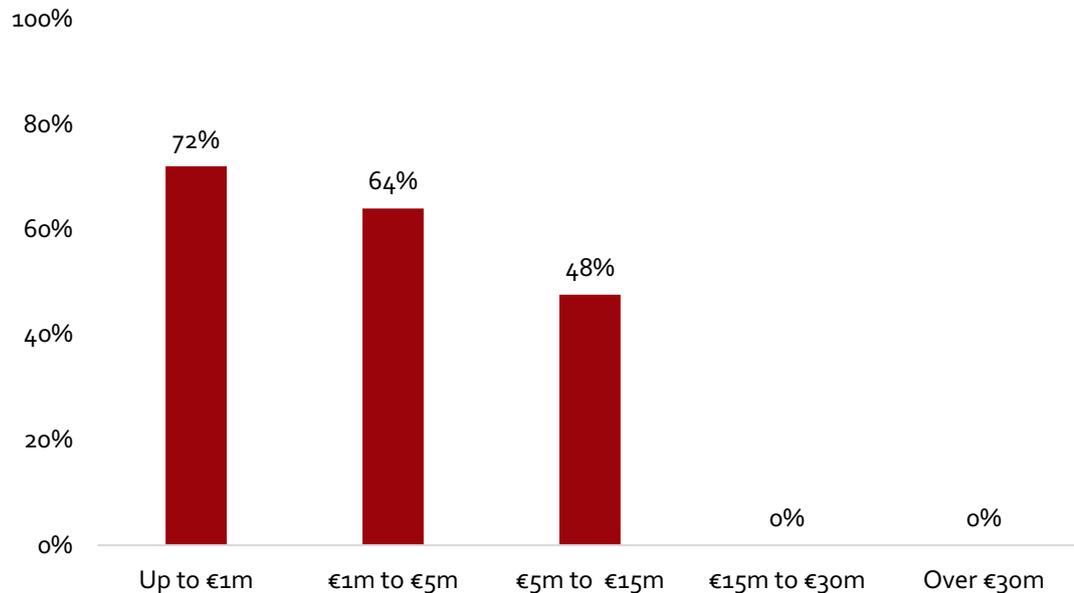


Source: Screen Ireland (2022) (N=286)

Analysis of Irish IP by spend type shows that Section 481 has been accessed by a number of sub-€1 million productions that utilise Irish IP. Larger-budget productions, however, tend

not to not use Irish IP. This underlines the overall attractiveness and flexibility of Ireland as a global production destination for major global producers. Incoming productions are not made in Ireland solely to tell Irish stories – but such productions can still create significant cultural impacts.

Figure 16 – Percentage of Section 481 Productions with Irish Intellectual Property, by Eligible Spend Range (Film and Television Drama only), 2017-2021



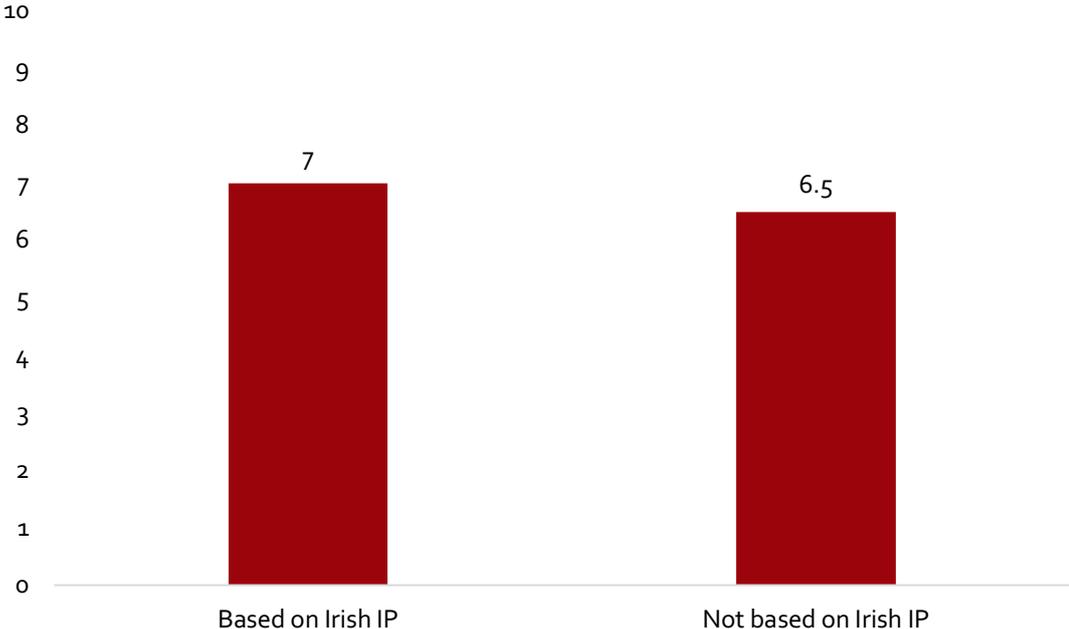
Source: Screen Ireland (2022) (N=133)

As outlined, intrinsic value can be associated with notions such as quality. To examine this, all productions in the Section 481 sample between 2017 and 2021 were assessed for how audiences and critics had responded to them.

Averages were calculated from user ratings scores from the major online review aggregators – IMDB, Metacritic, and Rotten Tomatoes.

Productions based on Irish IP were scored more favourably by audiences than those that were not. The difference between them (6.5 to 7) is of some significance and demonstrates that productions based on Irish IP compete strongly with other types of production.

Figure 17 – Average Audience Score of Section 481 Productions, by Those Based on Irish IP and Those Not Based on Irish IP, 2017-2021



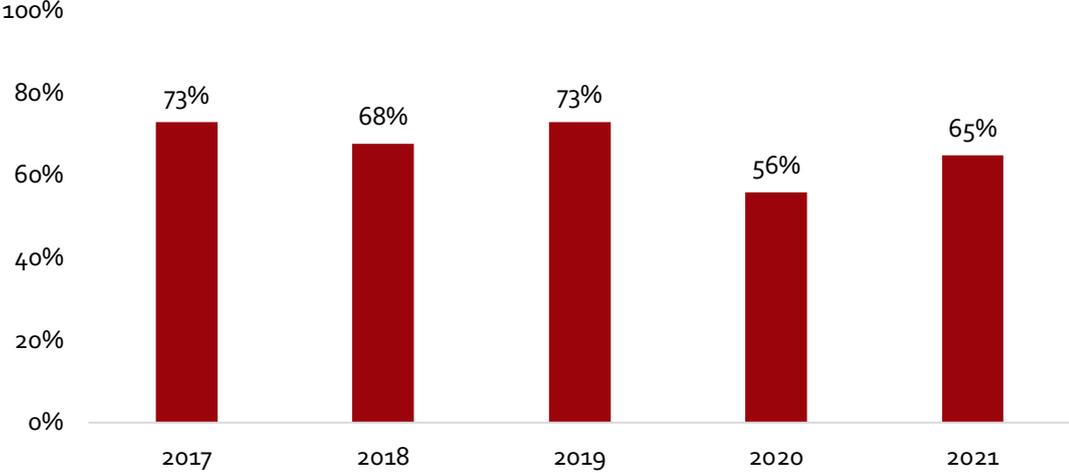
Source: Screen Ireland (2022) (N=144)

2.5.3. Irish Talent

A high proportion of projects accessing Section 481 rely on Irish talent, with 68% of productions using Irish talent between 2017 and 2021. As well as providing career opportunities for Irish residents, the use of Irish talent can also provide authenticity to productions in which Irish stories are told. This helps instil a sense of pride in Irish audiences since the work is created by Irish talent.

Productions were classed as relying on Irish talent if they made substantial use of Irish talent in key creative roles such as writer, director, or the lead cast. For the purposes of this analysis, producers were excluded because Section 481 requires an Irish producer on all funded productions.

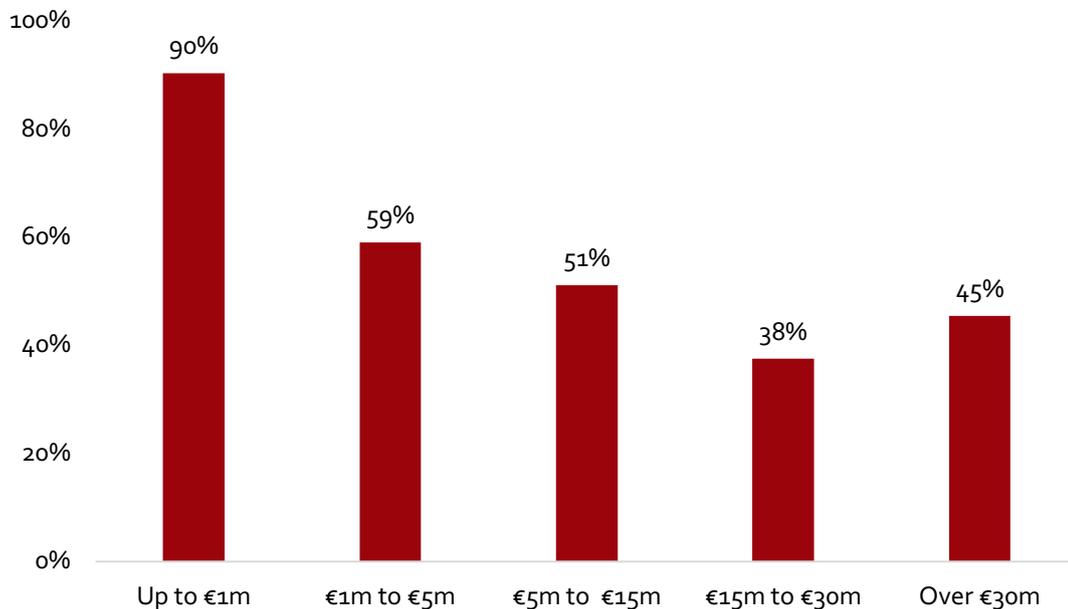
Figure 18 – Percentage of Section 481 Productions with Irish Talent, 2017-2021



Source: Screen Ireland (2022) (N=286)

Smaller-budget productions tend to feature a higher proportion of Irish talent. However, the figure is still sizeable even in the higher eligible spend range categories, demonstrating the attraction of Irish talent to global producers.

Figure 19 – Percentage of Section 481 Productions with Irish Talent by Eligible Spend Range, 2017-2021



Source: Screen Ireland (2022) (N=286)

2.5.4. European Partners

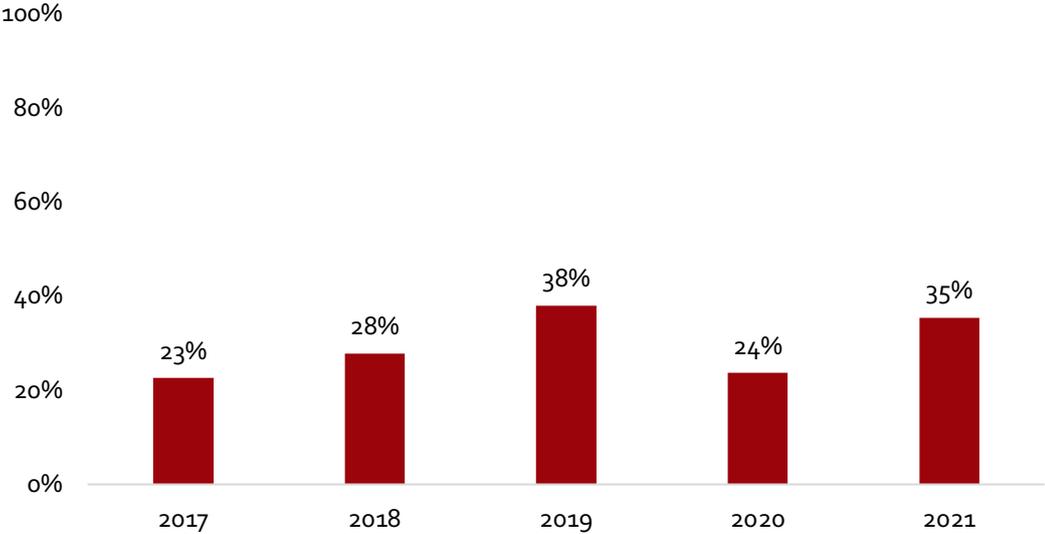
For film, television drama and animation, 30% of productions accessing Section 481 had a European partner.¹⁷ These are defined as productions that were structured as either official European co-productions with European countries or had substantial finance from a European partner.

When considering film, television drama and documentary, 72% of productions had a European story.¹⁸ These were defined as productions which contain a European setting or story, including those projects that are also set in Ireland.

¹⁷ Documentary was excluded due to its tendency to be financed domestically

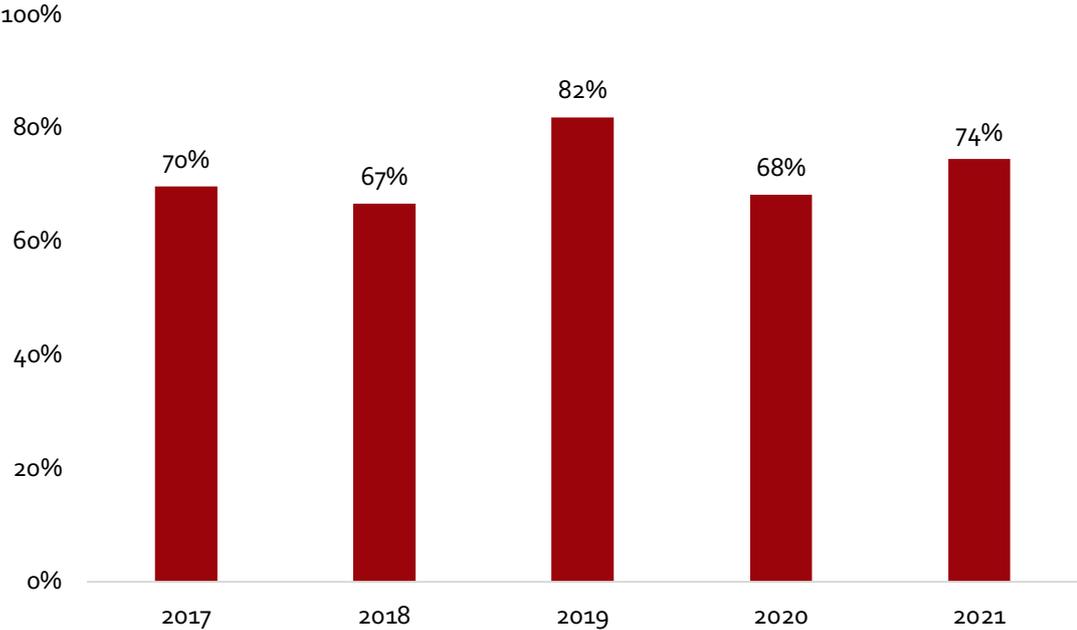
¹⁸ Animation was excluded due to its form of storytelling typically involving non-specific settings

Figure 20 – Percentage of Section 481 Productions Involving a European Partner (Film, Television Drama and Animation only), 2017-2021



Source: Screen Ireland (2022) (N=224)

Figure 21 – Percentage of Section 481 Productions with a European Story (Film, Television Drama and Documentary only), 2017-2021



Source: Screen Ireland (2022) (N=195)

2.6. Case Studies Demonstrating Intrinsic Value

2.6.1. *An Cailín Ciúin (The Quiet Girl)*



Credit: Inscéal

An Cailín Ciúin (The Quiet Girl) is a 2022 Irish-language film for the cinema, directed and written by Colm Bairéad and produced by Cleona Ní Chruaí of Dublin-based production company, Inscéal. The film tells the story of a reserved young girl who experiences a loving home for the first time when she spends the summer on a farm with distant relatives in the Gaeltacht area of An Rinn in County Waterford.

The film was backed by Screen Ireland, TG4 and the Broadcasting Authority of Ireland and also received Section 481 funding. It is based on the book, *Foster*, by Claire Keegan. Bairéad and Ní Chruaí were keen to make a project in the Irish language – until recently, there have been very few theatrical films made in Irish.

The film offers a non-anglicised view of Irish people and this focus, the universality of the broader narrative and its attention to authentic period detail are among the factors which have made the film hugely appealing to audiences in Ireland and the UK, the two territories where it was first released. At time of writing, it is still currently showing in select cinemas in Ireland and is also out for theatrical release in New Zealand and Australia, with other territories to follow. It has broken box office records in Ireland and the UK, making more than five times the record for any previous Irish-language film.

In Ireland, the film's intrinsic cultural values attracted people who had not visited a cinema in years. Its audience has been extremely varied – ranging from young children to people in their eighties.

The time period within which *An Cailín Ciúin* was released is likely to have impacted the film's cultural resonance. Following a shift in a country's socio-economic footing, of the kind that preceded the 2007-08 financial crisis, a society tends to look at itself more openly. This may

have been a catalyst in Ireland for increased interest in indigenous identity. Moreover, a younger generation that is perhaps more sensitised to issues of cultural identity clearly feels a connection with the film.

The ever-expanding network of Irish-language primary and secondary schools (which gained a foothold from the 1970s onwards) has contributed to a cross-generational and largely positive relationship with the language and its cultural output for those who passed through that system.

It is likely that the success of the film will have a significant impact on the desire of people in Ireland to learn their indigenous language. Many secondary schools will show the film and pupils studying Irish have been on trips to see the film. The Irish Film Institute runs a programme for schools and intends to run the film in the current school year.

In March 2022, *An Cailín Ciúin* became the first Irish-language film to win the Irish Film & Television Academy Award (IFTA) for Best Film. The film received 7 IFTAs including awards for Director, Actress, Cinematography, Editing, Production Design and Original Score.

In August 2022, *An Cailín Ciúin* was selected as Ireland's entry for the Best International Feature Film category of the 2023 Oscars and in December it was shortlisted for nomination.¹⁹ This has, and will likely continue to, significantly increase its international exposure and cultural impact. Since this selection, it has gone on to pick up US distribution by Super, and its UK-Ireland box office has surpassed €1 million, making it the highest grossing Irish language feature film and the first Irish language film to pass this threshold.

2.6.2. *Angela's Christmas*



Angela's Christmas is an animated short for children and families, set in the 1910s in Ireland. The eponymous Angela, seeing the Baby Jesus cold and alone in his crib, feels pity for him and takes him home to keep him warm. The film is set in Limerick and the creative team paid meticulous attention to reproducing the period detail of the time as precisely as possible, for example, St Joseph's church. The project is a striking example of how a work with all its elements based on Irish IP can achieve cultural resonance across the world.

¹⁹ 95th Oscars Shortlists Announced for 10 Categories. Oscars, 21st December 2022. Accessible from: <https://aframe.oscars.org/news/post/2023-oscars-shortlists>

The film was produced by Brown Bag Films and aired on Netflix. Founded in Dublin in 1994 by Managing Director Cathal Gaffney and Creative Director Darragh O'Connell, Brown Bag is one of Ireland's most successful animation companies. Since 2015, Brown Bag has been owned by 9 Story Media Group, a leading creator of content for children and families, based in Canada.

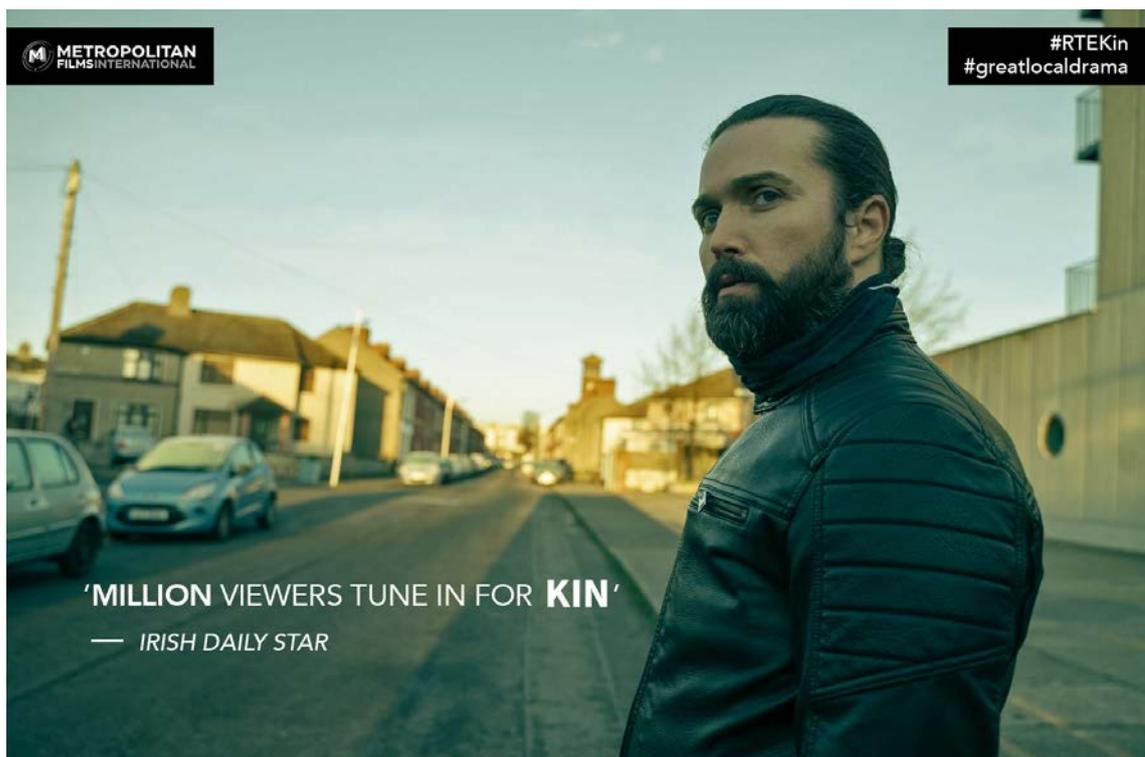
The project, directed by Damien O'Connor, was based on the book 'Angela and the Baby Jesus' by Frank McCourt. The production team were attracted to it because it is unashamedly an Irish story, rooted in the Irish experience and with a very strong sense of place. 'Angela's Song', which features in the credits, was written and sung by Dolores O'Riordan and was the last song that she recorded before her death in January 2018.

Because it can be easily dubbed, animation travels extremely well. *Angela's Christmas* has been dubbed into over 40 different languages and featured in the top 10 on Netflix's international carousel, thereby ensuring audiences across the world are able to access and enjoy this intensely Irish cultural work.

Cathal Gaffney, now Chief Operating Officer of 9 Story Media, emphasises that animation creates careers, not just jobs. Learning and development is core to every project that the company undertakes, and *Angela's Christmas* contributed significantly to the development of the production team's skills.

The film also spawned a sequel, *Angela's Christmas Wish*, released in 2020, again directed by Damien O'Connor and also made for Netflix.

2.6.3. KIN



Credit: BRON Studios

KIN is an ongoing Irish co-production crime drama series produced by Canada's BRON Studios, the UK's Headline Pictures and Ireland's Metropolitan Films. It is co-financed by ViaPlay, AMC, and Sweden's Nordic Entertainment Group.

The first season aired on RTÉ in Ireland in 2021, with production now ongoing for its second season. KIN has been extremely popular in Ireland and was the country's most watched television drama in 2021, including both domestic and international series. The series tells the

story of a fictional Dublin family embroiled in gangland warfare, whilst dealing with the theme of the enduring nature of family bonds.

The series underlines the fact that there can be a significant cultural and audience impact when it comes to bold investment in contemporary Irish production. As a result of per-episode budgets comparable to UK crime dramas, KIN has a visibly high production value, with a “Hollywood slickness”²⁰ and “style and star power”.²¹

Consequently, KIN has been a phenomenon in Ireland, with 687,000 viewers tuning in on RTÉ and 2.5 million total streams on the RTÉ player. KIN’s viewing figures rivalled those of major Euro 2020 and Six Nations matches from the same year and was especially popular amongst younger audiences.

The significant investment in the series allowed it to attract major Irish acting such as Aidan Gillen and Ciarán Hinds. The show almost has an almost entirely Irish cast and crew, an Irish writer/showrunner, and a number of Irish directors.

The level of investment was also evident in the sophistication and ambition of its production design and cinematography. In combination with its production value, KIN’s popularity in Ireland stems from its authentically Irish take on the feuding dynastic gangland premise, depicting the grittier, edgier side of contemporary Dublin.

With over half of survey respondents suggesting that Irish film and television is a source of pride for Ireland and its residents, KIN is a strong example of a production of Irish drama competing on the global stage. The show's quality was demonstrated by 11 IFTA Awards nominations and 4 IFTA Awards wins in 2021.

2.7. Cultural Contribution – Instrumental Value

Instrumental value relates to the social and economic uses of cultural value and the effects that film and television content may have on individuals and on society on a broader basis.

For the individual, this could include impacts on areas such as awareness of Irish history or language, and personal feelings of belonging or pride in being Irish. Regarding broader societal impacts, this could include the potential of film and television to positively challenge attitudes or to increase the profile of certain fundamental areas of culture – such as the Irish language.

As with intrinsic value, consumption of Irish Screen content is an important consideration in determining impact. Findings related to the circulation and quality of Section 481 projects in the previous section are therefore relevant to instrumental impacts.

The consideration of instrumental value is relevant to both Irish residents and international audiences; instrumental cultural impacts include the potential for film and television to promote positive interest in Ireland, its locations, and history – which can then generate valuable tourism.

2.8. Domestic Survey

²⁰ *Kin review — family feuds in the Irish Sopranos*. The Times, 17th September 2021. Accessible at: <https://www.thetimes.co.uk/article/kin-review-family-feuds-in-the-irish-sopranos-5cg5hcbgd#:~:text=Literal%2Dminded%20souls%20who%20expect,performances%20from%20a%20stalwart%20cast>.

²¹ *Kin review: RTÉ series has style and star power but needs more tension*. Irish Examiner, 12th September 2021. Accessible at: <https://www.irishexaminer.com/lifestyle/artsandculture/arid-40695524.html>

2.8.1. International Projects

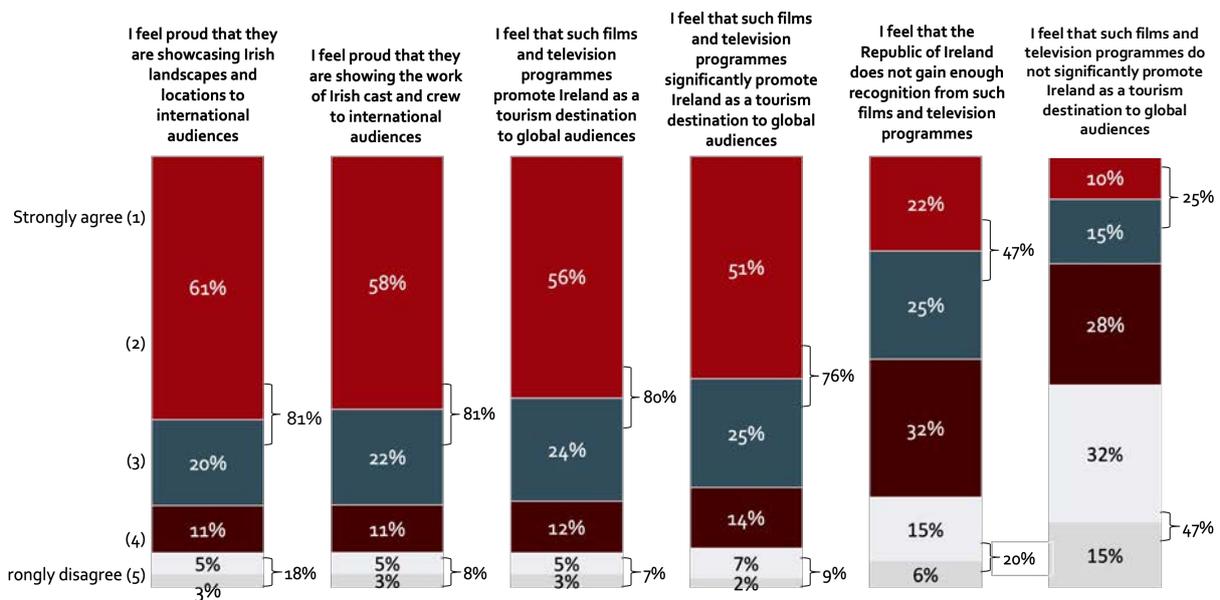
In addition to gathering their views on Irish film and television, Irish residents were also asked about their attitudes to larger international inward productions that are produced in Ireland and are highly likely to utilise Section 481.

Responses demonstrate that there is strong recognition among Irish residents that films such as *Star Wars: Episode VII – The Force Awakens* are made in Ireland, and that such projects can have sizeable positive impacts globally for Ireland.

This includes the impact of showcasing Irish locations to global audiences, showcasing the work of Irish cast and crew and promoting Ireland as a tourist destination.

Some responses were mixed in relation to the impacts of tourism and promotion. This underlines the lack of data on this phenomenon and suggests that stakeholders should undertake more robust measurement and ensure that tourism and promotional impacts are communicated publicly.

Figure 22 – “Some major international films or television programmes – such as *Star Wars: Episode VII – The Force Awakens* – are filmed in the Republic of Ireland, but not set in Ireland. Thinking about this type of international film or television programme, to what extent do you agree with the following statements?”



Source: Irish Residents' Survey (2022) (N=1000)

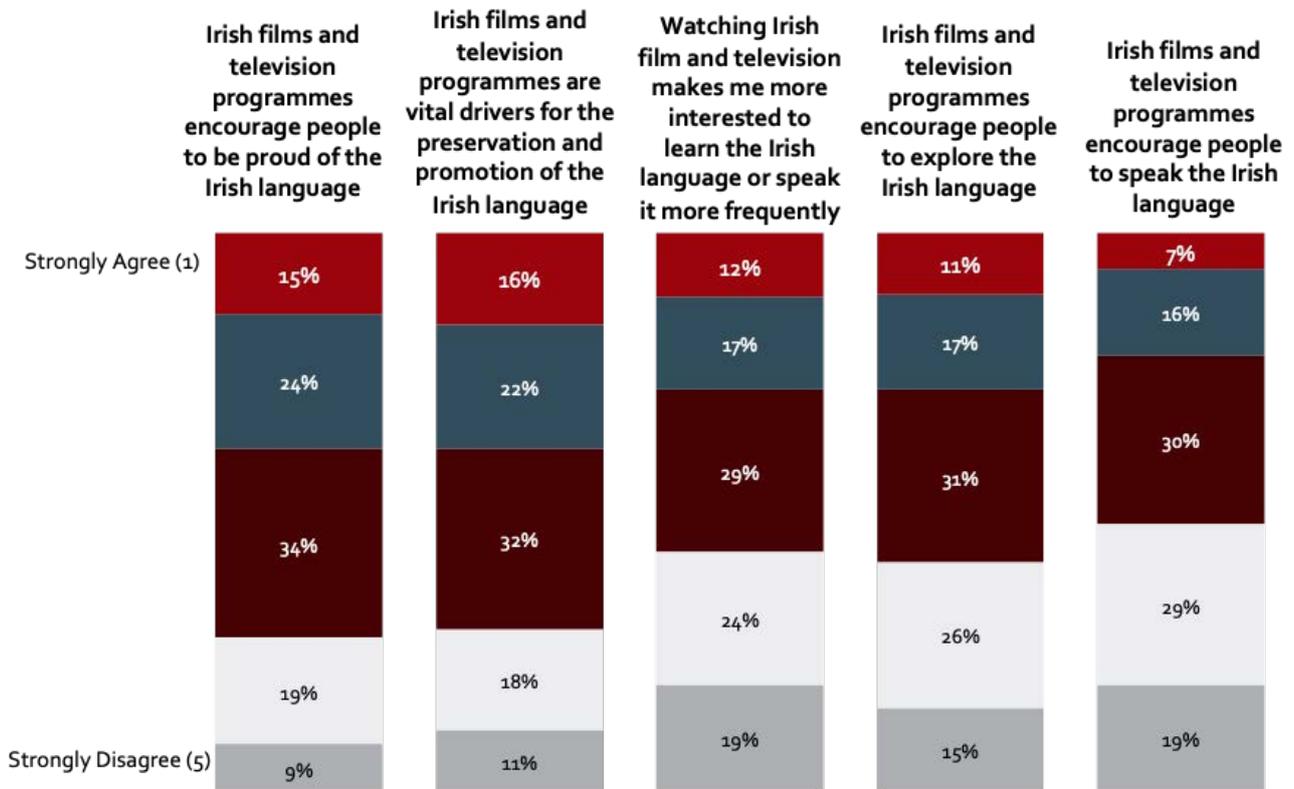
2.8.2. Impact of Irish Film and Television on the Irish Language

A critical area of instrumental value for Ireland is encouraging, promoting and preserving the Irish language. Irish film and television performs very strongly in this regard, with almost four in 10 Irish residents believing that Irish films and television programmes encourage pride and promotion of the Irish language.

There are also effects on making Irish residents more interested in learning the language or speaking it more frequently.

Since the survey for this Study was held before the exceptionally successful release of the Irish language *An Cailín Ciúin (The Quiet Girl)* it is likely that these impacts would now be notably higher.

Figure 23 – The Role of Irish Film and Television in the Preservation and Promotion of the Irish Language



Source: Irish Residents' Survey (2022) (N=1000)

Younger Irish residents were particularly positive regarding the impacts of film and television on promoting and preserving the Irish language. As outlined below, respondents under 35 were more likely to say that Irish screen content encouraged people to be proud of the Irish language and made them want to learn the Irish language or speak it more frequently.

Dublin residents over-index for agreeing that Irish films and television programmes encourage pride and exportation of the Irish language.

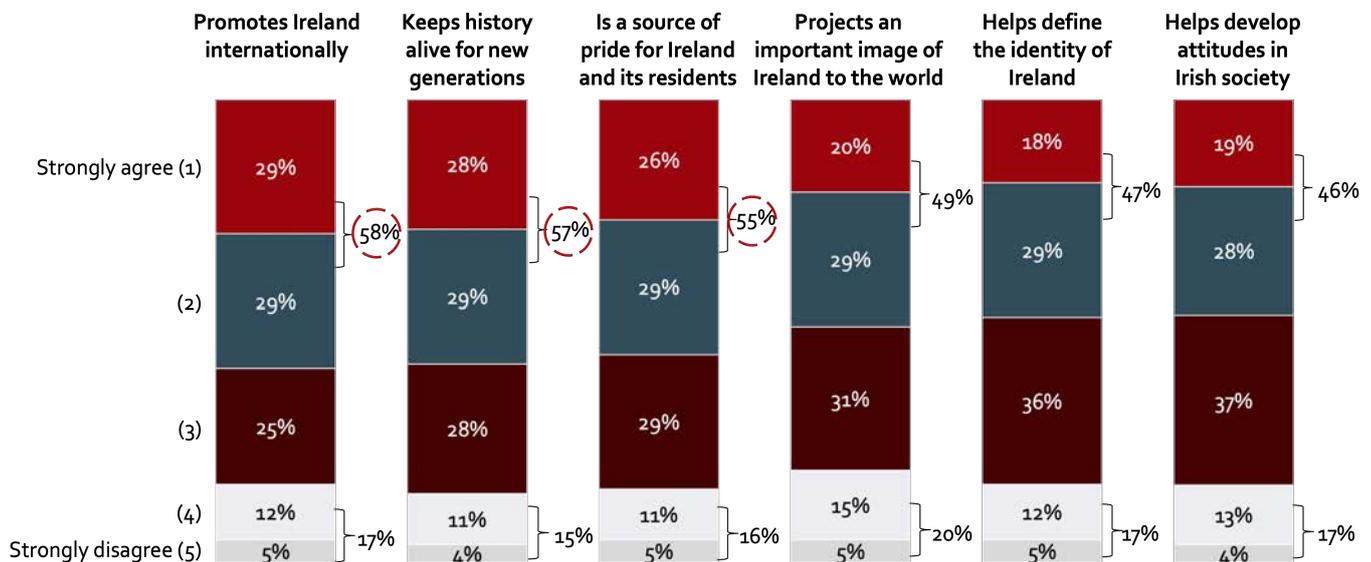
Figure 24 – Encouraging, Promoting and Preserving the Irish language, Responses by Demographic Group

	TOTAL	Gender		Age				Socio-economic group		Region				Irish citizen	
		Male	Female	Under 35	35-44	45-54	55+	ABC1	C2DE	Dublin	Rest of Leinster	Munster	Connacht/ Ulster	Yes	No/No but applied
N=	1000	490	510	275	204	180	341	508	492	291	265	269	175	949	49
Irish films and television programmes encourage people to be proud of the Irish language	39%	38%	41%	44%	37%	30%	41%	40%	38%	44%	36%	38%	37%	40%	30%
Irish films and television programmes are vital drivers for the preservation and promotion of the Irish language	38%	38%	38%	40%	38%	30%	41%	42%	34%	39%	35%	42%	35%	39%	28%
Watching Irish film and television makes me more interested to learn the Irish language or speak it more frequently	28%	28%	28%	34%	26%	20%	30%	30%	26%	32%	25%	28%	28%	29%	16%
Irish films and television programmes encourage people to explore the Irish language	27%	29%	25%	36%	26%	19%	25%	29%	26%	33%	22%	25%	30%	27%	26%
Irish films and television programmes encourage people to speak the Irish language	22%	23%	22%	29%	20%	16%	20%	24%	20%	25%	20%	22%	20%	22%	16%

Source: Irish Residents' Survey (2022) (N=1000)

Irish residents were asked about their views on the impacts of Irish content on various fronts. The results show strong recognition of the ability for Irish film and television to promote Ireland internationally, as well as keeping Irish history alive and providing a source of pride.

Figure 25 – “How much do you agree that Irish film and television...”

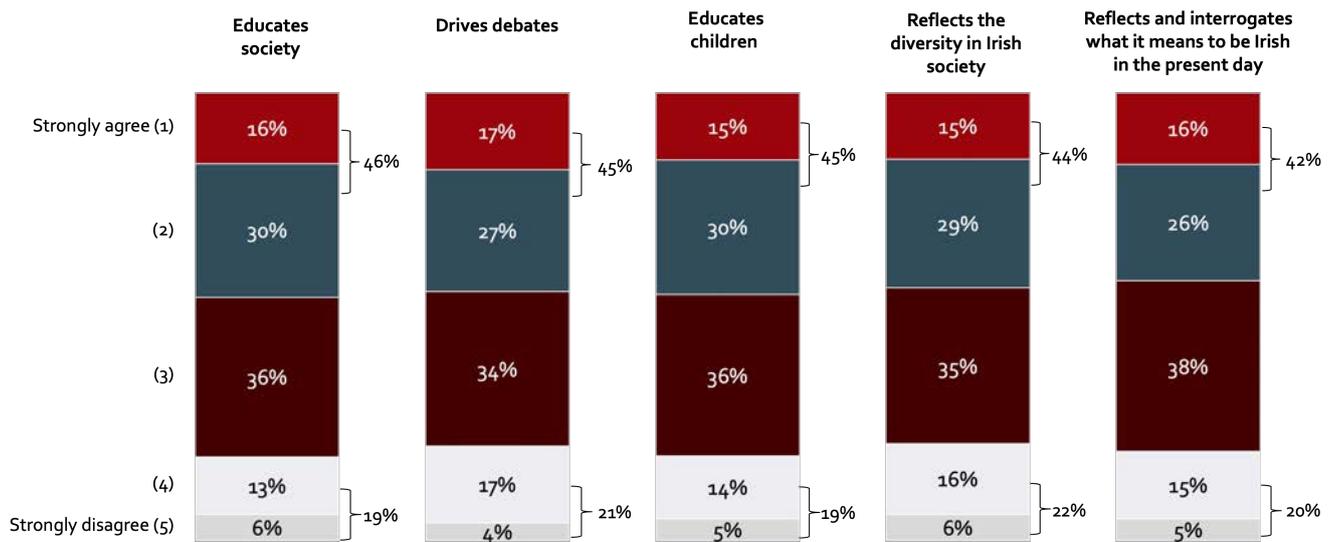


Source: Irish Residents' Survey (2022) (N=1000)

Significant numbers of respondents also agreed that Irish film and television had positive outcomes in areas like educating society, driving debate, and educating children.

This is reflected, for example, in school groups attending theatrical screenings of Irish-language productions such as *Arracht*.

Figure 26 – "How much do you agree that Irish film and television..."



Source: Irish Residents' Survey (2022) (N=1000)

2.8.3. Section 481 and Irish Language Production

Section 481 is a critical funding source for Irish language productions and has played a key role in the current resurgence of Irish-language filmmaking, with projects such as *Arracht* and *An Cailín Ciúin (The Quiet Girl)* attracting significant attention domestically and overseas.

From the production sample, between 2017 and 2021 some 21 Irish language productions accessed Section 481, equating to 12% of indigenous productions. Irish language productions were defined as productions that were entirely in the Irish language or contained a substantial amount of dialogue in the Irish language.

Of these productions, 12 had an eligible spend range of up to €1 million, six were between €1 million and €5 million, and three were between €5 million and €15 million (each a season of *Ros na Rún*). Of the eight with available location information, five were shot in Galway, two in Dublin/Wicklow, and one in Meath. Virtually all have an Irish setting, use Irish IP and use Irish talent. Productions were also researched to obtain an audience score – an average of their user scores from IMDB, Rotten Tomatoes and Metacritic. All seven productions with available data scored well, averaging 7.8, with none below 7.4.

2.9. Screen Tourism

Tourism generated by film and television drama is a key area of instrumental value. While there is a lack of data nationally about tourist motivation, there are significant individual examples that underline the significant tourism impacts being delivered by Section 481 funded productions.

This includes such recent hits as *Star Wars: Episode VIII – The Last Jedi*, *Normal People* and *Vikings*, as well as films like *Harry Potter and the Half-Blood Prince*, *Brooklyn*, *The Quiet Man*, *Braveheart*, and *Saving Private Ryan*.

Normal People, for example, has been a sizeable international hit (see case study in Section 2.15.1). Produced by Element Pictures for BBC Three and the US streamer Hulu, the series was supported by Section 481, RTÉ and Screen Ireland, and was adapted from the 2018 novel of the same name by Irish author Sally Rooney, and directed by Lenny Abrahamson, the Oscar-nominated Irish director of *Room*. Key locations, including Streedagh Beach, Ben Bulbin and

Tubbercurry in Sligo and Trinity College in Dublin, along with the city's bars and cafés have seen significant uplifts in tourism as a result.

Tourism Ireland, in conjunction with Element Pictures, created a behind-the-scenes film shared on social media in which director Lenny Abrahamson, producer Catherine Magee and actress Daisy Edgar-Jones described and praised the filming locations.²² Anthony Gray, chair of Sligo Tourism, has said that the show has been a “massive endorsement” for Sligo, while tours related to the show are being offered by Sligo Tours.²³

Star Wars: Episode VIII – The Last Jedi filmed in County Donegal, while *Star Wars: Episode VII – The Force Awakens* was filmed on Skellig Michael. The latter was worth an estimated €40 million in advertising to Ireland, according to the Irish Tourism Industry Confederation.²⁴

The overall potential of screen tourism is also underlined by the impact of HBO's *Game of Thrones* in Northern Ireland. The show, which filmed extensively across Northern Irish locations, has been a major tourism driver: in 2019, Tourism NI estimated that because of the series 350,000 leisure visitors – or one in six – visit Northern Ireland annually, spending more than £50 million.²⁵ With multiple publicly accessible filming locations in Northern Ireland, *Game of Thrones* has also been used for tourism marketing and has seen the development of screen tourism products. This includes a legacy project, with the development of the *Game of Thrones* Studio Tour at Linen Mill Studios in Northern Ireland.²⁶

The Banshees of Inisherin, directed by Martin McDonagh, reunites Colin Farrell and Brendan Gleeson. Set on a fictional isle off the west coast of Ireland, the film also features Kerry Condon and Barry Keoghan. Following its premiere at the 2022 Venice International Film Festival, the film has been attracting significant critical acclaim. It was filmed on Achill Island and Inishmore and showcases the dark, mystic beauty of the West of Ireland. Because of its global exposure, it will likely contribute to tourism in the areas that the film was shot. As noted in *Variety's* review: “After a teasingly postcard-bright intro – which sets up an Emerald Isle ideal of verdant fields, rainbows and sunlight skittering across the ocean, soon to be bluntly shattered – McDonagh crafts an Ireland where despair, for everyone, is something to be managed rather than beaten.”²⁷

2.9.1. *Cartoon Saloon – Impact on Kilkenny Tourism*

Cartoon Saloon is an indelible part of the Kilkenny landscape. The popularity of Cartoon Saloon's award-winning films and series has connected Kilkenny with Irish animation and become a driver for domestic and international visitors.

Exhibitions have been held at Kilkenny's Butler Gallery for three Cartoon Saloon films: *Song of the Sea*, *Breadwinner*, and *Wolfwalkers*. The exhibitions typically attract at least 40,000 domestic and international visitors, and footfall for the *Song of the Sea* exhibition between July

²² *Behind-the-scenes film of Normal People showcases Ireland*. Tourism Ireland, 29th April 2020. Accessible at: <https://www.tourismireland.com/Press-Releases/2020/April/Behind-the-scenes-film-of-Normal-People-showcases>

²³ *How 'Normal People' gave Sligo a tourism boost*. Irish Examiner, 14th February 2021. Accessible at: <https://www.irishexaminer.com/lifestyle/travel/arid-40223420.html>

²⁴ *Star Wars Exposure Worth €40m In Tourism Advertising to Ireland*. Independent.ie, December 29th 2017. Accessible at: <https://www.independent.ie/irish-news/star-wars-exposure-worth-40m-in-tourism-advertising-to-ireland-36443191.html>

²⁵ *Building the Value of Tourism*. Tourism NI Annual Review, 2019. Accessible at: <https://www.tourismni.com/globalassets/about-tourism-ni/tourism-ni-annual-review/the-value-of-tourism-2019-review.pdf>

²⁶ <https://www.gameofthronesstudiotour.com>

²⁷ *'The Banshees of Inisherin' Review: Colin Farrell and Brendan Gleeson Reunite for a Darkly Comic, Devastating Feud Between Friends*. *Variety*, 5th September 2022. Accessible at: <https://variety.com/2022/film/reviews/the-banshees-of-inisherin-review-colin-farrell-1235360424/>

and October was measured at 50,000. The gallery would typically see a footfall of 60,000 over an entire year.

Kilkenny Animated is an annual animation festival hosted by Cartoon Saloon and funded by Fáilte Ireland and Kilkenny County Council. During the 2020 festival, scenes from the film *Wolfwalkers* were projected onto Kilkenny Castle, a location in the animated film.

The Kilkenny Catwalk was an art trail around the city featuring cat sculptures based on a character from *The Secret of Kells*. Each sculpture has been decorated by artists, predominantly those local to Kilkenny. The project was a partnership between Kilkenny Civic Trust and Kilkenny County Council as part of the Keep Well Campaign. Cartoon Saloon director Tomm Moore was named one of Kilkenny's tourism ambassadors in 2021.

2.10. Case Studies Demonstrating Instrumental Value

2.10.1. *Songs for While I'm Away*



Credit: © Universal Music Group

Songs for While I'm Away is a 2020 documentary film, made for release in cinemas, about the life of the singer-songwriter Phil Lynott and his career with Thin Lizzy. It tells the story of how Lynott, as a young black boy growing up in a working-class area of Dublin in the 1950s became Ireland's best known rock star of his era, leading a band loved by fans across the world.

The film was produced by Cowtown Pictures and directed by Emer Reynolds. The production values are those of a theatrical film as a means of distinguishing it from a television documentary. The genre of theatrical documentary has become increasingly popular in recent years.

The film examines Lynott's life work through concert footage, interviews with the singer, his family and with Adam Clayton, Suzi Quatro and Midge Ure. In this way, it is an exploration of an aspect of Irish popular culture, with a strong contemporary resonance, especially as regards

issues of diversity and inclusion and the societal challenges that Lynott faced growing up given his background.

From the outset the producers wanted the project to be celebratory, rather than salacious, and most especially they wanted the audience to be as broad as possible, including younger people. It was a priority to focus on Lynott's ethnic background, and how he coped with the challenges he had faced in Irish society at that time because of his roots. This is an aspect of Irish life that has been relatively under-explored on screen.

Each of Lynott's films represented a part of his life in Ireland at the time and the producers wanted to reflect that. The film used contemporary footage featuring some unusual locations, as well as the historical footage and avoided drone shots, with the aim of making the Irish backdrop feel especially distinctive.

The release of the film was pushed back several times because cinemas were closed during COVID-19 lockdowns. There were very few physical film festivals, in Ireland or elsewhere, during this period which made getting exposure for the film more challenging. Nonetheless, the film secured widespread exposure in the media, achieved very strong box-offices from its theatrical release by Break Out Pictures and attracted a broad audience in the different territories where it was released. It was acquired by RTÉ Television where it achieved very high ratings and has been aired on television internationally – for example on BBC2 – as well as screening in cinemas in several international territories. It was released on transactional video-on-demand (TVoD) in the US in late 2021.

2.10.2. *Herself*



Credit: © Element Pictures Limited/Herself Film Productions Limited MMXIX

Produced by Element Pictures and Merman, *Herself* (2020) is an Irish feature film directed by Phyllida Lloyd (*Mamma Mia!*, *The Iron Lady*) which follows the story of Sandra, a young mother in Dublin struggling to provide for her two daughters after leaving her abusive husband. After the housing system refuses to give her a new home, she decides to build her own with the help of a friendly community.

The film tackles important social issues, such as domestic abuse, wage poverty, and problems in navigating the Irish housing system. The film shines a light on these issues, but also provides the audience with a deeper awareness and understanding of their complexities and consequences. Despite taking on cleaning jobs, Sandra struggles to support her two children and is forced to live in state-funded hotel accommodation. Her story is an example of in-work poverty, which has become a more prominent issue in Europe since the 2008 financial crisis. A European Commission report in 2017 estimated the number of Irish residents living in in-work poverty to be 5.2% of the population.²⁸

After struggling against obstruction from the council to improve her housing situation, Sandra sets about building a house herself, using self-build templates found online and one of the council's many derelict brownfield sites. This is only possible with the help of those in her community generous enough to offer their support, which forms another social theme that the film looked to explore, the importance of 'meitheal' – an Irish term that describes how neighbours would come together to help each other achieve a goal that elevates the whole community. Clare Dunne, who plays Sandra and co-wrote the script based on events in her friend's life, states that with the idea of meitheal, she wanted to show that "we used to be a bit more community-based" and that by tapping into this "we don't have to make it so hard to get food, shelter, water, and education".²⁹

Following its world premiere at the Sundance Film Festival in 2020, Amazon acquired the US distribution rights to the film, releasing it on Amazon Prime Video after a limited theatrical release. It is currently available to stream in 33 countries, including diverse markets such as the UAE, Cuba, and Egypt as well as major markets such as the UK, Canada, and Australia. The film has gone on to receive significant critical acclaim, with a 94% critics score on Rotten Tomatoes and seven IFTA nominations, and a win for Best Script – Film. *Herself* not only explores social issues but is regarded as having managed to do so with an "empathy and grace" that has resulted in its popularity with audiences and critics.³⁰

2.11. Cultural Contribution – Institutional Value

For this Study, institutional value is considered to be related to the effects that content may have on the promotion and recognition of Ireland and highlights how organisations can gain the trust and esteem of the public through user engagement. This includes concepts such as soft power. The Department of Finance's Cost Benefit Analysis noted that: "Recognition of Irish productions at a global level enhances Ireland's international reputation. Projecting the work of Irish actors, directors, writers, producers and crews, and indeed Ireland itself, to audiences around the world conveys the message that Ireland is a country with a rich history and a thriving cultural community. Section 481 contributes to the dissemination of that message."³¹

Within *Global Ireland 2025*, a core objective is to bring Irish culture and heritage to the wider world. Film and television production is specifically highlighted for its ability to project a positive image of Ireland and reflect it as a creative place.

²⁸ *In-work Poverty in Ireland*. European Commission, 2019. Accessible at: <https://ec.europa.eu/social/BlobServlet?docId=21107&langId=en>

²⁹ *Herself – The Best Irish Movie of 2020*. Irish Central, 8th January 2021. Accessible at: <https://www.irishcentral.com/culture/entertainment/herself-irish-movie-online>

³⁰ *Herself*. Rotten Tomatoes. Accessible at: <https://www.rottentomatoes.com/m/herself>

³¹ Budget 2023 – Report on Tax Expenditures 2022. Ibid

2.12. International Circulation of Irish Content

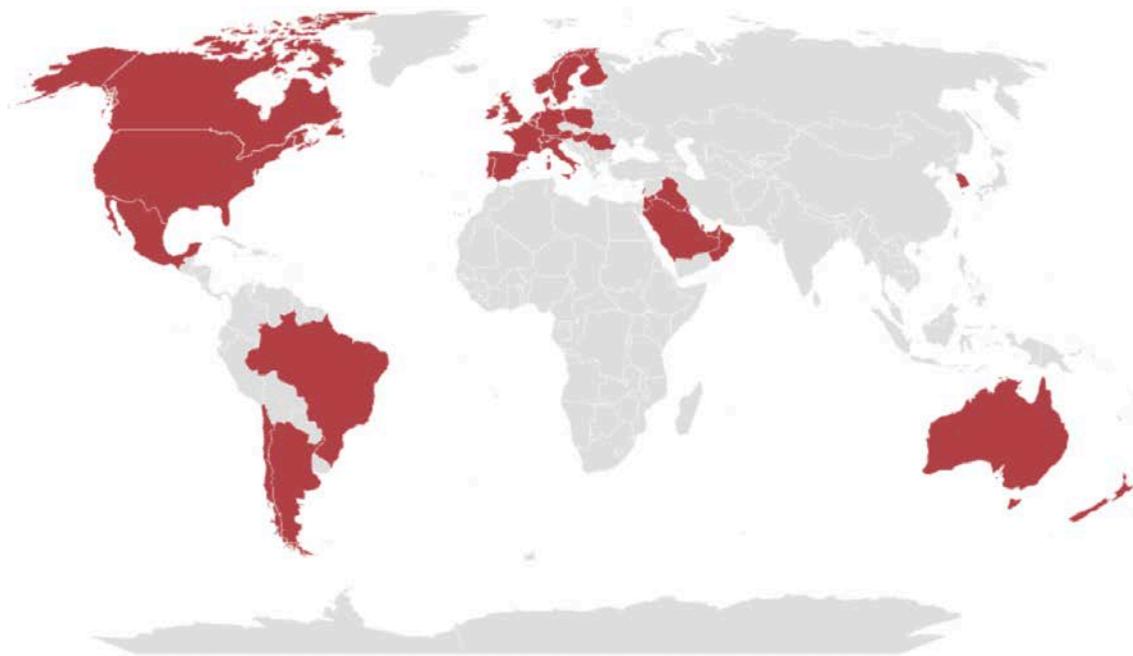
2.12.1. Theatrical and Streaming Releases

To understand routes to creating institutional value globally, and the potential scale of this impact, the global consumption of productions accessing Section 481 was analysed. Data was collected on the 286 Section 481 funded productions in our sample, covering international theatrical showings and availability on streaming services. The release data were supplied for this project by Irish company Usheru and was current as of 25th August 2022. Usheru collects data on productions globally, including on where productions are released theatrically, and where streaming links for productions are available in the world.³²

Not all Section 481 supported projects are aimed at the theatrical market, for example television drama and animation. Furthermore, as a result of cinema closures during the pandemic many projects produced in 2019, 2020 and 2021 have yet to come to market or had reduced releases. In the period under review, 43 Section 481 productions had global theatrical release information, with these productions screening in a median of four countries per production.

Regarding institutional value – as with other types of cultural value – theatrical release demonstrates a particular level of quality given the third-party investment necessary for each cinema release. The theatrical profile of these projects in each territory also creates a strong base to create cultural value.

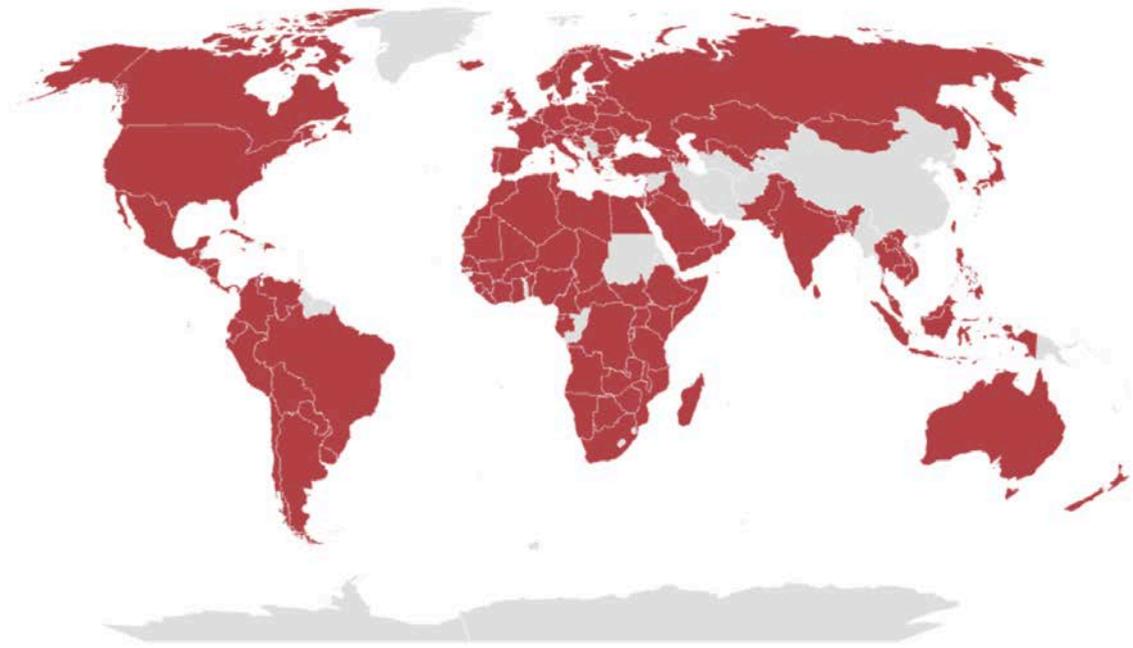
Figure 27 – Territories with Theatrical Releases of Section 481 Productions, 2017-2021



Source: Olsberg•SPI analysis of Usheru data (2022)

³² <https://www.usheru.com/>

Figure 28 – Territories with Streaming Availability of Section 481 Productions, 2017-2021



Source: Olsberg•SPI analysis of Usheru data (2022)

As outlined in the figure above, the penetration of Section 481 productions globally is very high, with projects available to stream in the vast majority of territories. Between 2017 and 2021, 50 productions were available to stream online in at least one territory outside of Ireland, with 46 being available to stream within Ireland. The US and the UK were tied with 39 Section 481 productions available to stream – more than any other countries. English-speaking countries tended to be more likely to have Irish content available to stream, with Canada, Australia, and New Zealand having 31, 26 and 22 productions available, respectively. Within continental Europe, Germany had 18 available, whilst France had 15. Seven productions on the cultural case study list for this Study were available to stream online between 2017 and 25th August 2022. Relatively new productions such as *An Cailín Ciúin* are likely to see their streaming availability increase over time:

- *Normal People (2020)* – available to stream in 102 countries
- *Angela's Christmas (2017)* – available to stream in 89 countries
- *Vikings: Valhalla (2022)* - available to stream in 59 countries
- *Songs for While I'm Away* – available to stream in 59 countries
- *Herself (2020)* – available to stream in 33 countries
- *Kin (2021)* – available to stream in 4 countries
- *An Cailín Ciúin (The Quiet Girl) (2022)* – available to stream in Ireland and the UK, Australia, and US.

Virtually all content produced with Section 481 will be broadcast on television in a variety of international territories.³³

³³ Screen Ireland has partnered with Usheru to develop a platform which will improve the findability of films and television made in Ireland with Section 481 funding. Screen Ireland will launch a major campaign highlighting the platform www.wheretowatchireland.com

2.13. Television Audiences

Content is released via a framework of 'windows'. These windows can include theatrical, streaming, pay-television and free television. Section 481 benefits television as well as film.

In the period under review – 2017 to 2021 – 26% of projects were aimed at a theatrical audience, 36% at a domestic television audience, 25% at an international television audience and 12% at a streaming audience.

Importantly, in this period, at least 50% of all projects profiled had a transmission on free-to-air television in the Republic of Ireland, which may increase over time. This underlines the importance of Section 481 to Irish broadcasters and the commissioning of cultural content, as well as the benefits to Irish audiences of the investment in cultural content.³⁴

2.14. Major Awards Nominations and Wins

Section 481 productions between 2017 and 2021 were also tracked for their international exposure at major festivals, and key awards and nominations received. As with theatrical and streaming releases, these are a mark of quality as well as providing a benchmark for cultural impact as festival and award wins suggest a certain level of audience appreciation. A number of Section 481 productions have achieved international awards and film festival success. According to Olsberg•SPI research, eleven Section 481 productions have achieved awards wins or nominations at the world's most prestigious international awards ceremonies and festivals, with many more also picking up awards elsewhere (see [Appendix 3 – Awards Analysis](#)).

An Cailín Ciúin (The Quiet Girl) received unprecedented critical acclaim for an Irish language film, premiering at the Berlin Film Festival and winning an International Jury prize. *Cartoon Saloon* has been nominated for three Oscars in the Animated Feature category, competing with productions from Pixar and DreamWorks. *Normal People* attracted seven nominations across the BAFTAs and Emmys, including a Best Leading Actor BAFTA win.

³⁴ This is primary analysis from Fís Éireann/Screen Ireland based on its knowledge of projects. In this analysis, theatrical means projects that are theatrically led and intended for screening in cinemas. Streaming is a mix of high-value live action and animation and available to audiences globally. Television accounts for live action television projects and animation. Documentary is included across television, streaming and theatrical.

2.15. Case Studies Demonstrating Institutional Value

2.15.1. *Normal People*



Credit: © EP (Normal People) Limited/Enda Bowe MMXX

The limited series *Normal People* was a significant international success in 2020. An Element Pictures production for BBC Three and the US streamer Hulu, the series was supported by Section 481, RTÉ and Screen Ireland. The series is adapted from the 2018 novel of the same name by Irish author Sally Rooney, and directed by Lenny Abrahamson, the Oscar-nominated Irish director of *Room* (2015). The series follows the relationship of Marianne Sheridan (Daisy Edgar-Jones) and Connell Waldron (Paul Mescal) through high school and college, exploring the highs and lows of both characters as they navigate their way into adulthood. The series shot primarily in Sligo and Dublin in 2019.

Coming out at the height of the COVID-19 pandemic, *Normal People* was quickly embraced by audiences in Ireland and internationally. The series was sold to more than 30 countries globally, including Australia, Japan, Germany, and Spain and was screened on RTÉ One and available on the RTÉ Player in Ireland.³⁵ Setting new records on the RTÉ Player, *Normal People* was the strongest drama opening ever on the player with over 352,000 streams and set the record for the highest number of streams for any show within a short space of time, amassing over 3.3 million streams by the end of the series.³⁶

The series also set records in the UK where it delivered the best week for BBC Three, with 16.2 million requests on the BBC iPlayer following its 26th April 2020 launch. This beat the previous opening-week record of eight million requests set by season one of *Killing Eve* in 2018.³⁷ *Normal*

³⁵ *Normal People goes global with new TV deals*. RTÉ, 20th May 2020. Accessible at: <https://amp.rte.ie/amp/1139462/>

³⁶ *Normal People Ends on a High and Smashes RTÉ Player record with 3.3 million streams*. RTÉ, 3rd June 2020. Accessible at: <https://about.rte.ie/2020/06/03/normal-people-ends-on-a-high-and-smashes-rte-player-record-with-3-3-million-streams/>

³⁷ *Normal People delivers best week ever for BBC Three*. The Guardian, 5th May 2020. Accessible at: <https://www.theguardian.com/media/2020/may/05/normal-people-delivers-best-week-ever-for-bbc-three>

People became the BBC's most streamed show of 2020 with 62.7 million streams from its launch through to December.³⁸

This interest has converted to tourism opportunities in Sligo and Dublin. Tourism Ireland launched a campaign featuring a behind-the-scenes video from the set of *Normal People* and a guide to the show's shooting locations.³⁹ The behind-the-scenes video has amassed more than 323,588 views on the Discover Ireland YouTube page. Sligo Tourism has dedicated a webpage to the series, guiding tourists to the shooting locations featured in the show.

With an average critic score of 91% on review aggregate website Rotten Tomatoes, *Normal People* has made waves critically and received awards nominations and wins in Ireland and internationally. The series was nominated for four Emmys in 2020, two Golden Globes, seven British Academy of Film and Television Arts (BAFTA) awards and 15 IFTA awards in 2021. Lead actor Paul Mescal won a BAFTA for Best Actor, and the series picked up eight awards at the 2021 IFTAs with wins for Best Drama, Best Cinematography, Best Director – Drama and Lead Actor – Drama.

Normal People launched the careers of Paul Mescal and Daisy Edgar-Jones. It was Mescal's first television role, and he has since gone on to star in the film *The Lost Daughter* (2021) and the Section 481 supported film *God's Creatures* (2022) which premiered at the 2022 Cannes film festival. Daisy Edgar-Jones had acting credits prior to *Normal People*, however since the launch of *Normal People*, she has starred in the film *Fresh* (2022) which premiered at the Sundance Film Festival, the film adaptation of *Where the Crawdads Sing* (2022) and *Under the Banner of Heaven* (2022), starring alongside Andrew Garfield.

Element Pictures partnered with Lenny Abrahamson, BBC Three and Hulu once again to adapt Sally Rooney's 2017 debut novel *Conversations with Friends*. The series, also supported by Northern Ireland Screen, RTÉ and Section 481, premiered in May 2022.

³⁸ *Normal People* is the year's most popular series on BBC iPlayer, which has broken 5 billion annual requests for first time. BBC, 8th December 2020. Accessible at: <https://www.bbc.co.uk/mediacentre/2020/iplayer-breaks-5-billion-annual-requests>

³⁹ *Normal People on Location*. Tourism Ireland, 17th May 2022. Accessible at: <https://www.ireland.com/en-gb/magazine/ireland-on-screen/normal-people-on-location/>

2.15.2. *Vikings: Valhalla*



Credit: Bernard Walsh

Vikings: Valhalla is a high-end television drama series financed by Netflix and produced by MGM in association with O’Sullivan Productions (Ireland) and Take 5 Productions (Canada). It is a spin-off of the *Vikings* (2013-2020) series which was developed and produced in Ireland as an official Irish/Canadian co-production.

Filmed in County Wicklow, *Vikings: Valhalla* is a historical drama which chronicles the beginning of the end of the Viking Age. The first season premiered on 25th February 2022, and it has been officially renewed for at least two more seasons.

The show is an example of a Section 481 supported production that tells a European story. *Vikings: Valhalla* is based on major historical events that have European historical significance. The season opens with a battle based on the St Brice’s Day Massacre of 1002, when an English king’s army set out to kill all Vikings living in England. The series also goes on to depict internal tensions amongst the Vikings over conflicting Christian and Pagan beliefs, and ultimately builds towards the battle of Stamford Bridge in 1066, a major part of the eventual downfall of the Viking era.

The era depicted had a profound impact on the early medieval history of areas now known as Ireland, Scandinavia, the UK, France, Estonia, Belarus, Russia and Ukraine, and shows the overlapping and intertwined histories of modern-day European countries. Despite being a fictional series, *Vikings: Valhalla* attempted to ground much of the history in fact, from its plot to its locations, to costumes, sets and weapons – a concerted effort across production departments. This retelling of European history was not just something Irish audiences were able to benefit from, as the show has been a global success, with figures published by Netflix suggesting *Vikings: Valhalla* racked up more than 113 million hours of viewing in its first week, becoming the top series worldwide on the streaming platform at the time.

The series showrunner, Jeb Stuart, has said that despite being based on historical events, the series also covers themes with contemporary cultural and social relevance, including

“immigration issues in Europe”, and similar disunion in ideology that was present between Pagan Vikings and Christian Vikings.

The series represents a significant inward investment in terms of US finance and has been a large employer in the east of Ireland. With a crew ranging from 700-800 persons, it is one of Ireland’s biggest ever productions, and the vast majority of the crew, the heads of department, and also directors have been Irish. With the original *Vikings* series similarly relying on Irish filmmakers, the combined 10 years of shooting of both productions in Ireland has led to exceptional production and training opportunities for local Irish crew, both in terms of quality of experience and amount of experience. The presence of both series in Ireland has significantly contributed to the development of Irish heads of department (HODs) with high-end drama experience at the top level.

Part Three:

**The Industry Development
Contribution of Section 481**



3. INDUSTRY DEVELOPMENT CONTRIBUTION

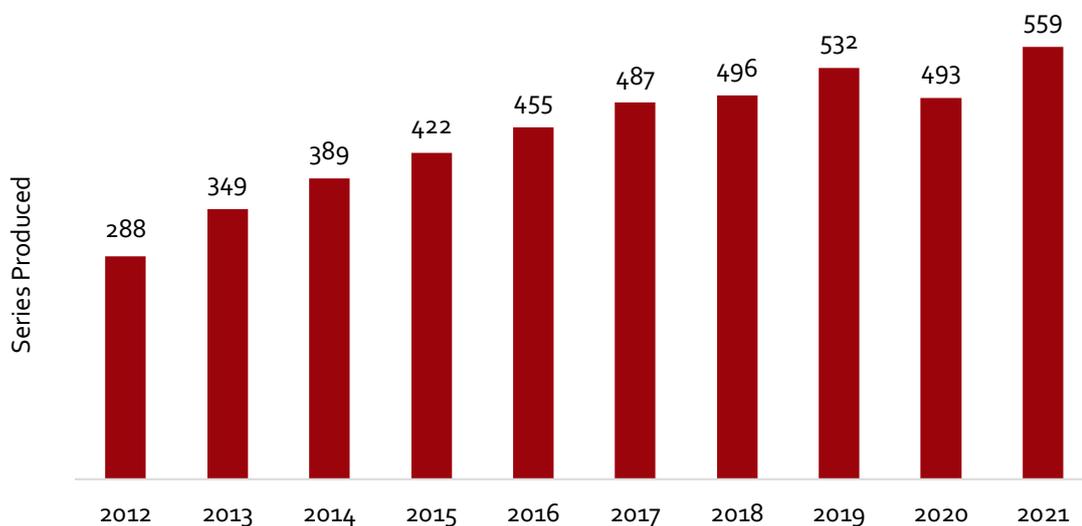
3.1. Overview

In addition to encouraging cultural development, Section 481 is also designed to act as a stimulus to filmmaking in Ireland, including through creating quality employment, training, and skills development.

Recent years have seen a global deluge of film and television production. This has been driven by demand for all types of content from consumers and investors alike – which include newer entrants such as the streamers, as well as established broadcasters and US studios.

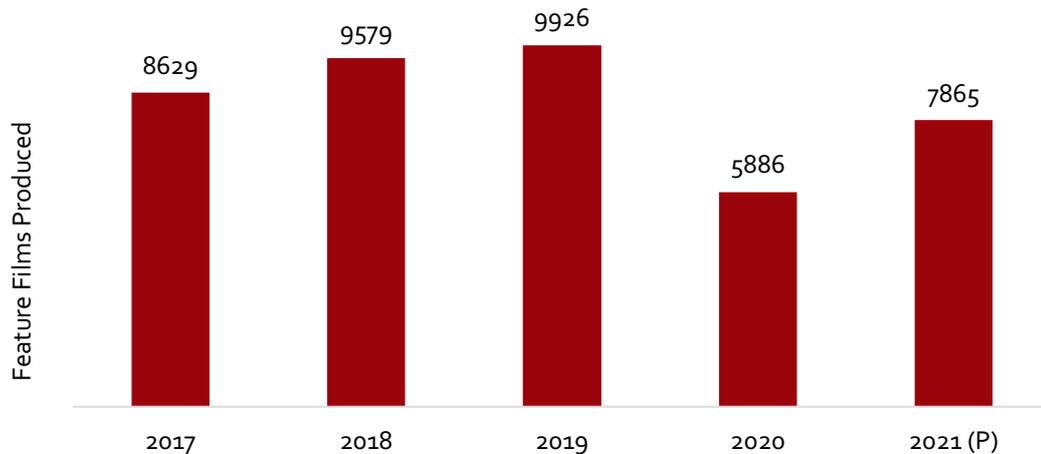
Globally, investment in screen content production has been at record levels, with US\$177 billion in global production spend in 2019. Olsberg•SPI forecasts content investment to substantially exceed US\$200 billion in 2022, primarily driven by subscription streaming services – both in the US, but also in the global markets which are increasingly key for growth. Much of the growth has been driven by television series although feature film production has also been gradually increasing.

Figure 29 – Scripted Original Series Production in the US, 2012-2021



Source: FX Networks Research

Figure 30 – Worldwide Feature Film Production, 2017-2021



Source: European Audiovisual Observatory

3.2. Opportunity for Ireland

Established markets continue to see strong demand from producers and with its existing strengths in creation of all kinds, Ireland is very well placed to seize the opportunities presented by the production opportunity. Irish policymakers have recognised that by taking advantage of this growth, Ireland can greatly expand the industrial base of its Screen sector, as well as enhancing the flow of culturally diverse stories for audiences to enjoy at home and abroad.⁴⁰

A key driver of the Irish Government’s strategy for the development of the Screen industries is the Creative Ireland Programme.⁴¹ This Programme emerged from Ireland 2016, the state initiative to mark the centenary of the Easter Rising and is designed to help connect people and to promote creativity and well-being. It runs from 2017 to 2022 and puts creativity at the heart of public policy. Its underlying rationale is to build on the nation’s strengths in storytelling, literature and creativity which together with its geographic location offer rich potential to build a leading global position in the Screen industries.

Pillar 4 of the Creative Ireland Programme is focused on expanding Ireland’s capacity in the various genres of screen production – films for cinema, television drama, documentary, children’s storytelling and animation.

The aim of the Creative Ireland Programme to stimulate the growth of the Screen sector dovetails with other key planks of the Irish Government’s policy for economic growth. In particular, the National Development Plan 2021-2030 identifies capital investment in the tourism, media, and audiovisual sectors, underpinned by the Economic Recovery Plan, as key in “help[ing] to secure and enhance the contribution of these sectors, including in rural communities, to Ireland’s wider economy”.⁴²

The Plan identifies the Screen sector as key to economic recovery in the wake of the COVID-19 pandemic. Screen Ireland, as the national development agency for the sectors is identified as playing a crucial role. In the Plan it is noted that “[K]ey measures will include actions such as

⁴⁰ In September 2022, the Section 481 film and television production tax credit incentive was extended from its sunset date on 31st December 2024 to 31st December 2028 as part of Budget 2023 (p2; 7). Accessible at <https://www.gov.ie/en/publication/cc22-budget-2023-taxation-measures/>

⁴¹ Creative Ireland. <https://www.creativeireland.gov.ie/en/>

⁴² *National Development Plan 2021-2030*. Department of Public Expenditure and Reform, 4th October 2021. Accessible at: <https://www.gov.ie/en/publication/774e2-national-development-plan-2021-2030/>

increased investment in high-end television drama, as well as a strong emphasis on training and skills development in the sector.”⁴³

The Plan also identifies the importance of the audiovisual sector to the growth of the regional economies and to place-making in rural areas.

Section 481 is central to the delivery of all these objectives. It provides relief in the form of a corporation tax credit related to the cost of production of qualifying productions. The credit is granted at a rate of 32% (with a tapering uplift, which is set at 3% for 2022, for expenditure in certain regional areas). The Audiovisual Action Plan, published in 2019, recognises Section 481 as “a vital part of the financial infrastructure of the audio-visual industry in Ireland.” It was noted in the Plan that Ireland’s audiovisual sector could, in a period of five years, double employment in the “film, television and animation” sub sector to over 24,000 full time equivalents and a gross value added of nearly €1.4 billion.

The contribution that the audiovisual sector can make to the creation of skilled employment is especially important to policymakers and is reflected in the current structure of Section 481. The creation of skilled jobs is a critical policy concern, not only in Ireland, but globally. COVID-19 revealed a number of weaknesses across various sectors and emphasised the importance of supporting the development of an innovative workforce.

The National Development Plan 2021-2030 identifies a goal of growing employment in Ireland by 660,000 by 2040.⁴⁴ The Plan’s authors underline the need to “ensure quality jobs” and move beyond implementing more jobs and focusing “on enabling the creation of highly productive, sustainable jobs”. A requirement for Section 481 funding is for the applicant to outline how their production acts as a stimulus to filmmaking through, among other things, the provision of quality employment.

By stimulating investment in production, Section 481 also helps to stimulate investment in film and television studios, thereby promoting capital investment as well.

Such quality employment is crucial to the objectives of the Irish Government. The definition of quality employment or ‘good jobs’ is a growing, but contested, area of research. The term can be subjective and open to interpretation.

The Good Jobs Agenda, published by the National Economic and Social Council in 2021 identifies good jobs as associated with higher levels of productivity, performance and innovation, which, in turn, are viewed as drivers of sustainable economic growth.⁴⁵

The project-based nature of the Screen sector and prevalence of freelance work has been an area of concern in Ireland and globally. In 2022, the Irish government launched a Basic Income for the Arts pilot scheme which will run for three years between 2022 and 2025.⁴⁶ The scheme’s objective is to address earning instability that can be associated with the intermittent nature of work in the arts. The scheme will evaluate the impact of a basic income on artists and creatives’ work patterns.

⁴³ The importance of the economic contribution of the Screen sector to employment, along with Ireland’s potential to be a global leader, is also explicitly recognised in the National Development Plan 2018-2027, p.71. Accessible at: <https://www.gov.ie/en/policy-information/07e507-national-development-plan-2018-2027/>

⁴⁴ *National Development Plan 2021-2030*. Department of Public Expenditure and Reform, 4th October 2021. Ibid

⁴⁵ *Shared Island: Projects, Progress & Policy. The Good Jobs Agenda*. National Economic and Social Council, 15th March 2021. Accessible at: <https://www.nesc.ie/news-events/press-releases/shared-island-projects-progress-policy-the-good-jobs-agenda-new-paper-from-nesc-secretariat/>

⁴⁶ *Basic Income for the Arts*. Citizens Information. Accessible at: https://www.citizensinformation.ie/en/employment/unemployment_and_redundancy/employment_support_schemes/basic_income_arts.html#:~:text=The%20new%20Basic%20Income%20for,many%20working%20in%20the%20arts.

By virtue of its membership of the EU, Ireland participates fully in the EU's Creative Europe programme. The objectives of Creative Europe are to:

- Safeguard, develop and promote European cultural and linguistic diversity and heritage
- Increase the competitiveness and economic potential of the cultural and creative sectors, in particular the audiovisual sector.

Both of these are crucial objectives for Ireland. The Creative Europe programme 2021-2027 has a budget of €2.44 billion, almost double the budget of the previous programme.⁴⁷

3.3. Industry Development Contribution – Stimulus of Industry

3.3.1. Overview

This section looks at Section 481's stimulus to the Screen industries through production levels, studio provision, and company investment. It draws on Section 481 production data, desk research on industry announcements and comparable sectors, and government policy.

The research, including an additionality survey, shows that production has increased steadily because of Section 481. The Screen sector strongly aligns with government policy on attracting talent to Ireland, increasing participation in the labour force, encouraging the growth of clusters, cementing linkage between foreign and Irish owned businesses, and embracing technology and innovation.

3.3.2. Section 481 Data Analysis

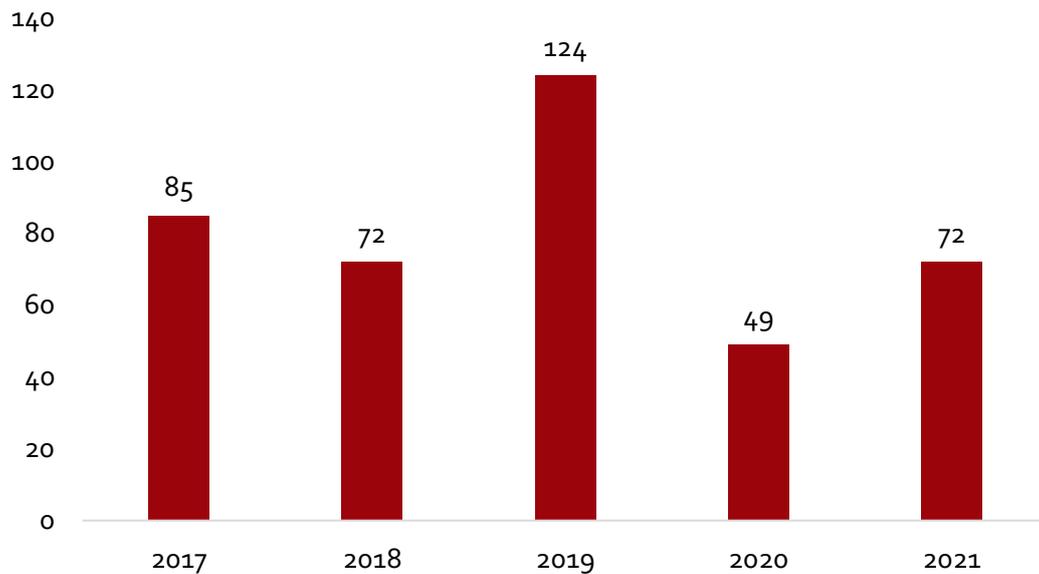
To assess the stimulus of industry through production levels, data on Section 481 productions in the years 2017 to 2021 were analysed. Data provided for analysis included the number of productions and amount of Irish expenditure, separated by production type (animation, film, television drama and documentary) and whether a production was indigenous or incoming. Data was aggregated and did not include individual project details.

Figures for 2017, 2018, and 2019 were provided by the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media (TCGASM) and were based on year of certification. From 2020 onwards, the figures are derived from Screen Ireland and are based on year of production, not year of certification. Screen Ireland data is based on Screen Ireland funded projects and all other projects with an eligible spend greater than €2 million.

For purposes of comparison with other figures (TCGASM and Revenue) there will therefore be timing differences.

⁴⁷ *The Creative Europe programme 2021-2027*. European Commission. Accessible at: <https://culture.ec.europa.eu/creative-europe/about-the-creative-europe-programme>

Figure 31 – Number of Section 481 Productions Per Year, 2017-2021



Source: Olsberg•SPI's analysis of Screen Ireland data (2022)⁴⁸

Screen production in Ireland has generally remained steady since 2017. In 2018 there was a dip in production numbers compared to 2017 before increasing significantly in 2019 where 124 productions received support from Section 481.

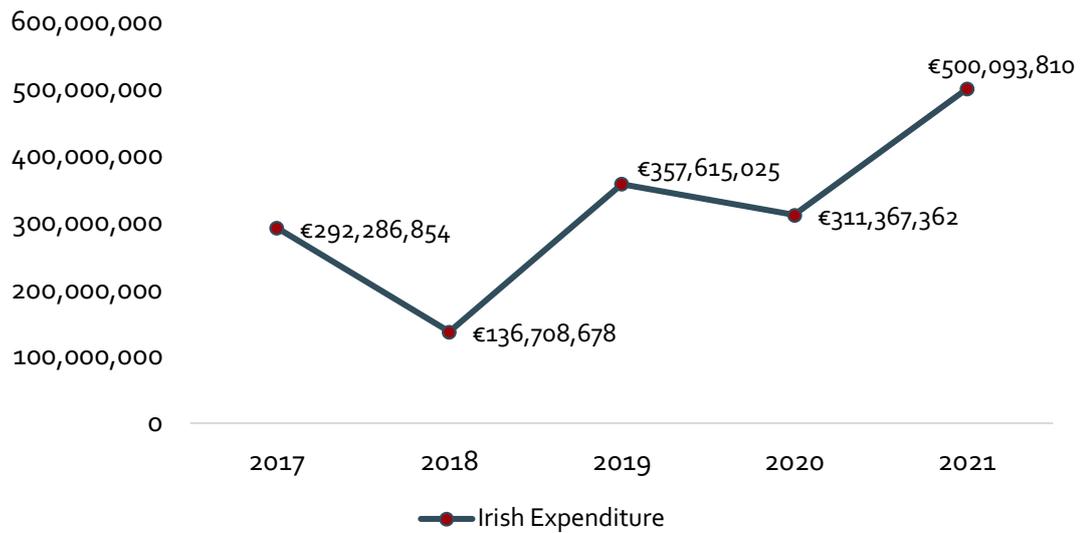
Production in 2020 was impacted by the COVID-19 pandemic, with production in Ireland shutting down in March 2020. Production was able to resume in late June 2020 following the publication of Screen Producers Ireland's *Production Guidelines for Irish Film and Television* complications around travel and lockdown restrictions impacted production throughout 2020.⁴⁹

Production figures recovered in 2021, with 72 animation, documentary, film and television drama productions taking place. Productions in 2021 included *Aisha*, *Conversations with Friends*, *Disenchanted*, *Foundation* season two and *God's Creatures*, which premiered at the 2022 Cannes film festival.

⁴⁸ Note: Figures for 2017 – 2019 are from TCGASM and are based on year of certification. Figures for 2020 – 2021 are from Screen Ireland and based on year of production. For purposes of comparison, there will be timing differences between the figures.

⁴⁹ *Production Guidelines for Irish Film and Television (Live Action)*. Screen Producers Ireland. Accessible at: https://mcusercontent.com/08c90c91baec71952f1d33172/files/04ed30c2-b94c-4d17-be34-8e7f37417bd0/Film_and_TV_Drama_Guidance_Document.pdf

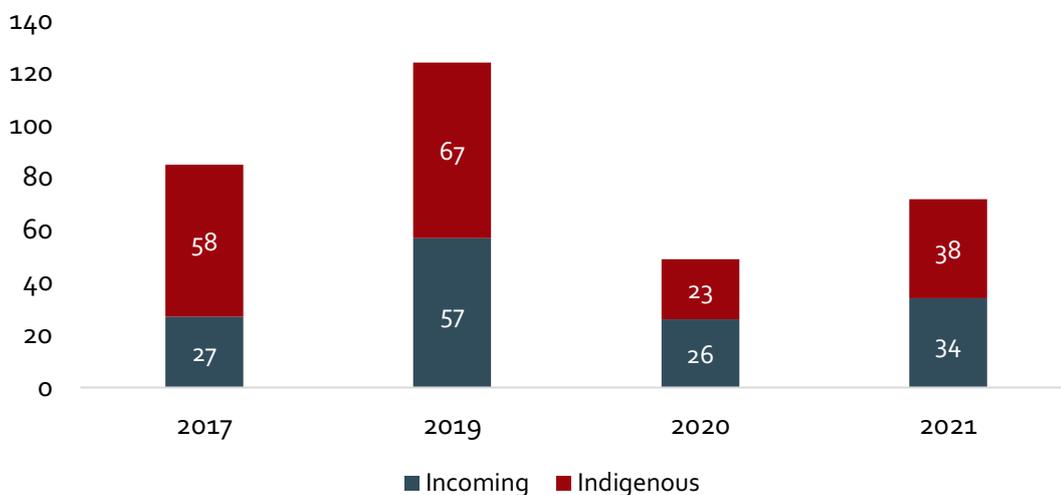
Figure 32 – Irish Expenditure for Section 481 Productions, per year, 2017-2021



Source: Olsberg•SPI's analysis of Screen Ireland data (2022)⁵⁰

The Irish expenditure associated with Section 481 productions has shown a steady increase. 2021 demonstrates the strong recovery out of the pandemic, with a 60% increase on 2020. As demonstrated in Figure 33 and Figure 34 below, this trend is due in part to the strong number of incoming productions to Ireland.

Figure 33 – Incoming or Indigenous Section 481 Productions by Year, 2017; 2019-2021⁵¹



Source: Olsberg•SPI's analysis of Screen Ireland data (2022)⁵²

The number of incoming and indigenous animation, film, and television drama productions in Ireland have remained proportionate in the four years analysed. Of these years, 2017 showed

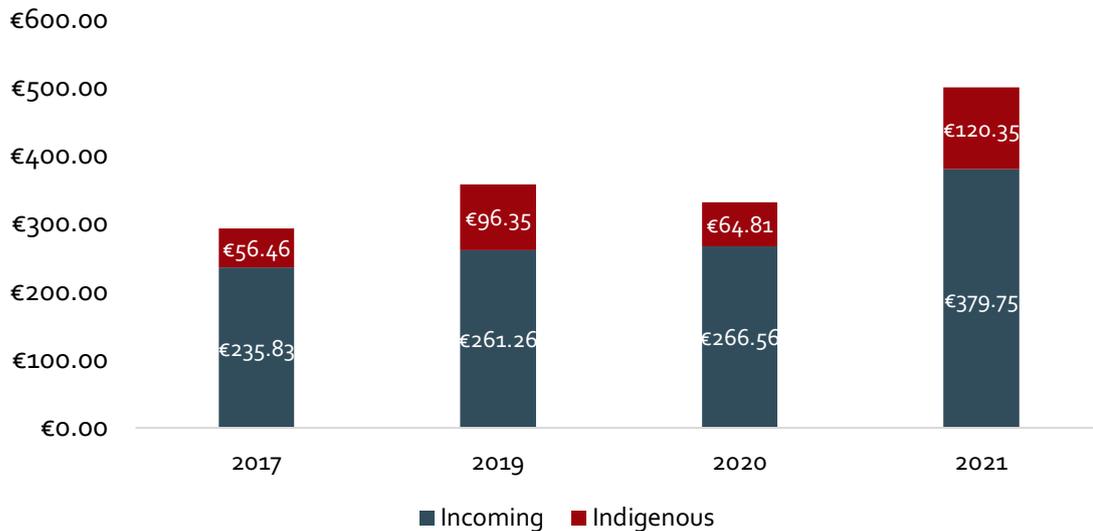
⁵⁰ Note: Figures for 2017 – 2019 are from TCGASM and are based on year of certification. Figures for 2020 – 2021 are from Screen Ireland and based on year of production. For purposes of comparison, there will be timing differences between the figures.

⁵¹ Note: Due to a change in documentation, disaggregated incoming and indigenous figures for 2018 are not available.

⁵² Note: Figures for 2017 – 2019 are from TCGASM and are based on year of certification. Figures for 2020 – 2021 are from Screen Ireland and based on year of production. For purposes of comparison, there will be timing differences between the figures.

the greatest gap between incoming and indigenous production numbers owing to 32 indigenous documentaries certified that year.

Figure 34 – Irish Expenditure for Section 481 Productions, Incoming or Indigenous, €m, 2017; 2019-2021⁵³



Source: Olsberg•SPI's analysis of Screen Ireland data (2022)⁵⁴

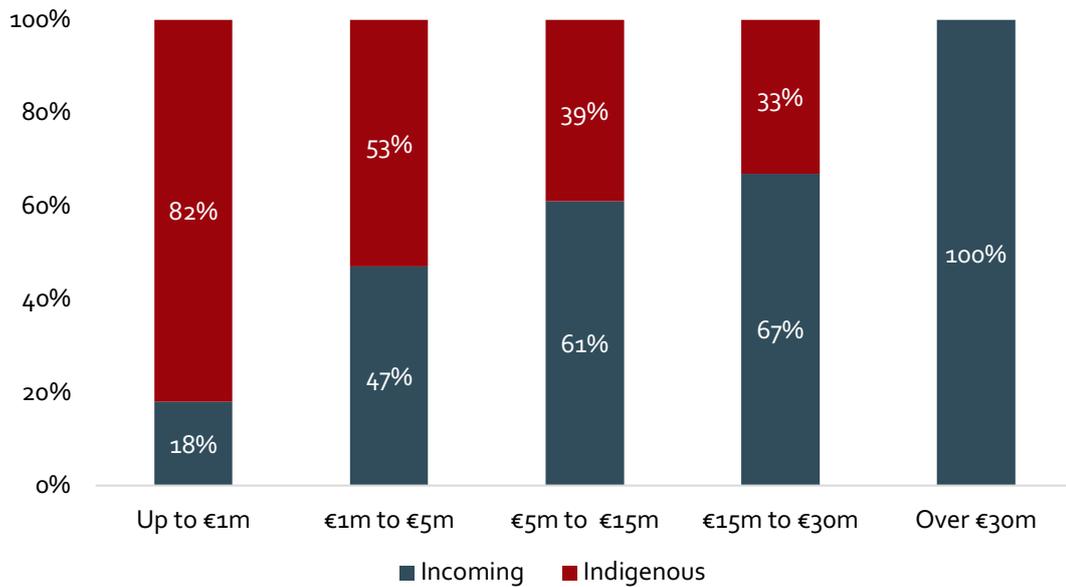
When comparing Irish expenditure associated with incoming and indigenous animation, film and television drama productions, significantly more expenditure is associated with incoming productions.

A total of €120 million in Irish expenditure was associated with the 38 indigenous productions in 2021. In comparison, €379 million in Irish expenditure is associated with the 34 incoming productions. Incoming productions, therefore, accounted for almost 76% of the Irish expenditure for the year.

⁵³ Note: Due to a change in documentation, disaggregated incoming and indigenous figures for 2018 are not available.

⁵⁴ Note: Figures for 2017 – 2019 are from TCGASM and are based on year of certification. Figures for 2020 – 2021 are from Screen Ireland and based on year of production. For purposes of comparison, there will be timing differences between the figures.

Figure 35 – Incoming and Indigenous Section 481 Productions, by Eligible Spend Range, 2020-2021

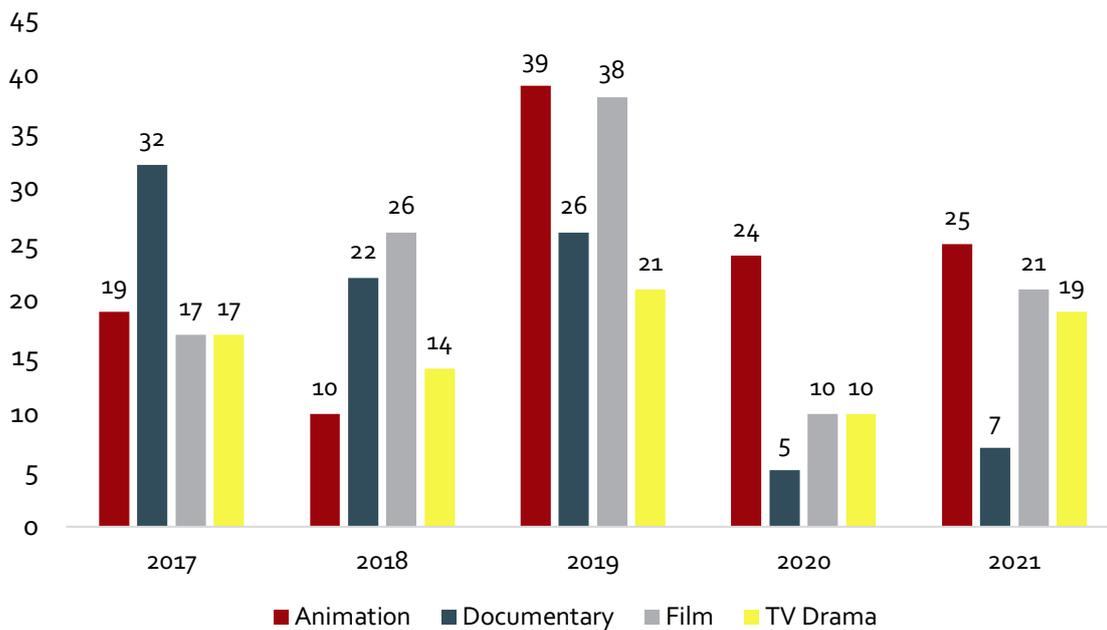


Source: Olsberg•SPI’s analysis of Screen Ireland data (2022) (N=115)

The analysis above of 115 Section 481 productions in 2020 and 2021 shows that, incoming productions more frequently have eligible spend ranges over €5 million, with 100% of Section 481 productions with an eligible spend range over €30 million being incoming productions.

In contrast, indigenous productions are more likely to sit at the lower end of the eligible spend range. 82% of Section 481 projects with an eligible spend range up to €1 million are indigenous productions. Of these indigenous productions with an eligible spend range up to €1 million 35% were documentaries, compared to 15% across all indigenous eligible spend ranges.

Figure 36 – Number of Each Production Type by Year, 2017-2021



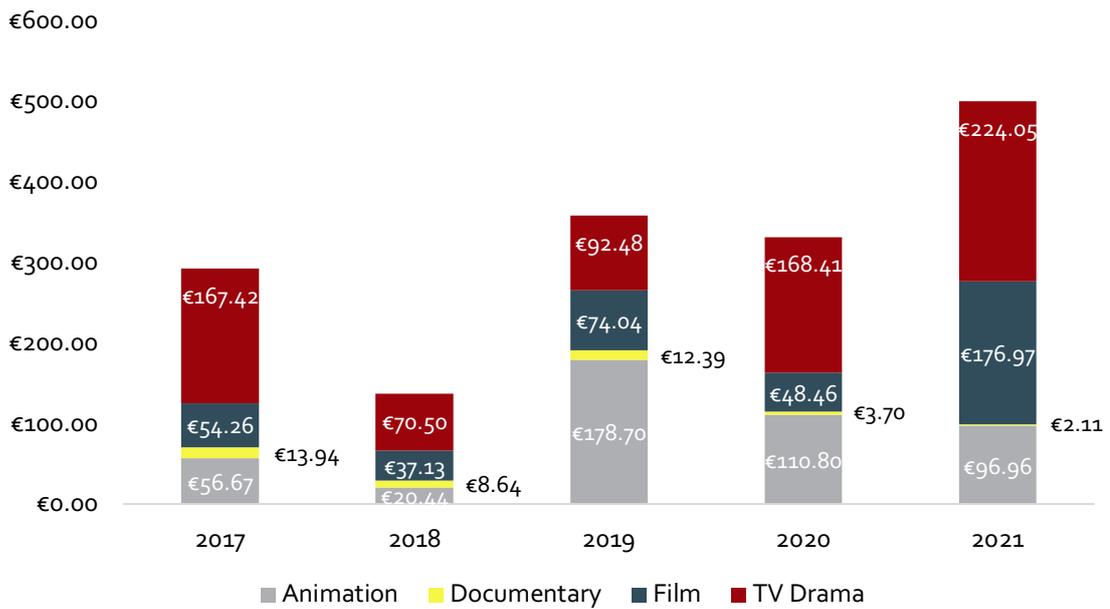
Source: Olsberg•SPI's analysis of Screen Ireland data (2022)⁵⁵

Animation has continued to strengthen over the past five years, despite a drop in production numbers in 2018. During the COVID-19 pandemic in 2020, production levels did not drop as substantially as they did for other production types. This was largely due to the lack of on-set production requirements for animation, so work was able to continue during the shutdown period despite travel and lockdown complications.

Film and television drama decreased in 2020 due to the COVID-19 pandemic, however they recovered in 2021 with at around double the number of productions as the previous year. Film has not quite returned to pre-pandemic production numbers yet, however television drama in 2021 has exceeded the numbers in 2017 and 2018.

⁵⁵ Figures for 2017 – 2019 are from TCGASM and are based on year of certification. Figures for 2020 – 2021 are from Screen Ireland and based on year of production. For purposes of comparison, there will be timing differences between the figures.

Figure 37 – Irish Expenditure for Section 481 Productions, by Type, €m, 2017-2021



Source: Olsberg•SPI's analysis of Screen Ireland data (2022)⁵⁶

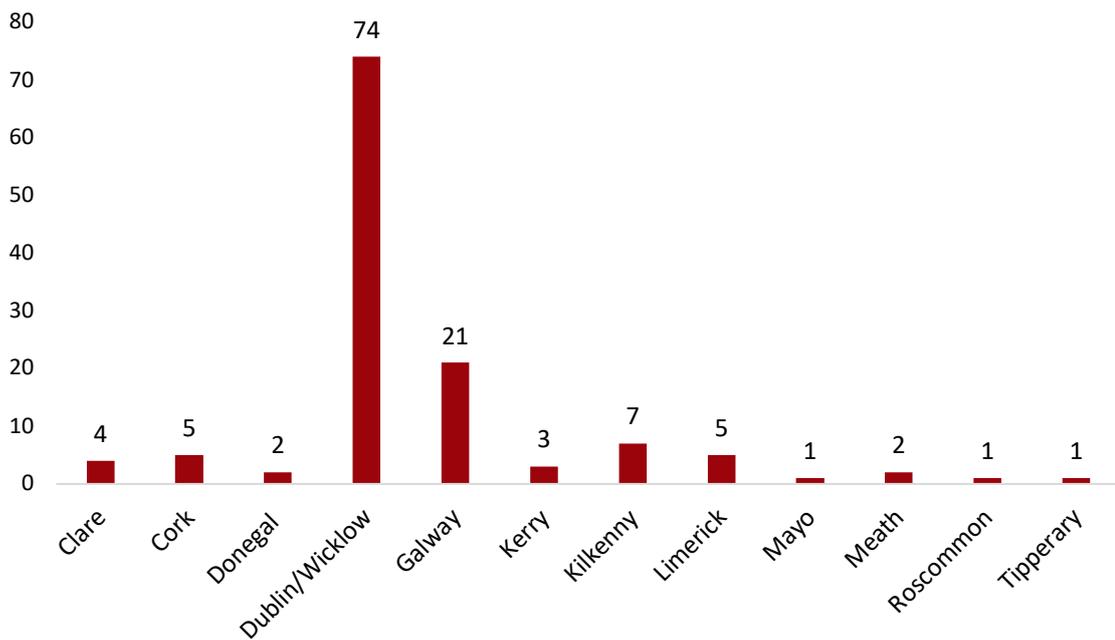
The majority of annual Irish expenditure can be attributed to film and television drama productions. In 2021, 80% of Irish expenditure was from film and television drama.

Since 2019, however, expenditure attributed to animation is growing. In 2019 almost 50% of Irish expenditure was attributed to animated productions alone, and in 2020 33% of Irish expenditure was attributable to animated productions.

The animation sector has grown rapidly in the last decade, with Ireland gaining a reputation internationally for high-quality animation combined with creative storytelling from companies including Cartoon Saloon, Brown Bag Films, and Boulder Media.

⁵⁶ Figures for 2017 – 2019 are from TCGASM and are based on year of certification. Figures for 2020 – 2021 are from Screen Ireland and based on year of production. For purposes of comparison, there will be timing differences between the figures.

Figure 38 – Sample of Section 481 Productions by Region, 2020-2021



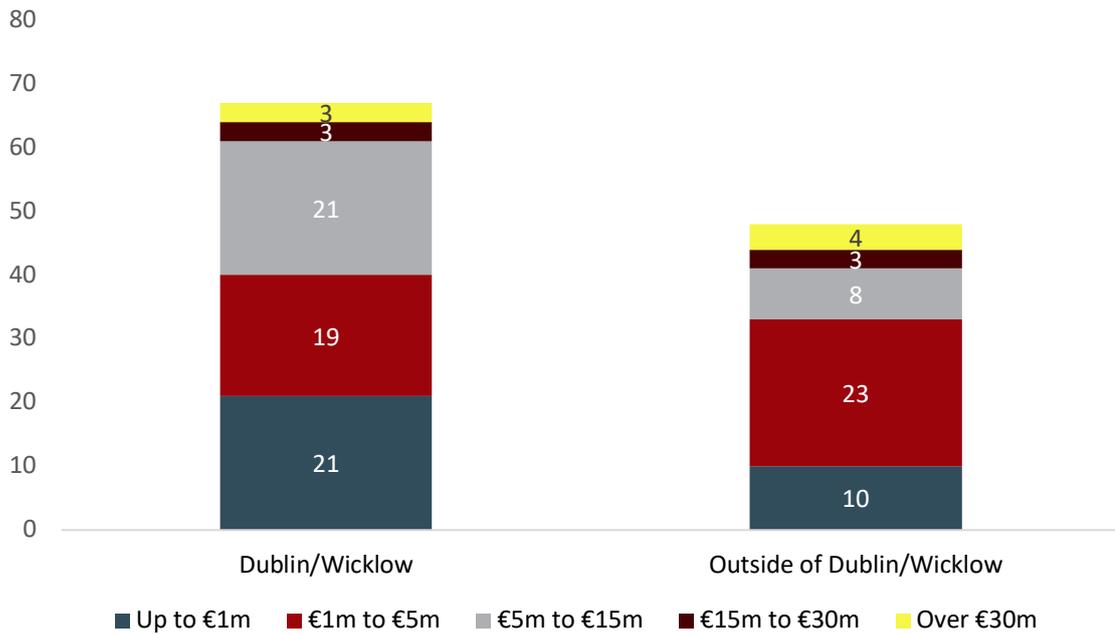
Source: Olsberg•SPI's analysis of Screen Ireland data (2022) (N=115)⁵⁷

Due in part to the cluster of studios and production companies in Dublin/Wicklow, this area has accounted for nearly two thirds of a sample of Section 481 productions supported between 2020 and 2021.

Incoming productions and indigenous productions alike have used a range of Irish locations outside of Dublin, including *Star Wars: Episode VIII – The Last Jedi* (2017) which filmed at a range of sites, including Skellig Michael, *God's Creatures* (2022) in Donegal and *Smother* (2021) in Clare.

⁵⁷ Some productions filmed in multiple locations; in which case one is added to the count for each used location. Locations outside of the Republic of Ireland have not been included.

Figure 39 – Sample of Section 481 Productions Filmed in Ireland by Eligible Spend Range, Split between those Within and those Outside of Dublin/Wicklow, 2020-2021



Source: Olsberg•SPI’s analysis of Screen Ireland data (2022) (N=115)⁵⁸

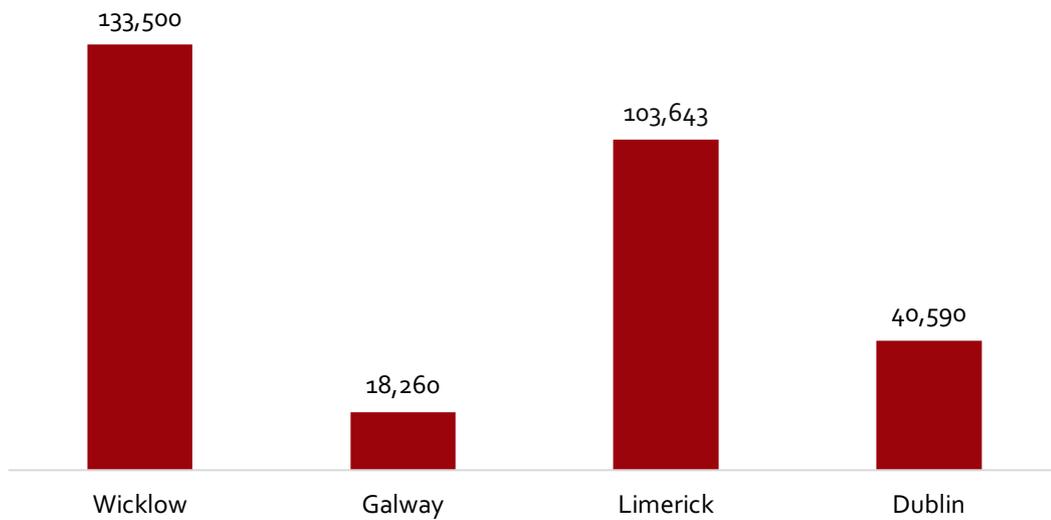
While a higher proportion of productions across most eligible spend ranges took place in Dublin/Wicklow, a strong number of productions also filmed outside of the Dublin/Wicklow area. With the proposed development of new studios across Ireland, the number of productions and associated eligible spend in areas outside Dublin/Wicklow is likely to increase.

3.3.3. Studio Developments

Ireland is currently home to eight film studios, including Ardmore Studios and Ashford Studios in Wicklow, Troy Studios in Limerick and Stiúideo Telegaél in Galway. Across these studios, there is approximately 295,993 ft² of soundstage space available.

⁵⁸ Productions shot both within and outside of Dublin/Wicklow were only counted as ‘Outside of Dublin/Wicklow’, given policy focus of ensuring regional activity occurs *in addition to* rather than *in place of* Dublin/Wicklow activity

Figure 40 – Current Production Stages in Ireland by County, ft²



Source: Olsberg•SPI's analysis of Screen Ireland data and studio websites

In the past three years, several new studio developments have been announced for Ireland, in line with the growth of the sector. These proposals are at various stages of planning and development.⁵⁹

Greystones Media Campus in Wicklow County was announced with an expected opening date in 2024. A joint venture with the Ireland Strategic Investment Fund and Capwell, the project is estimated to involve a total investment of almost €300 million. The studio is announced as including 14 sound stages and ancillary production space across a 44-acre site. According to announcements, an initial phase of seven sound stages is due to become available in mid-2024. Hackman Capital Partners and Square Mile Capital, along with The MBS Group have been chosen to develop and operate the site.⁶⁰

Plans for Hammerlake Studios were greenlit by local councillors in September 2022, following the studio receiving planning approval in principle in July 2022.⁶¹ According to announcements, the proposed Mullingar studio will deliver 236,000ft² across four sound stages in the first phase of construction, with an additional seven stages to be built resulting in a total stage footprint of 460,000ft². Phase one is projected to generate €50 million for the local economy once operational.⁶²

Further stages have been announced in Tipperary, Galway and West Cork, which will offer productions the opportunity to shoot outside of the Dublin/Wicklow production hub. Atlantic Studios has proposed a 40,000ft² studio on the site of the former Galway Airport.⁶³ Planning

⁵⁹ Not all studios that go to the proposal or planning stage will be built and opened.

⁶⁰ *Ireland's Largest Film & TV Studio to Open in 2024*. The MBS Group, 8th April 2022. Accessible at: <https://the-mbsgroup.com/the-mbs-group-announces-irelands-largest-film-tv-studio/>

⁶¹ *Hammerlake Committed to 'Building a Legacy for Mullingar'*. Independent Westmeath, 19th September 2022. Accessible at: <https://www.westmeathindependent.ie/2022/09/19/hammerlake-committed-to-building-a-legacy-for-mullingar/>

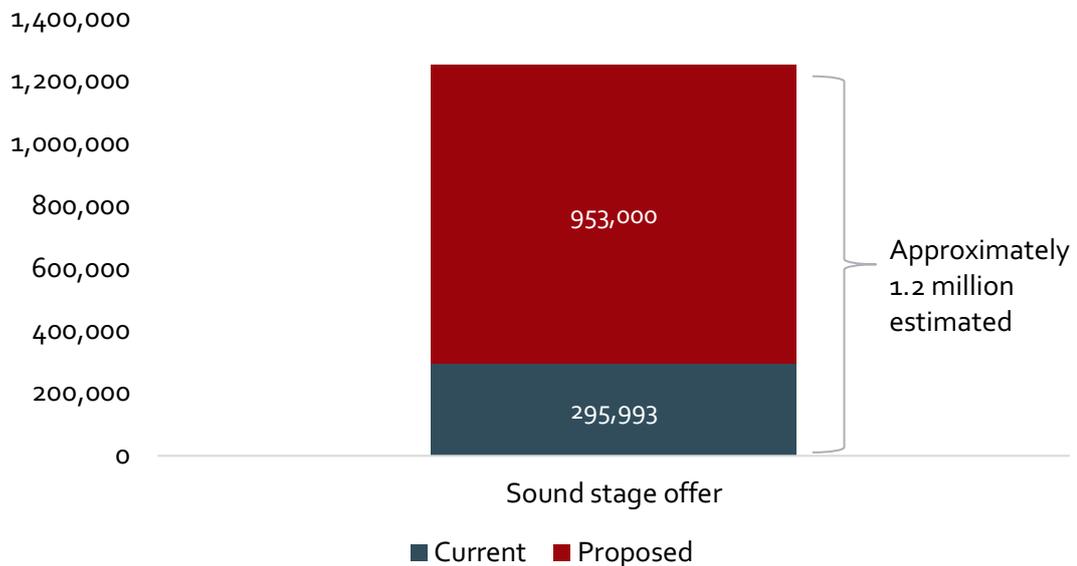
⁶² *Hammerlake Studios Receives Planning Approval in Principle to Build Phase One of Ireland's Largest Film Studio*. Hammerlake Studio, 19th July 2022. Accessible at: https://www.hammerlakestudios.com/files/ugd/4ad54c_65f993204ade484b94a8a9d3e25ao69o.pdf

⁶³ *Galway Airport to be Transformed into Film and TV Studio Hub*. This is Galway, 9th August 2021. Accessible at: <https://thisisgalway.ie/galway-airport-to-be-transformed-into-film-tv-studio-hub/?fbclid=IwAR1Jo7u8a8PGTgIHws-NoHrRHqBdtYjR77Hfg4dvJNQdYcBm19aCUYd1vtM>

permission has been granted to convert a furniture factory in Skibbereen, West Cork into a 20,000ft² studio.⁶⁴ Silver Rock Studios in Tipperary has received planning permission for a €30 million studio to be developed on the site of a former Rorer factory.⁶⁵

In addition to the new studio developments, expansions have also been planned for Ardmore Studios and Ashford Studios in Wicklow.

Figure 41 – Current and Proposed Soundstage Offer in Ireland, ft²



Source: Olsberg•SPI’s analysis of Screen Ireland, studio websites⁶⁶

In total, a footprint of almost one million ft² of sound stage has been proposed for Ireland. This is an increase of 221% on the current sound stage offer in Ireland. Due to the global production deluge, there is an international appetite for production sound stages, with key production hubs established in territories including the US, Canada, and the UK.

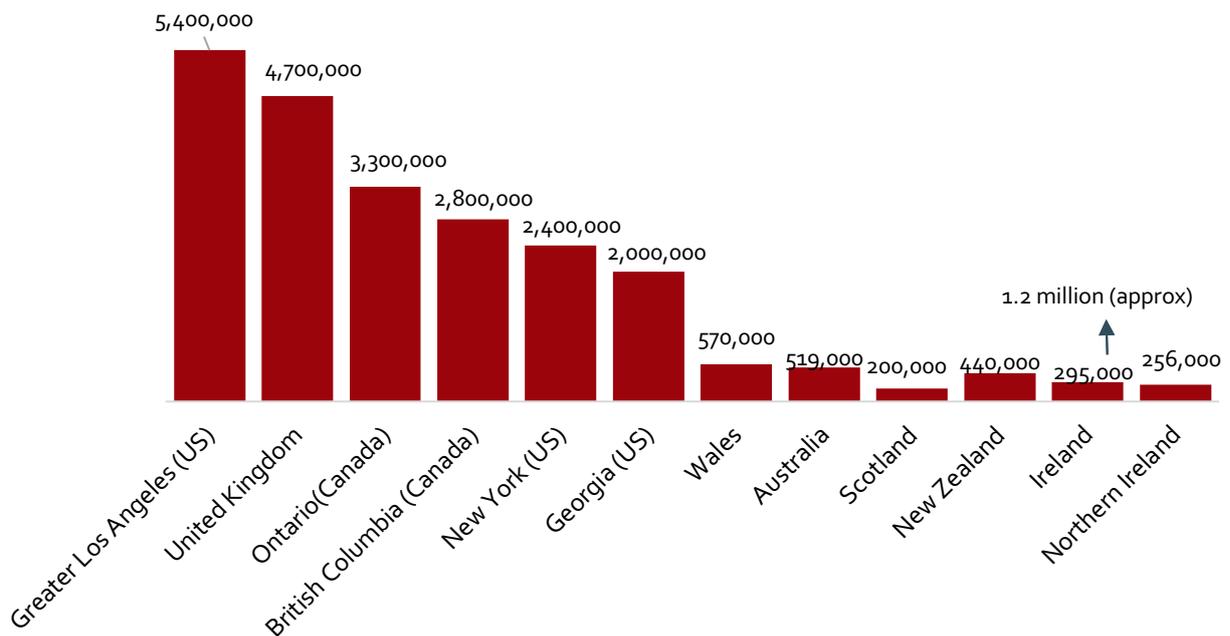
As demonstrated in Figure 42, Ireland’s provision of sound stages is comparable with Northern Ireland, Scotland, and New Zealand. However, if the proposed studio developments all proceed, Ireland will have infrastructure in line with more mature production markets.

⁶⁴ *Bringing the Action to West Cork: Green Light to Open New Film Studios in Skibbereen.* Echo Live, 3rd May 2022. Accessible at: <https://www.echolive.ie/corknews/arid-40864121.html>

⁶⁵ *Green Light for Tipp’s Film Studio.* The Nenagh Guardian, 6th November 2021. Accessible at: <https://www.silverrockstudios.com/latest-news>

⁶⁶ Note: figures for proposed studios are drawn from studio announcements and are therefore approximate. Phase two of Hammerlake Studios is not included in the estimate. Not all studios that go to proposal or planning stage will be built and opened.

Figure 42 – Dedicated Production Stages in Key Markets, ft²



Source: FilmLA (2022), British Film Commission, Ausfilm, New Zealand Film Commission, Olsberg•SPI (2022)⁶⁷

3.3.4. Company Investment and Acquisition

The strength of Ireland’s Screen industries has helped forge strong links between foreign and Irish owned businesses which have deepened as the industry continues to grow and develop. According to Animation Ireland’s 2017 pre-Budget submission, approximately 60% of economic spend in the animation sector is Foreign Direct Investment (FDI). At the time of that report, this amounted to €30 million to €60 million invested into the Irish economy from foreign sources.⁶⁸ Based on Section 481 production expenditure for 2021, Screen Ireland estimates the FDI figure for film, television and animation in 2021 as €332 million.

Future Jobs 2019 has a focus on improving SME productivity and diversifying Ireland’s enterprise base. According to that report, Ireland’s FDI is an “essential contributor to Irish economic performance”. It notes that opportunities to develop the wider creative industries are an area of focus as the creative industries have demonstrated a capacity for expansion.

Acquisitions and partnerships with international companies provide Irish screen companies with an opportunity to expand their global reach, grow their IP and benefit from the reach of international firms.

In 2015, North American animation studio g Story Media Group acquired the animation studio Brown Bag Films. Through the acquisition, the Brown Bag brand was maintained, and the senior management team continued to lead the company. Cathal Gaffney, chief executive of Brown Bag Films at the time of the deal, stated at the time of the acquisition that the deal

⁶⁷ Note: Key markets only account for current stage provision, and do not include proposed developments or expansions. All figures have been rounded and are not exact. UK figure includes soundstages across England, Northern Ireland, Wales and Scotland. Figures for Ireland’s proposed stages drawn from studio announcements and are approximate. Not all studios that go to proposal or planning stage will be built and opened.

⁶⁸ *Developing talent and Creating Growth in a Sustainable Explore Industry*. Animation Ireland, September 2017. <http://animationireland.com/wp-content/uploads/2017/09/AI-Pre-budget-submission-sept2017-web-.pdf>

facilitated an opportunity to get their content to a wide audience, benefiting from 9 Story's experience in licensing and distribution.⁶⁹

In 2017, Ireland's Cartoon Saloon partnered with Canada's Mercury Filmworks to establish Lighthouse Studios. Based in Kilkenny, Lighthouse Studios focuses on delivering animated content and end-to-end production services for a global client base, including Netflix, Apple TV+, Warner Bros. Animation and Amazon. The joint venture between the two animation companies was supported by Ireland's Department of Jobs, Enterprise and Innovation through IDA Ireland.⁷⁰

US firm Hasbro acquired Dublin-based animation company Boulder Media in 2016, while Indian-based Toonz Media Group acquired a majority stake in animation company Telegael in 2019. The acquisition followed a co-production between Telegael and Toonz on comedy series *Mondo Yan*. Through the acquisition, Telegael obtained opportunities to grow its IP and service production.^{71, 72}

In 2022, it was announced that Fremantle had acquired a majority stake in Element Pictures, the production company responsible for *Normal People*, *Herself*, *The Favourite* and *Room*. The acquisition was part of Fremantle's growth strategy to invest in global production companies to "source the best creative ideas, [and] develop and create strong and unmissable IP".⁷³

This points to a significant strengthening of the production company base.

Investment into Ireland's sound stages is also strengthening Ireland's place in the global production landscape. The joint venture of Hackman Capital Partners and Square Mile Capital – who are also developing and operating the Greystones Media Campus with The MBS Group – acquired Ardmore Studios in Wicklow and Troy Studios in Limerick in 2021. The partnership services more than 360 stages across four countries and 46 cities.

⁶⁹ *Brown Bag Acquired by 9 Story Media, to take on 50 new staff*. The Irish Times, 19th August 2015. Accessible at: <https://www.irishtimes.com/business/media-and-marketing/brown-bag-acquired-by-9-story-media-to-take-on-50-new-staff-1.2320757>

⁷⁰ *Announcing Lighthouse Studios*. Cartoon Saloon, 6th February 2017. Accessible at: <https://www.cartoonsaloon.ie/announcing-lighthouse-studios/>

⁷¹ Hasbro buys Irish animation company Boulder Media. The Irish Times, 13th July 2016. Accessible at: <https://www.irishtimes.com/business/media-and-marketing/hasbro-buys-irish-animation-company-boulder-media-1.2720801>

⁷² *India's Toonz Media Buys Majority Stake in Galway's Telegael*. RTÉ, 29th May 2019. Accessible at: <https://www.rte.ie/news/business/2019/0529/1052317-telegael-toonz-deal/>

⁷³ *Fremantle Acquires Majority Stake in Element Pictures*. Fremantle, 11th May 2022. Accessible at: <https://fremantle.com/fremantle-acquires-majority-stake-in-element-pictures/>

3.4. Case Studies

3.4.1. Cartoon Saloon



Credit: *My Father's Dragon* (2022). Netflix

Cartoon Saloon was founded in 1999 and is based in Kilkenny. The studio rose to international acclaim with its first feature film, *The Secret of Kells*, which was nominated for an Academy Award. Since then, the studio has released three more feature films, short films and a number of children's television series. The studio has received numerous award nominations and wins from organisations and festivals including the BAFTAs, Golden Globes, the IFTA Academy Awards, Annie Awards and many others. Through this recognition, and due to its productions being available to purchase or stream on global platforms such as Amazon, Netflix and Apple TV+, Cartoon Saloon has grown to be one of Ireland's most successful animation studios.

The studio is known for its original content that weaves together hand-drawn 2D animation, culturally rich storytelling and unique perspectives. Many Cartoon Saloon productions feature Irish stories, Irish music and prominent Irish talent. *Anam an Amhráin*, produced for TG4 with Sóna Productions, animates 12 classic Irish songs for modern audiences. Actors Brendan Gleeson (*The Secret of Kells* and *Song of the Sea*) and Chris O'Dowd (*Puffin Rock*) have both featured in Cartoon Saloon productions as voice actors.

Cartoon Saloon has been steadily growing as a company since 2015. There was substantial growth during the COVID-19 pandemic, largely driven by content providers not having access to new live action content during the period of production shut down. In March 2020, Cartoon Saloon had 140 employees and expanded to 260 by March 2021. The company has now settled at around 210 employees. The company boasts a diverse workforce at a range of experience and career levels. Currently there are 31 different nationalities represented by Cartoon Saloon employees, and women make up 55% of the Cartoon Saloon workforce, with 42% male and 3% non-binary employees. The representation of women in the company continued to the leadership level, with strong representation at the highest levels of the company.

The pandemic emphasised that workers were no longer restricted geographically, and with the increased demand for animated content, Cartoon Saloon recognised the need to take a proactive approach to work policy to attract and retain employees. According to Catherine Roycroft, Cartoon Saloon's Chief Operations Officer, workers, particularly younger workers, are looking for companies that match their values, rather than just delivering an attractive compensation and benefits offer although these are also important factors to remain competitive in a global recruitment market.

One facet of this approach is the continued delivery of training and skills development for Cartoon Saloon employees. Internal training opportunities enable personal progression for

Cartoon Saloon employees and allows them to try different areas of the company to expand their expertise and grow their skillset. The company has engaged with Animation Skillsnet and Screen Ireland for training opportunities.

Cartoon Saloon has committed to engaging with a number of trainees/work placements. There will typically be three work placements to a production; however, it takes a bespoke model to deliver on-the-job training specifically developed for the intern. Around 10% of interns come from Ireland, with the bulk coming from Denmark, Spain, and France where Cartoon Saloon has fostered relationships with leading animation schools in those countries. Prior to COVID-19, 95% of interns converted to employees at Cartoon Saloon. The work placement programme reduced slightly during the pandemic due to the difficulty maintaining that training virtually. However, during COVID-19 conversion rates of trainees remained at around 80%.

Cartoon Saloon has delivered a number of training initiatives, workshops and events for students, for people looking to enter the industry and for the public. In addition to workshops and events at their Kilkenny Animated Festival, Cartoon Saloon regularly visits schools to introduce students to a career in animation, looking beyond the standard creative roles and introducing areas such as accounting and human resources. The company hopes to bridge the gap between what is taught in class and what it takes to work in Ireland's animation and Screen industries.

3.5. Industry Development Contribution – Provision of Quality Jobs

3.5.1. Ireland Industry Overview

Ireland is home to a strong and well-regarded Screen production crew base. It is currently estimated that across the value chain in Ireland, the Screen industries supports approximately 12,000 local jobs.⁷⁴ In the five years from 2011 to 2016, employment at least doubled in film, television and animation production. For animation, this rapid growth has seen the sector expand to more than 2,500 workers.⁷⁵

Employment has also expanded beyond the production hubs in Dublin and Wicklow. Clusters can be found in Limerick, Galway, and Kilkenny. The digital nature of animation and VFX means that individual studios have also expanded into other areas of Ireland, including Clare, Cork, and Dundalk.

Incoming production has created a significant number of jobs in the country, with Section 481 leveraging skills development and training opportunities for local Irish workers. Disney's film *Disenchanted* hired a crew that was 98% Irish, equating to over 1,000 jobs. The Apple+ production *Foundation* hired up to 500 people for the 10-episode show.

3.5.2. Quality Employment Framework

Project Ireland 2040's National Development Plan 2021-2030 states that there is a need to shift focus to "ensure quality jobs" and move beyond implementing more jobs to "enabling the creation of highly productive, sustainable jobs".⁷⁶

To assess the provision of quality employment in Ireland's Screen industries for this project, Olsberg•SPI drew on research from the National Economic & Social Council (NES), the

⁷⁴ *Record Breaking Production Figures for the Irish Screen Industry in 2021*. Screen Ireland, 18th February 2022. Accessible at: <https://www.screenireland.ie/news/record-breaking-production-figures-for-the-irish-screen-industry-in-2021-published-by-fis-eireann-screen-ireland>

⁷⁵ *Irish Animation Film and Television Sector Calls on Tax Relief to be Extended*. Independent, 28th August 2022. Accessible at: <https://www.independent.ie/entertainment/irish-animation-film-and-television-sector-calls-on-tax-relief-to-be-extended-41942968.html>

⁷⁶ National Development Plan 2021-2030, 4th October 2021. Ibid

Organisation for Economic Cooperation and Development (OECD), NESTA, the Northern Ireland Statistics and Research Agency, Eurofound and Carnegie UK and the Royal Society of Arts (RSA) among others.

While definitions of quality employment and 'good jobs' vary and are often open to interpretation, the terms are designed to move analysis beyond the simple delivery of employment to consider a more holistic view of how work impacts and influences life and vice versa.

According to *Understanding Life in Ireland: The Well-being Dashboard 2022*, work and job quality is defined through "the productive activities (both paid and unpaid) that shape how an individual progresses through their life (i.e., develop their skills and abilities, fulfil their ambitions) as well as building and supporting their self-esteem and their sense of contributing to society".⁷⁷

The NESC's 2021 paper *The Good Jobs Agenda* states that we associate good jobs with higher levels of productivity, performance and innovation, which are viewed as drivers of sustainable economic growth.

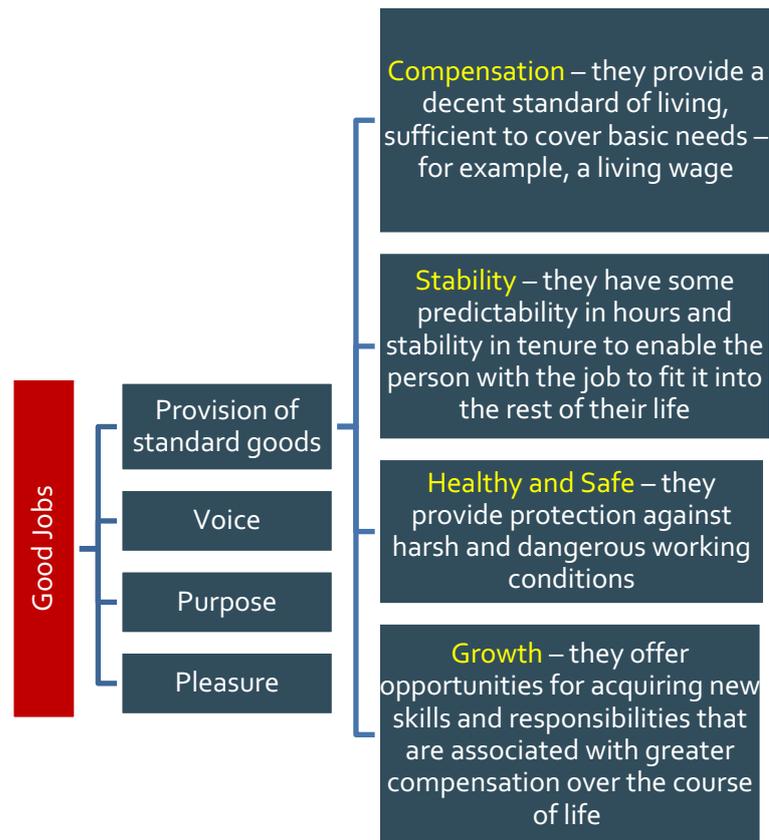
To assess the provision of quality employment, Olsberg•SPI adopted Cohen (2020) as a framework.⁷⁸ This framework looks at various intersecting areas to create a holistic view of quality employment. Cohen's research on 'good jobs' is quoted in research from the NESC and OECD and aligns with metrics in frameworks from the OECD, Eurofound, EU Laeken Indicators, European Trade Union Institute (ETUI) and International Labour Organization (ILO).

Cohen (2020), as depicted in the following figure, contends that there are four core instrumental and intrinsic features of a good job. Olsberg•SPI included questions in the crew survey relating to Cohen's definition of a good job.

⁷⁷ *Understanding Life in Ireland: The Well-being Dashboard 2022*. Government of Ireland. Accessible at: <https://www.gov.ie/pdf?file=https://assets.gov.ie/226075/822141e0-a0ce-4a1b-beab-79c54aa0d43d.pdf#page=null>

⁷⁸ *Good Jobs*. Joshua Cohen, 2020. Accessible at: <https://workofthefuture.mit.edu/wp-content/uploads/2020/10/2020-Research-Brief-Cohen.pdf>

Figure 43: Cohen (2020) Quality Job Model



3.5.3. Analytical Methods

To assess the industry development contribution of Section 481, Olsberg•SPI developed two industry surveys.

The **Cultural Dividend of Ireland’s Section 481 Production Incentive: Section 481 Crew and Industry Survey** was distributed across VFX, live action film and television drama and animation by production guilds in Ireland, including Animation Ireland and Screen Producers Ireland. The survey covered areas including growth of industry, provision of quality employment, training and skills development. The survey was open for one month and received 413 responses.

The **Cultural Dividend of Ireland’s Section 481 Production Incentive: Section 481 Skills Development Survey** was distributed across VFX, live action film and television drama and animation to skills participants, supervisors, skills officers and producers, and sent to approximately 140 people. The survey specifically aligned with the skills development plan required as part of Section 481, to assess the engagement with and perceived value of the skills development plans. The survey was open for one month and had a 46% response rate.

Table 1 – Crew and Skills Development Survey Demographics

Crew and Industry Survey	Skills Development Survey
51% of respondents were female; 44% were male	54% of respondents were female; 43% were male
22% of respondents were aged between 25-34 32% were aged between 35-44 24% were aged between 45-54 16% were aged between 55-64 A small amount fell into the 18-24 and 65-74 age brackets	48% of respondents were aged between 25-34 22% between 35-44 12% between 45-54 9% between 18-24 7% between 55-64
While the bulk of respondents live in the Dublin (59%), Wicklow area (10%), survey respondents reside across Ireland	45% of respondents are located in Dublin 13% in Kilkenny 9% in Wicklow 7% in Limerick The remaining respondents live primarily in Counties Clare, Galway, Kildare, Laois, Louth, Meath, Tipperary, and Waterford

Following the survey, Olsberg•SPI held a number of consultations with producers and members of Ireland’s animation and live action crew to further analyse employment in the Irish Screen sector.

3.5.4. Standard Goods

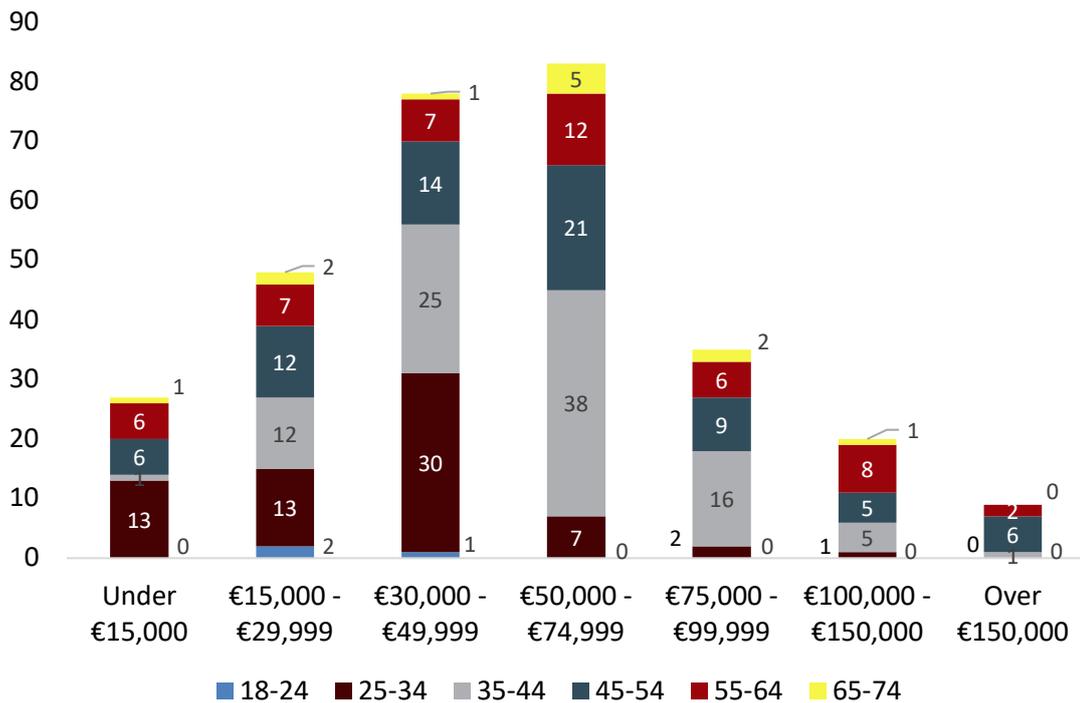
According to Cohen, the standard metrics of compensation, stability, healthy and safe and growth, are “features that contribute instrumentally to the quality of a person’s life by making a decent level of resources available, growing over the life course, and enabling some stability of expectations around resources and time”.

3.5.5. Compensation

Within Cohen’s framework, compensation denotes a wage that provides a decent standard of living and ability to cover basic needs. Ireland’s Well-being Dashboard 2022 uses average gross weekly earnings as a proxy for work quality.⁷⁹

⁷⁹ Understanding Life in Ireland: The Well-being Dashboard 2022. Ibid

Figure 44 – “What is Your Average Salary Band?”



Source: Olsberg•SPI (2022) (N=334)

In total, 54% of survey respondents stated that, on average, they earn between €30,000 to €74,999 annually. Within those salary bands, most survey respondents are aged between 25 and 54, with those aged between 25 and 34 more likely to earn in the €30,000 to €49,999 salary band. Those earning under €15,000 or between €15,000 to €29,999 were predominantly people who work part-time in the industry.

Using the survey data, the estimated average annual salary for all Screen workers is €57,372 and for full-time employees (both freelance and those within companies) it is €65,096.

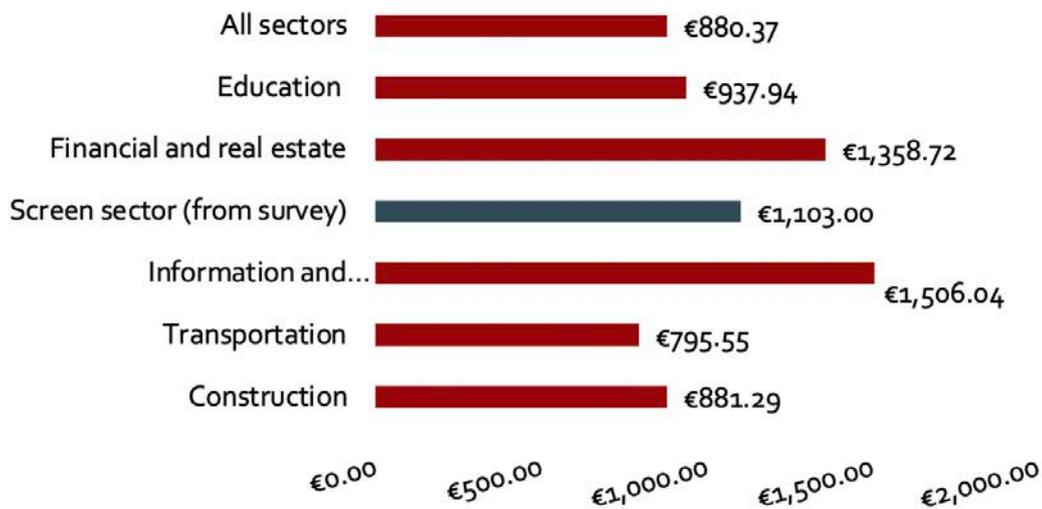
According to the Central Statistics Office (CSO), in Q4 2021 the average weekly earnings in Ireland was €863.70, rising to €880.37 in Q1 2022 (preliminary estimates).⁸⁰ Assuming a standard 52-week year, this amounts to an annual income of between €44,912 and €45,779.

This would suggest the average annual income for surveyed Screen workers is 27% higher than the average income in Ireland. However, as demonstrated further below in These results reflect a pattern of employment that is recognised worldwide in the screen industries. Because of financing, schedules and pipelines, the animation / VFX sector tend to offer continuous employment. Live action that is commissioned or financed independently tends to be a freelance sector as individual projects cannot offer continuous employment.

Figure 50 and Figure 51, workers in the Screen sector on average also work longer hours.

⁸⁰ *Earnings and Labour Costs Quarterly*. Central Statistics Office. Accessible at: <https://www.cso.ie/en/releasesandpublications/er/elcq/earningsandlabourcostsq42021finalq12022preliminaryestimates/>

Figure 45 – Average Weekly Earnings, by Economic Sector (Q1 2022)



Source: Olsberg•SPI analysis of Central Statistics Office data (2022)

Figure 45 outlines the average weekly earnings by sector. Motion picture, video and television programme activities (inclusive of production and post-production) falls under NACE code J: Information and Communication. According to the CSO’s latest Earnings and Labour Costs, information and communication is the highest paid sector in Ireland, with earnings reaching €1,506.04 weekly on average. According to the survey, Screen workers on average earn approximately €1,103 per week, assuming a standard 52-week year.

The freelance and project-based nature of the Screen sector has been raised as an area of concern by parties both within and outside the sector. In 2022, the government launched the Basic Income for the Arts pilot scheme (UBI) which will run from 2022 to 2025. The pilot programme was established following the Arts and Culture Taskforce report *Life Worth Living*, where the scheme was the first recommendation made by the taskforce.⁸¹ The scheme’s objective is to address earning instability that can be associated with the intermittent nature of work in the arts.

In consultations with Irish Screen production crew, several noted that their work is well compensated. One consultee explained that this is a marked change from earlier decades where a career in the arts was done for love and was not considered a sustainable or reliable career path. The level of productions now shooting in Ireland, both indigenous and incoming, has established a career pathway that is financially supportive as well as creatively satisfying.

Another consultee with three to five years’ experience in the Screen production sector noted that they made a comfortable wage that was enough to allow them to save money. This meant that if production slowed – for example, over winter – they can draw on those savings as needed.

However, several consultees noted the difficulty in gaining access to the industry. One producer noted that having family or a support system who can support you during the infancy of your career while building a reputation and network is often vital to remaining in the sector.

⁸¹ *Life Worth Living: The Report of the Arts and Culture Recovery Taskforce*. Arts and Culture Recovery Taskforce, October 2020. Accessible at: <https://www.gov.ie/pdf/?file=https://assets.gov.ie/98470/16fdf28f-bb34-471d-8f9f-1ed64f4aea2f.pdf#page=null>

This support may be provided through young adults continuing to live at home, or parents subsidising rent or car costs.

There are regional differences to this picture, with Dublin being more expensive than other regions. This means that companies based in Dublin might pay more than those companies based elsewhere. In the animation sector, there are also differences depending on whether a company is doing service work, as that tends to pay better than original productions where the budget may be a lot smaller.

3.5.6. Stability

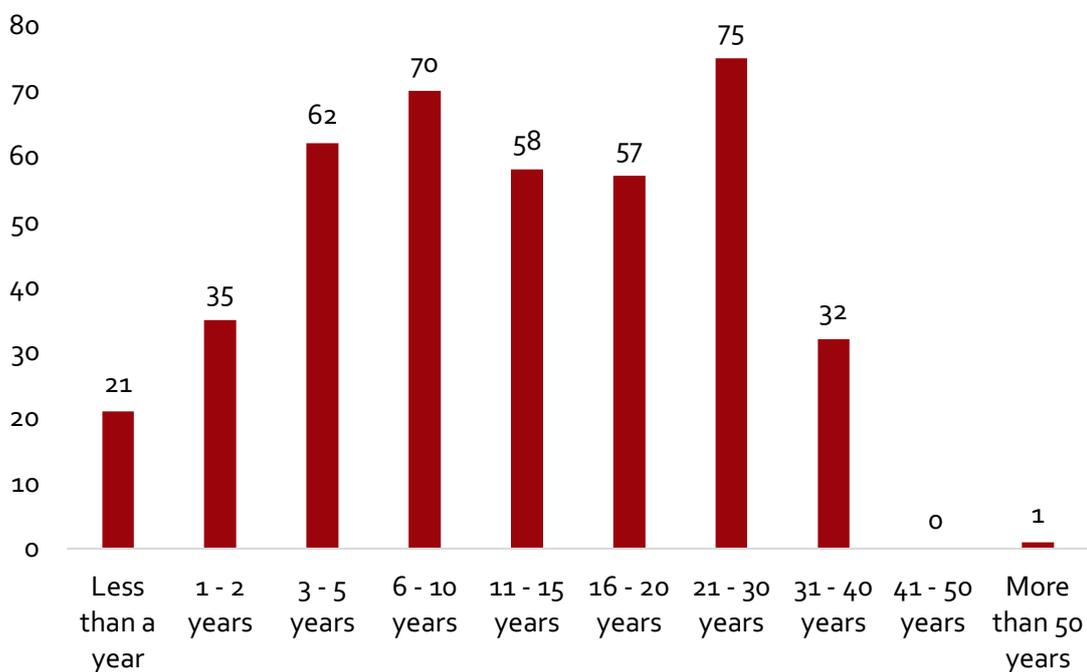
Cohen states that the marker of a 'stable' job is some predictability in hours and stability in tenure. The nature of the Screen industries is such that jobs are typically project-based and continuity of work is tied to the rate of production in the country. In Ireland, Section 481 has assisted in developing regular opportunities and ensuring the development of a well-established crew base.

As outlined in Section 3.3.2, production levels in Ireland have remained relatively steady for the past five years, with rapid growth for the animation sector.

As an established production jurisdiction, Ireland offers a degree of stability. This is reflected in the length of career that survey respondents have maintained. In total, 54% of respondents have worked in the sector for more than 10 years.

In total, 29% have joined the industry in the past five years, in line with the growing stability of work available in film, television drama, animation, VFX and documentary.

Figure 46 – "How long have you worked in the Irish screen production sector?"

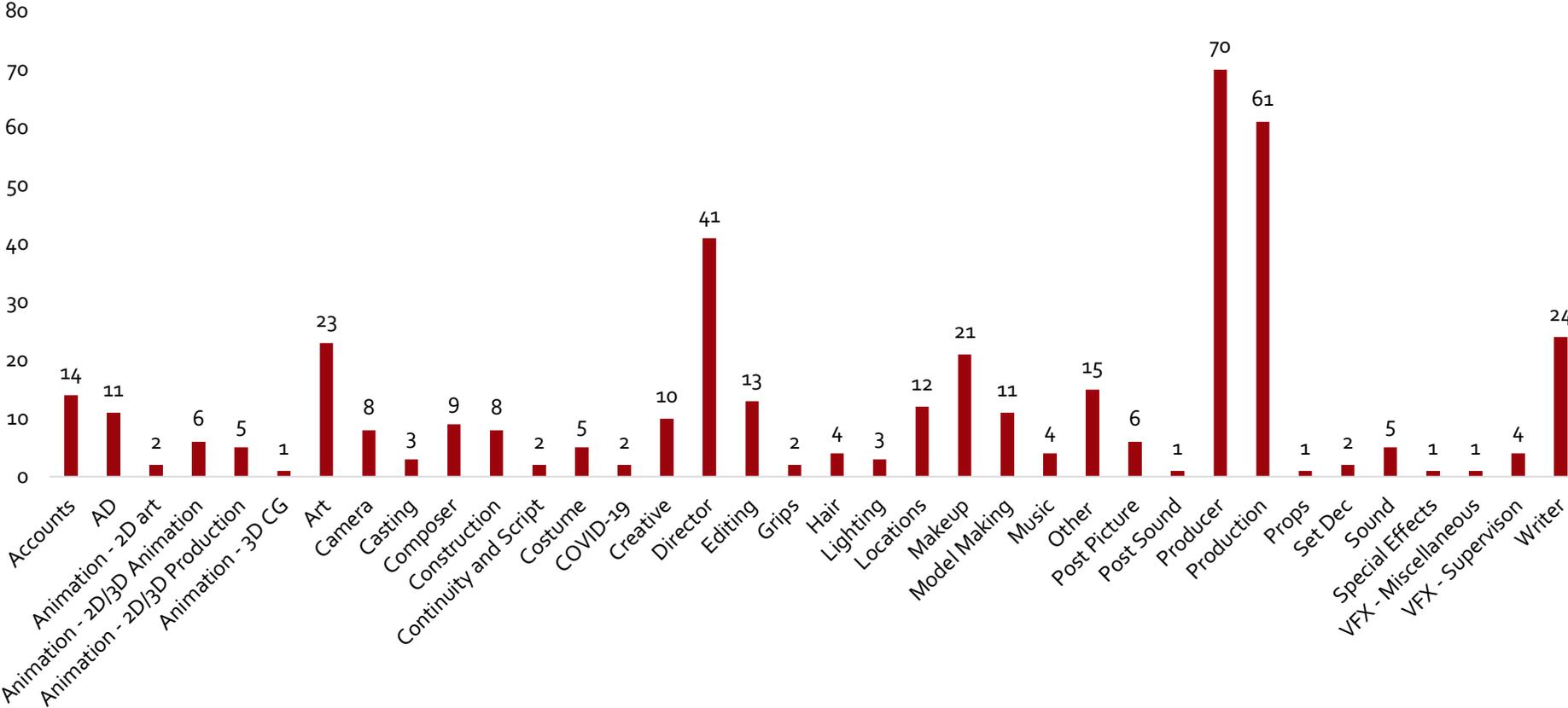


Source: Olsberg•SPI (2022) (N=411)

In addition to maintaining a career in the sector, the survey explored whether people maintained tenure in their particular roles. Figure 47 demonstrates the range of departments in which survey respondents work. Survey respondents predominantly work as producers or in the production department. However, there was a wide representation from across live action, animation and VFX.

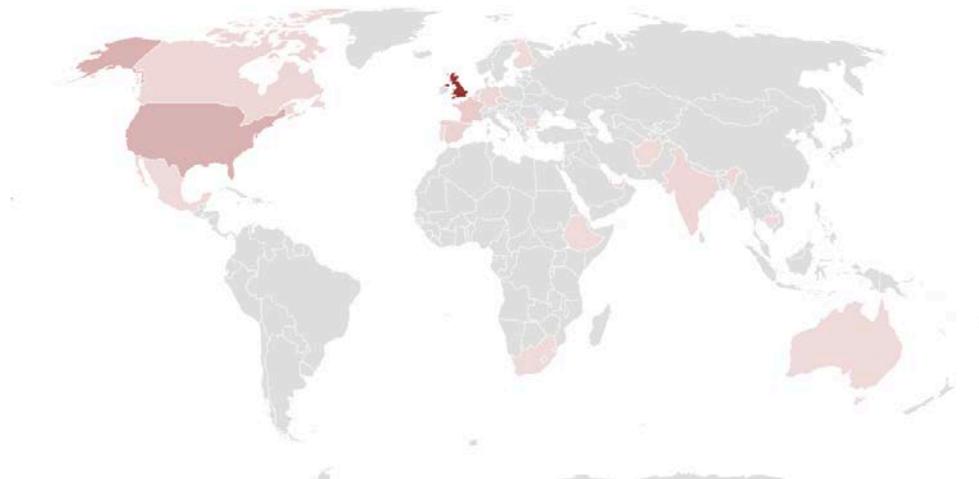
The survey respondents have worked in their current role for a wide range of years, with 20% holding the role for three to five years. In total, 32.5% are newer to their roles, with 16.5% having been in the role for one to two years and 16% holding it for less than a year.

Figure 47 – “What production department do you typically work in within the Irish screen production sector?”



Source: Olsberg•SPI (2022) (N=41)

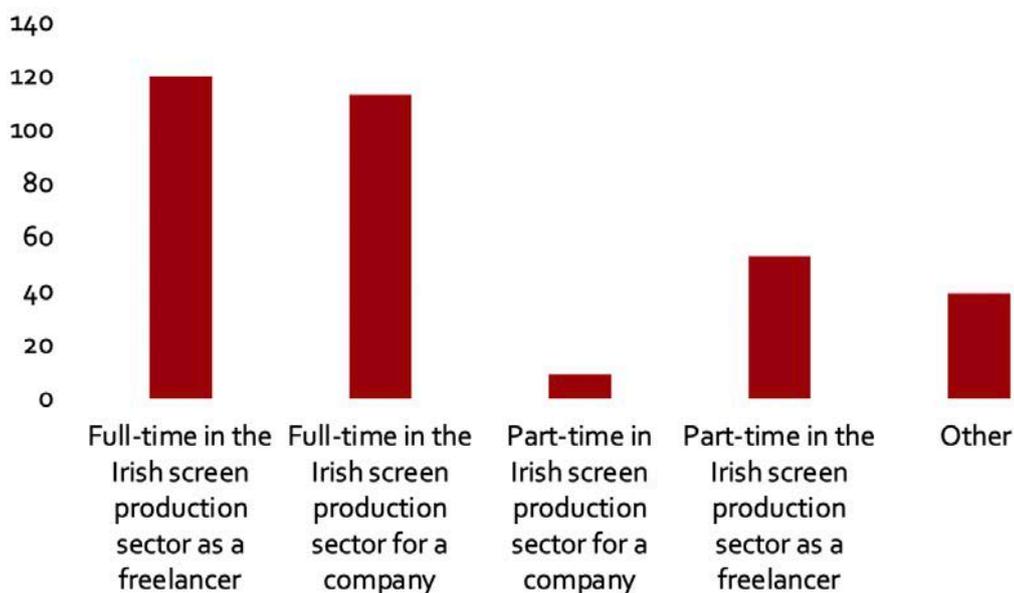
Figure 48 – “If you travel outside of work, where do you habitually work?”



Source: Olsberg•SPI (2022) (N=150)

In total, 66% of survey respondents only work in Ireland. Those who have worked outside of Ireland predominantly work in the UK (including Northern Ireland), Europe and the US. While a number of respondents have worked in these international markets for a sustained period of time (one to 20 years), it was clear that most respondents primarily leave Ireland to work on specific projects shooting internationally for 3 to 6 months.

Figure 49 – “What is your employment status?”



Source: Olsberg•SPI (2022) (N=334)

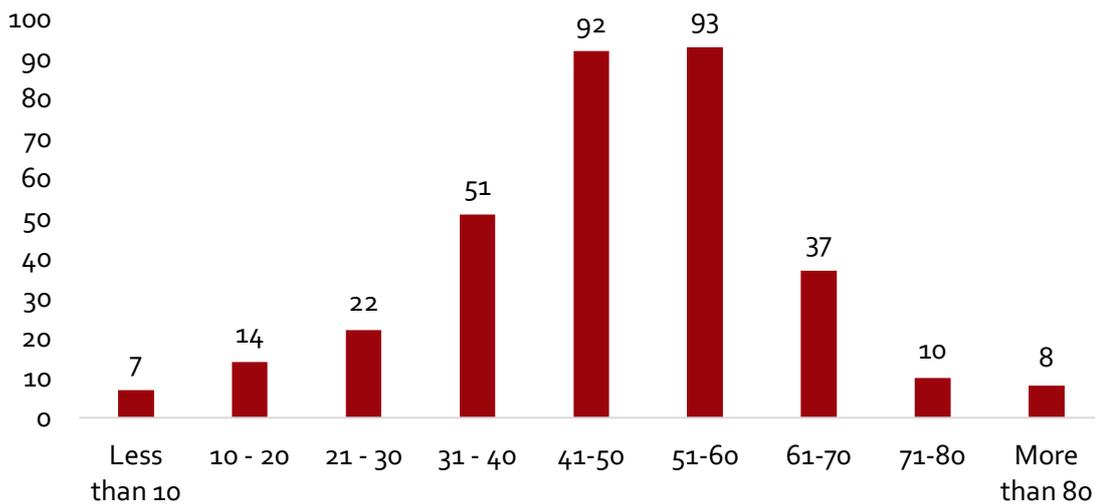
Almost 70% of respondents work full-time in the Screen sector as either a freelancer or employee for a company. The number of full-time professionals working as freelancers is comparable to those attached to a company.

Consultations with industry showed that attitudes vary towards freelance and permanent work in the sector. Some workers are focused on full time permanent positions and the level of security they provide. In doing so they tend to look to production companies or animation

studios that are in a continuous production pipeline where they can go from project to project. Other workers may prefer to go from job to job, particularly in the feature film sector – looking for the next feature that they are personally interested in working on.

These results reflect a pattern of employment that is recognised worldwide in the screen industries. Because of financing, schedules and pipelines, the animation / VFX sector tend to offer continuous employment. Live action that is commissioned or financed independently tends to be a freelance sector as individual projects cannot offer continuous employment.

Figure 50 – "On average, how many hours do you work a week?"

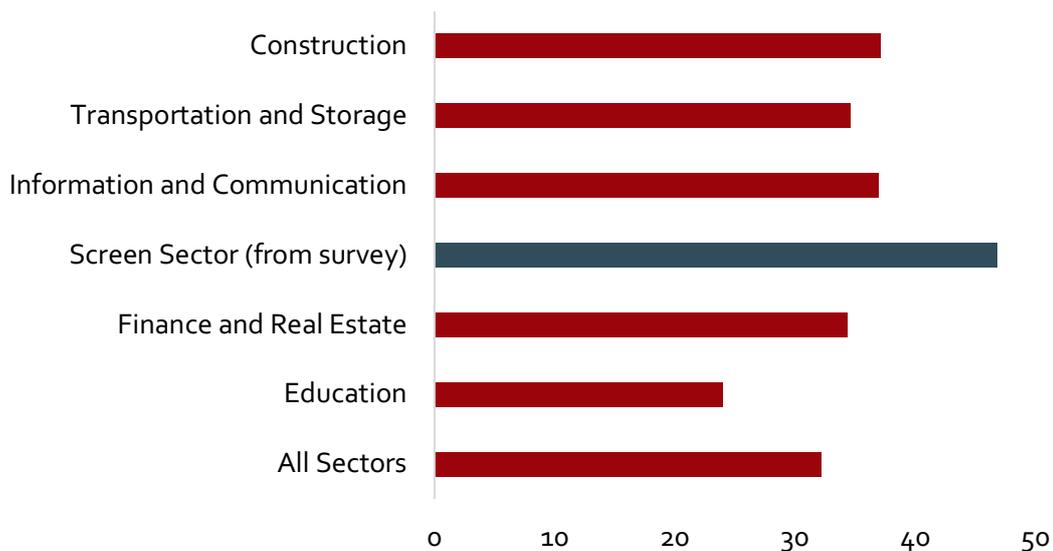


Source: Olsberg•SPI (2022) (N=334)

Most survey respondents work between 41 to 50 and 51 to 60 hours per week. In total, 16% of respondents stated they work in excess of 61 hours.

In the animation sector, jobs are generally structured around a typical working day – though there are times when workers have to do additional hours or work longer on something to get it approved by the directors or the animation director. Typically, animation workers will be given tasks that match their experience. There may also be a 'crunch' time towards the end of a schedule, when longer hours will be required.

Figure 51 – Average Weekly Paid Hours by Economic Sector, Q1 2022



Source: Olsberg•SPI analysis of Central Statistics Office data (2022)

Figure 51 displays the results of the survey against other industries in Ireland. The Irish national average of weekly paid hours across all sectors is 32.2 hours.⁸²

The average screen sector working hours identified in the survey align with data on sector working hours in other countries. In November 2021, Uni Global Union gathered data through a survey with 28 unions in 22 countries on the average working week in the film and television industry.⁸³ The survey found that in most countries the average working hours were typically between 40 to 50 hours, often rising to more than 60 hours per week.⁸⁴

The CSO well-being hub measures the percentage of people in employment aged 15 to 89 years that usually work 49 hours or more per week. The most current data at the time of writing are for Q2 2021 and state that 8.2% of people in Ireland, 12.4% of men and 3.2% of women, usually work more than 49 hours or more per week.⁸⁵

According to the well-being hub, 44.8% of those who usually work 49 hours or more per week were within the agriculture, forestry and fishing economic sector, followed by construction (11.9%), professional, scientific, and technical activities (10.4%), financial, insurance and real estate activities (9%).

An indicator of stability of tenure in the crew and industry survey was whether respondents felt they had a future in the Irish Screen sector. This would suggest that they feel that they are able to fit the job with the rest of their life, and want to continue working in the sector.

⁸² *Earnings and Labour Costs Quarterly*. Central Statistics Office. Accessible at: <https://www.cso.ie/en/releasesandpublications/er/elcq/earningsandlabourcostsq42021finalq12022preliminaryestimates/>

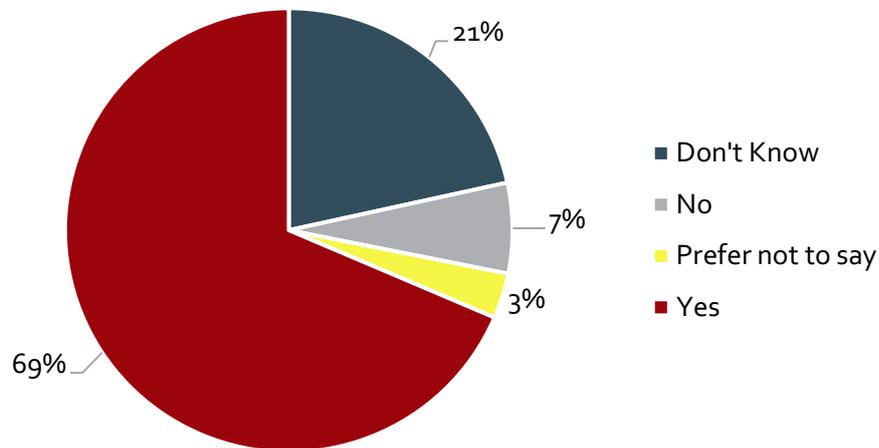
⁸³ The 22 countries surveyed were Argentina, Australia, Belgium, Brazil, Canada, Chile, Colombia, Denmark, Finland, France, Germany, Iceland, Israel, Lithuania, Malaysia, Peru, Slovenia, Spain, Sweden, Switzerland, the United Kingdom and the United States

⁸⁴ *Demanding Dignity Behind the Scenes*. Uni Global Union, November 2021. Accessible at: https://uniglobalunion.org/news_media/uploads/2021/12/uniglobal_behindthescenes_en_final.pdf

⁸⁵ *Long Working Hours in Main Job*. Central Statistics Office. Accessible at: <https://www.cso.ie/en/releasesandpublications/ep/p-wbhub/well-beinginformationhub/timeuse/longworkinghoursinmainjob/>

In total, 69% of survey respondents responded 'yes' to this question. Of those who stated they feel they have a future in the Irish Screen industries, 31% were aged 35 to 44 and 21% were 45 to 54-year-olds.

Figure 52 – "Do you feel like you have a future in the Irish Screen industries?"



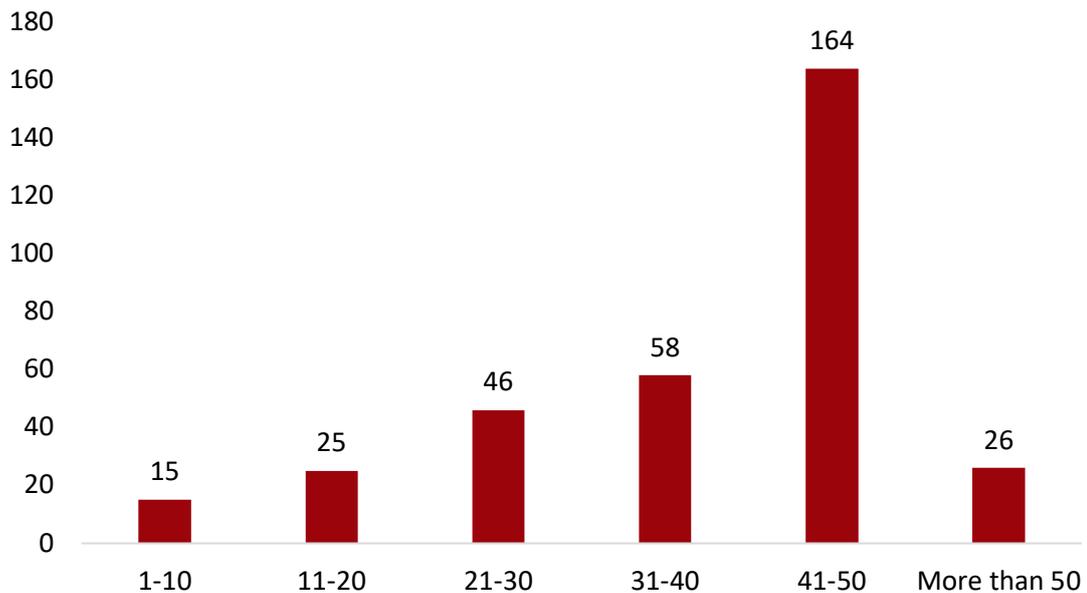
Source: Olsberg•SPI (2022) (N=334)

However, younger survey respondents were more likely to answer 'no' or 'don't know'. In total, 36% of 25 to 34-year-olds do not feel as though they have a future in the Irish Screen industries, while 18% of the same age group answered 'don't know'. When probed further, the long hours associated with work in the Irish Screen industries was one of the leading causes for respondents not feeling as though they had a future in the Screen industries.

In addition to the hours addressed in These results reflect a pattern of employment that is recognised worldwide in the screen industries. Because of financing, schedules and pipelines, the animation / VFX sector tend to offer continuous employment. Live action that is commissioned or financed independently tends to be a freelance sector as individual projects cannot offer continuous employment.

Figure 50, Just under 50% of respondents stated that they work between 41 to 50 weeks per year on average. A further 7% stated that they typically work either 51 or 52 weeks per year. Just over 25% work, on average, fewer than 30 weeks per year. Figure 53 below shows the full range of survey responses.

Figure 53 – “On average, how many weeks do you work per year”



Source: Olsberg•SPI (2022) (N=334)

When asked how many hours they would need to work to feel secure in their employment, more than 50% of respondents said that they would need to work more than 44 weeks in a year. Within that group, 21% selected 50 to 52 weeks per year.

Furthermore, a number of respondents emphasised the difficulty of maintaining family life with the hours and schedules expected. They said that finding affordable and reliable childcare that is flexible enough to work for sudden changes in hours and scheduled dates was another challenge.

Raising Films Ireland’s 2022 report *Pursuit of Change* found that 75% of respondents said caring had a negative impact on their career and that the progression of their career would have been different without their caring responsibilities.⁸⁶ This is an issue that overwhelmingly affects women, with 97% of single or solo parents and carers identifying as female.

Survey respondents also noted the difficulty of maintaining an appropriate work-life balance in the long term, and the challenging cost of working in Dublin/Wicklow if they live elsewhere.

Long hours are a characteristic of the Screen industries internationally, and not just in Ireland. However, the long hours are a cause of concern. In 2020, Ireland’s Shooting Crew Agreement in Ireland was updated and now includes a commitment to developing a Worklife Balance policy.⁸⁷ This policy, as well as other initiatives that could address the working week should be further explored.

3.5.7. Healthy and Safe

Cohen states that good jobs are those that provide protections against harsh and dangerous working conditions. Clearly, the COVID-19 pandemic has created challenges for all

⁸⁶ *The Pursuit of Change: Issues Affecting Parents and Carers in Ireland’s Screen Industries*. Raising Films Ireland, 2nd March 2022. Available at: https://static1.squarespace.com/static/5f2818e5a510d01444930624/t/621e7doc8bef3579cf6f53cb/1646165261241/RI_Reports_FINAL.pdf

⁸⁷ *Screen Producers Ireland Welcomes SIPTU Members Decision to Accept the 2020 Shooting Crew Agreement*. Screen Producers Ireland, 6th December 2020. Accessible at: <https://www.screenproducersireland.com/news/screen-producers-ireland-welcomes-siptu-members-decision-accept-2020-shooting-crew-agreement-c2-ao>

employment in this regard, although the Screen production sector across the world was able to implement effective protocols and return to production rapidly after shutdowns. Screen Producers Ireland, for example, worked closely with industry stakeholders to develop Return to Production Guidelines for the film, television drama and factual genres. The Production Guidelines include information on options for modifying work structures to help to reduce contact, on implementing an effective cleaning and sanitation regime to reduce risk of transmission of COVID-19, and options for minimising risk for activities such as costume and make-up.

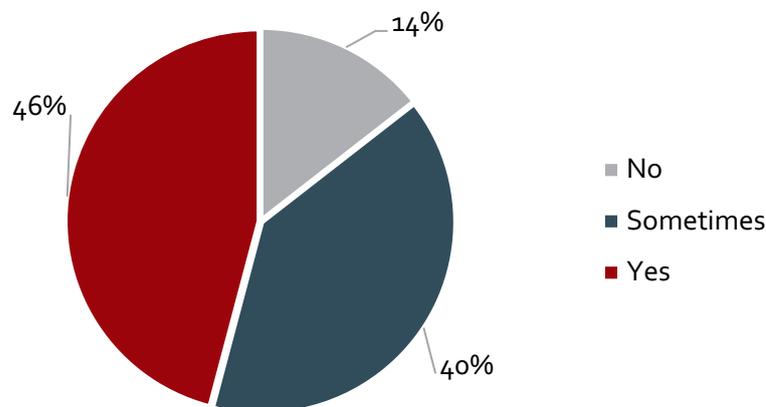
TCGASM confirmed that these guidelines adhered to Government COVID-19 health and safety guidelines.

3.5.8. Growth

A core tenet of quality employment, according to Cohen’s framework, is the opportunity for growth and development. Both acquiring new skills and new responsibilities are integral components of growth in a job.

This metric aligns with a pillar of Ireland’s *Future Jobs 2019*. Pillar 3 of that report is focussed on enhancing skills and developing and attracting talent. To ensure Ireland maintains an ability to compete internationally, “our managers and workers must have up-to-date skills and continue to train and develop throughout their careers”. The report emphasises the importance of soft skills and transversal skills, along with creative skills, in achieving this goal.

Figure 54 – “Does your role enable you to experience international best practice in terms of skills and technology, including on-the-job learning?”



Source: Olsberg•SPI (2022) (N=305)

In total, 86% of survey respondents believe that their role enables, or sometimes enables, them to experience international best practice in skills and technology, including on-the-job learning. Previously, industry progression tended to function informally and was based on workers simply serving their time and working their way through the ranks.

Screen Ireland has created a solid basis for on-the-job training. One challenge is that, particularly for those new to the industry, additional time is needed to become familiar with key and speciality equipment. However, there are often can be time pressures on such equipment during a shoot: courses that provide quality time with key equipment are therefore very valuable and can speed up progression.

In the animation sector, training courses have also been very helpful for industry progression.

3.5.9. Voice

Cohen defines voice as the opportunity for workers to have a say in their work, either directly or indirectly. The worker should have avenues available to engage with their work and input "into what the firm does, how their own work is done, how their safety is protected, and how much they are compensated".

In the 2021 *Audiovisual Action Plan Progress Report* the results of the Workplace Relations Commission audit of the Independent Film and Television Drama Production sector found that:

"The positive impact of the guilds structure was evident from the submission received. It is recommended that this structure is supported and expanded on, to incorporate all categories of crew. This structure will give workers and opportunity to work together, build consensus and exert influence in the sector in relation to terms and conditions."

Screen Ireland continues to work collaboratively with key organisations like Screen Guilds of Ireland (SGI) to support access routes, progression opportunities and retention within the crew base. SGI was established in 2019 to represent Irish film and television workers across various departments including accounts, art, assistant directors, camera, construction, continuity, costume, facilities, editing, grips, hair, locations, make up, modelmaking, production, props, prosthetics, set decoration, sound, special effects, stunts, transport and visual effects.

SGI members were also part of the SIPTU union committee that reached a consensus with the employer/producer representative body Screen Producers Ireland in 2020, on a new comprehensive agreement for the film and television drama industry in Ireland, to modernise and standardise work practices across the industry. The 2020 Crew Agreement updates the 2010 agreement in line with evolving work practices and will be utilised as a framework for the Screen sector and to promote good practice.

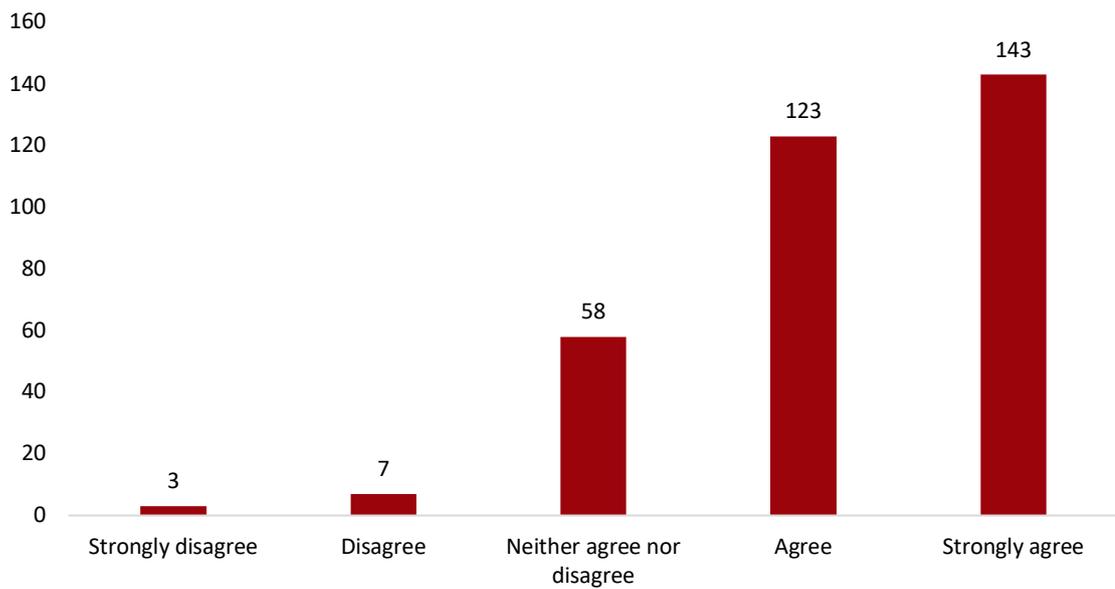
As part of the 2020 Crew Agreement, an industry pension scheme operating under the Construction Workers Pension Scheme (CWPS) was implemented. This incorporates a monitoring structure to oversee the agreement's operation and, as mentioned previously, develop the first Worklife Balance policy for the film and television industry.⁸⁸

3.5.10. Purpose

Cohen states "a good job involves work that serves, and is understood by the person doing the job, as serving a valuable purpose." The Well-being Dashboard 2022 defines work and job quality as "the productive activities ... building and supporting their self-esteem and their sense of contributing to society."

⁸⁸ *Screen Producers Ireland Welcomes SIPTU Members Decision to Accept the 2020 Shooting Crew Agreement*. Screen Producers Ireland, 6th December 2022. Accessible at: <https://www.screenproducersireland.com/news/screen-producers-ireland-welcomes-siptu-members-decision-accept-2020-shooting-crew-agreement-c2-ao>

Figure 55 – “To what extent do you agree that you do meaningful work?”



Source: Olsberg•SPI (2022) (N=334)

When asked to what extent they agree that they do meaningful work in the Screen sector, 80% of survey respondents selected either ‘agree’ or ‘strongly agree’. As one respondent said, the work is meaningful as they are “writing stories which connect people and says something about the world we live in”.

Responses came from a mix of above-the-line and below-the-line production departments in the live action, animation, and VFX sectors. Common responses when asked why they considered their work to be meaningful included:

- Being creative and creating art;
- Collaborating with colleagues;
- Creating work that is culturally resonant;
- Creating employment opportunities;
- Creating something that is enjoyed by other people; and
- Connecting with audiences.

Several respondents referenced the importance of art and culture in Irish identity as part of their response. One respondent stated that “arts and culture are core parts of Irish identity and DNA” while another found purpose in being part of an industry that promotes “Irish culture on an international stage”.

The variety of responses demonstrate that Irish crew feel their work serves a clear purpose, and that there are both cultural and social values associated with this work. Consultations showed a sense of motivational purpose: some consultees described being in the industry not for money but for originating material, making creative content, and engaging with creatives.

3.5.11. Pleasure

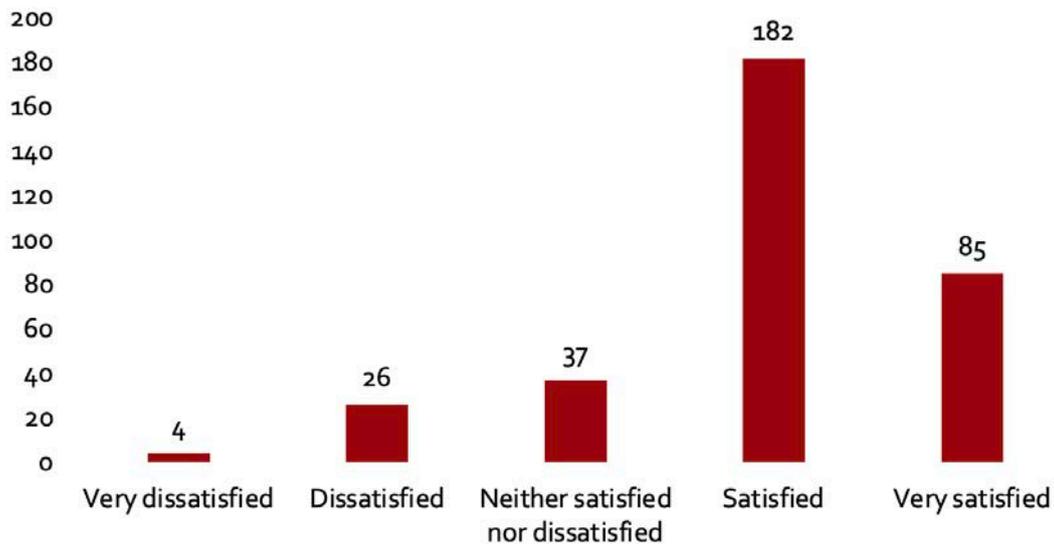
According to Cohen, pleasure in work is tied to a person’s motivation and desire to engage with complex yet rewarding tasks. He emphasises the following principles as key to finding pleasure in work:

- Variety – Work that involves different tasks, breaks from routine and includes a redirection of attention
- Exercise of judgement – Work that requires active engagement and reaction

- Division of labour – Work that requires a mix of reflection and imagination, rather than rote participation
- Social collaboration – Work that requires a pooling of different kinds of knowledge, disciplinary expertise, skill and sensibility.

For the purpose of this research, the survey focused on variety and social collaboration as exemplars of the Screen sector’s engagement with pleasure.

Figure 56 – “How satisfied are you with your work?”



Source: Olsberg•SPI (2022) (N=334)

The survey asked respondents to rate how satisfied they are with their work. Despite the previously addressed challenges around work/life balance and long hours, some 80% of survey respondents stated they are either ‘satisfied’ or ‘very satisfied’ with their work. Only 9% of respondents selected either ‘very dissatisfied’ or ‘dissatisfied’.

Through the survey, it was evident that the challenge associated with Screen production work, including the opportunity to grow and develop was a leading reason for satisfaction or pleasure in jobs. One survey respondent elaborated and said that satisfaction was through “achieving results and working through a challenge with a team of collaborators”.

Similarly, the social interaction with similarly minded creative workers was often identified as a key reason for satisfaction, with one identifying “access to creativity and creative people” a reason for their satisfaction.

The six most common responses when asked why they were satisfied with their work were:

- Challenging
- Creatively driven work
- Travel
- Tangible results
- Social interaction
- Progress of talent and work.

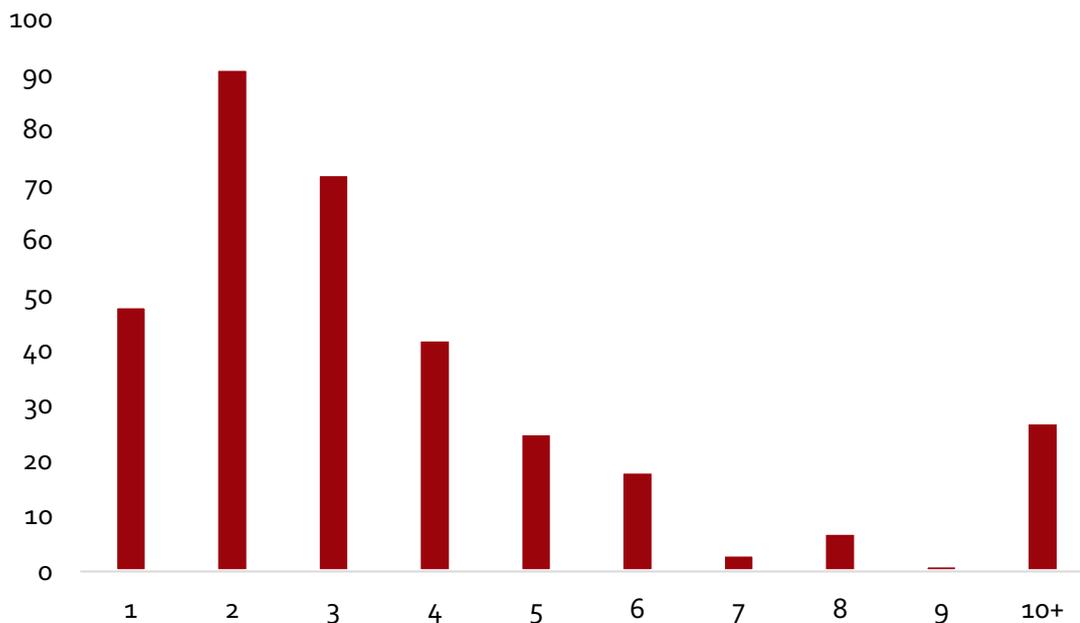
Other consultees placed high value on their work being practical and that they learned by doing.

3.5.12. Variety

According to the survey, most workers in the Irish Screen sector get an opportunity to work on a variety of productions. One survey respondent noted that “working in a ‘different’ industry where no two days are the same” gave them satisfaction in their work.

The bulk of respondents (88%) work on between one and six productions per year. In total, 27% of survey respondents typically work on two productions per year, while 22% work on three. In total, 8% of respondents will typically work on 10 or more productions each year.

Figure 57 – “How many screen productions do you work on in a typical year?”



Source: Olsberg•SPI (2022) (N=334)

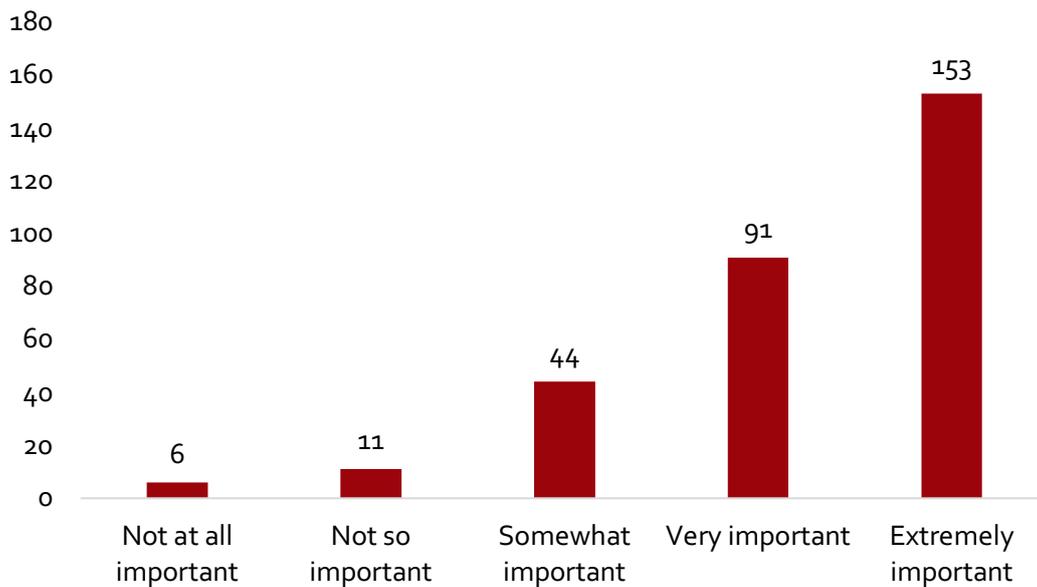
As previously noted, some workers prefer to go from job to job, following projects that they are interested in. This offers creative variety, as well as variety in locations.

3.5.13. Social Collaboration

Cohen states that social collaboration involves a “pooling and coordination of different kinds of knowledge, disciplinary expertise, skill, and sensibility”.

Survey respondents emphasised working in teams, with other creative people and in international environments as core reasons for their satisfaction in work.

Figure 58 – “How important is working with experienced international or Irish talent to you?”



Source: Olsberg•SPI (N=305)

In total, 72% of respondents stated that their role enables them to work with experienced international and Irish talent. A further 25% of respondents stated that their role sometimes enables them to work with experienced international and Irish talent. Some 80% of respondents stated that it is either very important or extremely important to work with experienced international and Irish talent as part of their job.

3.6. Industry Development Contribution – Training and Skills Opportunities

In March 2019, Screen Ireland was asked to take on a new role to develop and oversee a new process for tracking training and skills development opportunities on Section 481 funded projects, which is a requirement of the tax credit. This was a new departure for the agency, providing an opportunity for Screen Ireland to introduce a more structured approach to work-based learning and skills tracking in the Screen sector.

All qualifying productions are required to submit a Skills Development Plan as a condition of access to the tax credit. For those with eligible expenditure in excess of €2 million, a comprehensive Proposal for Skills Development must be submitted to Screen Ireland for approval prior to the commencement of the production. The Screen Ireland skills team reviews each plan and may seek changes, especially in relation to specific skills deficits and priority roles that have been identified through the Screen Ireland Skills Needs Analysis report.

Each Skills Development Plan should set out learning objectives for Skills Development Participants, who may be new entrants, trainees, or upskillers on the production. Typically, one skills participant must be engaged for every €177,500 of corporation tax credit claimed, and at least eight where the amount of corporation tax credit exceeds €1.4 million. However, the varying needs of productions mean that a case-by-case approach can usually be taken, depending on factors such as type of production, scale, and duration.

On-the-job learning is the most common type of skills development for participants, though eligible activities may include training courses, mentoring, shadowing, and masterclasses provided by the production. All Section 481 productions are also required to maintain regular engagement with Screen Ireland staff throughout the process, including accommodation of workplace and set visits. Each production is also encouraged to either appoint a new, or nominate an existing, crew member to the role of Skills Development Officer to help manage

and monitor the plan. To help ensure Skills Development Plans are appropriately delivered, a compliance stage at the end of production must be completed and signed off by Screen Ireland before the last 10% of the tax credit can be claimed.

Between April 2019 and the time of writing, over 161 skills development plans have been submitted to Screen Ireland for approval and over 1,719 skills participants have been tracked on those productions.

As well as the skills development aspect of the Section 481 skills plan, producers are also encouraged through the skills development process to introduce both sustainability initiatives and Diversity, Equity and Inclusion (DEI) initiatives on their productions. This has seen significant positive change within the sector.

Where a Section 481 application is made for the additional Regional Film Development Uplift incentive, Screen Ireland seeks additional participants to be engaged in skills development, furthering the aim of developing local pools of crew and talent outside the dominant Dublin and Wicklow production hubs.

Between 2019 and the time of writing, 49 regional skills development Plans have been submitted to Screen Ireland covering 578 regional skills development participants. Screen Ireland recently announced an investment of over €2 million towards the establishment of five new National Talent Academies across Ireland in Wicklow, Limerick, Galway (x2) and Dublin for film and television drama, animation and production crew. These new Talent Academies will build on the success of the Section 481 skills model to develop opportunities for diverse and regional talent on a national level. This includes ensuring there are opportunities within the industry for those who may feel precluded from a career within the sector.

The Section 481 skills process enables engagement with producers and, importantly, crew, and ensures that formal, structured training is available. It also provides data on key skills shortages and gaps. This, in turn, allows the sector to ensure that there is a pipeline of skilled talent to support both indigenous and incoming production in a sustainable way.

A recent example of an approved skills development plan is that used for *Joyride*, a regional Section 481 production. The project's skills plan included six trainees and two new entrants that were local to the region as well as a work placement programme with a local college.⁸⁹

As set out in Screen Ireland's case study of the project, "participants were paired with a mentor in their department to set out both the requirements for performing tasks in the role as well as individual learning objectives for the mentee. This approach ensured that skills participants were actively engaged in their own personal skills development while also fulfilling the crew needs in their department."

The first Competency Framework for crew (developed by SGI with support from Screen Ireland) was launched in July 2022. The development of this Competency Framework involved in-depth engagement with 17 crew guilds over an extended period. In late 2022, Screen Ireland in collaboration with key stakeholders (Screen Guilds Ireland, Screen Producers Ireland, Screen Directors Guild, Screen Writers Guild, Screen Composers Guild and Animation Ireland) will launch new Competency Frameworks for all roles across the Screen sector in Ireland. These Competency Frameworks are intended as a resource for the Section 481 skills tracking process, for increasing access and career progression routes within the sector, and for enhanced and relevant programme and curriculum development.

Screen Ireland will also introduce new technical systems, including a new, digital, skills tracking system that will link to a new online Screen Production Directory (crew database) to track

⁸⁹ *Joyride. Section 481 Skills Development Case Study*. Screen Ireland, 2022. Accessible at: <https://www.screenireland.ie/skills/section-481-skills-development/case-studies/joyride>

individuals as they develop skills throughout their careers and support the development of new certification/accreditation models. This will involve Screen Ireland working closely with third level partners.

A new fund launched by Screen Ireland in 2021, called Pathways, targets the development of a more diverse and inclusive Screen sector. The funding scheme enables companies/producers to provide structured opportunities on set for those from historically under-represented groups within the sector. In 2021, 13 companies/producers received funding that provided work placement opportunities for 28 participants from historically under-represented groups.

In addition to the Pathways scheme, Screen Ireland delivers access programmes for new entrants to the industry, including the Passport to Production programme. This scheme saw over 50 new entrants receive on the job training as part of a paid work placement in 2021. In the last year, Screen Ireland has also moved towards the development and delivery of flexible, self-led online training programmes, for example programmes related to COVID-19 (Return to Work and Compliance Officer) and Health and Safety (Screen Pass). These programmes can target a wider range of people working in the sector who can complete the courses in their own time and at their own pace.

3.6.1. Industry Development Survey

Both surveys for this Study asked respondents about training and skills opportunities in Ireland. The crew and industry survey discussed it more broadly, whereas the skills development survey spoke to people who had participated in a Section 481 Skills Development Plan.

3.6.2. Professional Development

The provision of quality employment aligns closely with the delivery and availability of training and skills development opportunities. Skills development is a core focus of Screen Ireland. Strategic Objective two in *Strategy: Building for a Creative Future 2024* focuses on investing in talent and skills development to encourage “creative excellence, enable growth and ensure long-term sustainability”. This aligns with government policy on sustainable employment, upskilling and retraining workers, investing in transversal skills and creating a dynamic and innovative workforce.

For the purpose of Olsberg•SPI’s crew and industry survey, professional training and skills development was defined as opportunities organised and delivered via skills providers, including continuing professional development, training opportunities through subsidised skills providers (i.e., Screen Ireland) and formal traineeships / placements.

Consultations underlined the challenges on independent projects to train crew in a hands-on way, when timeframes and budgets are tight. Higher-budget incoming productions were regarded as having more potential – regarding budget and time – to offer more in-depth opportunities. Previous structures in the sector meant that training occurred much more informally, and the introduction of formal training is a relatively new concept.

Figure 59 – “Have you undertaken any form of professional industry training or skills development?”

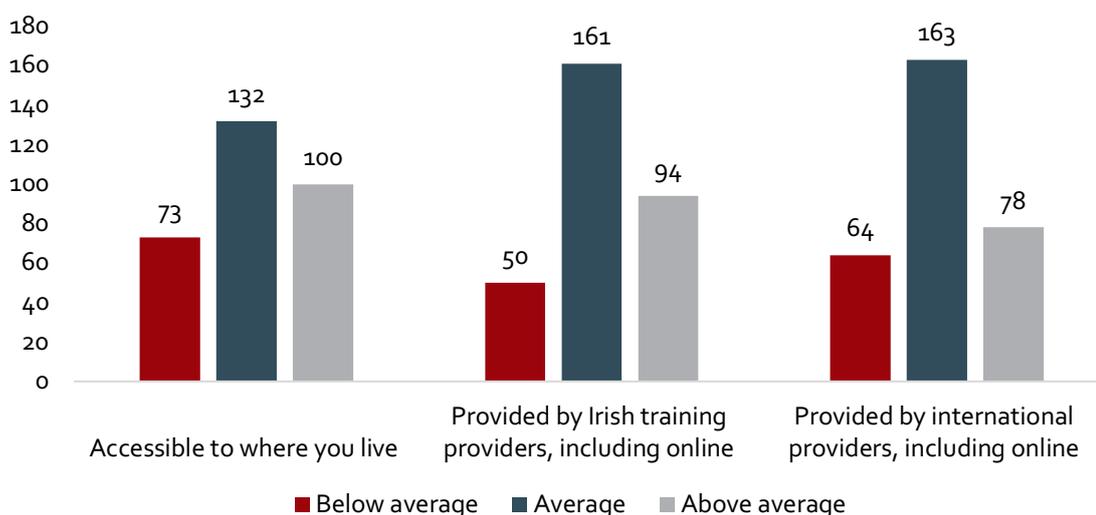


Source: Olsberg•SPI (2022) (N=305)

Regardless of whether they entered with some specialist training or not, 81% of survey respondents have taken part in some further training or skills development since joining the industry.

Only 12% of survey respondents have completed no further training or skills development since entering the industry. While another 6.5% have completed no training or skills development before or after joining the sector.

Figure 60 – “How do you rate the opportunities for training and development in the industry overall?”



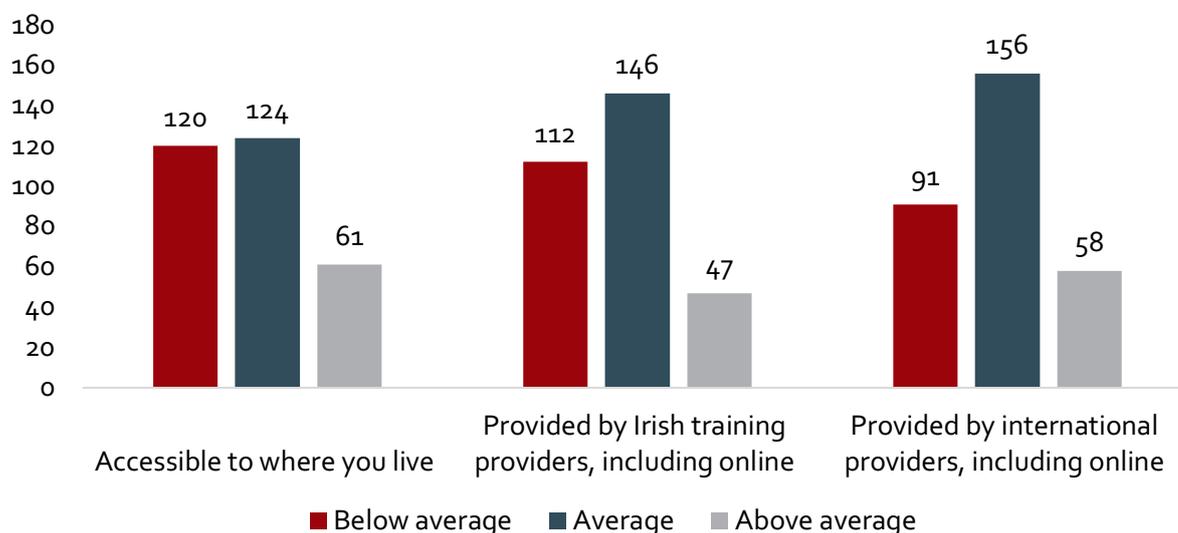
Source: Olsberg•SPI (2022) (N=305)

Survey respondents were asked to rate the opportunities for training and development in the Screen industries overall.

- 76% of respondents believe that the opportunities for training and development accessible to where they live is either ‘average’ or ‘above average’

- 84% of respondents believe that the opportunities for training and development provided by Irish training providers is either 'average' or 'above average'
- 79% of respondents believe that the opportunities for training and development provided by international providers is either 'average' or 'above average'.

Figure 61 – “How do you rate the opportunities for training and development in the industry in the specific role in which you work?”



Source: Olsberg•SPI (2022) (N=305)

Survey respondents were also asked to rate the opportunities for training and development for their specific role in the industry.

- 61% of respondents believe that the opportunities for training and development accessible to where they live is either 'average' or 'above average'.
- 63% of respondents believe that the opportunities for training and development provided by Irish training providers is either 'average' or 'above average'.
- 70% of respondents believe that the opportunities for training and development provided by international providers is either 'average' or 'above average'.

As previously outlined, consultees reported that there may be challenges on set during production to spend time with equipment, and that it would be helpful if Screen Skills Ireland was able to partner with camera manufacturers. It would be useful to have time to experiment with gear off set.

3.6.3. Informal Training and Skills Opportunities

For the purpose of Olsberg•SPI's crew and industry survey, informal training and skills development was defined as training that falls outside of the formal education system, including on-the-job learning, shadowing and mentor relationships.

Screen Skills Ireland's *Skills Needs Analysis Report for the Screen Sector in Ireland 2019-2020* found that 67% of producers or employers; 77% of line manager / heads of department and 87% of freelancers prefer to address skills gaps through on-the-job training.⁹⁰

⁹⁰ *Skills Needs Analysis Report for the Screen Sector in Ireland 2019-2020*. Screen Skills Ireland. Accessible at: https://www.screenireland.ie/images/uploads/general/Screen_Skills_Ireland_2019_Report_vG.pdf

For producers or employers, on-the-job learning is seen as more flexible and able to fit into the workflow of very busy productions. For freelancers, this method was linked with the opportunity to be on set and understand the workflow. Shadowing and mentoring were also seen as optimal approaches to learning.

Figure 62 – “To what degree does your career in the Irish Screen sector offer opportunities to learn, develop and progress?”



Source: Olsberg•SPI (2022) (N=305)

In total, 43% of survey respondents believe they receive ‘a great deal’ of informal and on-the-job opportunities to learn, develop and progress as part of their career in the Irish Screen sector, and 24% believe there are ‘a lot’ of these opportunities.

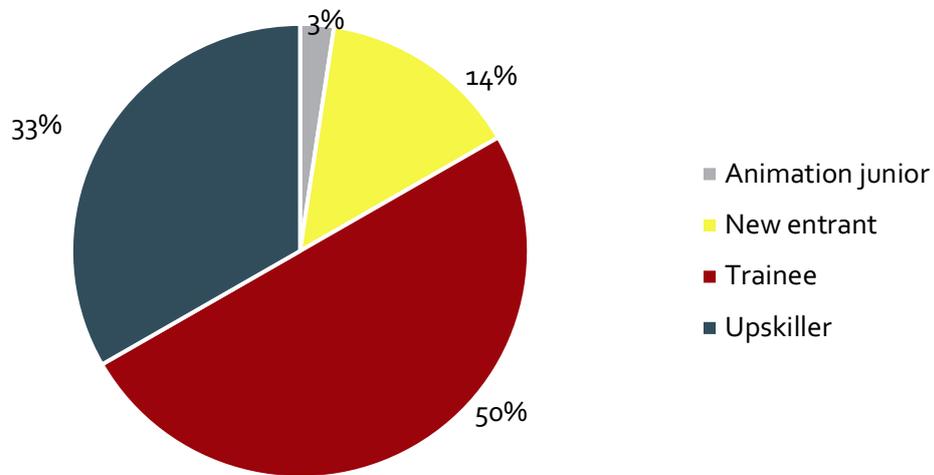
Some 36% of survey respondents believe they receive ‘a moderate amount’ of opportunities to learn, develop and progress as part of their career in the Irish Screen sector through professional training and skills development.

3.6.4. Skills Development Plan

The requirement for Skills Development Plans in all Section 481 applications has ensured training and skills development will occur across production in Ireland and provide opportunities for Irish crew to engage with national and international best practice.

Around 40% of respondents in Olsberg•SPI’s Skills Development survey participated in a skills development initiative as a producer or skills officer. More than half of the respondents had participated in a skills development initiative as a skills participant. Of those who had participated as a skills participant, 50% were part of the trainee category, 33% were upskillers and 14% were new entrants.

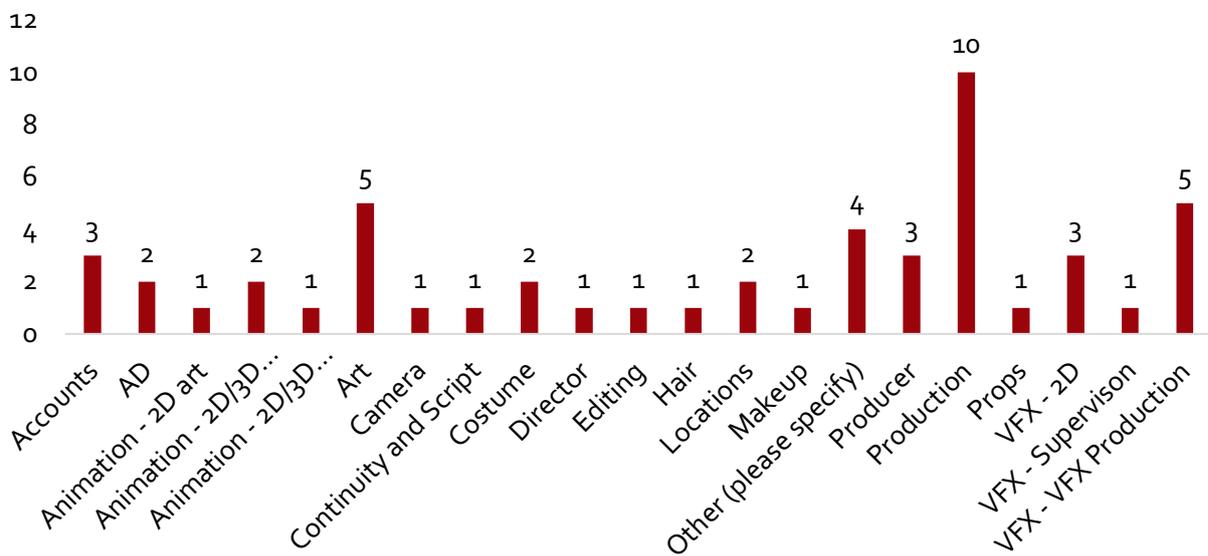
Figure 63 – “If you were engaged as a skills participant, which category were you when you participated?”



Source: Olsberg•SPI (2022) (N=42)

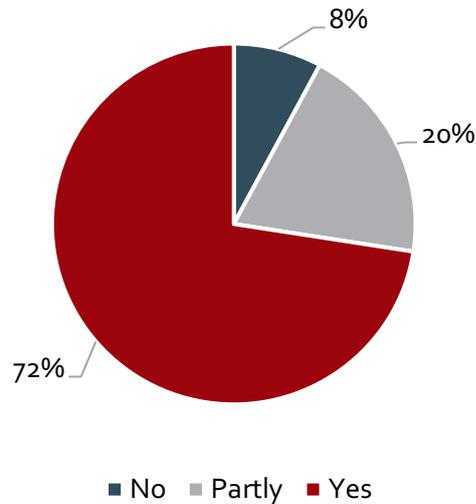
Respondents had participated from a wide range of departments, with slightly higher representation from the production, VFX production and art departments.

Figure 64 – “What department did you work in while engaged with the Skills Development Plan?”



Source: Olsberg•SPI (2022) (N=51)

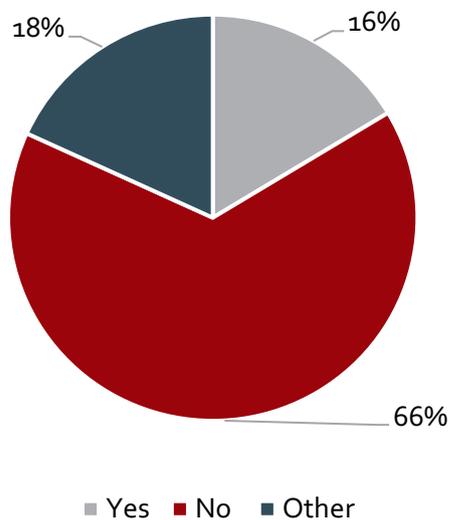
Figure 65 – “Were your immediate skills gaps addressed during the Section 481 skills development process?”



Source: Olsberg•SPI (2022) (N=51)

Survey respondents were overwhelmingly positive in their feedback on their experiences. Some 72% of respondents felt that their immediate skills gaps were addressed during the process. When asked what skills were addressed during the process, technical, production and soft skills were most frequently selected by respondents.

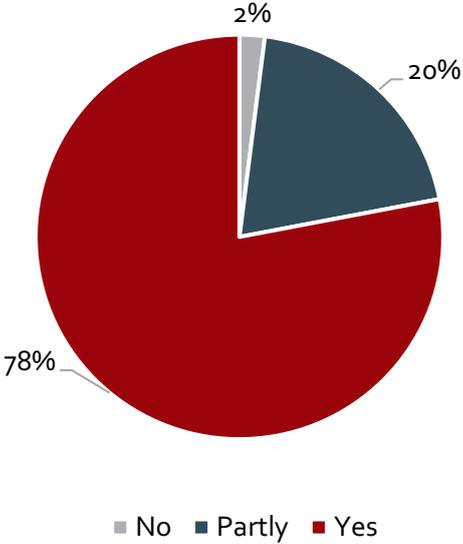
Figure 66 – “Were there any barriers to learning on the job, during the Section 481 skills development process?”



Source: Olsberg•SPI (2022) (N=55)

Overall, 66% of respondents did not face any barriers to learning on the job during the process. For the 18% who selected 'other', common barriers were COVID-19 (predominantly having to work virtually rather than in person) and busy production schedules. In total, 92% of respondents felt that their supervisor supported them through the process.

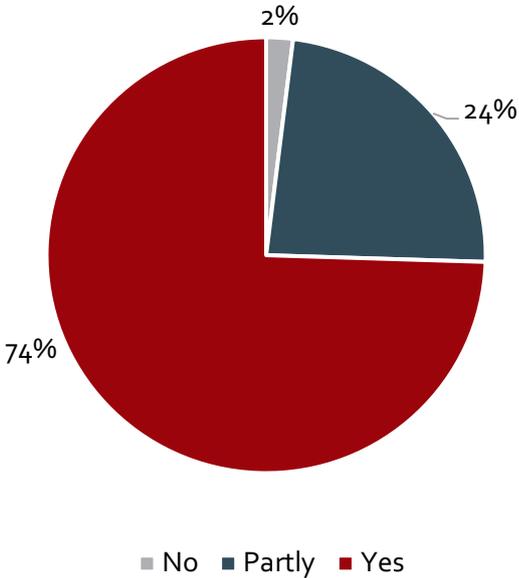
Figure 67 – “Do you think participating in the Section 481 skills process helped to develop skills related to your role?”



Source: Olsberg•SPI (2022) (N=50)

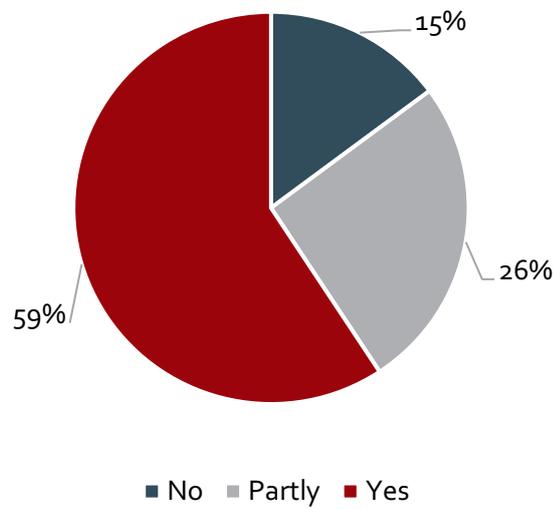
In total, 78% of respondents agreed that participating in the Section 481 skills process helped to develop skills related to their role, while 74% of respondents believe that participating in the process has helped their career progression

Figure 68 – “Do you think participating in the Section 481 skills process has helped your career progression?”



Source: Olsberg•SPI (2022) (N=51)

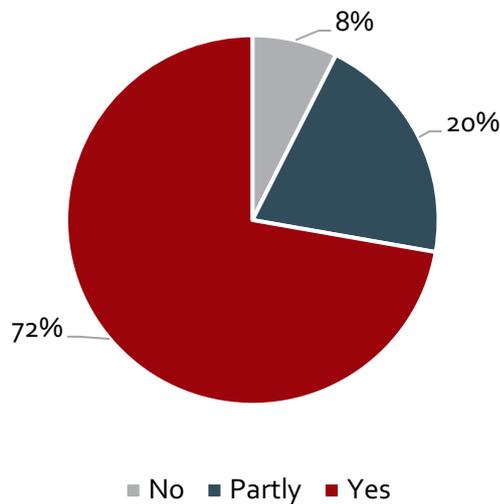
Figure 69 – “Do you think Section 481’s skills process is helping to develop new local pools of talent outside the main production hubs (Dublin/Wicklow and Cork City and County)?”



Source: Olsberg•SPI (2022) (N=54)

As with the impact of skills development initiatives on their personal development, survey respondents also saw value in the programme for the wider industry and 59% of respondents believe the Section 481 skills process is helping to develop talent pools outside of the predominant Irish production hubs.

Figure 70 – “Do you think the Section 481 skills development process provides relevant and robust on-the-job training and skills opportunities that helps to support the growth of the Irish industry?”



Source: Olsberg•SPI (2022) (N=54)

In total, 72% of respondents believe that the Section 481 skills process is providing the necessary training and opportunities to support the Irish industry’s growth.

3.7. Case Studies

3.7.1. *Ros na Rún*



Credit: © Léirúchán RnR Teo

Since its inception in 1996, *Ros na Rún* has established itself as TG4's longest running series and only Irish-language soap opera. Currently 27 seasons in, the show has developed a strong core audience base in Ireland and beyond. The series is available on the TG4 player, where audiences from across the globe can view episodes. The series receives funding through Section 481.

The show is developed and shot in Galway, and shoots for six months between August and February each year. The length of the *Ros na Rún* season and its established production practices results in as close to a standard 9-to-5 job as can be found in live action film and television. As a result, *Ros na Rún* has become a valuable training ground for new entrants to Ireland's Screen sector and a reliable employer for screen workers. The series is a large employer in the region and considered the backbone of the industry in the west of Ireland.

The show offers a continuity of work that is attractive to a number of screen workers. Many heads of department have worked on *Ros na Rún* for decades, in some cases working their way up through the department. Because the show shoots in the winter, crew have the opportunity to work on alternative productions in the summer months, before returning for the next season.

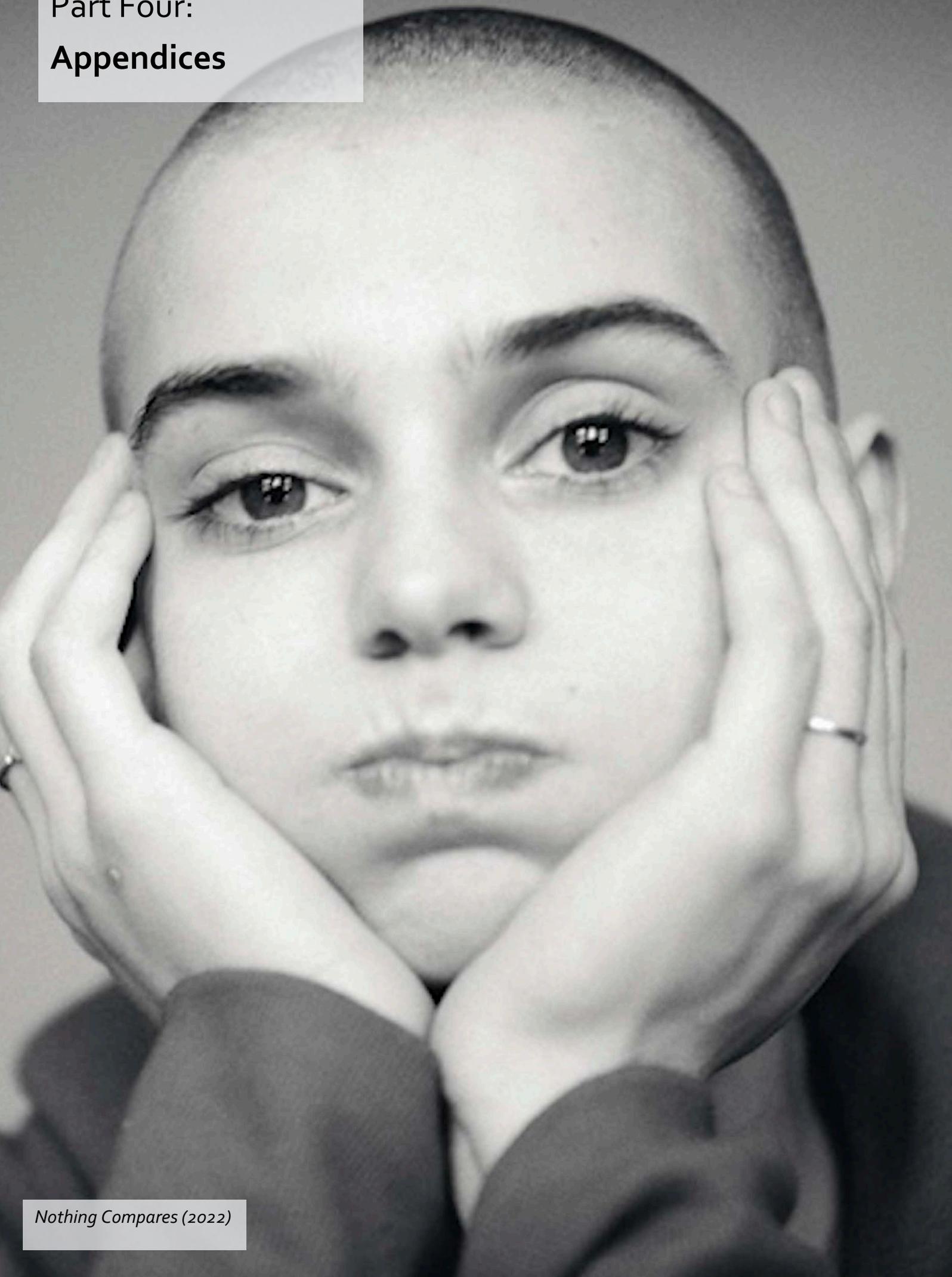
There are a number of new entrants to the crew each year. It is typical for younger crew to stay for several years building their experience, skillset and confidence, before moving on to new horizons. Because of the breadth of work completed in a season of *Ros na Rún*, new entrants are often quickly snapped up by other productions that shoot in Ireland.

During a season, a number of on-the-job training opportunities are available to crew. A feedback system has been integrated into the process, asking directors or visiting crew to provide feedback on each department. This is then used to identify where additional training or support is required. At the end of the season, crew are also asked about their experiences and whether there are any new areas they want to explore or skills they would like to develop. This flexibility and mobility across and into departments has allowed crew to explore new avenues and progress through new stages in their career. For example, one rigger was interested in working towards becoming an art director, so has moved sideways onto that pathway.

Training also occurs outside of the crew base. Workshops on story editing or multi-camera directing are advertised publicly. Following the multi-camera workshop, participants are offered a paid opportunity to shadow during the season over a five-week period. This includes two weeks of preparation, two weeks of shooting and one week of post-production. This intensive opportunity offers a rare insight into the mechanics of screen production and a hands-on opportunity to learn.

As a small, regional show, crew rates are lower than the largest incoming productions that shoot in Ireland. However, efforts are made to balance this out through the quality of the training provided, the longevity and stability of the series and the camaraderie between the crew.

Part Four:
Appendices



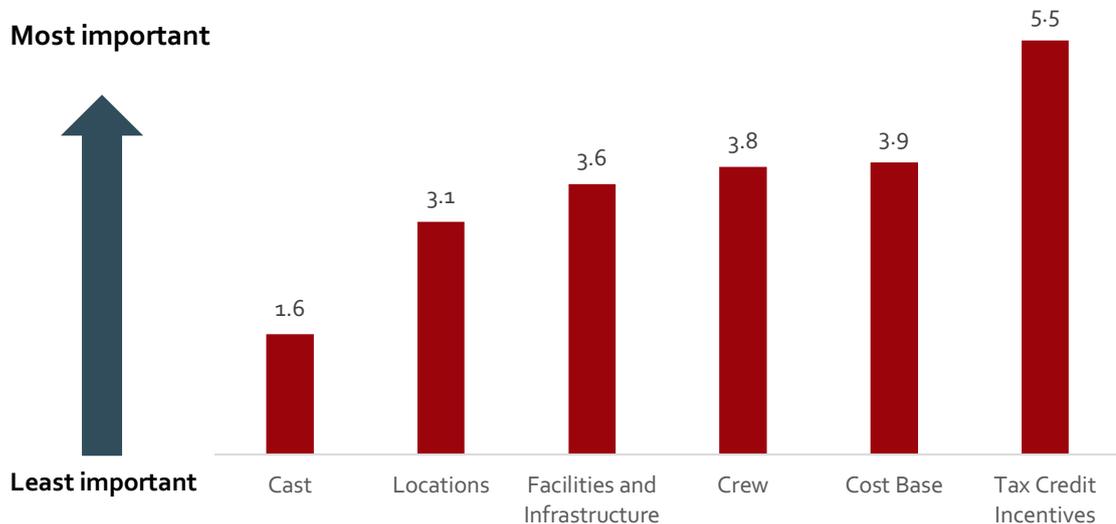
4. APPENDIX 1 – ADDITIONALITY

Additionality describes how much production expenditure – and its associated impacts – can be attributed to Section 481. This enables consideration of deadweight, which refers to the production expenditure that would still have happened in the absence of the incentive.

In this case, it describes how much production expenditure can be attributed to Section 481. To determine additionality, a survey was sent to Section 481 applicants to explore what production companies would have done without the incentive. There were 41 responses, which together accounted for 84% of eligible spend in 2020 and 2021.

Overall, Section 481 leverages very high additionality for Ireland. As shown in the following figure, respondents from incoming productions were asked to rank the importance of six factors in the decision to produce in Ireland with incentives clearly identified as the most important factor.

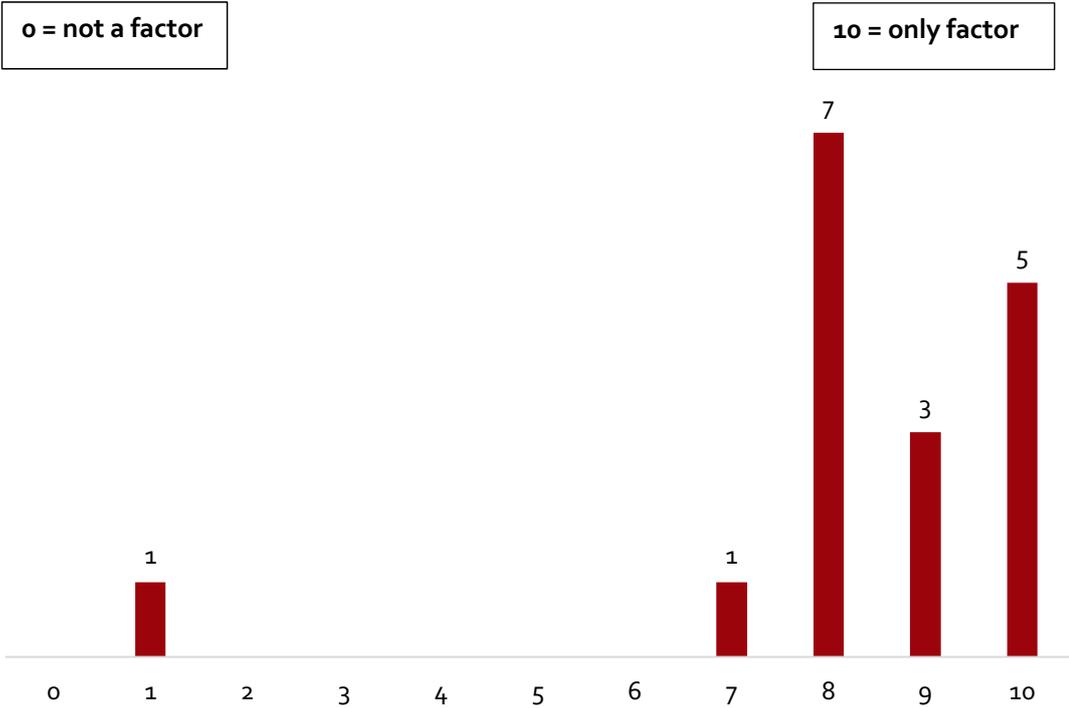
Figure 71 – Decision Factors for Producing in Ireland – Average Rank (6 most important, 1 least important), Inward Investment Projects



Source: Screen Ireland Production Location Decision Survey (2022) (N=15)

For incoming productions, when asked to score from 1 to 10 the importance of Section 481 incentives as a factor in deciding to produce in Ireland, producers gave an average score of 8.33.

Figure 72 – “How important was the Section 481 incentive in your decision to produce in Ireland?” (Frequency of Score, Inward Investment Projects)

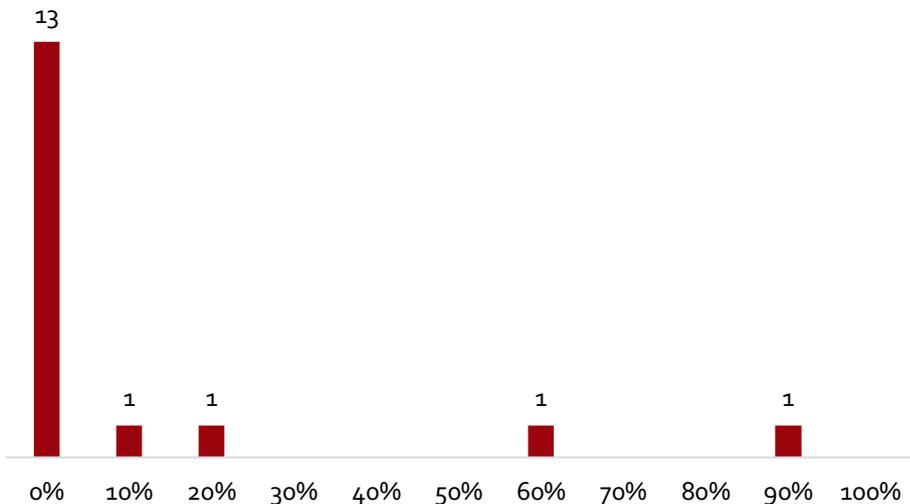


Source: Screen Ireland Production Location Decision Survey (2022) (N=17)

Survey respondents were also asked how much of the actual Irish spend would have happened in the absence of the incentive, where 0% indicates no expenditure in Ireland and 100% indicates no change to the expenditure in Ireland.

The average (median) response was that there would be no production expenditure without the incentive (13 out of 17). The mean response was that 11% of production expenditure would have happened without the incentive – 0% indicates no expenditure in Ireland and 100% indicates the exact same expenditure in Ireland.

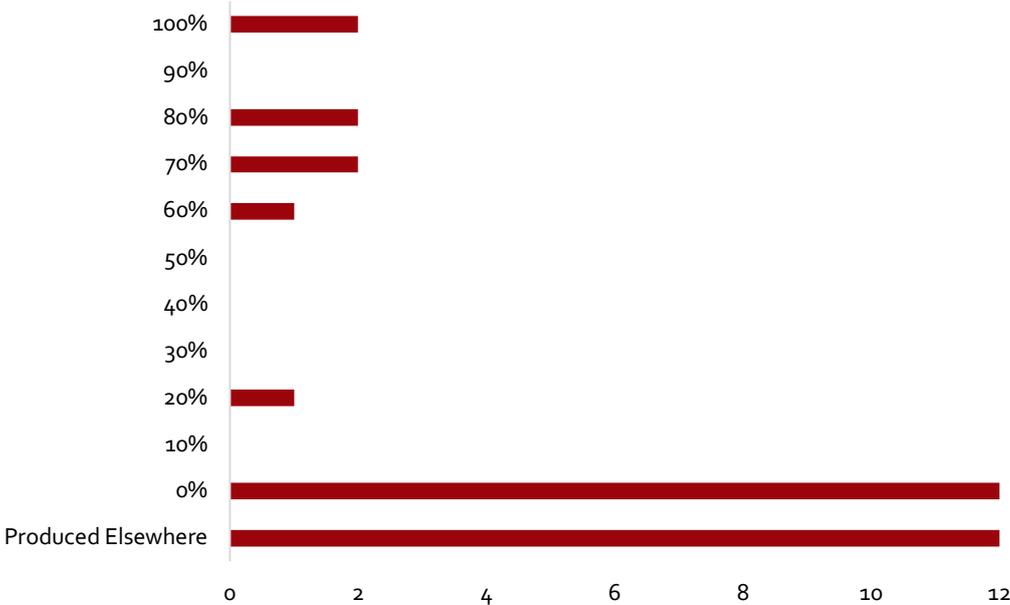
Figure 73 – “How much of the actual Irish spend would have happened without the incentive?” (Frequency of score, inward investment projects)



Source: Screen Ireland Production Location Decision Survey (2022) (N=17)

Similarly, respondents from productions that were fully Irish or Irish co-productions were asked what would have happened to the production in the absence of Section 481. Responses demonstrated the impact that Section 481 has on these projects getting made in Ireland, or at all. Overall, 24 out of 32 respondents would have either produced the project in another country or not gone ahead with producing it.

Figure 74 – “In the absence of Section 481, what would have happened to the production? (If it would have gone ahead, what percentage of the original budget would it have been made with?)” (Frequency of score, Irish Productions and Co-productions)



Source: Screen Ireland Production Location Decision Survey (2022) (N=32)

While the methodology of surveying stakeholders to inform deadweight is not perfect the alternatives – econometric analysis and control group analysis – is not practical in the context of an automatic incentive.

The Department of Finance's Cost Benefit Analysis incorporates an assessment of deadweight. Its report assumes an additionality rate of 35% which comes from the Department of Finance's 2012 report *Economic Impact Assessment of Section 481 Film Relief*. This 35% is calculated as follows: first, it is assumed that the level of deadweight for incoming productions is low (assumed to be 10%) due to the highly competitive international market. Second, it argues that since Section 481 funds only 28% of the production costs and the remaining 72% has to be financed from other sources, it is assumed that overall deadweight should be 72% for domestic productions. This contains an implicit assumption that productions would go ahead with only 72% of the budget. The 35% is calculated through a weighted average of the domestic and international rates.

Our production company survey finds a rate of additionality for international productions which is aligned to the Department of Finance assumption above. Our assessment of what would happen to domestic production in the absence of Section 481 diverges from the Department of Finance view. From a survey of domestic producers and extensive stakeholder consultations, we find that the vast majority of domestic production companies indicate that without Section 481 either their production would not have been financially viable (and therefore none of the expenditure would have happened: not 72% as per assumed by the Department of Finance) or their production would have moved abroad. This is the justification for a substantially lower deadweight for domestic productions than assumed by the Department of Finance.

5. APPENDIX 2 – IRELAND AND THE EU

Ireland's membership of the EU's Creative Europe programme is a key support for Ireland's Screen culture as it assists the development of the Irish industry. Creative Europe's total budget for 2022 is €385.6 million.

The MEDIA strand of the Creative Europe programme provides financial support for Irish companies to develop, distribute and promote their works across the EU as well encouraging cooperation across the audiovisual industry in Europe and nurturing new creative talent.

Creative Europe also provides important financial support for training initiatives. Such initiatives include Irish-based initiatives such as Screen Leaders, co-funded by Screen Ireland, which provides support for strategic company development. It also includes support for and training programmes, such as ACE and EAVE, attended by Irish professionals, which are based in other EU Member States.

Ireland is also a member of the Council of Europe's Eurimages scheme. Eurimages promotes independent filmmaking by providing financial support to feature-length films, animation and documentary films and thus encourages co-operation between professionals established in different countries.

Eurimages was established in 1988 and Ireland has been a member since 1992. Screen Ireland pays Ireland's annual subscription to Eurimages. Numerous Irish producers have benefitted from support from the scheme, which has thereby contributed to the cultural richness of Irish film and television output.

Ireland is in the process of transposing the latest iteration of the Audiovisual Media Services Directive (AVMSD 2018/1808); the previous versions of AVMSD are already on the statute book in Ireland. The transposition is being undertaken via the Online Safety and Media Regulation Bill. Once this process is complete, the new Irish regulator, the Media Commission (which is replacing the Broadcasting Authority of Ireland) will, among other things, be empowered under AVMSD 2018 to introduce a content levy on on-demand services; both on those based in Ireland and those targeting Ireland.

6. APPENDIX 3 – AWARDS ANALYSIS

This section outlines selected awards and nominations⁹¹ achieved by Irish productions or co-productions that have qualified for Section 481 since 2017. The list was compiled using information from Screen Ireland's Annual Statistics reports as well as additional desk research and is up to date as of 1st September 2022.

Table 2 – Selected Section 481 Project Awards and Nominations

Section 481 Funded Projects ⁹²	Major International Awards Wins and Nominations, January 2017-September 2022 ⁹³
<i>Angela's Christmas</i> (2017)	3 Emmy Awards nominations
<i>The Breadwinner</i> (2017)	1 Golden Globes nomination; 1 Academy Awards nomination
<i>Calm with Horses</i> (2019)	4 BAFTA nominations
<i>Vivarium</i> (2019)	2 Cannes Film Festival nominations, including 1 win
<i>Sea Fever</i> (2019)	1 Cannes Film Festival win
<i>Gaza</i> (2019)	1 Sundance Film Festival nomination
<i>Rialto</i> (2019)	2 Venice Film Festival nominations
<i>Dirty God</i> (2019)	1 Sundance Film Festival nomination
<i>Normal People</i> (2020)	2 Golden Globes nominations; 3 BAFTA nominations, including one win; 4 Emmy Awards nominations
<i>Wolfwalkers</i> (2020)	10 Annie Awards nominations, including 5 wins; 1 Academy Awards nomination; 1 Golden Globes nomination; 1 BAFTA nomination
<i>An Cailín Ciúin (The Quiet Girl)</i> (2022)	4 Berlin Film Festival nominations, including 2 wins

⁹¹ Major international awards include the Academy Awards, the Emmy Awards, the Golden Globes, Cannes Film Festival, the Berlin International Film Festival, BAFTA, Toronto International Film Festival, Venice International Film Festival, Sundance Film Festival, and the Annie Awards

⁹² For series listed, awards tally refers only to seasons receiving Section 481 funding. This list does not include short films.

⁹³ Note. The awards nominations and wins listed are only for productions that qualified for Section 481 from 2017 – 2021. Projects, including *The Lobster* (2015) and *Sing Street* (2016) were nominated for awards in 2017, however fall outside of the analysis window of this project.

7. APPENDIX 4 – ABOUT FÍS ÉIREANN/SCREEN IRELAND

As the national agency for the Irish film, television drama, animation and documentary industry, Fís Éireann/Screen Ireland is the creative partner to the sector, investing in talent, creativity and enterprise. We are inspired by original storytelling that will emotionally move audiences at home and abroad. Through a wide range of practical funding supports across development, production, distribution, promotion and skills development, Screen Ireland supports the sector at every stage. We support filmmakers in their creative pursuit to share valuable artistic, cultural and commercial stories on screen.

Film and television production is an intensely collaborative process, requiring the contributions and expertise of countless creatives, artists and professionals across multiple departments, and at all levels. Screen Ireland's fundamental aim is to support every stage of the process in different ways. We are for the story makers: in funding creative projects; in developing structures that support work on set; in mapping out future career opportunities and skills development in different departments; and in championing directors, writers, producers and creatives. This approach is rooted in building a more inclusive, stable and fairer industry – but it is also led by the understanding that when artists are supported, the breathing space is created to make the best work possible.

Fís Éireann/Screen Ireland support for the Irish screen industry includes the funding of development, production and distribution for feature films across live action and animation and television series from the Academy Award-nominated *Wolfwalkers* to record-breaking television series *Normal People*. Screen Ireland works together with Irish and international partners to promote Irish film, television and screen talent at major international festivals and markets.

To empower the Irish screen industry, Screen Ireland engages with industry stakeholders, representatives and crew and creatives at all levels to address the sector's needs. The skills development unit within Screen Ireland has responsibility for the design, development and delivery of industry-focused skills development initiatives encompassing film, TV, animation, games and VFX, for all roles from new entrants to company leaders. The skills development department also oversees the skills development requirements linked to the Section 481 film tax credit, the first country in the world to link skills development to a country's filming tax credit. Screen Ireland's Screen Stakeholders funding scheme has, since its establishment in 2020, supported over 50 organisations in areas as diverse as helping parents and carers return to work in the screen industry; creating screen mentoring programmes for Transition Year students; and a series focusing on immersive technologies and the games sector.

Across production, development, distribution, marketing and skills development, Screen Ireland's core value is to support creative excellence and the importance of bringing Irish stories to the screen and to the world.

8. APPENDIX 5 – ABOUT OLSBERG•SPI

Olsberg•SPI is an international creative industries consultancy, specialising in the global screen sector.

SPI provides a range of expert consultancy and strategic advisory services to public and private sector clients in the worlds of film, television, video games and digital media. Formed in 1992, it has become one of the leading international consultancies in these dynamic creative screen industries.

The firm's expert advice, trusted vision and proven track record create high levels of new and repeat business from a diverse group of companies and organisations, including:

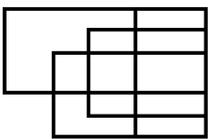
- National governments, including culture and economics ministries
- National film institutes and screen agencies | Regional and city development agencies and local authorities
- Multi-national cultural funds and authorities
- National and regional tourism agencies
- Established studios and streamers
- Independent companies at all points of the screen business value chain
- National and international broadcasters
- Trade associations and guilds
- Training and skills development organisations
- Publishers and conference organisers.

With expertise in all areas of the fast-moving global creative sector, SPI offers a wide range of services, including:

- Analysis and strategic advice for building healthy and sustainable national and regional industries, and recommendations for public policies to support this
- Mapping and assessment of physical infrastructure, services and workforce
- Delivering economic impact studies of whole sector activity or of incentives
- Advice on the creation of fiscal incentives for screen productions
- Helping businesses and governments interpret the strategic implications of digital media innovations
- Business development strategies for content companies
- Feasibility studies, marketing and business strategies for small and large-scale studio facilities
- Evaluations of publicly-funded investment schemes
- Acquisition and divestment advice for owners or managers of SMEs
- International cost comparisons for small and large film and television productions
- Strategic advice on inward investment and exports for national and regional public bodies
- Analysing and explaining the links between growth in tourism and a nation's film and television output
- Providing strategic advice for screen commissions, including business and marketing plans
- Keynote speakers at industry events.

Further information on SPI's work can be found at www.o-spi.com and within the [SPI Company Brochure](#).

Please **contact Kayleigh Hughes** on kayleigh@o-spi.com for further information about this Study.



Fís Éireann
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