



**Fís Éireann  
Screen Ireland**

## **Submission to the Future of Media Commission**

**January 2021**

### **Introduction**

Fís Éireann / Screen Ireland (Screen Ireland) is the national development agency for the creative screen industries in Ireland, investing in *Talent, Creativity and Enterprise*, and promoting the expression of national Irish culture on screen. The agency supports and promotes the Irish film, television and animation sector and Ireland as a location for international production. Screen Ireland operates under the aegis of the Government of Ireland's Department of Tourism, Culture, Arts, Gaeltacht, Sports, and Media.

Screen Ireland is directly involved in the development and production of Irish feature film, TV drama, animation, documentary and short film. Screen Ireland is committed to addressing the current Irish TV drama deficit and building the sector in partnership with public service media (PSM) and all key domestic and international stakeholders. The agency provides financing for projects which can demonstrate creative, cultural, social and commercial viability. Through Screen Skills Ireland we are also responsible for the delivery of skills across the sector, in every genre.

### **Value of the Irish Film and Television Sector**

The film and television sector is a dynamic and competitive landscape made up of an indigenous industry developing Irish content for local and international audiences, and an inward production sector where Ireland plays host to large-scale international production. The

indigenous sector value proposition is Irish creative talent producing Irish content that can travel internationally.

Incoming international film and television production provides huge value in terms of opportunities for employment, infrastructure investment and building the career base of Irish professionals. Both local and international production rely on the existence of the tax incentive for film production, Section 481 of the Taxes Consolidation Act 1997 (as amended), and Screen Ireland for financing and development.

The film, television and animation sector in Ireland employs over 12,000 people, has a payroll of over €500m, contributes €690m to the Irish economy in Gross Value Added and annually generates over €200m in export earnings and over €230m in taxes.<sup>1</sup> The figures relating to Section 481 tax credit claims for 2019 showed an increase in output of 35%, an increase in production spend to €357 million and a 68% increase in labour spend to €235 million.

Over the last 10 years Ireland has received numerous major international TV drama and animation awards at the Emmys, BAFTAs and Golden Globes. The industry has also picked up over 30 Academy Award nominations, an incredible achievement for a small European country that points to the creative wealth of the sector. Irish animation has become world-renowned, winning countless awards and achieving critical acclaim while being watched by millions of children around the world. The Irish creative screen industry is a significant sector that also makes a substantial cultural contribution as evidenced by a wide range of productions from animated global critical and commercial hit *Wolfwalkers* to the record-breaking success of TV series *Normal People*. This is the power of strong Irish content finding global audiences.

## Screen Ireland Investment in TV Drama

Screen Ireland is uniquely positioned to understand and evolve partnerships and investment opportunities in an increasingly diverse and competitive international media landscape. The agency has an independent strategic position in the growth of Irish talent, representing Ireland at an international level and in delivering quality content. Given the increased international competition within the creative screen sector, the accelerated diversification of platforms and content opportunities, Screen Ireland works to champion Ireland at all levels

---

<sup>1</sup> Olsberg-SPI, December 2017: *Economic Analysis of the Audiovisual Sector in the Republic of Ireland: A Report from Olsberg-SPI with Nordicity*: [https://www.screenireland.ie/images/uploads/general/Olsberg\\_Report.pdf](https://www.screenireland.ie/images/uploads/general/Olsberg_Report.pdf)

and in all new forms of content exploitation. On a local level, we have increased our collaboration and relationships with the public service broadcasters (PSBs) and the Broadcasting Authority of Ireland (BAI) in order to ensure Irish, as well as global, audiences are best served within this ambition.

In order to respond to the increased global demand for high-end TV drama and address the existing Irish TV drama deficit, Screen Ireland is collaborating with PSM to build the sector. As part of Screen Ireland's continued investment, we have partnered with all the key PSBs setting up development and production initiatives with RTÉ, TG4 and VMTV during the Covid-19 pandemic. These form part of Screen Ireland's broader independent objectives in Talent Development, Genre Expansion, Innovation Investment and further market expansion for Irish producers. With this in mind, through 2020 stimulus funding we have invested in further supports for TV Drama, have set up two Talent Academies for Drama and Animation (with a regional and diverse focus), have launched diversity focused development investments, launched comedy and younger audience focused live action TV initiatives and ensured that Irish Language drama is supported.

Additionally, other recent Screen Ireland programmes have driven and evolve our policy to meet the needs of a growing and changing media landscape and ensure that creatives are well positioned to deliver successful diverse campaigns and content across the globe. Investments in this guise include an "Innovation Fund" which focuses on new technological workflows and emerging genres of content exploitation for the Animation sector. It is also our hope that with increased investment we can expand our focus into further international opportunities for Irish Talent.

A key policy priority for Screen Ireland in the coming years is the development of the industry in the regions and the promotion of the Irish language. We currently collaborate with TG4 and BAI on Cine4, which are feature films in the Irish language and have committed, over a 5-year period to 10 Irish language feature films. We have also invested additional stimulus funding support in partnership with TG4 recognising the key role they play in promoting Irish language, heritage and culture and in reaching the Irish diaspora around the world.

## **Looking to the future**

The remit of the new Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, combining Culture and Media, means that Screen Ireland can make a strategic impact across

the whole Departmental portfolio including media and tourism. We believe that there is enormous opportunity now to look at the totality of the screen sector in a more cohesive and strategic way and gain benefits for Ireland in terms of development, production, talent development and export growth of Irish culture on Screen. Minister Catherine Martin has demonstrated significant support for Screen Ireland's ambition for the sector through the additional TV drama stimulus funding in 2020 and providing a 52% increase in capital funding for 2021. The support Screen Ireland has received from the Minister and the Department will enable the industry's recovery and rebuilding in the coming years.

We welcome this opportunity to input into the shape and future of public service media in Ireland.

## Questions

**Question 1: How should Government develop and support the concept and role of public service media and what should its role in relation to public service content in the wider media be?**

Screen Ireland believes that independent, well-resourced and balanced public service media is fundamental to our democratic society. As the national development agency for film, television and animation, Screen Ireland strongly supports the role of Irish public service broadcasters in promoting cultural diversity and Irish storytelling on screen that is accessible 'free-to-air' to audiences across Ireland.

The unprecedented challenges facing PSM and broadcasters all over the world as younger audiences in particular are changing how they consume media requires transformational change. Ireland has the creative talent, the literary heritage and the international credibility to create stories that engage audiences worldwide. Our PSBs need to be empowered to play an even more significant role in developing Irish stories on screen and supporting the independent creative community across Ireland.

Public service broadcasting is more important than ever to our national culture, as well as to Ireland's global image. PSBs inform, educate and entertain, reflecting Ireland's cultural identity and representing a broad range of people and perspectives. PSM makes a significant contribution economically, socially and culturally, supporting the wider creative screen industries and audio-visual eco-system.

Government should support PSBs to thrive in a digital world, be appropriately funded to serve their remit and remain financially viable in an ever-more competitive media landscape. Government should also support the development of the industry regionally and underscore the importance of equality, diversity, inclusion, sustainability and plurality in the sector. Skills development in all of these areas, working in close consultation with key stakeholders to identify skills gaps and shortages, is crucial to ensure long-term growth and viability. Support should also be provided for the development of and increased investment in the Irish language within PSM, which will play a critical role in the retention of the Irish language for generations to come.

The many challenges ahead for Public Service Media lie within what is becoming a very highly competitive market for content and audiences. The amount of content and the quality of that content has exponentially increased over the last number of years. The proliferation of subscriber on-demand platforms means that the consumer is in charge of the choice of what to watch, when to watch and where to watch it.

SVOD platforms have moved into mainstream production, setting up large-scale production hubs around the world and their significant financial resources means that there has been an increase in the cost of production and the expectations of audiences in terms of quality storytelling and production values.

Across Europe there is a strong focus on engaging the audience of young people and such a strategy should provide for clear segmentation that allows for increased investment in areas such as Young People's drama. PSBs should have a clearly defined strategy for drama creation across all genres and consumers.

The success of *Normal People* which was funded by Screen Ireland is the strongest example of the metrics that could be achieved from sustained development and production in TV drama. The project was based on an underlying literary IP by an Irish writer, it was developed and produced by an Irish production company, the director and majority of the key talent was Irish and the key locations were Ireland for Ireland.

However, it is important to note, that without the support of non-terrestrial broadcasters some of the most successful Irish projects might not ever have happened and therefore we believe there should be the funding available within the Public Service Broadcast drama departments to develop and be a lead financier of such Irish projects to retain valuable IP in Ireland.

We believe there are great opportunities for broadcast collaboration to build a National TV drama brand. But that needs investment both from Screen Ireland and further Government investment in public service broadcasters to develop that intellectual property either from existing literary works or from original idea creation.

There is high demand for TV drama and animated content internationally especially through the SVOD channels and that has the potential effect of expanding the pool of Irish creative talent vital for the development of the sector. The following are some key opportunities in meeting the challenge of an ever changing and competitive content environment:

1. Increased investment in Irish talent from early-stage through to excellence in third level screen education.
2. Increased investment in Irish production (feature film, animation and documentary) - current streams of funding should be increased, stable and secure for the longer-term.
3. Increased investment in TV Drama to ensure truly great cultural content is invested in from an early stage within Ireland and IP retained (instead of with international parties or broadcasters).
4. Increased access for Irish audiences in offering Irish content to the public on an on-demand basis. Increased investment is required to improve on-line access and build the domestic on-demand platforms offering Irish content. There is also a hugely significant back catalogue of content with production companies, broadcasters and in individual collections which need digitisation and to be made available to the Irish public.
5. Investment in scale and scope of activities of PSBs to allow them to carry out expansive and expensive activities such as drama production, animation and feature film which speak to a local and global audience.

What will best serve Irish audiences and content makers is well-funded PSBs working collaboratively with a well-funded, secure and stable Screen Ireland to encourage new, original stories that can ask questions of Ireland and reflect Irish society.

## **Question 2: How should public service media be financed sustainably?**

Screen Ireland suggests that the key public funding principles for PSM<sup>2</sup> should be applied including:

- Stable and predictable source of funding enabling full coverage of the public service remit in the digital media age.
- Independent from political interference and promoting public trust in PSM and its role as an indispensable national service.
- Fair and objectively justifiable to the public and the market.
- Transparent and accountable, holding PSM accountable to its audience.

Many different approaches to PSM funding exist across the EBU, primarily through a variety of models of the licence fee, direct state funding, levies, tax credits and advertising or other commercial revenues. The existing licence fee system requires reform to respond to the evolution of the media landscape and to better reflect the changing consumption habits of consumers. The licence fee remains the main source of PSM funding across EBU countries but it is being reformed or examined in many other European member states. New approaches have been implemented in other countries and all options should be considered by the Commission.

Additional funding streams for Irish content to achieve scale and respond to the global opportunity in demand for content is also required. The most important piece of legislation for the audio-visual industries is currently before the Oireachtas in the form of the Online Safety and Media Regulation Bill which transposes the Audio Visual Media Services Directive (AVMSD) into Irish law.

The AVMSD provides that Member States are able to impose financial obligations on media service providers that are either established in their territory or established in another Member State but providing service into their territory. The most common proposal across Europe is a form of content levy. Screen Ireland fully supports the implementation of a form of content levy on subscription on-demand providers that will help fund the creation of new Irish content and allow for a level playing field. An emphasis on skills development in the design of the content levy will play a key role in its success.

---

<sup>2</sup> European Broadcasting Union, December 2017: *Public Funding Principles for Public Service Media*: [https://www.ebu.ch/files/live/sites/ebu/files/Publications/EBU-Legal-Focus-Pub-Fund\\_EN.pdf](https://www.ebu.ch/files/live/sites/ebu/files/Publications/EBU-Legal-Focus-Pub-Fund_EN.pdf)

The AVMSD is already adopted in a number of Member States and the Online Safety and Media Regulation Bill is a crucially important piece of legislation for the Irish creative industries. It is vital that the design and administration of a content levy interacts optimally with content creators and the market, it must be agile and responsive to work effectively with strong creative and editorial investment expertise.

Screen Ireland supports any increase in funding support for Irish Creative Talent. In order to build and maintain a sustainable audio-visual industry, focus on developing Irish creative talent through early-stage development funding and production funding, whether feature film, television, animation or radio, is essential. Further creative skills development provided by Screen Skills Ireland is a key priority for Screen Ireland in the coming years, and through close partnership with PSM and PSBs, will have a larger impact on the growth and stability of the sector overall.

PSBs should be leaders in nurturing creative talent, it should be an avenue for domestic talent to get into the market. In order to respond to the needs of Irish audiences and the Irish audio-visual sector, an increase in TV drama development and production is crucial given the worldwide demand for content. Alongside this there is a need to increase financial and creative supports for Irish language feature films and television series developed and produced by Irish talent with stories that will travel the world.

With the development of new information and communication technology, PSBs also have an opportunity to fulfil their remit in new and more effective ways to allow them to offer better targeted and more interactive content and services

Screen Ireland has a unique and independent role to play in investing in Irish Public Service content and supporting PSM, whilst also maintaining a broader view to the global opportunity and the evolving content landscape available to Irish creatives. This can be further driven through ensuring that Screen Ireland is given increased support in the years ahead to drive strategic investment in Animation, Drama, Film and Documentary as well as new and immersive forms of content and story-telling that will evolve as part of the future content landscape.

Separate to individual broadcaster investments, all public funding including a potential content levy, invested in Irish creative content generation, should be strategically aligned to achieve



increased scale of investment, provide greater visibility to Irish voices internationally and greater return on investment overall.

### **Question 3: How should media be governed and regulated?**

Screen Ireland supports a strong independent regulator that is fully resourced financially in a diversified and competitive content landscape. The Online Safety and Media Regulation Bill transposing the Audio Visual Media Services Directive provides important obligations on media service providers of on-demand services to secure at least 30% share of European Works in their catalogues and ensure prominence of same. This is an extremely important function and it is imperative that a regulator is well resourced in this ambition.

Robust media regulation that is current and addresses the evolving media landscape is essential. PSM content should be universally available and accessible to all and PSM prominence will be key if universality is to be retained. Unless Irish PSM is supported and given due prominence it may lose relevance particularly for younger audiences living in a global media environment. Government should legislate for prominence via the new Online Safety and Media Regulation Bill and should outline a role for the new Media Commission to regulate that prominence. The Media Commission should be empowered to fully regulate and enforce prominence requirements among those distributing content across Ireland.

A strong, robust regulator will ensure that Irish audiences are better served, respected and delivered truthful, accurate and considered content through all broadcast channels under their governance. Screen Ireland will continue to strategically and independently invest and assess the broader audio-visual growth potentials for the sector and ensure that Irish creatives and talent are central in all of our thinking both locally and internationally.