

# Implementation of the Audiovisual Action Plan

Second Progress Report to the Minister for Tourism, Culture, Arts, Gaeltacht, Sport  
and Media

August 2021

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# Glossary

Animation Ireland	Trade association for the leading Irish animation studios
AR/VR	Augmented Reality/ Virtual Reality
AVMSD	Audiovisual Media Services Directive, the EU legislation which governs EU-wide coordination of national legislation in the TV and on-demand markets
BAI	Broadcasting Authority of Ireland
CMF	Canada Media Fund
CPD	Continuing Professional Development
EFADs	European Film Agency Directors
ETB	Education and Training Board
IBI Members	Independent Broadcasters of Ireland Members
IP	Intellectual Property
JOC Report	Joint Oireachtas Committee Report
NFQ	National Framework of Qualifications
OSN Report	Olsberg SPI with Nordicity Report: Economic Analysis of the Audiovisual Sector in Ireland
RAGs	Regional Aid Guidelines
Regional Uplift	Regional Film Development Uplift
SFX	Special Effects
SLMRU	Skills and Labour Market Research Unit
SME	Small to Medium sized Enterprise
Solas	Agency of the Department of Education and Skills with responsibility for funding, planning and co-ordinating Further Education and Training (FET) in Ireland
SPI	Screen Producers Ireland
VFX	Visual Effects
VoD	Video on demand
WRAP Fund	Western Regional Audiovisual Producers Fund

# 1 Abstract

The **Audiovisual Action Plan**<sup>1</sup> was launched in June 2018. This is an industry-wide, long-term plan, under the **Creative Ireland Programme**<sup>2</sup>, developed to support the Government's ambition to enable Ireland to become a global hub for the production of film, TV drama and animation. Progress will be reported on a regular basis. The **First Progress Report on Implementation of the Audiovisual Action Plan**<sup>3</sup>, was published in 2019. This is the second progress report and sets out details of key items in the Audiovisual Action Plan that have been achieved in 2020.

## 2 Introduction

The film, TV and animation sector in Ireland entered 2020 in robust health. Much work has taken place in recent years to lay the foundations for positive growth in the sector. Government policy supports the film and television sector in a number of ways to create an attractive environment for film production, through

- international film co-production treaties,
- the Section 481 tax credit,
- funding for Screen Ireland, the development agency for the Irish film, television and animation industry; and
- through support for skills and training initiatives in the sector.

A strong focus on skills development has ensured a talented workforce across the sector. Studio infrastructure has been expanded through private investment and Ireland is home to a number of world class animation studios. Our cultural heritage and landscapes also prove attractive to incoming productions and Screen Ireland has over 2,000 production locations across the country listed on its databases. It is for all these reasons that Ireland has successfully attracted international stakeholders including ABC, Amazon, Apple, BBC, Cartoon Network, Disney, Hulu, MGM, NBC Universal, Netflix, Nickelodeon, Skydance and

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<sup>1</sup> Audiovisual Action Plan: <https://www.chg.gov.ie/app/uploads/2018/06/audiovisual-action-plan.pdf>. The Audiovisual Action Plan is underpinned by the Olsberg SPI with Nordicity Report: Economic Analysis of the Audiovisual Sector in Ireland ("the OSN Report") whose main focus was the audiovisual sector which includes Film, TV and animation, Commercial advertising, and Video games.

<sup>2</sup> Creative Ireland Programme: <https://www.chg.gov.ie/arts/creative-arts/creative-ireland-programme/>

<sup>3</sup> First Progress Report on Implementation of the Audiovisual Action Plan

Warner Brothers across all genres of production and post-production as well as continuing to develop indigenous productions.

In March 2020, the landscape altered in a manner that was heretofore unimaginable as measures to combat the COVID-19 crisis were introduced. Overnight, the independent film production sector closed and new productions were put on pause with an associated loss of work for those engaged on those productions. This also had an impact on post-production work. Due to the nature of the sector, animation was quickly able to adapt to remote working and to largely continue its operations, albeit with new challenges. As essential services with a central role in disseminating crucial COVID-19 information to the public, broadcast work continued across radio and television but in increasingly challenging circumstances. The broadcast media witnessed a reduction of advertising revenue, coupled with a fall in licence fee sales particularly in the period March-May 2020.

Notwithstanding the impact of COVID-19 across all sectors of society and industry, the global “stay at home” measures to slow the spread of the virus generated a substantial demand for screen content and a particular expansion of opportunities in the streaming sector. This demand has also been felt in the games sector, particularly in Europe, with trends showing consumer spending increases in online entertainment and ancillary revenue realisation.

In the midst of ongoing COVID19 uncertainty and negativity, opportunities arise to benefit from the global demand for screen content that continues to facilitate the achievement of the key objectives of the Audiovisual Action Plan to attract inward investment and to grow the domestic audiovisual sector. Despite the challenges encountered in 2020, a number of initiatives that advance key aims under the Action Plan were announced.

This report sets out in detail key achievements in the implementation of the Audiovisual Action Plan.

### 3 Summary of progress to date

In a year that has been unlike any other, work continues across government departments, state agencies and stakeholder groups to grow and develop the audiovisual industry in Ireland. The immediate response was one of action as Government Departments and State agencies worked to get funds and support to the areas in most need. Despite the enormity of the challenges presented by COVID-19, particularly to the cultural sector, steps taken in 2020 offer strong support for the survival of the industry, its recovery in the latter half of 2020 and its sustainability into the future.

The Programme for Government commits to updating the Future Jobs Ireland framework, which seeks to put our economy in a better place to withstand shocks when they come. COVID-19 highlights the need to make a deliberate policy shift to increase both quality jobs that will allow for better living standards and sustainable jobs, which will be less vulnerable to loss. The Jobs Stimulus measures announced in July 2020 contained specific measures to support jobs in the audiovisual sector.

As part of the Government's July Jobs Stimulus Package, Screen Ireland received an additional €3 million to stimulate large-scale production activity and to support investment in **TV drama production**. Additional funding of €2million was also secured as part of the July Jobs Stimulus for the **Sound and Vision fund**

Production insurance for COVID19 related risks has been a significant issue. With exclusions in operation, the indigenous live action sector would have faced additional challenges returning to production. Screen Ireland was allocated €5 million to administer a pilot production continuation fund for the sector. This €5 million fund was provided as part of the July Stimulus and has assisted a number of indigenous projects to recommence and complete production.

As an early response to the crisis, Screen Ireland devised and rapidly implemented a broad range of COVID-19 measures designed to support the diverse emerging needs of the sector. With production at a standstill, focus was redirected to project development which could continue remotely. Screen Skills Ireland provided COVID-19 *Return to Work and Compliance Officer* training as well as transitioning its other courses online. There was an unprecedented response in terms of people availing of upskilling and developmental opportunities.

Since the onset of the pandemic, a key priority has been to establish a path forward for the industry to **resume production** with the health and safety of cast and crew the primary concern. In preparation for recommencing production, Screen Ireland supported Screen

Producers Ireland (“SPI”) in the development of comprehensive health and safety guidelines<sup>4</sup> which are in use across productions and kept under regular review to reflect the latest public health guidance and Government protocols. Implementation of these extensive protocols has seen costs of production rise, in some cases, up to as much as 20% of the original production budget. In response, Screen Ireland introduced funding to contribute towards some of these costs.

The OSN Report which underpins the Audiovisual Action Plan made a number of recommendations in respect of games, noting in particular that the development of Ireland’s **games sector** could be aided by the introduction of incentives for the industry. Budget 2021 saw the announcement that work will commence to develop **a tax initiative for the digital gaming sector**, with a view to supporting qualifying activity from January 2022. The expected impact of a competitive games development incentive in Ireland will be in maintaining the operations of the main brands that are here through the addition of development activities, support the scale up of indigenous developers, and providing an attractive lure to international studios who haven’t already invested in Ireland. In addition, with 11 dedicated third and fourth level games courses in Ireland (in addition to 50 other computer sciences and multimedia courses that are games relevant), development of the industry could see a growth in job opportunities for the graduate output from these courses. An important point to note is that the gaming industry adds to the audiovisual (and IT) sectors with potential synergies with established film and animation sectors to support quality employment in creative and digital arts in Ireland.

Overseas locations that are home to a larger scale footprint of games development also see a number of other positive spill over effects over and above the direct contribution to the economy from the development studios. Like Irish animation, the games sector in Ireland adapted readily to remote working in the early stages of ‘lockdown’. Both these sectors offer resilient – and versatile - employment possibilities

The **extension of the Regional Film Development Uplift** (“Regional Uplift”) by an additional year at 5% is also a welcome achievement, offering companies who have lost significant production time in 2020 the opportunity to avail of the relief at 5% for projects that may be delayed for an additional year.

**Funding increases** in 2021 for Screen Ireland, and TG4 will also assist in the challenges of supporting the Audiovisual Sector in 2021 and beyond. In Budget 2021, Screen Ireland will

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<sup>4</sup> <https://www.screenproducersireland.com/news/return-production-guidelines%C2%A0-creative-screen-industry>

see an increase in its capital budget to a record €26.2 million. TG4 will also see its 2021 funding allocation increase by €3.5 million to €40.7 million.

The Sound and Vision Scheme is primarily funded through the TV licence fee. The Broadcasting Act, 2009 provides that 7% of net licence fee receipts are paid to the BAI Broadcasting Fund which supports both the **Sound and Vision** (S&V) and Archiving Schemes. The BAI announced €7.02 million in grants under Sound and Vision at the start of April 2020: €1 million more than initially planned in recognition of the challenges being presented by COVID 19. In December 2020, the BAI allocated €5.5m which included additional funding of €2m the Minister secured under the July stimulus and an additional €1m secured in December. €5.3 m of this funding was provided to 23 television projects ranging from feature drama, serial drama, documentaries, animation, entertainment, and education projects to be broadcast across public service, commercial and community broadcasters.

A further €3.9m provided in December will be allocated in 2021 of which €1.4m has been ring-fenced for projects supporting the live music sector and €2.5 for the commercial radio sector. The commercial radio round has been assessed and decisions are expected to be announced in late April. The live music stream is currently being assessed and decisions are due in late May. Additional rounds for the audiovisual sector will be held during the year with BAI announcing details as these arise.

Since March 2020, the BAI has operated additional flexibility with its contractors to facilitate contracting where possible so that pre-production can commence on projects, in some cases it has been able to award additional funds so that production can commence safely and altered some of its work practices to facilitate contracting and payments to contractors more easily in light of COVID-19 restrictions.

COVID-19 is a crisis that has touched every sector of Irish enterprise in 2020 and in addition to sectoral supports, broad measures have been implemented to offer support to all industries, including the audiovisual sector. The sector was also included in the Arts and Culture Recovery Taskforce. *Life Worth Living - The Report of the Arts and Culture Recovery Taskforce*<sup>5</sup> was published in October 2020 which has identified a number of issues and solutions under the themes of: ensuring recovery; building resilience; and facing forward. Some of its ten recommendations are of particular relevance for the audiovisual sector:

- Pilot a Universal Basic Income Scheme for a three-year period in the Arts, Culture, Audio Visual and Live Performance and Events Sector.

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<sup>5</sup> <https://www.gov.ie/pdf/?file=https://assets.gov.ie/97434/162e9253-ca14-4395-a1e8-221d51ff401f.pdf#page=null>



- The Taskforce submits strongly that the Audio Visual Media Service Directive (AVMSD) should be transposed into Irish Law immediately, because of its importance to the Audio-Visual and Creative Screen Sectors.
- Establish a programme that provides wellbeing supports to the creative sector.
- Establish a capacity building and up-skilling scheme for Artists and Creative Workers aimed at recovery and renewal through Professional Development.
- Establish and fund a Creative Green Programme. This could promote sustainable practices in the sectors, informed by research and actions already undertaken nationally and internationally.

These are significant recommendations that will be of benefit in protecting and sustaining the arts and culture sector through COVID-19 recovery and beyond and the report of the taskforce is currently being considered as part of preparations of the national recovery plan.

## **4 Report on policy recommendations listed in the Audiovisual Action Plan**

### **4.1 Oversight of Industry by Steering Group**

A high level Steering Group has been in place to oversee implementation of the Audiovisual Action Plan since 2018. Arising from the reconfiguration of Government Departments, changes were made to the membership of the Steering Group which is now comprised of representatives of the following departments and agencies involved in the industry:-

- Department of Tourism, Culture, Arts, Gaeltacht, Sports and Media;
- Department of Finance;
- Department of Further and Higher Education, Research, Innovation and Science
- Department of Enterprise, Trade and Employment;
- The Revenue Commissioners;
- Screen Ireland;
- Broadcasting Authority of Ireland;
- IDA Ireland;
- Enterprise Ireland.

Broadcasting policy is now encompassed in the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media.

## 4.2 Section 481 Film Tax Relief

As set out in detail in the *First Progress Report on the Implementation of the Audiovisual Action Plan* published in 2019, significant changes were made to the administration of the Section 481 tax credit in 2019. Along with extending the relief to 31 December 2024, a new Regional Uplift was introduced to provide an incentive to productions that located in areas defined as “assisted regions” under the Regional Aid Guidelines. Much of the planned incentive effect of the Regional Uplift for 2020 was lost due to COVID-19 shutdowns. As a result, the scheme was amended in Budget 2021 to provide for an additional year at the peak rate of 5%. The Regional Uplift will now be in place until 31st December 2023. A number of projects have already availed of the uplift, selecting to locate qualifying films in the west, mid-west, south-east and border areas. Regional activity is key to ensuring production jobs continue to exist in regional areas.

The administrative change to the certification process and the requirement for a producer company to apply for a Certificate before commencement of Irish production has allowed for earlier engagement on the training and skills development requirement. The involvement of Screen Skills Ireland in this process has facilitated the development of talent and a spread of skills and training opportunities, not alone in Dublin but across the country, complementing the Regional Uplift initiative. A key part of Screen Skills Ireland’s 10 Point Action Plan: 2020 – 2025 involves supporting the rollout of regional skills development initiatives that address regional skills shortages through close cooperation with stakeholders throughout Ireland. Screen Skills Ireland is working with regional stakeholders in Limerick, Galway, Cork and Kilkenny in order to promote a regional balance in film and animation skills throughout the country. More detail on skills development initiatives can be found in section 4.5.

The emphasis placed on Section 481 in the Audiovisual Action Plan recognises the value of the tax credit system as a vital part of the financial infrastructure of the audiovisual industry in Ireland. The commitments relating to Section 481 in the Audiovisual Action Plan are to:

- review Section 481 under the tax expenditure guidelines of the Department of Finance;
- signal a decision in respect of the extension of the scheme;
- have the Department of Culture, Heritage and the Gaeltacht engage with the Department of Finance in relation to operational and regulatory aspects of the tax credit; and
- have the Department of Culture, Heritage and the Gaeltacht engage with the Revenue Commissioners on the administration of Section 481.

These have all been delivered on since the plan was launched in June 2018. Section 481 will continue to be kept under review by the Steering Group over the lifetime of the Audiovisual Action Plan.

### 4.3 Strategic Review of Feature Film Funding

Screen Ireland is the national development agency for Irish filmmaking and the Irish film, television and animation industry and is under the auspices of the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media. In 2020, Exchequer funding amounted to €21.066million. As part of the jobs stimulus announced in July 2020, an additional €3 million of TV Drama Funding and €5 million as a production continuation support was allocated to Screen Ireland in 2020.

Screen Ireland supports and promotes Irish film, television and animation through fostering Irish artistic vision, growing Irish and international audiences and attracting filmmakers and investment into the country.

Its key priorities are for a sustainable, inclusive and vibrant industry, advocating for cultural diversity and gender parity within the film and TV industry in Ireland.

In 2019, in line with this recommendation of the Audiovisual Action Plan, Screen Ireland participated in a European wide study with the European Film Agency Directors (EFADs) of which Screen Ireland is a member. The study provided a comparative overview of the audiovisual industry in 31 European countries as well as detailed analysis of national and regional industries. The report sets out the range of available measures to promote European films and TV programmes and incorporates a contribution by Screen Ireland describing the Irish landscape in terms of financial obligations imposed on broadcasters, Video on Demand (VoD) providers and distributors; levies imposed on film and audiovisual stakeholders; quotas for European works on broadcasters and VoD providers; and the kind of prominence obligations imposed on VoD providers.

Ireland proceeds with its implementation of the revised Audiovisual Media Services Directive (AVMSD), adopted by the European Council on 6 November 2018. The European Commission issued Guidance on the implementation of the quota requirements in September 2020 <https://ec.europa.eu/digital-single-market/en/audiovisual-media-services-directive-avmsd> .

The AVMSD provides for a quota requirement, where on-demand services are required to secure at least a 30% share of European works in their catalogues and ensure a certain level of prominence, providing an opportunity to increase the diversity of European content available on services. It should be noted that services can fulfil this requirement by carrying content from any EU Member State and from other European countries including the UK.

Recommendation 3 of Life Worth Living: *The Report of the Arts and Culture Recovery Taskforce*<sup>6</sup> sought the implementation of the AVMSD and underlined its importance to the Audiovisual and Creative Screen sectors. The Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media is responsible for the transposition of the revised AVMSD which will be transposed through the Online Safety and Media Regulation Bill.

The implementation of the revised AVMSD comes at a time of significant change to the ecosystem for the production, distribution and viewing of audiovisual content. The traditional model of linear programming comprising real-time television services and broadcast scheduled programming is seeing increased competition from non-linear programming and online and mobile distribution and content.

A report published by the European Audiovisual Observatory in October 2019 stated that 23 TV channels and 125 on-demand channels are operating from Ireland. As well as changes in respect of quotas and prominence for European works, the revised AVMSD also provides scope for Member States to require broadcasters/on-demand providers to pay into national funds to support European film and television productions by means of a levy. In addition to a levy, the Revised AVMSD also allows Member States to impose investment obligations on providers. These obligations can take the form of direct contributions to the production of and acquisition of rights in European works.

Provisions regarding the establishment of a content production levy are included in the finalised General Scheme of the Online Safety and Media Regulation Bill. It is envisaged that the content production levy provisions in the OSMR Bill would only be commenced by the Minister at a later date should research by the Media Commission show that the introduction of such a levy is a fair and viable source of funding for Irish content.

## 4.4 Funding

***Investing in our Culture, Language and Heritage 2018 – 2027*** provides for investment in Media Production and the Audiovisual Industry through Screen Ireland of €200 million. Since the commencement of implementation of the Audiovisual Action Plan, Screen Ireland has seen an annual increase in its funding allocation in Budget 2019, 2020 and 2021. In addition to its budgetary allocation for 2020, Screen Ireland was allocated funding in the July Jobs Stimulus. Screen Ireland's Exchequer funding in 2021 totals €30.09 million. This increased funding will be administered by Screen Ireland to deliver on strategic priorities under the Audiovisual

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<sup>6</sup> *ibid*

Action Plan and to provide ongoing support to a sector adapting to the realities of working in a COVID19 climate.

***a) Co-Production funding to support the development and production of more projects***

The Audiovisual Action Plan anticipated co-production funding would cost an additional €3 million per annum, with the cost to be met within the increased Exchequer contribution for Screen Ireland as set out in ***Investing in our Culture, Language and Heritage 2018 – 2027***. The increases in Screen Ireland's allocation will result in an increase in the volume of film and TV co-productions being made in Ireland. In 2020, Screen Ireland supported the work of creative talent through their participation in eleven feature film co-productions in collaboration with creative talent across the world from countries such as Belgium, Luxembourg, Canada, Italy and the United Kingdom in addition to three television co-productions in collaboration with creative talent from Canada.

***b) Development funding to increase the value of Irish productions in the marketplace by ensuring they are fully developed before entering production***

The Audiovisual Action Plan commits to primarily focusing the additional capital funding in the sector on film production, high-end TV drama and animation under a range of headings, including development funding to increase the value of Irish productions in the marketplace by ensuring they are fully developed before entering production.

In March 2020, as COVID19 and the public health measures necessary to slow the spread of the virus effectively halted the sector, Screen Ireland moved to introduce a number of stimulus measures to support the industry. These new measures were designed to aid production companies and creative talent in developing a strong slate of quality projects, so that the industry could emerge from the crisis in a position to scale-up production activity. Given the lack of live action production activity, Screen Ireland focused on the development of projects so that the industry could be ready to flourish when production resumed.

While funding schemes were also introduced by Screen Ireland to offer distribution, strategy and planning support, specific measures aimed at development introduced by Screen Ireland since March 2020 include:

- ***Strategic Slate Development Fund:*** Originally announced early in 2020, the fund was repurposed to respond to COVID-19, increasing by €2 million in response to the impact of the global pandemic. The fund supported strategic slate project development with strong creative ambition and a focus on diversity and inclusion. Through the fund, Screen Ireland offered support to production companies, working closely with

screenwriters and directors with strong creative vision to develop their own IP. It opened for applications on 24th April 2020 and announced awards from the scheme on 29 June 2020, awarding €3.2 million to 26 production companies.

- **Enhanced Development Support:** An additional €1.1 million in enhanced development support was made available in 2020 to Irish production companies to support the development of projects in the short term. It targeted companies with smaller slates or who work project by project and have close collaborations with writers and directors. Up to 90% of each award was made available upfront to successful applicants. Round 1 of the scheme opened for applications on 11th of May 2020, Round 2 opened 13th of July 2020. Round 1 recipients were announced by mid-September; with Round 2 recipients announced in early October. Round 1 saw €557,000 awarded to 16 production companies while Round 2 saw €558,000 awarded to 19 production companies.
- **Creative Conceptual Development Fund (The Voice) for Directors:** Screen Ireland and the Screen Directors Guild of Ireland collaborated on 'The Voice': a conceptual development fund for directors to invest in the vision of the director to develop high-value projects for film, TV (animation and live action) and documentary. At the end of this process, directors will have created a *proof of concept* for a feature film or television show ready to take to a producer or to the market. The scheme opened for applications on 18 May 2020 with awards announced on 31 August 2020. Funding of €312,500 was awarded to 27 directors.
- **Enhanced Investment in Screenplay & Spotlight Schemes:** An additional €100,000 total investment was made available into the Screenplay Development (Established Talent) and the Spotlight writing schemes (€50,000 to each scheme). The Spotlight scheme is a structured development scheme aimed at discovering and developing diverse, fresh and exciting new screenwriting talent in Ireland, with guidance and mentorship from leading industry figures. The scheme is intended as an opportunity for new writers to develop a feature film screenplay, offering direct support to screenwriters through guidance and mentorship from leading industry figures at the very beginning of their careers. As in previous years, the Screenplay Development Scheme had four rounds in April, June, October and December 2020 with quarterly announcements on funding decisions for screenplay development recipients. On the Spotlight scheme, 15 screenwriters were selected: this included an additional 5 places made available with increased funding.
- **The Actors Showcase – The Actor as Creator**  
Screen Ireland in partnership with the Bow Street Academy – The National Screen Acting School of Ireland collaborated on 'The Actor as Creator': a talent development initiative to showcase the unique creative voices of actors. An investment of €75,000

was made available in 2020. At the end of the process, each selected actor produced a short piece that expresses their creative vision.

The broadcasting sector also contributed to development in the audiovisual industry. On 23 April 2020, TG4 announced three commissioning rounds for the Independent Production Sector, to support the audiovisual sector during the COVID-19 crisis. These included:

- A Programme Development Round
- An Additional 'Multi-Annual Output Deal'
- A 5<sup>th</sup> round of the successful Cine 4 scheme. 'Cine4' is an initiative between TG4, Screen Ireland and the Broadcasting Authority of Ireland, to develop original feature films in the Irish language. To date, €9.6 million has been allocated through the Cine 4 Scheme to support the development and production of new feature films in the Irish Language. The first Cine 4 project *Finky*, was premiered in 2019 and a 2020 release *Arracht* was selected as Ireland's entry for the best international feature in the 93rd annual Academy Awards. A further 6 films are currently in production. A scheme to develop a new teenage drama was launched in 2019 and €575k allocated.
- A new drama series, *Saol Ella*, is in production. This initiative was also supported by the WRAP fund

**(c) *Funding to encourage the production of new Irish TV drama content***

The Audiovisual Action Plan targets TV Drama as an area of significant potential for growth and employment in the Irish audiovisual sector. It estimated that an annual investment of €10m in TV Drama funding would generate co-production expenditure in Ireland of up to €50 million per annum. TV Drama offers the potential of longer term employment due to episodic nature of the filming coupled with the likely return for several years where a production is successful. TV Drama also provides extensive skills development opportunities, which is both an important facet of Section 481 and a key driver of capacity and growth in the industry.

Despite the unrelenting challenges presented in 2020, a strong signal of the Government's commitment to the sector and in implementing the Audiovisual Action Plan was taken in July 2020 with the announcement that an additional €3million was to be made available to Screen Ireland for 2020 to invest in high-end TV drama. This is a sector witnessing phenomenal international demand with the global acclaim for '*Normal People*' and the fanfare it generated, at a time of doom and gloom, is indicative of the power and potential of the Irish audiovisual sector. The July Jobs Stimulus also announced an additional €2 million to be made available for the Sound and Vision Scheme.

In 2019, *Normal People* was the first project to receive TV Drama funding from Screen Ireland. Its success demonstrates the scope of Irish creative talent to reach a worldwide audience and to enjoy commercial and critical acclaim.

In 2020, the increase of €3 million is designed to specifically focus on stimulating large-scale production activity across Irish TV drama, with a focus on regional and diverse opportunities. By the end of 2020, additional funding had been awarded across five television drama projects to help production to commence and create employment opportunities for the sector. Projects in receipt of an award of funding include '*Glorious Heresies*' to be produced by The Film Workshop, '*Hidden Assets*' to be produced by Saffron Moon, '*Kin*' to be produced by Metropolitan, '*Grace*' to be produced by Subotica and '*The Dry*' to be produced by Element Pictures. It is expected that a number of these projects will film on location in Galway, Cork, Clare and Limerick throughout 2021. There will also be a specific focus on regional development, diversity and emerging talent with €600,000 invested in a new National Talent Development Academy for drama and scripted production which will be based outside of the Dublin/Wicklow region. Screen Ireland has also committed €1 million of this funding for a number of joint development initiatives across Comedy, Young People's drama programming, Irish language TV drama and a diverse range of short films with the leading Irish broadcasters including RTÉ, VMTV and TG4. Specific initiatives include:

- a production development initiative with RTÉ across Comedy and Young People's drama programming;
- a 'Fair City' training initiative with RTÉ
- development and production of an Irish language young people's TV drama with TG4; and
- in association with Virgin Media Television, Screen Ireland has supported a prize fund to offer new and established filmmakers support in developing and bringing to screen a ten minute short film. All projects are required to have a focus on diversity and inclusion.

Over the course of 2020, the BAI awarded €2.62 million to drama projects. This includes funding support for a range of programme series, feature films and experimental film that will cater for a range of audiences. A number of the projects have an international dimension regarding the make-up of the finance plan and some of the productions are planned to be largely undertaken in regional locations such as West Cork and Mayo.

#### ***d) Supports to attract and encourage audiovisual projects***

Screen Ireland supports writers, directors and production companies by providing investment loans for the development, production and distribution of film, television and animation



projects. It works in conjunction with the enterprise agencies to support the development of the film sector to make a substantial contribution to inward investment. It promotes Ireland as a location for international production by providing advice and support for international companies seeking to locate production activity to Ireland, organising inward and outward trade missions on an annual basis and working in partnership with EU counterparts on co-productions.

As articulated in ***Enterprise 2025: Renewed***, the Government takes a whole of enterprise perspective to support the full range of businesses in Ireland including the audiovisual sector. In terms of provision of business and advisory supports to indigenous local businesses, the Department of Enterprise, Trade & Employment in conjunction with its development agencies and offices, other Government departments and sectoral support bodies, has, over time, built a comprehensive suite of supports – which can be broadly categorised as information/awareness, advisory, financial, and supports for regional enterprise development. In June 2019, that Department produced an ‘*Overview of Government Supports for Indigenous Business*’<sup>7</sup> which sets out the range of supports and services available to over 250,000 business enterprises in Ireland, across all sectors and activities. Chapter 5 gives an overview of the sector-specific supports available to business including, the creative sector.

As part of the response to COVID19, in addition to initiatives specific to the audiovisual industry, the Government also introduced measures to support workers and businesses affected by COVID-19 that apply to all sectors of the economy, including those who work in the audiovisual sector.

A key facet in seeking to deliver on the Government’s ambition to enable Ireland to become a global hub for the production of film, TV drama and animation is Ireland’s ability to attract additional international productions from overseas, and particularly from the US market. In the midst of a global pandemic, production mobility is severely hampered. Despite the challenges of 2020, Screen Ireland has remained committed to establishing its presence in Los Angeles and intends to announce an appointment this year.

The domestic screen sector has taken considerable steps to allow it to return to production in a safe manner. Screen Producers Ireland, in consultation with key industry stakeholders and with funding from Screen Ireland published COVID-19 Production Guidelines for live action film and TV drama to coincide with the sector’s return to work from 29 June 2020. These guidelines allowed the sector to resume production and has resulted in a number of projects – including large international projects – being successfully completed. In tandem with these guidelines, Screen Ireland launched a new €1 million *COVID-19 Production Fund*, which is

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<sup>7</sup> <https://dbei.gov.ie/en/Publications/Overview-of-Government-Supports-for-Indigenous-Business.html>

designed to partially offset additional production costs associated with implementing safety guidelines measures on set, costs which could prohibit productions getting back up and running.

The strength of the Irish animation sector was very much in evidence in 2020. This was a sector that was quickly able to adapt to remote working and continue to operate despite COVID restrictions. The Kilkenny-based animation studio, Cartoon Saloon, reached a global audience with its feature film *Wolfwalkers* released in US cinemas in November and nominated for a 2021 Academy Award. Since its premiere at the Toronto International Film Festival, critics have already heralded the film as one of the most powerful animated works of the year. Screen Skills Ireland works closely with the animation sector to develop quality skills development opportunities while Screen Ireland is examining scope to work more directly with emerging technologies and explore new platforms to help secure Irish animation's long-term future as a global-facing industry with sustainable growth potential. In collaboration with Animation Ireland, Screen Ireland, under the **Concept & Creative Innovation Development Fund**, allocated €400,000 in funding to be invested in new innovation, high concept development and business growth opportunities within the Animation sector along with €600,000 towards a new Talent Development Academy for Animation. Screen Ireland and Animation Ireland<sup>8</sup> aim to reinforce and highlight Ireland's growing position in Animation as a centre of excellence and this fund will invest in a broad and diverse range of talent, genres, formats and business growth potentials, ensuring high-value national and international success.

Enterprise Ireland's (EI) standard suite of business development supports for clients across various stages is aimed at assisting businesses to start, grow, innovate and win export sales in global markets. EI support for companies includes a focus on connecting them with international customers across multiple industries. Various targeted supports include exploring innovation, R&D, agile, lean, business innovation and employment.

#### ***e) Regional development***

The Regional Uplift to Section 481 was introduced in July 2019 to contribute to the strategic aims of building the audiovisual industry in regions outside of the areas in which it is currently concentrated by providing for an additional tax credit (in addition to the standard 32% tax credit) to be made available to productions being substantially undertaken in "assisted regions". In order to qualify for the relief in the assisted region, producer companies are required to show that training and skills development opportunities are provided to individuals

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<sup>8</sup> Animation Ireland is the trade association for the leading Irish animation studios

habitually resident in the area and address a skills deficit in the area. With changes to the scheme in Budget 2021, the Regional Uplift is available for 5 years with 5% additional tax credit available in 2019, 2020, and 2021, 3% in 2022, and 2% in 2023.

The announcement in Budget 2021 that a new tax incentive for the digital gaming industry may also benefit regional development. Ireland has a number of small independent games companies in the regions while synergies with the animation sector may help contribute to its promotion across the country. The shift towards remote working imposed by the pandemic may also present opportunities for growth amongst companies establishing a presence in the regions.

#### ***f) EU Action Plan***

In December 2020, the European Commission adopted an Action Plan<sup>9</sup> to support the recovery and transformation of the media and audiovisual sector. The EU Action Plan aims to facilitate access to EU support via a dedicated tool for media companies to find all relevant EU funding opportunities for them. This will offer guidance on how to apply for relevant EU support, in the context of the 2021-2027 Multiannual Financial Framework, but also through national recovery and resilience plans. It hopes to boost investment in the industry through a new initiative MEDIA INVEST whose target is to leverage investments of €400 million over a 7-year period. Under the plan, a “NEWS” initiative to bundle actions and support for the news media sector will be launched and will include a pilot NEWS invest project with foundations and other private partners, access to loans to be backed by the InvestEU guarantee, grants, and a European News Media Forum with the sector. Particular attention will be paid to local media.

The EU Action Plan also seeks to support the green and digital transformation of the sector by encouraging European media data spaces for data sharing and innovation; fostering a European Virtual and Augmented Reality industrial coalition to help EU media benefit from these immersive technologies; and through the launch of a VR Media Lab on projects for new ways of storytelling and interacting. Discussion and actions for the industry to become climate neutral by 2050 will also be facilitated. In recent years, Screen Ireland has placed a particular focus on sustainability goals and offers carbon calculation and “Albert” certification to productions shooting in Ireland. The BAFTA Albert Carbon Calculator allows producers to understand a productions' environmental impact. By providing some basic information about studio, work, travel, accommodation, locations, materials use and disposal, and post-production; the calculator reveals the extent of the carbon emissions on any given production.

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<sup>9</sup> <https://digital-strategy.ec.europa.eu/en/library/europes-media-digital-decade-action-plan-support-recovery-and-transformation>

As part of its role in relation to the section 481 application process, Screen Ireland also draws attention to sustainable and responsible production across the screen industries.

The EU Action plan also contains a commitment to launch a dialogue with the audiovisual industry to improve access to and availability of audiovisual content across the EU, to help the industry scale up and reach new audiences and consumers to enjoy a wide diversity of content. Media talent across Europe will be fostered, including through promotion of diversity both on and off camera. Screen Ireland works to achieve enhanced levels of diversity in films and screen content supported by the agency. As part of its artistic leadership role in film and screen content, Screen Ireland is conscious that it represents a contemporary Ireland with all of its uniqueness, originality of voice and cultural diversity and will continue to work to promote diversity across the sector.

## 4.5 Skills Development

Screen Skills Ireland, the skills development unit of Screen Ireland, has responsibility for investing in people and skills development for the screen sectors in Ireland, through the design, development and delivery of industry-focused initiatives encompassing film, TV, animation, games and VFX, for all roles from new entrants to company leaders, that includes flagship programmes such as Screen Leaders and Advanced Producing. Screen Skills Ireland also supports the sector through funding schemes that leverage and empower stakeholders and professionals linked to the screen sector in Ireland, including schemes for Stakeholders, Mentoring and Bursaries. Screen Skills Ireland also oversees the skills development requirements linked to the Section 481 film tax credit; carries out research and data gathering to identify the skills needs of the industry; and disseminates skills-related reports that are relevant to the screen sector in Ireland.

In 2020, in response to COVID-19, Screen Skills Ireland moved its courses online and saw a significant uptake in participant numbers. Screen Skills Ireland developed and delivered e-learning COVID-19 courses based on return to work protocols developed for the sector by SPI. To date 1,365 screen sector professionals have successfully completed the COVID-19 *Return to Work for the Screen Sector* course and 445 screen sector professionals have successfully completed the *COVID-19 Compliance Officer for the Screen Sector* course. Screen Skills Ireland followed up on these courses with additional webinars in partnership with SPI, Animation Ireland and Commercial Producers Ireland focusing on good practices for production during COVID-19 to further support the sector with the return to production.

### ***a) Business skills development and ensuring Irish companies can leverage Intellectual Property (IP)***

Screen Skills Ireland, continues to deliver the 'Screen Leaders' programme, a strategic company development programme for European audiovisual companies, for over 10 years. The programme is designed for company leaders working in film, television, animation, games, post-production, visual effects (VFX), facilities, sales, distribution and exhibition. It is co-funded by the Creative Europe Programme<sup>10</sup> and focuses on strategic planning; the ability to implement strategic decisions; methodologies to align company culture to the strategic plan; development of organisational structure; and the skills to adapt to change, foster innovation, explore new and developing business models and build company value. This programme focuses on the execution and implementation of company strategies and building industry leaders. To date, over 130 companies and over 200 company leaders across industry sectors such as film, television, animation, games, post-production, VFX, facilities, sales, distribution and exhibition have participated on the programme.

Screen Skills Ireland collaborates with education providers to develop and deliver accredited/certified programmes for participants in a range of roles and at all stages of their careers, and which emphasise inclusion and progression.

2019 saw Screen Skills Ireland launch 3 new certified programmes in collaboration with Irish academic institutions, covering the topic of Business Skills Development: 'Creative Leadership' 'Advanced Producing' (both in partnership with Technological University (TU) Dublin) and 'Production Management for Animation' (in partnership with IADT Dun Laoghaire). These industry focused courses are designed in collaboration with key stakeholders and address a range of skills areas including business and leadership skills, financing; legal issues; budgeting and scheduling; production; post-production; management skills; and negotiation skills. All 3 programmes were delivered successfully again in 2020.

The Creative Leaders programme continues to develop authentic leadership abilities within individuals who have moved, or wish to move from a technical/ creative role into a position where they are leading a team, within the larger organisation as well as those who are transitioning from outside of the industry, including returners. The Advanced Producing programme continues to grow from strength to strength with the aim of supporting producers to improve their skills in all aspects of producing, including preparing for pitching in key film and TV markets, such as the prestigious European Film Market in Berlin, as well as covering IP development and commercialisation

Other Screen Skills Ireland initiatives in the business skills area in 2020 included the Puttnam Scholars programme. Screen Skills Ireland partnered with Northern Ireland Screen, Future Screens NI and Atticus Education on this programme, which offered eight individuals the

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<sup>10</sup> [https://ec.europa.eu/programmes/creative-europe/node\\_en](https://ec.europa.eu/programmes/creative-europe/node_en)

opportunity to attend 6 two hour online masterclasses with Oscar-winning producer David Puttnam. The 8 up-and-coming writers, directors, and producers who participated on the programme also received a special Scholarship from Atticus Education to further their career development.

Screen Skills Ireland also launched a new industry mentoring programme in June 2020 that will support 50 mentees to avail of mentor support from experienced AV industry professionals throughout 2020.

In 2020, in collaboration with European Partner ACE Producers, Screen Skills Ireland delivered a successful new animation programme entitled The Animation Special for producers seeking to diversify and increase their knowledge of developing and producing feature film animation production for an international audience. This programme will run again in 2021.

Under the updated Sound & Vision 4 Scheme, the BAI has added an additional supplemental criterion that specifically considers skills development as part of its qualitative assessment of projects and awards scores to projects on this basis.

Enterprise Ireland (EI) delivers a suite of tailored leadership and management development programmes to support capability needs of client companies. Enterprise Ireland provides strategic programmes that create transformational business change, as well as flexible, short programmes addressing areas such as: Business Planning, Workforce Planning, Sales Pipeline, Innovation, and Talent Attraction and Retention. Its Mentor Network provides companies with access to highly experienced entrepreneurs and business leaders who offer practical guidance and support and assist business leaders in optimizing their growth potential.

EI's management development supports includes mentor grants, strategic consultancy grants, graduate placement grants, and key manager grants. Enterprise Ireland has also developed eiLearn, a new and innovative eLearning platform designed to help Irish businesses overcome key challenges as they grow their business globally.

#### ***b) Skills needs analysis and matching skills to production growth***

Since 2018, Screen Skills Ireland has conducted an annual survey to identify skills gaps and to support the ongoing professional development of the industry. This delivers on its commitment to continually evaluate the sector's ongoing and future needs and develop training on an evidence-basis. The surveys engage with stakeholders and sectoral professionals, offering an opportunity for those involved in the industry to have their say on what the skills development needs are. Screen Skills Ireland publishes the annual skills report. The data gathered informs the development of new courses, initiatives and funding

opportunities to the industry. It also informs the Section 481 skills development plan processes. To date, Screen Skills Ireland has tracked 861 skills development participants across 86 Section 481 productions. As part of the tracking of skills participants for Section 481, Screen Skills Ireland has carried out several company, studio and set visits through 2019 and 2020 (online meetings in the latter part of 2020) to meet with producers, to engage with the skills participants and to ensure a high quality of the skills activity on productions.

Screen Skills Ireland designed, developed, and delivered 78 continuous professional development courses in 2019 and allocated 1,309 places to participants from the audio-visual sector. In 2020, it delivered over 80 continuous professional development courses to more than 1,400 participants. Due to COVID-19, almost all these courses were delivered remotely online and for free. Due to excess demand for courses, and to support the sector further, Screen Skills Ireland also delivered 53 webinars online for free to over 4,000 participants in 2020.

In 2019, Screen Skills Ireland supported 49 masterclasses and workshops at leading Irish film festivals and seminars in partnership with various organisations and 29 Irish industry professionals availed of the Bursary Award Scheme to attend high-level skills development programmes and workshops with international organisations.

In 2020, Screen Skills Ireland's work has gone online. The Bursary Award Scheme funded 26 Irish industry professionals to attend high-level skills development programmes and workshops with international organisations remotely as well as 40 online master-classes and workshops with leading Irish film festivals and other sectoral organisations. Three new funding schemes supported the sector in 2020:

- the Screen Stakeholders scheme funded 19 stakeholder organisations to deliver a range of skills development related activity;
- the Screen Mentoring scheme, through which 50 mentees availed of mentor support from experienced AV industry professionals over a 12-month period.
- *The Actor as Creator* initiative saw 30 actors funded to produce short filmic pieces to enhance their career development.

Screen Skills Ireland is collaborating with Screen Guilds of Ireland to develop a competency framework for crew roles across all departments in the sector that will support the Section 481 skills requirements process, help to identify current and future skills needs and support future progression opportunities within the sector. Screen Guilds of Ireland represent 23 crew guilds and 2,500 crew members. Screen Skills Ireland is also in the process of developing a Crew Database that will aim to hold all details for all crew working in the sector and make recruitment and crew calls easier, while also supporting the Section 481 upskilling process. The Crew Database will provide a resource to assist in attracting incoming productions to Ireland.

In 2021, Screen Skills Ireland will publish a new Health and Safety manual for the AV sector that has been developed in collaboration with key sectoral stakeholders, including SPI, Screen Guilds Ireland and SIPTU. Screen Skills Ireland is also developing a new online e-learning Health and Safety course on the back of the manual (called Screen Pass) that will be rolled out to the sector online for free in early 2021.

In 2020, Screen Skills Ireland increased the number of its certified programmes to 5 to include the following:

1. Graduate Diploma in Advanced Producing (at Level 9 on the NFQ, in partnership with Technological University Dublin);
2. Graduate Certificate in Production Management for Animation (at Level 9 on the NFQ, in partnership with IADT Dun Laoghaire),
3. Graduate Certificate in Series Producing (at Level 9 on the NFQ, in partnership with IADT Dun Laoghaire),
4. BA (Hons) CGI Technical Artist Apprenticeship (at Level 8 on the NFQ, in partnership with Technological University Dublin); and
5. Media Production Traineeship (at Level 5 on the NFQ, in partnership with Galway Roscommon ETB).

Amongst the certified programmes developed and offered by Screen Skills Ireland, two are targeted at new entrants to the sector:

- the Media Production Assistant Traineeship with Galway Roscommon ETB (Level 5 on the NFQ); and
- the CGI Technical Artist Apprenticeship programme with TU Dublin (Level 8 on the NFQ).

These programmes work well as access points for new entrants to their first opportunity within the sector. Two other programmes provided by Screen Skills Ireland have also had a significant impact on opening up access opportunities for new entrants to the sector;

- the Passport to Production programme was developed to equip new entrants with the key future skills and the key elements of working in the Film and TV Industry and to support new entrants on their first job.
- The Graduate Traineeship Programme for Animation, VFX and Games, which has been running since 2016 and over 90% of participants go on to gain further work in the industry, either with their host studio or with another studio.

In 2020, in conjunction with the National Film School at IADT, Screen Skills Ireland announced the commencement of the inaugural Post Graduate Diploma in Series Production with 15



industry professionals. This course has been developed with, and will be delivered by, leading industry experts from Ireland and the UK and supported by all Irish broadcasters, Screen Skills Ireland, SPI, and several leading independent production companies. It is an advanced television production course, specifically for factual, entertainment and non-scripted television genres. Participants on this course will include a range of experienced freelance assistant producers, producers, editors, casting producers and production managers which reflects Screen Skills Ireland's strong focus on skills development at all levels.

In its work on Section 481 Skills Development Plans, Screen Skills Ireland has opened opportunities to all: whether they be new entrants, trainees, upskillers, people receiving mentoring or shadowing opportunities, or people availing of skills courses. This inclusive approach allows people at all levels of a production learn and progress. The new system is therefore more expansive than a system that only focuses on 'trainees'. This holistic approach will support the development of a highly capable crew base across all departments as well as presenting opportunities for new entrants to the sector. This approach is in line with government and European education and skills policy in terms of support for lifelong learning, digital skills, and future/transversal skills.

A key element of Screen Skills Ireland's 2020 activity was its range of online courses covering crucial transversal/future skills such as Emotional Intelligence, Leadership Skills, Teamwork, Time Management, Unconscious Bias, Adaptability, and Wellbeing and Resilience. These transversal skills programmes support professionals in the sector to improve their performance and overcome challenges in the workplace.

With the high-level aim of matching skills to production growth and encouraging more collaboration between industry and education, Screen Skills Ireland established a Screen Industry Education Forum in November 2018. This event brings together industry stakeholders and education providers on a regular basis to focus on the skills development challenges and opportunities facing the screen sectors in Ireland. Due to COVID-19, it did not prove possible to host the event in 2020 but it is intended to hold the event again in 2021 if the circumstances allow.

### ***c) Educational sector alignment with the industry:***

Higher Education providers in Ireland offer a range of courses to the Audiovisual sector and there are a range of initiatives underway to increase the alignment of courses on offer by further and higher education providers and the needs of the audiovisual industry which address matters raised by both the OSN and Crowe Howarth Reports.

The majority of courses in the sector are offered by Institutes of Technology but Universities also offer a range of courses relevant to the sector. Most students undertake courses at Level

8 (honours degree) on the National Framework of Qualifications (NFQ), as can be seen on the table below:

Mode of delivery/Award type	2016	2017	2018
E-Learning			1
Certificate			1
Full-time	1,282	1,349	1,242
Certificate		1	
Higher Certificate	14	18	29
Higher Diplomas	35	29	16
Honours Degrees	863	889	852
Ordinary Degrees	256	243	195
Post Graduate Diplomas	2	2	3
Taught Masters	112	167	147
Part-time	316	334	90
Certificate	57	81	55
Higher Certificate		3	2
Higher Diplomas	21	42	31
Honours Degrees	103	47	1
Ordinary Degrees	129	146	
Taught Masters	6	15	1
Grand Total	1,598	1,683	1,333

Higher education places of relevance to the Audiovisual sector are also provided through Springboard+ 2020 and Human Capital Initiative (HCI) Pillar 1, as set out below:

Provider	Type of courses	Course title	NFQ Level
Limerick Institute of Technology	SPRINGBOARD	Certificate in Art Direction in Film & TV	Level 9
Limerick Institute of Technology	SPRINGBOARD	Certificate in VFX for Film, TV and Animation	Level 9
Griffith College	SPRINGBOARD	Certificate in Music Production for Games	Level 6
Coláiste Dhúlaigh College of Further Education	SPRINGBOARD	3D Animation	Level 8
Dundalk Institute of Technology	ICT	Higher Diploma in Science in 3D Computer Animation	Level 8
Dundalk Institute of Technology	ICT	Post Graduate Diploma in Technical Direction for Computer Animation Production	Level 9
Dún Laoghaire IADT	SPRINGBOARD	Certificate Production Management for Animation	Level 9
Pulse College	SPRINGBOARD	1 Year Animation Level 6	Level 6
Pulse College	SPRINGBOARD	1 Year Animation Top-up Level 7 BA	Level 7
Limerick Institute of Technology	HCI Pillar 1	Postgraduate Diploma in Science in 3D Animation & VFX	Level 9

As part of Ireland's National Skills Strategy 2025<sup>11</sup>, nine Regional Skills Fora were established to provide an opportunity for employers and the education and training system to work together to meet the emerging skills needs of their regions. The fora provide a single contact point in

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<sup>11</sup> [https://www.education.ie/en/Publications/Policy-Reports/pub\\_national\\_skills\\_strategy\\_2025.pdf](https://www.education.ie/en/Publications/Policy-Reports/pub_national_skills_strategy_2025.pdf)

each region to help employers connect with the range of services and supports available across the education and training system. They also provide more robust labour market information and analysis of employer needs to inform programme development. This leads to a greater collaboration and utilisation of resources across the education and training system and the enhancement of progression routes for learners. The structure allows employers to become more involved in promoting employment roles and opportunities for career progression in their sectors. Nine Regional Skills Forum Managers are the key contact points and lead the work of the Forum in each Region. The work of the Fora applies to all enterprise sectors, including the audio visual sector. Significant work has been done to ensure that business and enterprise continue to receive support in terms of immediate and longer term skills needs during the current COVID-19 crisis. The Regional Skills Fora (RSF) Managers act as a first point of contact and co-ordination point for the COVID-19 supports available to businesses and employees. The RSF Managers have also continued to alert education and training providers to immediate enterprise requirements in their regions and facilitate responses.

Throughout the COVID-19 crisis, the RSF Managers have provided support for employers in relation to education and training programmes such as Springboard+, Skills to Advance and Apprenticeships. The Fora have been to the forefront in directing employers to online offerings from education and training providers including infection control programmes, remote working, telemarketing, online sales etc.

The RSF Managers have also created and maintained a Regional Monitoring Template that captures the regional and cross regional challenges that enterprise are currently facing, and expected to face, post COVID-19. The template provides information by Region and by sector on a monthly basis and feeds directly into the dataset available to the National Skills Council, the Skills and Labour Market Research Unit in SOLAS and the Labour Market Surveillance and Analytical sub group being led by the Department of Social Protection.

Skillnet Ireland is a business support agency with the objective of advancing the competitiveness, productivity and innovation of Irish businesses through enterprise-led workforce development. It is funded by the Department of Further and Higher Education, Research, Innovation and Science through the National Training Fund. Skillnet Ireland operates under a unique and innovative joint investment model partnering with key industry representative groups across the audiovisual industry.

In the audiovisual sphere, there are four industry Skillnet Ireland Networks:

1. the Animation Skillnet provides subsidised training solutions and networking opportunities to the animation, games and VFX sectors in Ireland;

2. Gréasán na Meán Skillnet supports the growth of Ireland's indigenous media industry by delivering networking events and specialised training, primarily through the Irish language;
3. Screen Skillnet, which was launched in 2019, supports the growth of Ireland's Film, TV and Post-Production sectors through the provision of bespoke training and professional networking event; and
4. Immersive Technologies Skillnet, which was launched in 2020, and provides bespoke and subsidised training and skills development solutions for the immersive technology sectors in Ireland to include VR (Virtual Reality), AR (Augmented Reality), MR (Mixed Reality), Games, Realtime Production, UX (User Experience) and UI (User Interface).

A sub-committee of the Steering Group is in place to consider, on an ongoing basis, actions to improve skills development. The oversight of training and the alignment of the education sector to the needs of the industry remains a standing item on the agenda of the Steering Group and will be of particular importance in the coming years with the anticipated growth of studio space and employment opportunities across the sector.

## **4.6 Regulatory Reform**

### ***a) Public Service Media***

The Future of Media Commission was launched by An Taoiseach Micheál Martin and Catherine Martin, Minister for Tourism, Culture, Arts, Gaeltacht, Sport and Media in September 2020. The Commission's remit is to examine how public service aims can be delivered and sustainably funded through the broadcasting, print and online media in Ireland over the next 10 years, while ensuring that independent editorial oversight is maintained and Ireland's creative and cultural sectors are supported. It held its inaugural meeting on 29 October and has engaged comprehensively with stakeholders, including broadcasters, journalists, publishers, regional media and the wider public with a public consultation, which ran from December 12th 2020 to January 8th 2021, resulting in over 800 written submissions from stakeholder groups and the general public. At the end of January 2021, the Commission began a series of thematic dialogues through online webinars in which panels of experts explored key themes in more depth and answered follow-up questions from the virtual audience and the Commission. The Commission is expected to Report to An Taoiseach and Minister Martin at the end of July. The Commission will consult with all stakeholders in the course of their work.

***b) Audiovisual Media Services Directive (AVMSD)***

The Online Safety and Media Regulation Bill introduces a number of reforms in relation to the regulation of audiovisual media services in the State.

The Revised AVMSD includes provisions which increase the level of regulation required in relation to On-Demand Audiovisual Media Services. In order to meet the requirements of the revised Directive, the Online Safety and Media Regulation Bill bring On-Demand Audiovisual Services under the direct regulatory supervision of the Media Commission. A wide range of services are likely to fall under the On-Demand Audiovisual Media Services regulatory regime, including:-

- Multinational companies which are currently providing On-Demand Audiovisual Media Services under Irish jurisdiction such as Apple+, Google Play Store, YouTube Originals and Microsoft Store;
- On-Demand Audiovisual Media Services provided by RTÉ, TG4 and other broadcasters established in the State;
- On-Demand Audiovisual Media Services operated by other persons (whether legal or natural), whether they are provided directly on an internet service maintained by the person in question or via an intermediary platform such as YouTube.

All On-Demand Audiovisual Media Services established in the State will have an obligation to register with the Media Commission, irrespective of the level of audience or turnover. Similar to the current measures in place for broadcasting services, On-Demand Audiovisual Media Services will be obliged to abide by regulatory codes and rules drawn up by the Media Commission. The Media Commission will have a range of compliance and enforcement measures at its disposal to address any breaches of regulatory codes and rules that it detects.

The Online Safety and Media Regulation Bill provides that professional media outlets including broadcasters and online news services shall ensure that any news and current affairs content provided on any On-Demand Audiovisual Media Service operated by that provider shall adhere to the same standards that are currently required of television broadcasting services under the Broadcasting Act 2009.

In order to mirror the intent of the revised Directive, the Online Safety and Media Regulation Bill, provides that the broadcasting and on-demand strands of regulation will be aligned in legislation. The Bill includes common provisions in relation to complaints and regulatory codes

which will be applicable to both broadcasting services and On-Demand Audiovisual Media Services.

The Online Safety and Media Regulation Bill also introduces a number of other reforms in relation to the regulation of audiovisual media services, including the introduction of European Works quotas and prominence requirements for On-Demand Audiovisual Media Services and the potential for increased flexibility for commercial broadcasters in how they allocate their advertising minutage.

## 4.7 Marketing

As the government organisation responsible for the development and growth of Irish enterprises in world markets, Enterprise Ireland endeavours to provide marketing support to all Irish business sectors, including the games industry. Likewise, IDA Ireland works to encourage investment into Ireland across a range of sectors. Screen Ireland, Enterprise Ireland and IDA Ireland continue to promote Irish industries abroad. In March 2021, building on the Taoiseach's two day trade mission to Los Angeles in September 2019, Screen Ireland held a virtual trade mission to Los Angeles in order to showcase Ireland's offering in the audiovisual sphere to Hollywood based film.

Ireland has a long history in the games industry ever since Atari established console manufacturing facilities in Limerick and Tipperary in 1978. The industry in Ireland was largely manufacturing focused until the early 1990s when UK developer Gremlin Interactive established a development studio in Dublin in 1991, closely followed by German company PCSL in 1992. The 1990s and 2000s saw the arrival of global brands such as Activision Blizzard, Electronic Arts, Riot Games, Zynga, Kama Games Gamestop, and Playrix Games and also saw the establishment of internationally recognised Irish games companies such as Digit, Jolt Games and Black Shamrock (all of whom subsequently attracted international investors), and world leading games middle ware companies such as Havok and DemonWare (now owned by Microsoft and ActivisionBlizzard respectively).

The OSN Report which underpins the Audiovisual Action Plan made a number of recommendations in respect of games industry and considerations relating to games flow through the policy recommendations in the Action Plan. The OSN report indicated that the development of Ireland's games sector is inhibited by the lack of access to reliable funding and that if a tax relief scheme was to be extended to the games sector, it would support development. Developing the industry in this regard would be complemented by examining the potential of Ireland's game sector abroad. The OSN Report suggested that the implementation of a tax credit in respect of games would also further ambitions to attract a

major games studio and the announcement in Budget 2021 that work will commence to develop a tax initiative for the digital gaming sector, with a view to supporting qualifying activity from January 2022 onwards, should help deliver on that aim.

## ***4.8 Other supports and reform***

### ***a) Intellectual Property:***

#### Enterprise Ireland supports

Enterprise Ireland provides assistance to companies in the area of Intellectual Property (IP). Enterprise Ireland's (EI) strategy offer for clients is focused on securing maximum value for IP and embedding IP strategy in small and medium sized enterprises (SMEs). Enterprise Ireland has hosted workshops focused on animation IP commercialisation for the US. To offset the turbulence in 2020 arising from COVID-19 and uncertainty surrounding Brexit, Enterprise Ireland continued to focus on supporting the competitiveness, innovation and diversification agenda. A wide range of supports were delivered to strengthen enterprise in response to COVID-19, including the Sustaining Enterprise Fund, the COVID-19 Products Scheme.

Significant work was undertaken to prepare Irish enterprise for the new trading arrangements with the UK, with supports and funding delivered to clients including the most Brexit impacted businesses. Throughout 2020, EI continued to support client companies in international markets, including through virtual trade and buyer events and promotion of Irish innovation in key export markets and sectors through the Irish Advantage campaign. Under the Government's Global Ireland 2025 initiative, Enterprise Ireland's overseas presence has expanded significantly to 40 locations in recent years representing global ambitions to grow in international markets, both emerging and established. To support companies address the challenges presented by COVID-19 a number of key programmes and events were delivered virtually including: Enter the Eurozone, Spotlight on Skills Workforce Planning, Talent Attraction & Retention, Virtual Selling MasterClasses, Brexit Webinar Series, International Markets Week. Digital entertainment / audiovisual targeted virtual undertakings included a series of virtual US marketplace sessions.

#### Screen Ireland supports

Screen Ireland continues to review its funding schemes and initiatives on an ongoing basis to improve supports for audiovisual companies. Through Screen Skills Ireland, specific IP Development and Commercialisation programmes were delivered in 2020 including:



- Television Drama Development with John Yorke aimed at experienced Creative Producers, Executive Producers and Development Executives seeking to gain further expertise in developing television drama;
- IP Development for Animation with Heath Kenny with a focus on practical tips, risk management and creative processes to help shape the strategy, tactics and tools to help to get original ideas to market. This programme is a collaboration between Screen Skills Ireland, Animation Skillnet and Animation Ireland, with support from the BAI;
- In the Writers Room with Michael Zam; and
- Commercialising Animated Kids IP with Emily Horgan.

***b) Studio Space:***

The Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media provides capital support for the enhancement and protection of cultural spaces under Project Ireland 2040<sup>12</sup>, the Government's long-term overarching strategy for investment in Ireland's public infrastructure. In 2019, the Department launched a new €4.7m capital investment scheme for arts and culture centres and Stream C of this scheme offered grants up to €15,000 aimed at upgrading artists' workspaces. Funding of approximately €80k has been recently announced for 10 successful applicants.

***c) Employment conditions in the audiovisual sector***

In furthering its aim of growing the sector, the Audiovisual Action Plan initiatives are designed to develop conditions for quality and sustained employment and training opportunities in the sector. Action taken is reflected in changes made to Section 481 in respect of quality employment and training.

***Workplace Relations Commission audit***

In 2020, following an audit of the Independent Film and Television Drama Production sector, the Workplace Relations Commission (WRC) published the outcome in 9 themes encompassed in four recommendations. The WRC had formally invited submissions from stakeholders as part of the audit to:

- examine industrial relations generally, employment practices and procedure,
- assess issues arising (if any), and

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<sup>12</sup> <https://www.gov.ie/en/campaigns/09022006-project-ireland-2040/>

- make recommendations for their improvement where appropriate.

The four WRC recommendations are:-

1. The maintenance of good industrial relations within the sector will be crucial going forward to maintain and build the reputation of Ireland as a production location. A strong international reputation will create the project pipeline with consistent employment for workers in the sector. It was clear from submissions received that the majority of workers and employers in the sector felt that an agreement addressing pay terms and conditions would have a beneficial impact on the sector. In this regard, an agreement negotiated by the principal parties for their members, addressing pay, terms and conditions such as hours of work, per diems, travel time, overtime, sick leave and pensions, could be adopted as the industry norm. If required, such negotiations can be developed further with the assistance of the Workplace Relations Commission. In addition, other wage setting structures available within the industrial relations structures of the State could also be considered where there is merit in doing so, e.g. an application to the Labour Court to have a Joint Labour Committee (JLC) established for the sector. Furthermore, the WRC is of the view that strong consideration should be given of the possible establishment of a formal structure for the resolution of industrial relations issues. Again, the WRC is available to assist if required.
2. Skills and training will be critical to building a strong film sector and attracting investment and productions. Notwithstanding that these matters are outside the scope of this review, it is considered that they are well covered by the Crowe Horwath Report which has been taken account of in the Action Plan for the Audio-visual Sector. The WRC sees the benefit to the sector building on the foundations laid by this Report and continue to put in place structures for ongoing crew training in conjunction with SSI so that their offering meets the needs of the sector into the future.
3. 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. SSI should develop a training module on the establishment and operation of guilds.
4. It is important that a continued focus is placed on improving HR management in the sector and that that recruitment practices support the hiring of the most suitable person for the job taking into account skills and experience. SPI should continue to upskill its members in this area. In addition, any issues arising in relation to hiring practices

should be addressed in the industrial relations structure referenced in Recommendation 1 above.

In response to the WRC report on its audit, the following developments have taken place:

1. In December 2020, a Shooting Crew Agreement developed between SIPTU and SPI was balloted on and approved by SIPTU members. The Agreement subsequently came into effect in January 2021. It is a modernised Crew Agreement promotes good practice, regularises evolving work practices and provides for an industry pension scheme operating under the Construction Workers Pension Scheme (CWPS). A monitoring structure to oversee the operation of the agreement is included as is a commitment to developing the first Work/Life Balance policy for the film and television industry. The Agreement acts as a framework for the industry covering all grades except film construction.

The Irish Congress of Trade Unions and SPI are engaged in negotiations to develop and adopt a similar agreement for film construction crew.

2. Screen Skills Ireland continues to work on implementing the skills and training initiatives that the WRC cited as critical to building a strong sector and attracting investment and productions. Over the past 18 months, significant work has taken place in training and skills development, course delivery and through the involvement of Screen Skills Ireland in the skills requirements for Section 481. The Regional Uplift that incentivises the delivery of training in the regions is also making a marked contribution.
3. With regard to recommendation 3, the Guilds operate under the umbrella of Screen Guilds of Ireland (SGI) and represent Irish Film and Television Workers across the various Departments within the industry and specifically crew in Accounts, Art, Assistant Directors, Camera, Construction, Continuity, Costume, Facilities, Editing, Grips, Hair, Locations, Make Up, Model-making, Production, Props, Prosthetics, Set Decoration, Sound, Special Effects, Stunts and Transport Departments.

Screen Skills Ireland is working with the Guilds on the development of a competency framework for the sector that will enhance access routes, progression opportunities and retention within the sector, as well as being a valuable source of data for future curriculum development at third level. To further support the Guilds, Screen Skills Ireland delivered a course on 'Making the Most of Your Guild' covering the purpose of

a guild, best practice in establishment and operation of a guild, being an effective guild committee, the practicalities of running a guild, and getting support.

4. SPI has delivered a number of workshops on HR best practice including 'Managing Staff in line with Legal Requirements & HR Best Practice'. The goal of taking into account skills and experience will be supported by Screen Skills Ireland's work in developing resources for the industry to allow for the accurate capturing of skills development information over the course of a production. Screen Skills Ireland places a strong focus on ensuring that those engaged on a film are employed at the correct skill level and an emphasis on training and upskilling at all levels so that "career-long" learning becomes ingrained and are working to develop a strong crew base.

Joint Oireachtas Committee Report on Development and Working Conditions in the Irish Film Industry

The Government's Audiovisual Action Plan was launched in June 2018. Just a few weeks later the Joint Oireachtas Committee on Culture, Heritage and the Gaeltacht published a Report on Development and Working Conditions in the Irish Film Industry<sup>13</sup> in July 2018 (the JOC Report). The Report made 11 Specific Conclusions and Recommendations (reproduced at Annex 1), many of which reflect or complement the actions set out in the Audiovisual Action Plan.

In similar vein to the Audiovisual Action Plan, the JOC Report recognised the primary importance of Section 481 and recommendations 1, 3, 5, and 11 have been addressed under revisions to the Section 481 tax incentive.

Recommendation 1 states that "Section 481 is a key and central component within the Irish Film Industry". Changes were made to Section 481 in the Finance Act 2018, improving administrative processes and to extend the tax credit beyond its 2020 deadline to 2024. The Regional Film Development Uplift was also introduced.

Recommendation 3 sought "the reform of training in the sector to ensure that all training has a recognised qualification where possible, has a beginning and an end, and that trainees are not forced to repeat specific training". The Committee also recommended a wider geographical spread of training courses, the introduction of formal apprenticeships and additional finance to improve this training and development. The Regional Uplift measure outlined above is specifically designed to support the geographic spread of the audio-visual sector and ensure a spread of production activity beyond the current traditional production hubs in Ireland by incentivising the training and development of new, local pools of talent in the film sector in areas outside the current main production hubs. Changes to Section 481 in 2019 has seen a strong focus on life-long learning and a more expansive range of skills development at all levels, including hard skills, soft skills, future skills, technical skills and leadership skills. As part of an application for Section 481, many companies are now required to work with Screen Ireland to develop training plans that consider the skills needs of the production, the company, the participant and the sector as a whole and to reflect on how the planned activity will address skills needs across different levels and different departments of the production from new entrants, trainees and crew to above the line talent and company leaders. This is designed to move away from a system where individuals are labelled as trainees and in doing so,

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[https://data.oireachtas.ie/ie/oireachtas/committee/dail/32/joint\\_committee\\_on\\_culture\\_heritage\\_and\\_the\\_gaeltacht/reports/2018/2018-07-12\\_development-and-working-conditions-in-the-irish-film-industry\\_en.pdf](https://data.oireachtas.ie/ie/oireachtas/committee/dail/32/joint_committee_on_culture_heritage_and_the_gaeltacht/reports/2018/2018-07-12_development-and-working-conditions-in-the-irish-film-industry_en.pdf)

addresses the concerns that the Committee flagged. Screen Skills Ireland, the training and skills development division of Screen Ireland, established a Screen Industry Education Forum in November 2018. This event brings together industry stakeholders and education providers on a regular basis to focus on the skills development challenges and opportunities facing the screen sectors in Ireland. Due to COVID-19, it did not prove possible to host the event in 2020 but it is intended to hold the event again in 2021 if the circumstances allow. Screen Skills Ireland frequently collaborates with education providers to develop and deliver accredited/certified programmes for participants in a range of roles and at all stages of their careers, and which emphasise inclusion and progression.

Recommendation 5 outlined that an “international comparative study should be constituted to analyse the strengths and weaknesses of the Section 481 tax credit”. Since the publication of the Report, as part of its work for the Finance Bill 2018, the Department of Finance published its review of the section titled ‘Review IV: Cost Benefit Analysis of Section 481 of the Taxes Consolidation Act 1997 – Film Corporation Tax Credit’. This analysis was the catalyst for the administrative changes to the Section 481 application process.

Recommendation 11 called for “Public funding and adherence to employment standards” to be linked. The Film Regulations 2019, introduced to give effect to changes in the Section 481 procedures, include a requirement to provide a signed undertaking in respect of quality employment which requires both the producer company and the qualifying company to comply with all obligations in the field of environmental, social and employment law. The producer company and the qualifying company must be responsible for compliance with all statutory requirements of an employer, have in place written policies and procedures in on Grievances, Discipline and Dignity at work (including harassment, bullying and equal opportunity). The companies are also required to provide details of any Work Place Relations Commission decisions aligned with confirmation that any findings against the companies have been followed or an explanation where the finding has not been followed. This also addresses Recommendation 2 of the Report which expressed concerns with regard to working terms and conditions. While matters relating to collective bargaining rights of freelance workers do not fall under the remit of the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, the opportunities presented by the changes made to the Section 481 procedures have been used to improve conditions in the industry particularly in relation to training commitments by producer companies. Recommendation 8 also deals with working conditions and more particularly, calls for state support for “the precarious existence of actors and sustainable pension structures for workers within the Irish film industry”. This comes within the remit of the Department of Social Protection, who passed legislation in the Employment (Miscellaneous Provisions) Act 2018 in December 2018 which addresses insecurity and unpredictability of working hours for employees on insecure contracts and those working variable hours. The

Social Welfare Scheme for Self-Employed Artists has also been extended to the wider creative community which means that self-employed artists in receipt of Jobseekers Allowance for the first year that they are out of work will be able to focus on their artistic work and developing their portfolio, rather than having to participate in the normal labour market activation activities. Artists eligible to apply to the scheme include actors, theatre and film directors, dancers, opera singers, set, costume and lighting designers, musicians, composers, choreographers, architects and street performers.

The Programme for Government contains a commitment to request the Low Pay Commission to examine Universal Basic Income, informed by a review of previous international pilots, and resulting in a universal basic income pilot in the lifetime of the Government. In November 2020, the Arts and Culture Recovery Taskforce, published its report 'Life Worth Living'. That report outlined ten recommendations, including a proposal to pilot a universal basic income scheme for a three-year period in the arts, culture, audiovisual and live performance and events sectors. The Taskforce was of the view that a pilot universal basic income would keep the sector intact, minimising the loss of skills and contributing to its gradual regrowth, with ongoing benefits: social and economic, local and national. The Low Pay Commission has been asked to examine the commitment in the Programme for Government and the Commission has agreed that this request will form part of its workplan for 2021. The terms of reference for the study on Universal Basic Income are currently being finalised by the Commission and research is due to begin shortly.

Recommendation 6 called for workers within the craft grades of the industry to have representatives nominated to the Irish Film Board to feed in their perspectives and needs into the industry's development. However, under the provisions of the Irish Film Board Acts 1980 to 2018, the Board of Screen Ireland as it is now known, is not a representative board in the sense of comprising representatives from the various industry sectors: Section 12 of the Act provides that 7 members shall be appointed to the Board by the Minister for Tourism, Culture, Arts, Gaeltacht, Sport and Media with the consent of the Minister for Public Expenditure and Reform. Vacancies arose on the Board in 2020 and were advertised by the Public Appointments Service in October 2020. In the call for expressions of interest, applications were sought from people with a broad range of profiles and skillsets. Appointments to the new board are expected in the coming weeks. Members of all State Boards are required to act on a fully informed basis, in good faith, with due diligence and care, and in the best interest of the State body, and are subject to the Code of Practice for the Governance of State Bodies 2016.

Recommendation 9 sought for the further integration of the film industry on a north/south basis with the creation of formal north/south structures, development plans and investment. While Screen Ireland competes with Northern Ireland Screen in its efforts to attract inward production

into the Republic of Ireland, it also regularly cooperates with Northern Ireland Screen in efforts to attract inward production to the island of Ireland.

Recommendation 4 saw the Committee call on the Irish Film Board to constitute the Board's Film Forum, with an independent Chair, in order to allow all stakeholders within the sector to meet and work together to develop mutually beneficial solutions for the industry while Recommendation 10 called on the unions and the representative organisations to work towards a mutually beneficial and respectful understanding. Despite efforts made by Screen Ireland in 2019, it did not prove possible to constitute a forum of all stakeholders that would adopt a collaborative approach as suggested by the Report. Instead, it seemed that the forum would simply comprise of the airing of disputes and grievances which are more properly dealt with by the State through other mechanisms such as the Workplace Relations Commission (WRC). As outlined above, in 2020, the WRC published its report following its audit of the Independent Film and Television Drama Production Sector.

## **5 Conclusion**

A significant portion of the Audiovisual Action Plan has already been implemented. In particular, much work has been done in relation to reforms of the Section 481 tax credit and training and skills development, given their widely acknowledged importance to the audiovisual industry. A substantial increase in dedicated funding for TV drama in 2020, together with an enhanced budget for Screen Ireland in 2021 are important measures to advance the Audiovisual Action Plan. Work will take place in 2021 in advancing the development of a games tax incentive. The Steering Group will continue to implement the actions set out in the plan and will continue to provide regular progress reports.



## **ANNEX 1**

### **Joint Committee on Culture, Heritage and the Gaeltacht Development and Working Conditions in the Irish Film Industry**

#### **Specific Conclusions and Recommendations**

1. Section 481 is a key and central component within the Irish Film Industry. This fact is accepted by the vast majority of the industry's stakeholders. Section 481 will remain central in the industry into the future.
2. Amongst certain sectors and grades of the industry, concerns exist with regard to working terms and conditions. There are concerns that these can impact workers with regards to income, redundancy and pension entitlements. They can also affect workers' ability to communicate real workplace difficulties as workers without permanent contracts must be constantly rehired. It is the view of the Committee that the Government should seek to make working arrangements more secure. Film companies should comply with all labour and other laws in relation to employment and self-employment. The Committee calls on the Government to develop plans that ensure gaps in work are counted towards employment rights and redundancy.
3. The Committee seeks the reform of training in the sector to ensure that all training has a recognised qualification where possible, has a beginning and an end, and that trainees are not forced to repeat specific training. The Committee proposes that there be a wider geographical spread of training courses, the introduction of formal apprenticeships and additional finance to improve this training and development.
4. The Committee calls on the Irish Film Board to constitute the Board's Film Forum, with an independent Chair, in order to allow all stakeholders within the sector to meet and work together to develop mutually beneficial solutions for the industry.
5. An international comparative study should be constituted to analyse the strengths and weaknesses of the Section 481 tax credit. The Committee is not recommending the abolition of the credit, far from it, but its evolution, to ensure that certain foreign investment is not being lost as a result of its current form. Attention must be focused on how Section 481 can be improved to develop rich productive and sustainable indigenous film industry capacity.

6. Workers within the craft grades of the industry should have representatives nominated to the Irish Film Board to feed in their perspectives and needs into the industry's development.
7. The Committee calls for collective bargaining rights of freelance workers.
8. The Committee calls for state support for the precarious existence of actors and sustainable pension structures for workers within the Irish film industry.
9. The Committee seeks the further integration of the film industry on a north/south basis with the creation of formal north/south structures, development plans and investment.
10. The Committee calls on the unions and the representative organisations to work towards a mutually beneficial and respectful understanding.
11. Public funding and adherence to employment standards should be linked.

