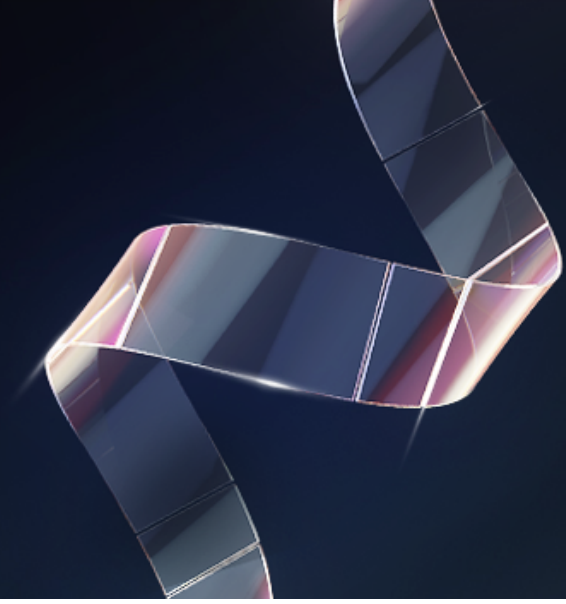




Fís Éireann
Screen Ireland

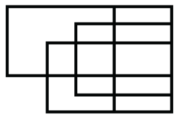
Joint Committee on Tourism, Culture, Arts, Sport and Media

Submission: Future business model plans and long-term
vision for the media sector



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Background

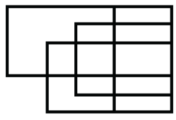
About Screen Ireland

As the national agency for the Irish film, television drama, animation, games and documentary industry, Fís Éireann/Screen Ireland is the creative partner to the sector, investing in talent, creativity and enterprise, inspired by original storytelling that will emotionally move audiences at home and abroad. Through a wide range of practical funding supports across development, production, distribution, promotion and skills development, Screen Ireland assists the sector at every stage. We support film and television makers in their creative pursuit to share valuable artistic, cultural, and commercial stories on screen. Screen Ireland collaborates with creative talent (screenwriters, directors, composers, producers) and other industry partners to ensure that there is a continuous pipeline of production and skills development across the country. We have also recently announced a commitment to support additional production nationwide by way of a pilot creative clusters programme that will encourage company development and leadership support.

Screen Ireland's vision for the industry is outlined in our three-year creative strategy "**Building for a Creative Future 2024**", in which we detailed ambitions and targets for the sector. Strategic objectives include innovative and creative storytelling excellence, investment in talent and skills, creating opportunities for global audiences to access Irish stories on screen, and championing sustainable industry development. A key component of that strategy is Irish television.

In 2019, Screen Ireland's remit expanded to include television, to invest in the development and production of high-end TV drama, documentary and animation series. We also support the television industry holistically through company development, skills development, and our sustainability advisor scheme.

From 2019 to 2022, Screen Ireland has supported 33 documentary projects, 17 TV drama projects and 27 TV animation projects for production. With a significant active slate in place, this support will continue to grow in 2023 and into 2024. Across the sector as a whole, in the period 2019 to 2022, there were an estimated 39 Irish animation projects with a combined spend in Ireland of €85m. In



the same period, spend in Ireland on Irish TV drama is estimated at over €160m across 31 projects. The annual estimated spend almost tripled from €17m in 2018 to €47m in 2022. 2021 in particular saw a very active year with an estimated spend of over €56m.

Screen Ireland's work with broadcast partners

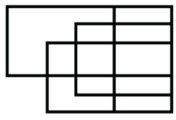
The organisation works closely with a range of television stakeholders both in Ireland and internationally, including national (TG4, RTÉ & Virgin Media Television) and international broadcasters (such as BBC, ITV, CH5) and major streaming platforms (including Disney, Netflix, Paramount+). Through these partnerships and in a relatively short space of time – less than four years – we have developed a significant slate of Irish TV drama, and invested heavily in animation and documentary production, launching further supports for documentary series in 2023.

Importantly, Screen Ireland works proactively with all of Ireland's broadcasters and key partners, including Comisiúin na Meán, to evolve and scale the sector. It is only through consistent partnership both at home and abroad that we can mutually help to bring to screen a new generation of Irish culture and production, ensuring that high-end intellectual property (IP) is commissioned and invested in, with Irish creatives at the heart of all projects. The retention and support of Irish IP and creative excellence in Ireland is a key objective.

The underlying strength, quality and reputation of Irish creative talent, entrepreneurship and IP has helped Ireland attract large-scale investment and ensured international exposure to Irish voices, culture and talent. Screen Ireland and all local broadcasters rely on the creative talent and crew that write, direct, produce or otherwise support production. Strong broadcasters are fed by strong programme makers and screen industries. Ireland possesses world-class craft and creative skills that must be maintained across the entire value chain to ensure further growth and success.

Genres

Irish TV drama, animation and documentary have gone from strength to strength in the last number of years, despite the many economic challenges.



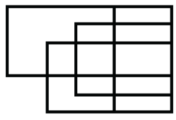
The breakout success of ***Normal People*** represented a turning point and provided further evidence of the popularity of Irish IP, both with national and international audiences. Produced by Element Pictures, with financing from Screen Ireland, BBC, Hulu and RTÉ, it was the most-streamed series of the year on the BBC iPlayer, with 62.7 million views from April to November 2020. The series also garnered over 5 million views on the RTÉ Player, breaking the previous record. ***Normal People*** achieved widespread critical acclaim with a host of awards and nominations, and the series has sold in almost all territories across the globe.

Other notable Irish TV drama, animation and documentary investments include a broad slate of series and standalone factual. TV Drama available for global audiences includes ***Hidden Assets***, ***Blackshore***, ***Clean Sweep*** (BBC), ***Smother*** (Peacock), ***The Dry*** (ITV), ***Kin*** (AMC+), ***Obituary*** (Hulu) and a new Irish-language international drama series ***Saor Sin Ó Olc***, currently being distributed globally.

Animation series have been watched by young audiences across the world, including ***The Ghastly Ghoul*** (Disney, Sky), ***Ladybird Lu*** (Cartoonito, Max), ***Viking Skool*** (Disney), ***Silly Sundays*** (Warner Discovery), ***Kiva Can Do*** (Sony) and ***Tales of Dún Draíochta***. Irish factual and insightful documentary making has also inspired audiences, including ***Nothing Compares***, ***Young Plato***, ***The Deepest Breath***, ***Children of Beirut*** and ***Million Dollar Pigeons***.

Creating value with RTÉ

RTÉ is a key partner in the development of the screen sector and invests in live action, animation and documentary production with Screen Ireland, ensuring the development of the screen sector more broadly. This ensures that increased scale and production value is achieved across small screen properties, for the widest reach of Irish cultural voices and talent. Screen Ireland has supported RTÉ and all local broadcasters in acquiring a pipeline of Irish IP across all genres. This has resulted in significant foreign direct investment, employment and scale of visibility for Ireland.



Opportunities and Challenges

The landscape is global and digital

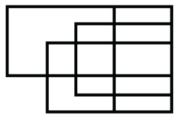
In recent years we have seen unprecedented change in the broadcasting landscape. The advent of streaming services has meant the globalisation of services with significant reach and deep financial resources. It has also seen the rise of localised commissioning of US players in European markets. In the case of English-speaking, non-US territories, this local commissioning effort is focused in London, and it is from London bases that US-entities would commission or participate in Irish productions. The advent of the streamers is blurring the lines between cinema and broadcast, with experimental windows emerging but with an overall drive to make product available for as long as possible on individual services.

Inevitably these dynamics present both opportunities and challenges to public service broadcasters and the wider supply and creative talent base. There is real international opportunity, but there has also never been a greater need across Europe for strong, robust, public service media providers who are able to present national audiences national stories as well as present local stories to the world and to bring wider international stories to domestic audiences. Public service broadcasting is at the heart of the socio and democratic needs of any country, and it is important in any screen ecology to have a strong, functioning, flourishing national broadcaster as a key stone of cultural and economic activity. Typically, a national broadcaster should be at the centre of mature, creative economies as a secure foundation to drive creative talent and activity.

Opportunities and challenges

Screen Ireland fully supports public service media and content providers and recognises the importance of ensuring that RTÉ is financially stable into the future. Stability will allow for further innovation in its future business model to support long-term sustainability.

The power of public service broadcaster content spend has overspill benefits beyond directly serving audiences. It also creates employment, raises skills levels and helps support Ireland's reputation



abroad. This should be optimally deployed with meaning and intent to help create positive societal, cultural and economic outcomes.

It is important that the brand equity of our national broadcaster is strong both locally and internationally. For Ireland to continue to avail of content investment (which benefits domestic audiences through the production value on screen) and wider export opportunity, the industry must be seen as a meaningful investor and content provider. This is in the interest of local audiences; the wider screen sector, particularly our creative talent base; and international visibility.

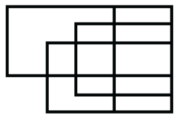
A strong national public service broadcaster delivering on its public service remit is arguably the primary means through which audiences experience the media. For Ireland to develop a screen culture with international reach and impact, our national public service broadcaster must be strong and focused on the needs of audiences. All broadcasters face challenges with younger audiences and appealing to this demographic in particular will be essential for longer term success.

Screen Ireland's on-going focus

In a short space of time, Screen Ireland and RTÉ have created value together for audiences. We will continue to develop our partnership with RTÉ, alongside all other television stakeholders and partners including TG4 and Virgin Media Television.

Our key focus in working with all our television partners is to encourage for Ireland:

- the flourishing of creative excellence in scripted, animation, documentary and screen content.
- diversity of storytelling and Irish creative voice that reaches a broad range of demos and expands audience reach both via broadcast and digital delivery
- more opportunity nationwide – developing skills, training and production and development activity right across Ireland
- more opportunity to build companies of scale driven by original IP and bold/innovative storytelling
- the further scaling of international partnership and investment for the benefit of Irish creative talent and the screen ecosystem at large
- the retention and control of creative IP in Ireland, as well as ensuring its proper Irish attribution when showcasing our talents internationally.



Future opportunity with Public Service Media

Beyond this, Screen Ireland supports more opportunity to work in partnership on:

1. New opportunities to help increase nationwide activity:

Working with stakeholders further to encourage more creative and production activity across the country. With an expanded footprint comes expanded opportunity and employment.

2. Digital innovation in storytelling, audience development and distribution delivery:

Working with partners to harness the opportunities presented by virtual production, new forms of audience engagement and digital distribution. Digital distribution is a profound question for broadcasters and is typically an inherent strategic piece that all broadcasters consider. Screen Ireland would like to use digital opportunities in particular to help bring through new voices and reach young and hard-to-reach audiences through experimentation and piloting of ideas and schemes. We must also ensure on a local level that Irish culture and creativity is reaching evolving audiences in a new age of digital transformation across all local broadcasters.

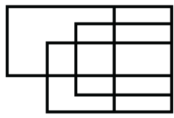
3. Increasing content investment and content sales internationally:

Sharing the costs of production with other partners helps raise creative aspirations and production value on-screen. This is to the betterment of the final end-product and has a potential longer tail of value. As the industry in Ireland evolves, it will be important to optimise international investment and content sales, not only to increase budgets and ambition, but also to more systematically boost creative investment and exports.

4. Ensuring Irish IP retention

Creating television programmes, particularly drama and animation, represents real IP opportunity. At Screen Ireland, we plan to work with partners on:

- further enhancing the principal importance of IP
- ensuring that as much IP as possible is retained in Ireland
- ensuring that the global exploitation of our IP optimally positions Ireland as much as possible in terms of creative/critical attribution and economic value.



5. Ensuring a diversity of Irish cultural voices:

Supporting Irish language and creativity and giving every opportunity for further growth via creative clustering, talent development and specific direct supports.

Screen Ireland recognises the clear benefits of increased creative competition amongst suppliers for public service media, so that the best ideas reach audiences domestically and internationally. Diversity and plurality of supply from production companies of all shapes and sizes is important for creating a creative meritocracy of ideas that best serve the audience. Ireland has a particularly strong and reputationally valued independent sector that is going from strength to strength, creating high-quality film and TV series. Creating further opportunity for the independent sector will likely yield strong on-screen results and help creatively reinvigorate public service media and further increase the long-term sustainability of Ireland's screen sector.

We look forward to continue working with RTÉ, TG4, Virgin Media and our other broadcast partners to build on the current success of the industry and further support Irish film and television into the future.