Final Report in respect of a Strategy for the Development of Skills for the Audiovisual Industry in Ireland

23 May 2017

Contents

Executive Summary

Crowe Horwath were commissioned by the Irish Film Board (IFB) and the Broadcasting Authority of Ireland (BAI) to prepare a national strategy for the development of skills for the audiovisual (AV) industry in Ireland. The audiovisual industry is defined as companies, other organisations, and individuals involved in screen content production.

The development of the strategy was undertaken primarily with a significant data-gathering exercise, by means of desk research, extensive stakeholder consultation, and international comparator analysis.

Recent years in particular have seen Irish film and screen productions achieve an outstanding level of success both domestically and on the international stage. The Irish screen production sector has the potential for substantial growth, increasing employment and economic impact as well as creative output and success.

The report examines the current policy context in relation to the audiovisual industry and skills development within and for the sector, the demand for education and training related to the audiovisual sector; the forces of change for the Irish AV industry; the provision of relevant education and training in Ireland; the linkages between education/training and the industry; some highlighted international experiences; and the current funding arrangements. Findings and recommendations are set out in respect of these sections, and then the overall strategic policy analysis and recommendations are set out.

Key findings include

- The absence of a national strategy for the development of the screen industry overall impacts on the assessment of demand and recommendations for the provision of education and training in respect of the sector.
- The challenges in accessing up-to-date accurate data also impact on the development of strategy for skills in the industry.
- The industry is facing continued and increasing change in terms of technological developments and consumer behaviour, which necessitate new and additional skills development opportunities.
- There is significant fragmentation of education and training provision.
- There are examples of good and innovative practice within the sector that should be supported and expanded.
- The links between industry and the education sector need to be strengthened and developed.
- Funding for screen industry training needs to be addressed to ensure adequate resourcing of future skills development.
- Screen Training Ireland is working well but requires additional resources and support to expand and build on its success.

Summary of Recommendations

- There is a requirement to develop a national strategy for the screen industry, to provide the strategic foundation for ongoing development of policies and plans in respect of the audiovisual sector skills.
- A new policy framework for training and skills development for the audiovisual sector should be developed in line with national strategies for the screen industry, for higher education, and for skills development.
- A detailed census should be undertaken across the industry, similar to the work undertaken by Creative Skillset for the creative industries in the UK.
- The courses most relevant to the audiovisual sector should be identified.
- There is a clear need for a detailed census to be undertaken, covering the relevant courses:
- Models of good practice within the training sector should continue to be supported and should be considered for expansion in scope and capacity.
- Improved coordination should be formalised between providers, both in the education sector and in training provision.
- Development and continuation of much stronger links between training and education providers and the audiovisual industry.
- Development of third-level courses should be in line with national and regional strategic priorities for the screen industry, for higher education, and for skills development.
- A more cohesive approach is required which ties in with national strategies for the screen industry, for higher education, and for skills development.
- There is a need for a rationalisation of provision (and associated funding) within the HE/FE sector.
- The overall quantum of future funding requirements should be determined.
- A training fund should be established, using an industry levy approach.
- Screen Training Ireland should be revamped to provide real leadership and to implement lasting change with regard to skills development within the audiovisual sector.

1 Introduction

1.1 Background to the Project

Crowe Horwath were commissioned by the Irish Film Board (IFB) and the Broadcasting Authority of Ireland (BAI) to prepare a national strategy for the development of skills for the audiovisual (AV) industry in Ireland.

1.2 Terms of Reference

The terms of reference for this assignment included the following requirements:

The objective of this tender is to produce a National Strategy for the Development of Skills and Talent of those working within the audiovisual industry. That strategy should be over a 5-year period (2016 – 2020).

In order to produce the Strategy, it is expected that quantitative and qualitative analysis will be undertaken by the successful tenderer, using research, consultations and forecasting. An essential part of the work will be profiling future occupations and the best methods of delivering training for such occupations. A more detailed scope of the work envisaged is as follows:

1) *Map the current policy framework in place for the delivery of training to the audiovisual sector;*
2) *Map the current provision of audiovisual professional training nationally and locally, where relevant, by statutory and other agencies and organisations and the related funding;*
3) *Map the current policy and provision of audiovisual education at higher and further level (insofar as it relates to film and television production);*
4) *Assess the current linkages between professional training bodies nationally and identify ways in which this may be improved – this linkage should be referenced to best international practice;*
5) *Assess the current linkages between the third level sector and industry and identify ways in which this may be improved – this linkage should be referenced to best international practice;*
6) *Map the forces of change in the industry (locally and internationally) in the short to medium term (3 – 5 years) which are currently contributing to dynamic change;*
7) *Map the industry skills needs with regard to; -*
    - current needs,
    - future industry needs, occupations and growth opportunities in terms of expanding industry capacity;
8) *Assess the effectiveness of the 'Section 481' traineeship model and identify ways in which it may be improved;*
9) *Assess best practice models of training delivery and standards in order to develop talent to its greatest potential;*

10) *Examine the current mix of public and private funding and make recommendations on a sustainable model for the funding of training into the future.*

11) *Make recommendations for a policy framework for the future delivery of training to the audiovisual sector.*

1.3 Definition of the Audiovisual Sector

In addressing the terms of reference and considering the development of a strategy for skills within the audiovisual industry, we must define what "audiovisual industry" means for the purpose of the strategy, and consequently for this assignment. The industry is defined as companies, other organisations, and individuals involved in screen content production. This reflects previous research in the sector such as the 2008 PricewaterhouseCoopers review of the audiovisual content production sector in Ireland. This strategy will not, therefore, encompass the radio sector. Throughout this document, the terms "screen industry", "audiovisual industry", and "audiovisual sector" can be considered interchangeable.

1.4 Methodology and Approach

1.4.1 Methodology

Our approach to this assignment has involved a significant data-gathering exercise, by means of desk research, extensive stakeholder consultation, and international comparator analysis.

Desk research

- We undertook documentary review and analysis of existing and former policies and strategies in respect of the AV industry and skills development, along with other reports and published material to establish the context for this skills development strategy for the sector.

Consultation

- Our extensive stakeholder consultation comprised face-to-face meetings, focus groups, and surveys with education and training providers, industry representatives, statutory bodies, and others involved in the industry. A full list of consultees is attached at Appendix 1. In the early stages of the project, we met with a substantial body of consultees either face to face or in groups, and we issued an online survey to those who registered their interest in participating (see below).

Survey

- Stakeholders were invited to register interest in participating in a survey, following an industry notice distributed by the Irish Film Board and publicised on their website and that of the BAI. Invitations to the survey were issued to those who had registered interest (approximately 60), and we received 12 fully complete and a further 10 semi-complete responses. The survey elicited mostly qualitative responses in respect of how skills development for the sector operates from the perspective of the survey participants. The findings from the survey have been incorporated into the findings from the other consultations.

Discussion document

- Following an initial round of consultation, we prepared a Discussion Paper and recirculated this among those who had been included in the consultations. We invited comment by means of additional focus groups in Dublin and Galway; by follow-up survey; or by email directly to Crowe Horwath.

Education sector survey

- Separately, we issued an online survey to education providers seeking quantitative data on the courses provided that related to the AV industry, student numbers associated with these, and similar details, along with qualitative opinion on the way in which such provision takes place and the links between the education sector and the industry. There were 16 responses, which was a low response rate, although the range of providers was broad and the opinion gathered was useful.

International comparator research

- Our project team included Mark John, a Wales-based established screen and radio producer, who has worked at a senior level across all media platforms for the past 30 years. He now works with leading Welsh education, skills and training services provider Big Learning Company, who specialise in learning solutions and skills and training delivery for the creative industries and digital tech sectors. Mark is well-versed in the UK and European funding and support infrastructure for the AV industry and for skills development relating to the sector, and as part of this project he undertook an analysis of the international context, the key drivers globally for the AV industry, and examples of UK and other funding and supports for skills development for the AV sector from which Ireland might draw inspiration and learning.

1.4.2 Project Oversight

This assignment was jointly commissioned by the Irish Film Board and the Broadcasting Authority of Ireland, and regular liaison and meetings with the nominated representatives of both organisations took place to update on progress, provide feedback on emerging findings, and agree the final deliverables.

1.5 Analysis of Stakeholder Input

As noted above, this assignment has involved a considerable level of interaction with a wide and diverse range of stakeholders.

A major part of our job as independent consultants is to critically assess the opinions, views and suggestions which are provided to us through the various processes of stakeholder engagement – meetings, focus groups, survey responses and the like. We recognise that stakeholders come to an exercise such as this with certain expectations, and that they will be engaging with us having a variety of vested interests and perspectives which relate to their role and the organisations they represent. All of this is entirely legitimate, and our role is to try to understand these perspectives and develop a clear picture of prevailing opinions.

In this context, we also recognise that stakeholders may, quite understandably, have different views of the same facts. Not everyone may be in possession of the same information, which will influence the opinions they provide.

What this means in practice is that we take great care to ensure that we deal properly with the information and opinion we gather through the stakeholder consultation process. Where necessary, we will challenge stakeholders to back up or further clarify the information or opinions they impart, and we frequently ask follow-up questions to probe issues presented to us. We do not take anything at face value and some stakeholder views are typically given less weight if they are isolated or reflect a particular vested interest. By contrast, we place significant emphasis on stakeholder contributions where the opinions expressed or the perspectives shared are consistent across a wide range of individuals and organisations.

Accordingly, what follows in this report is our independent assessment, based upon a variety of contributory elements – our analysis of factual and documentary information related to the present situation; our critical assessment of the full range of stakeholder contributions, weighted towards those where there is a common and consistent message; and our professional judgement on what all of this means for the future development of skills within the audiovisual sector.

2 The Irish Audiovisual Industry: An Overview

2.1 Introduction

The key driver for education, training, and skills development is the audiovisual sector's performance both currently and in the future. This encompasses both the scale of the industry (for example, whether there is predicted growth) and the nature of the activity (which drives demand for particular roles and the associated skillsets). We set out here an overview of the audiovisual industry in Ireland and the key aspects thereof that impact on the demand for skills development.

2.2 A Story of Success

Recent years in particular have seen Irish film and screen productions achieve an outstanding level of success both domestically and on the international stage. Highlights include:

$145 million in international box office takings

10 Academy Award nominations in 2016 for films with Irish involvement

Critical acclaim: Toronto audience prize; Cannes jury prize; and many more

€70 million invested by BAI 2010-2015 via Sound & Vision Scheme

€82 million invested by IFB 2009-2014 in Irish screen production

2.3 Continued Growth

Whilst detailed industry data on activity and employment is not readily available, there is evidence of substantial increases in activity within the Irish screen content production sector over the past five years. IFB data on production activity indicate year-on-year increases. The sector activity generated by the Star Wars films choosing Ireland for location filming has raised Ireland's profile internationally and provided a boost to regional production activity. New studio infrastructure is being developed in Limerick, with additional developments planned in other areas. The animation sector has seen significant growth and investment, with the buy-outs of Brown Bag Studios and Boulder Media, and Cartoon Saloon receiving an

Academy Award nomination for their work. The visual effects (VFX) sector is also performing strongly.

2.4 Drivers for Growth

Key drivers for growth in Ireland include the revised Section 481 tax incentive introduced in 2015, the new studio infrastructure, the particular high-profile success of Irish film in the past two years, and key support and stimulation of activity driven by strategies such as *Building on Success*, the recently launched IFB strategic plan 2016-2020 and the BAI's statements of strategy 2014-16 and 2017-19. Future strategic developments anticipated include an overall sector strategy, which will underpin and support the work of the key agencies involved and will drive the industry towards a shared vision.

2.5 Strong Potential

In summary, the Irish screen production sector has the potential for substantial growth, increasing employment and economic impact as well as creative output and success. (The Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs is in the process of commissioning an "Economic Analysis Study of the Audiovisual Sector in the Republic of Ireland", which *inter alia* will help to quantify the value of screen production to the Irish economy.)

This growth needs to be supported by the right education, training, and skills development to ensure the industry has access to the right people to develop its capacity to harness the potential for growth.

3 Strategic Context

3.1 The Policy Framework

We examined the current policy context in relation to the audiovisual industry and skills development within and for the sector. We set out here an overview of key agencies; policy and strategy relating to the sector as a whole; policy/strategy which is specifically related to skills development within it; and some of the principal publicly funded organisations delivering training and education in relation to the audiovisual sector.

3.2 Key Statutory Agencies Delivering on Government Policy and Strategy in the AV Sector

Bord Scannán na hÉireann/the Irish Film Board (IFB)

The development agency for Irish film and filmmaking in Ireland, Bord Scannán na hÉireann/ the Irish Film Board (IFB) was established as a state agency for film funding under the Irish Film Board Act 1980. The remit of the IFB is set out as follows: "The Board shall assist and encourage by any means it considers appropriate the making of films in the State and the development of any industry in the State for the making of films".

The IFB operates under the aegis of the Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs. Its work is overseen by a Board appointed by the relevant Minister. The IFB provides leadership and strategic vision for Irish film and the Irish film industry; provides a wide range of funding for film and screen content; and fosters an environment for a successful and growing Irish filmmaking culture. It invests its capital funding of €11.2m a year into development production, cinema distribution, and industry support.

The IFB supports skills development through Screen Training Ireland and other initiatives. Screen Training Ireland was transferred to the IFB from FÁS in 2013. IFB funding to Screen Training Ireland training programmes each year is €600,000.

Broadcasting Authority of Ireland (BAI)

The BAI is the regulator of broadcasting in Ireland. Under the aegis of the Department of Communications, Climate Action and the Environment, the remit of the BAI is set down in the Broadcasting Act 2009. Its key functions include: regulating and licensing radio and television services; making, monitoring, and enforcing broadcasting codes and rules; reviewing the performance of public service broadcasters; funding programming and archiving relating to Irish culture, heritage and experience; dealing with complaints from viewers and listeners regarding broadcast content; research and training; and fostering and supporting the understanding of media.

Through the Sound and Vision Scheme, the BAI supports the production of creative screen content, allocating some €14m each year to independent television, film, and radio productions.

Crowe Horwath.

> The BAI has a **specific remit in respect of skills**, in Sections 26.2 (d) and (e):
> (*d) to collect and disseminate information in relation to the skills requirements of the broadcasting sector,*
> *(e) to co-operate with other bodies, including representative bodies within the broadcasting sector, to promote training activities in areas of skill shortages in the broadcasting sector*

3.3 Government Policy/Strategy for the Audiovisual Industry as a Whole

3.3.1 History

A number of key policy and strategy documents and reports have been published over the past three decades in respect of the audiovisual industry, its impact, its potential, and mechanisms to support these. For example, in 1993 the Government introduced three pieces of legislation:

- An amendment to the Broadcasting Act mandating the national public service broadcaster RTÉ to spend a minimum amount of its indigenous programme production costs on independently commissioned programmes;
- An amendment to the tax incentive for filmmaking (Section 35, now Section 481) extending tax relief to individual investors;
- The reinstitution of funding for Bord Scannán na hÉireann/ Irish Film Board as a dedicated agency with a mandate and funding to assist in the development of Irish filmmaking and the development of an industry for the making of films.

The industry subsequently grew dramatically, increasing employment numbers nearly eightfold from 694 in 1991 to 5,440 in 2007, with the economic impact of the industry estimated at more than €550 million in the same year[1].

Other key reports and policy actions include

- the 2001 ***Kilkenny Report***, which was the first pan-industry development report;
- the establishment of the **Broadcasting Fund** in 2004, which through the Sound and Vision Scheme – administered by the Broadcasting Authority of Ireland – supports the production of independent radio and television content using a levy from the television licence fee;
- the ***Irish Audiovisual Content Production Sector Review***: a report by PwC in 2008 on the character, scale, and size of the industry;
- the 2011 ***Creative Capital*** report, which was intended as a key policy document, setting out an ambitious vision for the industry and a strategic policy approach and key actions to enable growth. The report recommended a framework of policies and initiatives for government that would stimulate growth were intended to be achievable, cost-neutral and capable of maximising the employment potential of the sector, with the aim of doubling the value of the Irish audiovisual industry to over €1 billion, increasing direct employment in the industry to over 10,000, and increasing exports of Irish audiovisual production. *Creative Capital* recommended a series of key actions and initiatives, but implementation was not consistent or comprehensive. An implementation committee chaired by the Department of Arts, Heritage and the Gaeltacht reviewed the recommendations of the report. Some were implemented, such as extending Section

1 Creative Capital Report, 2011

481; however, some were not. The committee met a number of times and developed reports that were passed to the Minister.

3.3.2 Section 481 Reformed

A particularly significant policy decision in recent years is the revision of the Section 481 tax incentive: in 2015 this was changed to a direct tax credit to production companies. The scheme provides relief in the form of a corporation tax credit related to the cost of production of certain films. The minimum amount that must be spent on the production is €250,000 and the minimum eligible expenditure amount to qualify is €125,000. The credit is granted at a rate of 32% of the lowest of:

- eligible expenditure (incurred by the qualifying company on the employment of eligible individuals or on goods, services or facilities within the State on the production of a qualifying film);
- 80% of the total cost of production of the film;
- €70,000,000.

The scale of the revised tax credit represents a very substantial investment in audiovisual screen production in Ireland, with the potential for single productions to incur rebates from the Revenue Commissioners to a level comparable to the total annual funding for the Irish Film Board and the Broadcasting Fund combined. In 2015, the first year of the revised tax incentive, approximately €17.5m was rebated under the tax credit.

The Section 481 tax credit means that Ireland is very competitive internationally as a location for filmmaking, and anecdotally has driven considerable activity since its introduction in filmmaking, animation, and television drama production, and is perceived by stakeholders to be a key driver for future growth, especially given its reformed and expanded investment model.

3.4 Policy in Respect of Training and Skills Development for the AV Sector

3.4.1 The Statcom Report (1995)

A critical juncture in the development of the audiovisual industry was the publication in 1995 of a key report in relation to training needs for the screen production sector: *“The Independent Film and Television Production Sector in Ireland – Training needs to 2000”.*

The **Statcom Report**, as it has come to be known, identified the training requirements of the independent film and television production sector in Ireland for the five years to the year 2000 and made recommendations for a training strategy.

The information regarding the specific training needs of those in the industry and new entrants was gathered through a mix of survey and interviews with key individuals. The training required split into three different categories:

- training required for new entrants;
- continuing professional development;
- business skills.

For both new entrants and CPD targeting national and international standards was seen as a key requirement as part of the training process. At the time of the report skills shortages were reported in a number of production and post production areas. Many of the recommendations from the report were implemented by the establishment of Screen Training Ireland.

The Statcom Report was a hugely significant milestone in its recognition of the importance of training and skills development and the establishment of what would become a key agency delivering on the industry's skills development needs.

3.4.2 BAI Sectoral Learning and Development Policy (2012)

In 2012, the BAI published its Sectoral Learning and Development Policy, the aim of which is:

> *to provide a framework for [the BAI] to engage strategically with broadcasters to establish their development needs and adopt strategies that will support the sector in developing and strengthening its role within the wider media environment. The Policy focuses on and supports the need for continual improvement of broadcasting outputs and the enhancements of the broadcasting sector's capacity to realise its potential with the creative industries. The Policy provides a framework for learning and development ... [and] outlines a broad range of approaches and initiatives which are consistent with the BAI's overall statutory and regulatory remit.*
>
> *Given the challenges created by economic uncertainty, the BAI endeavours to provide support, either financially or otherwise, to broadcasters and industry networks who strive to build capacity within their sector in so far as possible.*

The policy objectives in support of the above aim mandate the BAI to:

i. *contribute to the development of standards relating to governance, people and broadcasting outputs... including the pursuance of accredited training and the continued professional development of individuals working in the sector;*
ii. *co-operate with industry specific representative bodies to promote training activities in areas of skill shortages... To collect and disseminate information in relation to skills requirements... which aims to support industry networks and broadcasters to address effectively their development needs and that of their members;*
iii. *collect and disseminate information on the broadcasting sector in the State and co-operate with other bodies outside the State which perform similar functions to the BAI in order to monitor developments in broadcasting both nationally and internationally...;*
iv. *undertake, encourage and foster research, measures and activities which are directed towards the promotion of media literacy, including co-operation with broadcasters, educationalists and other relevant persons;*
v. *provide industry networks and broadcasters with a framework that supports the most appropriate, effective and consistent operation of their development initiatives which encourages the use of a mix of learning, training and development approaches and methodologies that respond to the variety of interests and needs in the sector.*

The BAI's Sectoral Learning and Development Policy provides a comprehensive framework to facilitate skills development within the broadcasting sector, and places the BAI at the heart of this activity. Many of the recommendations presented later in this report build upon this policy framework and are consistent with the objectives summarised above.

3.4.3 Other Policy/Strategy Documents in Respect of Training and Skills Development for the Sector

There have been several other key reports and policy recommendations in past years in relation to the need for and delivery of skills development for the audiovisual sector. We outline briefly the key elements of these below:

Year	Title	Key elements
2004	Skills Requirements of the Digital Content Industry in Ireland: Phase 1 (FÁS)	• Report looks at the Digital Content industry: relevance to the audiovisual industry is largely due to its reference to games • To increase employment in the sector the report suggested that either an extension of the R&D tax credit or section 481 could be used to stimulate growth in this sector. • For the games industry the report recommended that project management skills should be incorporated into all games courses and FAS/STI should make available suitable short business related training courses for games producers.
2009	Skills in Creativity, Design and Innovation (Forfás/ Expert group on future skills needs)	• The report looks at the need for skills in both specialist areas addressed by earlier reports and for lifelong learning. • It addresses ➢ The complementary skills needed by people with specialist skills to enable creativity and innovation ➢ The skills required in design ➢ The contribution that other specialist skills in the arts, humanities and social sciences can make to creativity and innovation ➢ Further measures required to develop the skills required for innovation in the workplace
2015	Ireland's Digital Future – Foresight Report on the Digital Content Sector in Ireland (Honeycomb Creative Works)	• Current situation in respect of the digital content sector in Ireland and comparing them to two other regions. For this study digital content was defined as film and broadcast; animation; games development; music technology; and interactive media • Many felt that there was poor engagement between HEIs and industry for various reasons. • Other feedback included graduates not aligned to industry needs, insufficient specialist skills, no portfolios and too much focus on group work rather than individual talent development.

Year	Title	Key elements
		• Skills identified by the respondents as required included business skills, sales and marketing, technical skills, finance, creative talent, and leadership and management.

3.4.4 *Creative Capital Report 2011: Focus on Development of Skills*

One key aspect of the *Creative Capital* report was a focus on the development of skills and talent for the audiovisual sector. The report notes a number of key themes in relation to the third-level sector's role in skills and talent development for the audiovisual industry:

- Concerns about the proliferation of similar courses in different institutions, diminishing critical mass and spreading resources thinly instead of a concerted effort to build specialisations and centres of excellence in different disciplines capable of achieving international recognition;
- Access routes to the industry were not clear;
- Critical importance in students having direct contact with the industry;
- Diminishing resources due to education funding cutbacks as a threat to quality;
- The evolving nature of media and markets needed to be addressed in education;
- No formalised accredited programmes connecting the education sector with industry.

It is interesting to note these findings as they echo similar issues and concerns from this strategy research.

3.5 Statutory Supports for the Development of Skills and Talent for the Audiovisual Industry

3.5.1 *Overview*

Skills and talent development for the audiovisual industry in Ireland is undertaken and supported by a wide range of organisations in the statutory sector. A brief outline of some of the main bodies involved is set out below:

3.5.2 *Screen Training Ireland: A National Resource*

Screen Training Ireland, part of Bord Scannán na hÉireann/the Irish Film Board, is the national training and development resource specifically created for Ireland's film and television industry. It was established in 1995 on foot of the Statcom Report to provide continuing training and career development opportunities for professionals working in the screen sectors.

Screen Training Ireland works with national and internationally recognised industry professionals, both locally and internationally, to identify, design and deliver training for professionals working in the Irish audiovisual industry. Training programmes are offered to practitioners and companies to enhance their expertise in film, television, animation and interactive screen content. The aims of Screen Training Ireland are:

- Develop storytelling skills (visual and narrative) across multiple genres and platforms and promote creative collaboration.
- Develop production and technical skills enabling Irish content creators compete at the highest level internationally
- Raise the bar of business acumen and entrepreneurship

Screen Training Ireland's training activities are described in more detail in the section on provision of training and skills development.

3.5.3 Other Agencies

Other State funding and support for skills development, training, and education for the AV sector is available through a range of agencies and organisations.

A brief overview of the key training and skills development functions is set out below; more detail on what each organisation delivers is in later sections on the provision of education and training.

Irish Film Board(IFB)

IFB supports the development of talent and skills through its funding and oversight of Screen Training Ireland and through funding film development and initiatives, such as targeted funding schemes for short film.

Broadcasting Authority of Ireland (BAI)

The BAI funds training and development initiatives for the audiovisual sector. Funding is available both for specific projects and initiatives and for networks who then deliver programmes with the grants provided.

Higher Education Authority

The HEA has central oversight role in the higher education system. It funds higher education institutions (HEIs) and is the regulator for the higher education sector. It is a lead agency in the creation of a co-ordinated system of HEIs with clear and diverse roles appropriate to their strengths and national needs.

Solas

Solas is the Further Education and Training Authority. Its functions are to manage, co-ordinate and support the delivery of this integrated Further Education and Training by the Education and Training Boards (ETBs); to monitor delivery and provide funding based on reliable, good quality data and positive outcomes; and to promote Further Education and Training provision that is relevant to individual learner needs and national skills needs. This includes the needs of business and future skills requirements.

Education & Training Boards

Education and Training Boards (ETBs) are statutory authorities which have responsibility for education and training, youth work and a range of other statutory functions. ETBs manage and operate schools, further education colleges, and a range of adult and further education centres delivering education and training programmes.

Higher Education Institutions

HEIs comprise the universities and Institutes of Technology (IOTs), which provide a wide range of courses directly and indirectly related to the skills requirements of the audiovisual industry. HEIs are funded via the HEA but decisions on course provision are currently made at individual HEI level.

Skillnets

Skillnets is a state-funded, enterprise-led support body that supports and funds networks of enterprises to engage in training. Funding comes from the Department of Education and Skills, and from employers in the networks. Two Skillnets training networks, Animation Skillnet and Gréasán na Meán, provide specialist training and development for the audiovisual industry.

3.6 Policy Analysis

3.6.1 Overall Policy Context

A fundamental context for the development of a skills strategy for the audiovisual sector is that there is no common government policy framework in position at present, and no clear strategic view regarding the development of the audiovisual sector in Ireland. It presents a challenge to the development of an effective skills strategy when there is no agreed vision or policy framework for the sector as a whole.

Within this context, however, it is clear that much has been achieved and that opportunities exist for co-operation and collaboration between the key agencies, working within their own strategic frameworks, to deliver on key skills needs for the sector. However, it is clear that in order to maintain the momentum of growth and meet the needs of the industry as it moves forward, a clear strategic framework, underpinned by adequate resources, will support the key agencies to do more and drive more potential in the sector.

3.6.2 Stakeholder Opinion in respect of Government Policy/Strategy

Our stakeholder consultation process is outlined in Section 1 above; here we indicate the key findings from that consultation with *specific reference to policy and strategy for the audiovisual industry and for skills development in respect of the sector*.

Many stakeholders expressed the opinion that there is very considerable potential for the creation and maintenance of a large number of sustainable, high-quality jobs within the screen industry in Ireland, but that there is no common vision for how the industry might develop. The vast majority of stakeholders were of the opinion that this is a matter for Government, and that a comprehensive policy should be developed covering every organisation with an interest in the audiovisual sector – Central Government Departments, State Agencies, broadcasters, independent producers, industry bodies, and others.

Many stakeholders expressed the belief that an effective audiovisual skills strategy will be highly dependent upon the development of an overall vision and strategy for the screen industry. There is a considerable desire across all stakeholders for both – a compelling strategy for the industry, and a clear strategic plan for skills development to enhance and strengthen the Irish screen industry. Again, it was felt that a single strategic plan covering every organisation involved in skills development would be essential, and should be binding on all involved with the audiovisual sector – Government departments and agencies, educational institutions, job creation bodies, broadcasters, industry, representative bodies, unions, and other interested parties.

Political support and direction was also seen as being of major importance. A significant number of consultees expressed positive views regarding the recent involvement of the Department of the Taoiseach in areas such as studio space and taxation incentives, and in relation to the level of interest shown by the Taoiseach in developing and growing the screen industry, many felt that this level of central support from the Taoiseach and his officials was essential on a continuing basis.

It is also noted that the Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs is commissioning an economic analysis of the audiovisual sector in Ireland. This is a very positive development and we would expect that the outcome of that analysis will inform any future development of a vision and strategy for the screen industry.

3.7 Policy/Strategy Findings and Recommendations

3.7.1 Findings: Policy Context

In summary, the principal findings in relation to the national policy framework are as follows:

- There is currently no national skills strategy for the audiovisual industry, and incomplete or ineffective implementation of previous national strategy or policy recommendations for this area;
- Strategic actions have been successfully delivered by key agencies including the BAI, the IFB, and Screen Training Ireland;
- National policy for education and training for the industry is fragmented, not fully implemented, and has not been reviewed or updated at a national level in recent years;
- Stakeholders have a clear desire for a national policy framework;
- The commissioning of an economic analysis of the audiovisual sector is a very helpful development which can contribute to a national vision and strategy for the industry.

3.7.2 Recommendations: Policy Context

Our recommendations in relation to the current policy framework for skills development for the audiovisual industry are as follows:

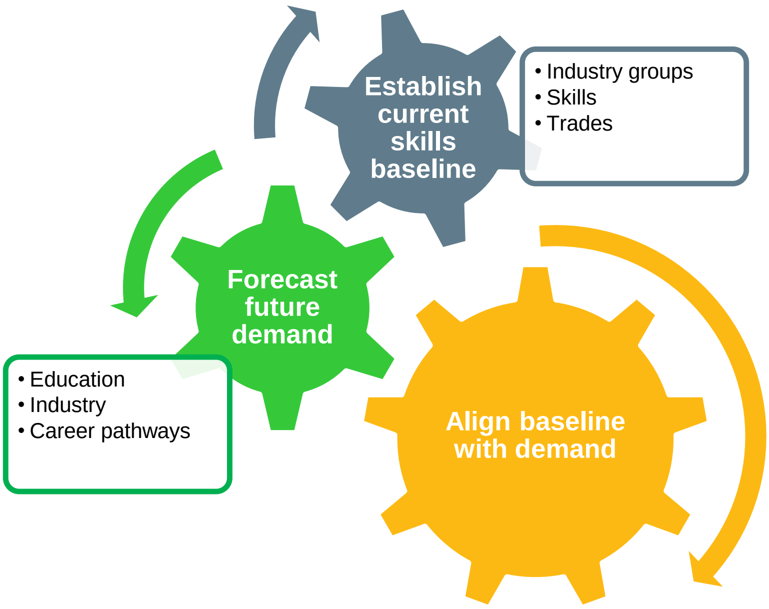
- **There is a requirement to develop a national strategy for the screen industry;**
- **A new policy framework for training and skills development for the audiovisual sector should be developed in line with national strategies for screen industry, for higher education, and for skills development.**

3.8 Translating Policy into Planning

The fundamental requirement is to develop a strategy for skills development based on the **current baseline**, the **future demand**, and the **alignment between the two**.

Within this model, developing a clear understanding of the current skills baseline is a fundamental prerequisite, covering all aspects of the audiovisual industry, all subsectors, all trades and support functions, etc. It is important to know how the industry is populated and by whom, and for the skills and qualifications are relevant to the roles that they fulfil and the jobs they perform.

Understanding current and future demand for skills development is another essential prerequisite, in relation to the needs that people will have within the industry for developing, maintaining and enhancing the skills they need to perform their current roles and to help develop their future careers. At a macro level, the needs of industry must also be properly understood – for example, if the screen industry is to grow, how many more screenwriters or directors will we need by 2020, and what is being done to ensure that they will be in place?



The final part of the model is to align the baseline with forecast future demand, and to begin to identify gaps in current provision and skills deficits that need to be addressed. This use of a supply-demand model provides a clear and simple basis for future planning in a rational and evidence-based manner. Fundamentally, reliable data will be required on both the demand and supply sides of the equation if this planning is to be effective; at present, as will be reported in the following sections of this report, there are data deficiencies on both sides.

4 Demand for Education, Training, and Skills Development

4.1 Assessing Current Demand

4.1.1 Introduction

In order to assess the demand for education, skills, qualifications, and training in respect of the audiovisual sector, the ideal would be to use current industry employment and activity figures, together with key trends and anticipated growth or contraction figures – for the sector as a whole and for the areas within it that might grow faster or slower or respond to different trends – as well as information on, for example, the numbers in different roles in the industry and the rate at which these are joining or leaving the sector. We set out to establish the current demand by seeking this type of information.

4.1.2 Approach

To achieve this, we sought up-to-date industry data on employment numbers, roles, growth trends, and so forth, but little or no hard data exists to support this kind of analysis. To gain an understanding of the key issues affecting the demand for audiovisual industry skills development, we drew on the findings of the stakeholder consultation, the purpose of which was partly to validate existing information, and/or to fill in the gaps in relation to data not readily available in respect of demand for skills development in the sector.

As outlined in Section 1.4.1, those consulted included statutory bodies, including Government Departments and agencies; industry associations and guilds; trade unions; broadcasters; regional hubs; film festival representatives; and others. The consultations were a mix of face-to-face and survey participation. The full list of stakeholders consulted is in Appendix 1.

4.2 Context

As indicated above, a starting point to establish the baseline of current demand for skills development would normally be the current employment numbers, ideally with a breakdown of how many are employed in the various different roles within the industry. By using current employment and activity data for the industry, we can develop an assessment of the kinds of skills, qualifications, experience, etc., required to effectively equip those entering and progressing within the sector. However, there is an absence of definitive information on the numbers employed within the audiovisual industry. This is due to a number of factors:

- There has not been any recent or ongoing industry or educational census or survey to track the numbers working in the sector (such as that undertaken by Creative Skillset in the UK: see Box 4.2 below for details);
- The nature of screen content production, its funding, and the structure of work within this sector lends itself to serial short-term contract employment rather than permanent jobs within companies;

- There is a very wide range of roles within the audiovisual sector, each requiring different sets of skills and qualifications, presenting a considerable challenge to the assessment of the quantum of skills needs for the sector as a whole;
- Many in the sector operate as self-employed freelancers for the same reason;
- Some work in paid roles only once or twice, such as scriptwriters or directors, and do not continue to be involved;
- There are roles within the industry that are not exclusive to the audiovisual sector, such as trades positions (e.g. carpenters) and business support roles: employees in these roles can and do move between industries;
- The definitions of roles within or related to the sector can present challenges, especially when aspects of the ICT, administrative, and business elements of the industry are considered, along with supporting services.

Box 4.2: Creative Skillset Employment Census

Creative Skillset is the UK industry skills body for the creative industries. It works across film, television, radio, fashion and textiles, animation, games, visual effects, publishing, advertising and marketing communications. It works with and for the Creative Industries to develop skills and talent, supporting productivity and employability.

Creative Skillset undertake a census of employment in the creative industries every 3-4 years, covering employment numbers, demographic profiles, proportion of freelancing, geographic profile of activity, and diversity within the creative industries in the UK. This is based on response rates of more than 50% to census surveys sent to c.20,000 entities.

Additionally, a workforce survey is carried out every year, eliciting information on those entering the industry, on career progression, training and development needs, diversity, and employment status.

The depth and breadth of the information gathered by Creative Skillset is extremely useful in planning for industry skills needs for the UK creative industries.

Existing sources of information on screen industry employment in Ireland are both dated and difficult to interpret in terms of consistency. The 2011 *Creative Capital* report cited research by PricewaterhouseCoopers that indicated the industry-related employment in 2007 to be 5,440, a dramatic increase from the 1991 figures of 640.

Ibec's Audiovisual Federation released a review in 2011 which noted that 261 productions for screen in 2010 had generated more than 26,500 "placements" in employment, translating to 1,695 full-time equivalent jobs.

The dearth of reliable information on the numbers working in the industry is a considerable challenge to the establishment of robust demand data. However, whilst there is little quantitative data on the precise numbers working in the industry, and the breakdown of these across the varied roles within the sector, we can consider the qualitative material gathered during our consultation exercise in relation to the demand for skills development.

4.3 Stakeholder Assessment of Demand

4.3.1 Preamble

The following is a high-level summary of some of the key themes arising from the stakeholder consultation in respect of the demand for skills and education in the sector.

4.3.2 Lack of Co-ordination across Sector re Training and Development Provision

A theme highlighted in our consultations was the perceived lack of co-ordination across the sector in relation to the provision of training and development. Whilst those consulted are very happy with the role of Screen Training Ireland in terms of its provision of training, many would like to see it, or another body, mandated and resourced to take a leading strategic role in the co-ordination of training and development for the audiovisual sector.

Some stakeholders also expressed a wish to see more co-ordination and collaboration with the county-based film boards and commissions.

Overall, there is a clear call from the industry for a strategic approach to education and training for the sector, and the proposed strategic framework (arising from this assignment) is considered a welcome development in this regard.

4.3.3 Demand for Additional Training and Skills Development

The consultations with stakeholders indicated strongly that there is ongoing and increasing demand within the industry for more training and education opportunities, both from the perspective of ensuring a supply of suitably qualified new entrants to the sector and in respect of those already working the sector seeking to maintain, upgrade, or acquire new skills and expertise.

This demand encompasses existing access to training and learning opportunities, of which the sector would like to see more, and the development of training and education in new skills. Whilst there appears to be demand for additional opportunities for training and development in a wide range of roles, building on whatever is already available from various providers, stakeholders indicated a particular concern about access to ***creative talent development*** (i.e. for writers and directors); ***training in relation to new and emerging technologies***; ***business skills for the sector*** such as raising finance, legal and copyright issues, people management, etc.; and ***subsector-specific training for animation, VFX, and games***, for example.

There is also demand for opportunities to access training and learning more easily from regions other than Dublin and its hinterland. Stakeholders cite difficulties in accessing training scheduled without reference to travel times, for example, even where they are willing to travel to participate.

4.3.4 Breadth of Roles and Skills Requirements in Sector

Stakeholders would like to see more awareness of opportunities that exist for graduates of courses that would not directly relate to the audiovisual sector, and of the breadth of skills needed in the industry, many of which are not what might be considered at first glance to be relevant.

Crowe Horwath.

Examples include roles in relation to the business and entrepreneurship aspects of production companies; marketing; trades qualifications needed for set construction; finance qualifications for production accounting; and increasingly, computer/ICT skills for a wide range of roles that formerly would not have been required or would have required different skillsets.

4.3.5 Challenge to Address Creative Skills Development

It was identified by many stakeholders that there is demand for more and better training and development for the creative roles within the industry, in particular writing and directing. The current structures are felt by many to be inadequate or ill-suited to the nature of the skills development needed for such roles. Stakeholders recognise the challenge in developing skills within these roles but consider that effective skills development for the creative side of the industry is critical to future success in the production of high-quality creative screen content.

4.3.6 The Role of Commissioning

An issue frequently raised by stakeholders was the extent to which public service broadcasters in Ireland, and particularly RTÉ, commission drama series: other than the long-running soap *Fair City*, RTÉ has tended to limit its commissioning to a small number of drama series each year, typically of four to six episodes. For example, in 2015, RTÉ commissioned fewer than 12 hours of independent drama from external production companies – Series 3 of *The Fall*, the 5-part series *Rebellion*, and the second series of the children's drama *The Spooky Stakeout*. [2]

This was felt to have a negative impact on the industry in terms of severely limiting the capacity for young writers, directors and producers to have an Irish-based outlet for their talent, which in turn makes courses in these fields less attractive. Many respondents referred to the comparative situation in the UK, where the BBC and Channel 4 in particular were praised for commissioning large amounts of television drama (proportionately much more than RTÉ even when allowing for their greater scale), as it opens up much more opportunity for younger writers, directors and producers to develop a career path.

From our discussions with a number of its senior executives, it is clear that RTÉ is sympathetic to these views and would wish to be in a position to commission more drama, but is constrained as a result of budgetary considerations. Many stakeholders external to RTÉ expressed the view that they would prefer to see RTÉ commissioning fewer programmes in areas such as light entertainment in favour of more drama, although they do understand the comparative costs involved. It is also recognised that significant funding for television drama comes through the Sound and Vision Scheme administered by the BAI – for example, figures for the latest funding round show just under €2m awarded to 9 TV drama productions destined for broadcast on RTÉ One, RTÉ2, TV3 and BBC2.[3]

The key issue here is the scale and extent of television drama, and the general desire amongst the vast majority of stakeholders to see more TV drama as a vehicle for creating opportunities for young producers, writers, and directors. We raise this issue because of the

2 Source: *Independent Productions Annual Report 2015*, RTÉ. It should be noted that RTÉ includes drama within a composite category of "Drama, Sport & Young Peoples" and does not report separately the commissioning of drama. We have analysed the 17 commissions, totalling 80.2 hours of TV output, reported by RTÉ under this composite category and have concluded that this includes 3 drama series, as reported above, and 14 which fall within the genres of sport or young people's programming.

3 Source: BAI 2016 - Broadcasting Funding Scheme, Sound & Vision 3, Round 26 Successful Applications

importance to make sure that there is an outlet for newly acquired audiovisual skills to be put to effective use within the industry in Ireland, and it re-emphasises the requirement for effective linkages between education and training providers and industry.

4.4 Findings and Recommendations

4.4.1 Findings: Demand for Education, Training, and Development for the Audiovisual Sector

The key findings in relation to the demand for skills development for the audiovisual industry are as follows:

- There is very limited hard data available to estimate the extent of demand for skills development, training, and education for the audiovisual industry: no strategy exists outlining the expected employment numbers for the sector overall, and no industry census has been undertaken for several years;
- There is a valuable exercise being undertaken by Screen Training Ireland to map the variety of roles within the audiovisual sector and to set out the key skills, competences, and qualifications associated with each. This will be very useful material, and if combined with projected employment and activity data for the sector, will enable a clear assessment of the demand for skills and the need for education and training to provide these.

4.4.2 Recommendations: Demand for Education, Training, and Development for the Sector

Our recommendations in relation to the demand for education, training and development for the audiovisual industry are as follows:

- **A detailed census should be undertaken across the industry, similar to the work undertaken by Creative Skillset for the creative industries in the UK:**
  - This census should include a combination of hard data and qualitative / descriptive information in a common format to facilitate analysis;
  - The data should include output of work on role mapping by Screen Training Ireland;
  - Numbers of employees, freelancers, trainees, etc., and the roles in which they are working should be captured;
  - Gender, disability, and other diversity measures should be included;
  - Demographic and geographic profile of workforce and activity should be captured;
  - The first census should be undertaken in 2017 and should be updated annually thereafter.

In relation to the above recommendation, it should be noted that the economic analysis of the audiovisual sector in Ireland being commission by the Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs states in its terms of reference that the output from the study should:

Provide baseline data on: -

A. *The economic size of and employment in the sector.*
B. *The direct impact of the sector on the Irish economy.*
C. *The percentage contribution of the sector to GDP and employment.*
D. *Public funding for the sector including from TV licence fees and tax relief schemes.*

Develop a robust data gathering framework for the audiovisual screen based creative industries in Ireland that would enable annual statistical reporting on A to D above. [4]

This would appear to be very much in line with our recommendation above, and we would suggest that this recommendation is factored into the work of the team appointed to undertake the economic analysis.

4 Source: Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs – terms of reference for economic analysis of the audiovisual sector in Ireland (2016)

5 Forces of Change

5.1 Overview

Along with the current demand, the forces of change within the audiovisual industry internationally and in Ireland must be taken into account when considering how these may impact on the industry overall and the associated demand for skills and training.

5.2 Current Forces for Change in the Audiovisual Industry Globally

5.2.1 Key Features

The audiovisual industry has undergone substantial change in recent years, and the pace of change continues to accelerate. These changes have impacted on the nature of the roles within the industry and the skills requirements for these. Looking to the global industry, we can identify some key drivers for change that are already and will continue to influence the audiovisual industry and the skills demands therein within Ireland.

5.2.2 Convergence

Convergence is the term describing the fact that a range of content types (audio, video, text, pictures) and services are now distributed over different digital networks (fixed broadband, mobile, satellite, cable, digital terrestrial) to a wide range of devices (televisions, computers, tablets, phones, etc.). Likewise, single devices such as mobile phones can now perform a wide range of functions, including receiving digital images and videos, internet streaming, and the "traditional" telephone functions.

According to Ofcom[5], *"convergence has been changing the communications landscape for some years and is continuing apace".* They conclude that the boundaries between different types of networks, services, and devices will continue to break down, which will be beneficial to consumers, but presents challenges to those creating and delivering content. For example, despite broadcast television remaining strong in the market, some of this is being consumed on "catch-up" services on mobile devices or computers using internet connections.

Convergence will continue to impact on the development, distribution, and consumption of screen content and this will be a key force for change in the AV industry.

5.2.3 The Digital Environment

A clear driver for change in the industry has been the shift to the digital environment. Related to convergence (indeed, the reason we are seeing convergence on this large scale), digital technology has affected almost all industries dramatically, and indeed everyday life. The Creative Skills Europe report[6] identifies the digital environment as a key trend affecting the AV sector in Europe, suggesting that the multiplatform, converged, digital environment is the most important aspect of the "new reality".

---

5 Ofcom (2014) *Market infrastructure report*. Available at: http://stakeholders.ofcom.org.uk/market-data-research/market-data/infrastructure/infrastructure-2014/network-convergence/

6 Creative Skills Europe (2016) *Trends and skills in the European audiovisual and live performance sectors*

The impact of the digital world requires new creation and production skills for the development of platform-specific content in additional to that for traditional media, along with “pure” IT-type skills and additional skills in relation to management of intellectual property, collaborative platforms, and so forth.

5.2.4 Economic Context

According to the Creative Skills Europe report, the effect of the economic downturn continues to shape the audiovisual sector and working within it. An increase in contracted employment patterns – self-employment and project-based work – has been seen across Europe in recent years, fuelled by the economic crisis. This has driven the need for more multi-skilling to counter the precariousness of the working environment.

5.2.5 Virtual Reality (VR)

Virtual reality technology has already significantly impacted on the games industry and is likely to make inroads to the audiovisual industry within the coming years. Within the increasingly convergent environment, we may see VR joining other forms of visual creativity accessible to consumers. This will require new skills and adaptation from those in the AV industry.

5.2.6 Financial Models

An implication of the drivers set out above is their impact on the industry’s use of new delivery mechanisms, technology, devices, and new distribution platforms to drive the monetisation of content.

- One example approach is the micropayment model, utilised so successfully in the games and gaming sector, where the product is often given away free, or at very low cost, to engage the client base, in return for low level buy-in from players, with the revenues being driven by high-volume rather than by high tariffs / price points.

5.3 Irish Audiovisual Sector – Forces for Change

Within the Irish sector, we can see evidence of many of the forces for change identified above, such as convergence and the digital environment. For example, subscription video on demand (SVOD) operators are now having a positive disruptive effect on both production and distribution. There may be opportunities as mentioned above to access different forms of funding and distribution channels in the wider convergent market.

The recent decision of the UK to leave the European Union (Brexit) may have an impact on the Irish industry. There is uncertainty around what this may mean: for example, the UK may offer substantial incentives to attract activity to the jurisdiction in the absence of EU controls on State aid. On the other hand, Ireland’s membership of the EU and the associated freedom of movement of workers may remain attractive to inward investment. The capacity of Irish producers to access additional skills from Europe may be enhanced if the UK moves to restrict EU worker migration.

6 Current Provision

6.1 Training Providers

6.1.1 Screen Training Ireland

Screen Training Ireland, part of the Irish Film Board, is the national training and development resource specifically created for Ireland's film and television industry. Screen Training Ireland works with the industry to identify skills needs and professional development opportunities for those working in the industry. It works with industry professionals, both locally and internationally, to identify, design and deliver training for Irish professionals. Training programmes are offered to practitioners and companies to enhance their expertise in film, television, animation and interactive screen content. Screen Training Ireland's approach is based on partnership.

Its aim is to:

- Develop storytelling skills (visual and narrative) across multiple genres and platforms and promote creative collaboration;
- Develop production and technical skills enabling Irish content creators compete at the highest level internationally;
- Raise the bar of business acumen and entrepreneurship.

Screen Training Ireland was established in 1995 to provide continuing training and career development opportunities for professionals working in the screen sectors. Originally under the remit of FÁS, with funding from the Irish Film Board, it was transferred in 2013 to the IFB. It employs six staff currently and its governance is overseen by the IFB.

Screen Training Ireland is currently rolling out training on a national level. In terms of the training offered by Screen Training Ireland, skills needs are categorised into three core areas:

- Creativity and creative collaboration;
- Production and technical skills;
- Business and enterprise.

Within these core areas, training opportunities are offered in the following:

- business and enterprise training to enhance expertise in business management and strategy development;
- masterclasses and specialised programmes to assist experienced professionals avail of advanced development opportunities;
- programmes to meet long term development needs in the creative areas of script, directing and producing;
- short focused courses to meet updating, upgrading and transfer skills needs of professionals;
- pathways to progression for technical professionals through traineeships and bridging programmes;
- international training and the Bursary Award scheme – enabling experienced professionals to participate in training opportunities on the international circuit and

where necessary design a development opportunity customised to meet their individual needs.

The model of training also encompasses mentoring, shadowing and structured traineeships.

Screen Training Ireland is funded from a number of sources: core funding from IFB (€600k), fee income (€75k), EU (€270k) and other partnership income.

Screen Training Ireland occupies a central and crucial role at the centre of training and skills development for the AV industry in Ireland. It is well-regarded by stakeholders, with a strong reputation for quality and for engaging industry. The organisation is seen as a key link between the industry and skills development provision, with deep understanding of the needs of the sector. Stakeholders would like to see Screen Training Ireland resourced in a way to increase its capacity to do what it does very well.

6.1.2 Broadcasting Authority of Ireland

As mentioned in the early part of the report, the BAI has a specific legislative remit in respect of skills for the sector. It fulfils this by funding training and development initiatives for the audiovisual sector. Funding is available

- for networks, who then deliver appropriate training and development initiatives with the grants provided (for example: SPI, SDGI, Animation Skillnets, NUJ, Community Television Association, Women in Film and Television, and Creative Europe Desk Ireland);
- for specific projects or initiatives: such as Red Rock Training Programme; Red Rock Writing Academy; and Big Stories for the Small Screen

The BAI investment in training and skills development in the audiovisual sector (not including radio and research) is approximately €190,000. The use of network approaches and collaborative initiatives with other agencies, such as the Irish Film Board, leverages the investment to generate significant value in training and skills development for the sector.

6.1.3 Skillnets: Animation Skillnet and Gréasán na Meán

Skillnets are networks of companies within a region or sector with similar training needs, funded to deliver subsidised training to address current and future skills needs for businesses. Skillnets was established in 1999 and is funded from the National Training Fund (NTF) through the Department of Education and Skills (DES). The training provided within Skillnets is funded by member companies and by the National Training Fund. Two key Skillnets are operating within the AV sector in Ireland:

Animation Skillnet

Animation Skillnet was established in July 2013 to address the current and future vital skills needs of the animation, games, and VFX sectors in Ireland. It runs regular (short and long) subsidised training courses for member companies and freelancers working in the sector. Courses are bespoke, specialist courses designed and delivered by industry professionals to address the needs identified by industry.

Animation Skillnet offers subsidised (up to 30%) in-house training solutions to companies (for current staff or new recruits). The definition of training that qualifies for the subsidy can be broad and can include on-the-job training, placements, networking etc. They also offer subsidised rates to high level personnel in studios to attend key international events (conferences/markets etc.).

They fund, organise and/or support key conferences/networking events for the sector, including the VFX and Animation Summit, Digital Biscuit, Animation Dingle, the Animation Art Show, Pegbar and Women In Animation Ireland to name a few. They are responsible for the Bridge Programme in partnership with Dublin Business Innovation Centre, Screen Training Ireland, and the Irish Film Board. The Bridge is an intensive 8-week programme aimed at producing “Industry Ready Specialists” for the animation, games, and VFX sectors in Ireland. In collaboration with Screen Training Ireland we run the 12 month Animation and VFX Traineeship Programme for the animation and VFX sectors in Ireland.

Gréasán na Meán Skillnet

Gréasán na Meán Skillnet is based in Connemara, within the Gaeltacht region, and offers creative and practical skills for storytelling and communications in print, radio, television, and web. Through innovative training initiatives, the network:

- Offers unemployed graduates new skills which will give them the knowledge and practical skills they need to secure future employment;
- Provides training which focuses on new and emerging needs in the media industry, for current and future members;
- Identifies and accesses new products and market development across multi-media platforms.

The aims and objectives of the Gréasán na Meán Skillnet are to:

- Continue to develop innovative training for the media industry;
- Deliver continuous improvement on training and best practice
- Ensure the training meets network member strategic goals;
- Support network members’ needs;
- Promote network members’ profiles;
- Increase networking opportunities between member companies and the other networks;
- Foster the media industry in the Gaeltacht.

The Skillnets are excellent examples of industry working together with the statutory sector to address skills development needs. The Animation and Gréasán na Meán Skillnets are well-regarded by stakeholders, both in terms of the quality of training provided and the model of working together with industry and other stakeholders, such as Screen Training Ireland, to deliver the appropriate training and development to support the industry’s needs.

6.1.4 Other Training Providers

There are a number of other providers of training within the audiovisual industry. Some of these include:

- **Filmbase** – a member-led organisation which offers training and a Masters level course as well as other services.

- **Bow Street Acting Academy**, which was founded by filmmakers as a means of collaborating and to share ideas, and has since evolved into a training centre for screen acting.
- **Galway Film Centre** – a not for profit, member-based organisation which is dedicated to the development of film in the West of Ireland and supports filmmakers though education and training as well as equipment provision.
- The **Cork Film Centre** provides training for filmmakers, video artists, and animators.

6.2 Education Sector Providers

6.2.1 Higher Education Institutions

Higher Education Institutions (HEIs) includes the Universities and the Institutes of Technology (IOTs). IOTs offer courses with qualifications starting at Level Six on the National Framework for Qualifications. Many of the IOT courses offer both Level Seven and Level Eight courses in the same subjects, with some Level Nine courses also offered. The university sector offers a range of courses starting at NFQ Level Eight and go up to NFQ Level Ten. Some institutions offer specialist centres in screen production education, such as the Huston Film School, part of the National University of Ireland, Galway, the Dún Laoghaire Institute of Art, Design, and Technology, and the Lir National Academy of Dramatic Art within Trinity College Dublin, which also has formal ties with the Royal Academy of Dramatic Art.

6.2.2 Colleges of Further Education/Technical Institutes

The Colleges of Further Education offer education and training after second level but are not part of the third-level system. There is a large number of Post-Leaving Cert (PLC) and Further Education Colleges offering courses, along with Adult Education Centres. Awards from Further Education Colleges range in most cases from NFQ Level Three to NFQ Level Six. Some colleges provide courses in conjunction with universities that offer a higher level of qualification upon completion.

6.3 Education Sector Courses

6.3.1 Overview

We undertook a high-level mapping of course provision in the education sector: we included courses that had a specific relevance to the audiovisual industry as listed below, but did not include courses that related to more generalised skills such as financial or management qualifications. In total we identified **216** courses across **53** providers. Depending on how one defines “relevant” courses, this figure could be revised downwards, but indeed could also be increased. It is evident, at least, that there is a very large number of courses offered by a substantial range of providers that at least partially relate to or are marketed as relevant to the audiovisual sector.

The main course types with specific relevance to the audiovisual sector offered by education providers include the following:

- Acting
- Animation
- Journalism
- Media

- Broadcasting
- Creative
- Design
- Film
- Production
- Visual Communication
- Games Development

6.3.2 Provider Types

The breakdown of courses by provider type is set out in the table below. The College of Further Education sector offers the highest number of relevant courses. This is followed by the Institute of Technology sector, the University sector and the Private Colleges sector.

NFQ Level	Number of courses	Percentage
Colleges of Further Education	94	43.5%
Institutes of Technology	66	30.6%
Universities/Associated Colleges	33	15.3%
Private Colleges	22	10.2%
Other Providers	1	0.5%
Total	**216**	**100.0%**

6.3.3 NFQ Levels

When we look at education sector courses by **NFQ level**, we see that most are Level 8 (primary degree) courses, followed by Level 5 and Level 6 courses.

NFQ Level	Number of courses	Percentage
Level 5	63	29.2%
Level 6	35	16.2%
Level 7	18	8.3%
Level 8	69	31.9%
Level 9	24	11.1%
Level 10	7	3.2%
Total	**216**	**100.0%**

6.4 Development of Regional Clusters

From our analysis, as we have reported, it would appear that there is a significant lack of co-ordination in the provision of third-level education courses relating to the audiovisual sector, as suggested by the number of courses on offer across multiple institutions and the apparent overlap between courses. (We make this comment on the basis of a high-level assessment of what is on offer, rather than a detailed examination of course content, syllabus details, etc.)

We note that the HEA is currently leading the development of Regional Clusters within the higher education sector, under the *National Strategy for Higher Education to 2030* (published

2011). This initiative, which is now at a regional implementation phase running from 2015 to 2020, places great emphasis upon the establishment of greater cohesion amongst HEIs through regional dialogue and planning, led by the HEA. Naturally, this is a very welcome initiative and ultimately is intended to achieve better strategic planning and resource allocation, and to eliminate duplication or gaps in provision.

From the perspective of the needs of the audiovisual sector, we offer a number of comments which are designed to feed in constructively to the regional clusters initiative, as follows:

- This initiative is primarily focused at this stage on broad strategic issues and the relationship between HEIs, rather than the lower level considerations of which institution runs which course – and as the strategic issues will inevitably take some time to resolve, the more detailed matters which are the focus of our report may need to be fast-tracked in some way;
- The fundamental issue relating to courses which serve the audiovisual sector is, in our view, the lack of strategic vision across the higher education sector regarding the needs of the industry (which, of course, are not themselves clear), and as a result the proliferation of courses which overlap, or which do not appear to meet any defined need, or which are not integrated into the industry – as a consequence, whilst part of the job of the clusters will be to work up the strategy, we also foresee a clear need to rationalise provision. In an environment where funding is closely tied in with student numbers, and where HEIs may regard courses related to film and screen to be attractive to prospective students, rationalisation of provision will almost certainly be seen as challenging.
- As recognised within the regional clusters initiative, there is a clear need to ensure that there are strong links in place between education and industry. This is particularly relevant within the audiovisual sector, as not all HEIs will have the capacity to provide courses which are attuned to the needs of a dynamically-changing industry, and which are often dependent upon the availability of modern equipment and technology. Experience to date, and feedback from stakeholders during the consultation process conducted during this study, would suggest that those HEIs which maintain active links with the audiovisual industry, and which are well-resourced, are seen as having a valuable role to play within the development of the industry, whereas others – which are often smaller and less connected with the industry – are seen as being peripheral.

Our view, therefore, is that whilst the development of regional clusters will almost certainly play a very important part in helping to resolve the issues we have reported with regard to education course provision, this is merely part of a wider solution rather than a solution in itself. Other recommendations made in this report take account of the regional clusters initiative and can provide a broader strategic framework for the audiovisual sector which can include development of the clusters.

6.5 Stakeholder Opinion – Education and Training

When commenting on the provision of education and training courses, industry and agency stakeholders made frequent reference to fragmentation of such provision, in particular in relation to education provision. Many stakeholders commented critically in respect of their concerns regarding such matters as:

- The number of further and higher educational institutions offering courses related to the audiovisual sector;

- The number of courses on offer;
- The lack of coordination in respect of the provision of educational courses;
- The lack of connection between many of the education providers and the screen industry – whilst some educational institutions work in a highly collaborative manner with industry (e.g. through internships, sharing resources, visiting lecturers, etc.), others appear to have little connection with the screen industry which may itself have no local presence.

The general consensus among industry and agency stakeholders was that it would be preferable to have a smaller number of educational institutions delivering a more concentrated range of courses specifically relevant to the needs of the industry now and in the future. It was also felt that this needs to be properly coordinated at national level in order to ensure that best use is made of scarce resources and limited budgets, and that centres of excellence should be established which maintain very close links with industry.

It should be pointed out that there is very little new in our findings above: most of these issues have featured in various reports over the last two decades, but still the situation remains characterised by oversupply, lack of coordination, and fragmentation. This suggests that resolute action is required if change is to be achieved.

On a more positive note, many stakeholders commented favourably regarding the role of Screen Training Ireland, which was felt to be playing a constructive part in skills development within the industry.

6.6 Education Sector Opinion

We conducted a survey of education providers, seeking quantitative and qualitative information on the provision of education courses for the audiovisual industry. Whilst too few responded (16 providers) to enable us to validate course or student numbers, a cross-section of institutions did participate and some valuable opinion was contributed. A summary of the findings is contained in Appendix 3. Broadly, respondents called for overall investment in third-level sector needs to be increased; support for a closer relationship with industry, including development of apprenticeship schemes; and better progression pathways from the further education sector into higher education.

6.7 Key Findings and Recommendations

6.7.1 Findings: Provision of Education, Training, and Development for the audiovisual Sector

The principal findings from our research are as follows:

- Training provision from Screen Training Ireland, the BAI, and the Skillnets, among others, works well and is well-regarded; however, there is potential to provide more and to roll out these successful models on a wider scale with additional resources;
- There is some data available on provision of relevant education courses, albeit without detailed student numbers, places, etc., but clear evidence of a multiplicity of courses from a wide range of institutions, reflecting similar findings from previous studies and policy reports.

- Provision in the education sector is fragmented and does not appear to align to any clear strategic vision for or skills requirements of the audiovisual sector. This is also complicated by the very wide range of roles in the audiovisual industry and the associated skillsets and qualifications required or desirable to take up and succeed in such roles.
- There is a wide variety in course type, content, approach (from academic to vocational or technical), and institution or organisation type.
- There is a lack of coordination in course provision – whilst needs assessment takes place as part of course planning within the third-level sector, it tends to relate to individual HEIs rather than the industry as a whole at regional or national level.

6.7.2 Recommendations: Provision of Education and Training for the Audiovisual Sector

We present below a series of key recommendations for actions to address the above findings:

- **The courses most relevant to the audiovisual sector should be identified:**
  - Whilst we have identified a wide range of courses, not all are directly pertaining to the audiovisual sector – it is an important first step to focus on the provision of courses deemed most relevant by reference to the data on demand within the industry.
- **There is a clear need for a detailed census to be undertaken, covering the relevant courses:**
  - Census should include a combination of hard data and qualitative / descriptive information in a common format to facilitate analysis;
  - This process should ideally include co-ordination with the HEA and Solas in relation to the entities they fund;
  - First census should be undertaken in 2017 and should be updated annually thereafter.
- **Models of good practice within the training sector should continue to be supported and should be considered for expansion in scope and capacity.**

7 Assessment of Linkages

7.1 Overview

In this section, we consider the linkages that exist between the education and training provision sectors and the audiovisual industry, and the effectiveness of these. We undertook desk research to try to identify formalised linkages between the education and training sectors and the audiovisual industry. We also consulted widely with the stakeholders in relation to this issue, both in the face-to-face engagements and the surveys to industry stakeholders and the education sector, and our findings reflect the key themes arising from these consultations.

7.2 Assessment of Linkages

7.2.1 Industry Stakeholder Views

A key issue for many industry stakeholders is a perception that there is a gap between the educational institutions providing courses in sector-related disciplines and the industry itself. By contrast, in the training sector, Screen Training Ireland and the Skillnets, as examples, have good linkages to and engagement with industry. This is expressed in a number of ways:

- In relation to training, stakeholders perceive that Screen Training Ireland is attuned and responsive to industry needs, with good links to industry and effective use of these relationships to increase the impact of their work.
- Formal industry-training links such as those within Skillnets are seen to be effective, with particular reference to the Animation and Gréasán na Meán Skillnet models.
- Many feel that the capacity of the education sector to keep up to date with industry trends and skills needs is limited and that consequently there can be a mismatch both in respect of the types of qualifications offered and the content of courses, such that those graduating lack the necessary skills and competences required by potential employers in the sector.
- Related to this is a perception that educational institutions by their nature can have difficulty in responding in a timely and flexible manner to changing industry requirements.
- The absence of sufficient and effective links between education providers and industry is also considered to contribute to this issue: stakeholders would like to see more formalised interaction such as work placements and structured pathways.

> ***Quote from industry survey participant in respect of links:***
> "Very little joined up thinking in the industry generally."

7.2.2 Education Sector Stakeholder Views

> ***Quote from education survey participant in respect of links:*** "There isn't a huge amount of connection between the industry and the colleges."

In the survey for education providers, we asked their views on the linkages between the education sector and the audiovisual industry. Whilst almost all respondents indicated that they perceived the links between their individual institution and the audiovisual industry were working well, they did not perceive that the overall co-ordination between the education sector as a whole and the industry was effective. In both cases, respondents felt that more links were needed and that these needed to be more formalised and less reliant on individual arrangements.

7.3 Findings and Recommendations

7.3.1 Findings: Links between Education/Training Sector and Audiovisual Industry

Our findings in relation to the linkages between the sectors providing education and training and the audiovisual industry are as follows:

- There are good and effective linkages co-ordinated by bodies such as Screen Training Ireland and other initiatives such as the Skillnets model being implemented by Gréasán na Meán in the West of Ireland, and Animation Skillnet for the animation and VFX sectors.
- Links between the education sector and industry are strong in some locations (for example, at individual HEI level) but weak or non-existent in others. Overall, the position is very patchy;
- Other co-ordination is limited and ineffective, which reflects the fragmented nature of provision and the absence of national strategy and policy guidance.

7.3.2 Recommendations: Links between Education/Training Sector and Audiovisual Industry

We present below a series of key recommendations for actions to address the above findings:

- **Improved coordination should be formalised between providers, both in the education sector and in training provision:**
  - This may be improved through the development of the regional clusters and links being fostered by the HEA;
  - Strategy for skills development should address ways to bring providers together in, for example, forums with each other and with industry.
- **Development and continuation of much stronger links between training and education providers and the audiovisual industry:**
  - Industry-education/training forum should be established to bring together the demand and supply sides of skills development;
  - Strengthen existing links such as those through Screen Training Ireland and the Skillnets operating in the industry.

- **Development of third-level courses should be in line with national and regional strategic priorities for the screen industry, for higher education, and for skills development.**
  - Course development in HEIs should not be entirely independent of national and regional considerations of demand for or provision of relevant courses;
  - The future skills needs of the audiovisual industry should influence the development and design of education and training courses.

8 Informing and Inspiring: Learning from International Experience

8.1 Overview

We set out here a small number of interesting or useful examples of practice in skills development in an international context. The aim is not to assume that any one model could be “transplanted” to Ireland, but to learn from and be informed by the approaches taken elsewhere when considering how Ireland should best develop a strategy for training and skills development in the audiovisual industry.

8.2 Creative Skillset (UK Sector Skills Council for the Creative Industries)

8.2.1 About Creative Skillset

Creative Skillset is the UK industry skills body for the creative industries (details appear in Box 4.2 above). Formerly centrally-funded as a semi-Governmental agency, it is a company limited by guarantee and also a registered charity. It works across the film, television, radio, fashion and textiles, animation, games, visual effects, publishing, advertising and marketing communications sectors to develop skills and talent, supporting productivity and employability. Its Board guides its strategy and its membership is drawn from senior employment and stakeholder interests from across the creative industries. Creative Skillset also operates a comprehensive, industry-endorsed programme of research about the industries and the training provision available to them, providing class-leading Labour Market Intelligence (LMI). It can claim with some merit to be the leading specialist in providing research for the creative industries in the UK. However, it now has to exist in a competitive skills market environment, pitching and tendering for skills and training project funding.

This has created a far more precarious funding context for the organisation, which has recently had to slim its core workforce dramatically, reducing staff numbers from around 120 to just 30 core staff, with the closure of the satellite offices in Wales, Scotland and Northern Ireland – this has created a skills and training vacuum in those areas, as well as a huge degree of uncertainty over the overall future of Creative Skillset itself, as it sits uneasily between large potential project contracts (which it is by no means certain of winning and delivering).

But although its future is by no means certain, Creative Skillset has shown itself to be highly proficient at securing a range of UK and EU finance for its projects (e.g. ESF), delivering significant added value to a range of creative industries companies large and small and to the freelance creative industries community, as a cornerstone of the UK’s Skills and Training landscape. Its demise (if that were to prove to be the case) would be problematic, as its beneficiaries in the UK number in the tens of thousands.

It has run a range of funding/financing schemes to provide and deliver training opportunities for the creative industries sector, a full list of which appears in Appendix 4.

8.2.2 Analysis of Creative Skillset

Strengths	Disadvantages
A particular strength of the Creative Skillset model was its devolved-nations profile. This national model with devolved local responsibility and accountability was able to customise delivery of skills training for specific regional sectoral requirements – bespoked for local conditions. Its "Tick" scheme – for approved creative industries courses in the HE and FE sector – was very well received and supported – acting as a kite-mark of quality, rigorously applying a set of stringent assessment criteria, with full industry support, involvement and engagement, via an extensive network of industry-approved experts, which developed its reputation as a trusted benchmark for quality in the creative industries sector.	▪ Extensive consultation can mean slow response times ▪ Census of skills needs is comprehensive but can become self-fulfilling prophecy ▪ Expensive – Creative Skillset was a major employer, with more than 120 staff at its height, which meant it carried a costly overhead ▪ Now seen as metro-centric, with the loss of the national regional offices in Wales, Scotland and Northern Ireland, creating a skills and training vacuum for the creative industries and digital skills industries.

However, as a model of a central, industry-engaged organising body for the development of strategic skills and training for the UK creative industries sector, it is a structure that could be mirrored and developed to facilitate regular engagement and dialogue on audiovisual skills development, involving Central Government Departments, state agencies, the education sector, industry bodies, broadcasters, representative groups and others. It works with employers, individuals, trade associations, unions, learning and training providers, Government and its public agencies and other key organisations, influencing and shaping policy at a governmental level (local, regional and national) and acting as a quality "kite-mark" for its skills and training programs and courses. Significantly, though, Creative Skillset does not work on an international/EU level, where there is a range of funding opportunities via partnership working.

There are several elements of the Creative Skillset model which are worth considering in an Irish context:

- Identifying the key stakeholders in the dialogue between **supply** side (education & skills/training sector) and **demand** side (industry) to create optimum conditions in which detailed and time-sensitive calibration of the supply-demand conversation can be achieved as successfully and efficiently as possible;
- An independent central body employed to act as the assessment and determining body to identify skills needs and commission provision of training – the example presented in Box 8.2 below of the make-up of Creative Skillset Cymru (CSC) national board members shows that they are drawn from both supply side (education/skills/training sector) and demand side (industry):

Box 8.2: Wales National Model – Creative Skillset Cymru (CSC): This comprises one of three Regional / Nations Management Boards, industry-driven by local/regional board of key stakeholders including:
■ Broadcasters – BBC / ITV Wales / S4C
■ Industry Representative bodies – PACT, TAC (Welsh equivalent of PACT), BECTU
■ Specific Media sector companies (large & small companies represented)
■ Other creative industries sector Reps (e.g. Animation, Games & Interactive),
■ Support Organisations (e.g. Film Agency for Wales)
■ Government Reps – for WG Economy, Skills, Education departments
■ Education Sector – HEIs, Skillset Media Academy Wales, HEFCW (Higher Education Funding Council for Wales)

8.3 Internships in the Audiovisual Sector in Belgium

An example given in the Creative Skills Europe report is that of a project designed to help young people gain professional experience in the media field. This is an initiative of *mediarte.be*, the Social Fund of the Audiovisual and film production sector in Belgium. The project offers young people an opportunity to take up an internship that both complies with employment legislation and enables the acquisition of professional competences.

mediarte.be creates the link between the graduate and the employer and ensures the quality of the internship. Internship offers are published and promoted in the mediarte.be online jobs database. Young people interested in a specific job offer apply to mediarte.be using a dedicated contact form.

If the profile of the intern matches the employer's expectations, *mediarte.be* puts the two in contact. *mediarte.be* then plays the role of 'internship sponsor', monitoring the internship over its duration and, when it ends, offering the intern practical feedback.

No intern may replace a paid employee and the educational objectives of the initiative must be respected during the internship. The objective is to counter the misuse of interns and to offer young graduates meaningful work experience.

mediarte.be have also developed an online tool that aims to offer workers the necessary knowledge to manage their careers in an informed way. The tool gives a comprehensive view of the various temporary job positions in the sector.

This initiative is interesting from an Irish perspective, given the call for additional opportunities for internships and work placements as part of pathways into working in the audiovisual industry. It bears similarities to the JobBridge initiative in Ireland, and it may be that a specific focused JobBridge programme or similar initiative could be considered for the audiovisual sector, overseen by Screen Training Ireland, who have experience in working with Animation Skillnet in respect of placements.

8.4 The Danish Experience

The success of the film industry in Denmark in recent years is evident. Danish people on average went to the cinema 2.5 times in 2015, well above the European average of 1.5 visits. Furthermore, domestically produced films were responsible for almost 30% of ticket sales, indicating a thriving domestic sector. The third-highest grossing movie of 2015 in Denmark was a domestic production, whilst the top Irish film for the same period was ranked ninth in terms of revenues.

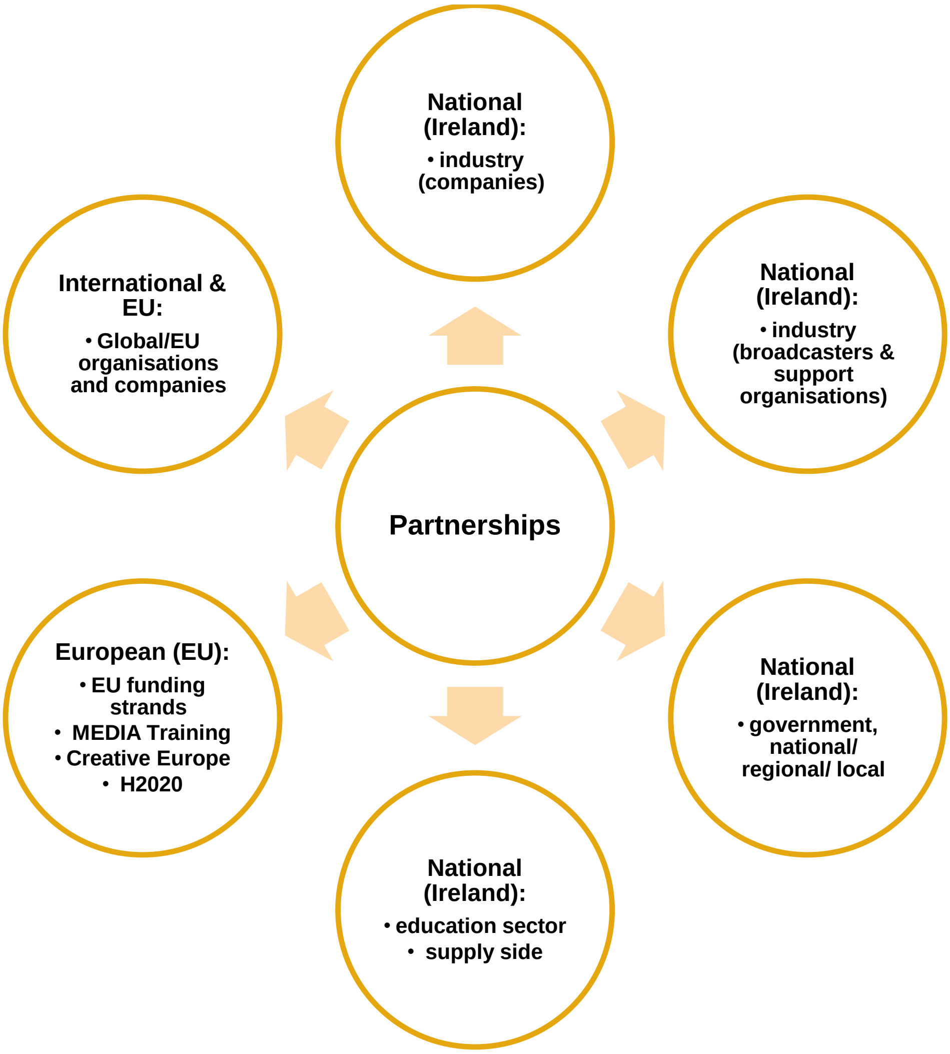
The reasons behind Denmark's success are credited to substantial state investment: the Government on average funds a third of the budget for 25 full-length features and 30 documentaries every year, with an average annual funding level of €67m approximately for the Danish Film Institute.

Another contributing factor to the success of the Danish industry is the significant funding of Den Danske Filmskole: the National Film School of Denmark, which is a state school financially supported by the Danish Ministry of Cultural Affairs providing specialised training and education in all aspects of film creation, direction, and production. The unique teaching approach in the Film School, coupled with the earmarking of state funding for artistic films that would struggle to secure financing through market mechanisms (for example, documentaries are typically funded to an average of 80% through state funding channels), contribute to the artistic success and sustainability of the Danish audiovisual sector. Much of Denmark's TV drama production is supported by the national broadcaster, DR. Unlike RTÉ, it is funded entirely by licence fee and has no advertising revenue, but the licence fee is substantially higher in Denmark and the consequent budget for DR is more than €450m a year.

The Danish approach to supporting the sector has led to disproportionate success for Danes on the international stage. The hugely popular series *Killing* and *Borgen*, and the Oscar-nominated *A Royal Affair* are key examples of the quality of output from the Danish audiovisual sector. Nicolas Winding Refn won Best Director at Cannes, and Danes won Best Film, Best Director, and Best European Achievement in World Cinema at the European Film Festival in 2011.

8.5 Lessons from International Experience

A key message is that of partnership working, between industry stakeholders, funding programmes, and supporting agencies, to achieve the desired outcomes. For Ireland, as illustrated below, the key partnerships would include:



During the consultation process, every respondent and every stakeholder indicated that they were in favour of partnership arrangements, and wanted to see more done. The core challenge is making it work in practice, and moving beyond positive comments and aspirations into a pragmatic series of actions to make it happen. Central to this, in our belief, is having an organisation or individual mandated with the responsibility to achieve this: ***unless creating stronger and more effective partnerships is a defined role for which someone has accountability, it will be unlikely to move beyond the aspirational.***

We will return to this theme in Section 10 below.

9 Current Funding Arrangements

9.1 Overview

We examined the funding mechanisms for the provision of education and training for skills development for the audiovisual industry. As with other elements of the report, this was undertaken with a combination of desk research and stakeholder consultation. We examine in particular detail the training provision incorporated into the S481 tax credit scheme, in accordance with the terms of reference for the report.

9.2 Funding for Skills Development for the Audiovisual Industry

There is a range of funding sources and supports for the provision of education, training, and development of skills for the audiovisual industry in Ireland, including, for example:

- Public funding for higher and further education course provision by HEIs;
- Funding for Screen Training Ireland from the Irish Film Board;
- Section 481 training provision (see below);
- Multi-funder initiatives such as Animation Skillnet;
- Training funded by Solas – delivered by ETBs;
- Private funding by industry or individuals;
- Development funding from the Irish Film Board to support emerging talent.

As with the provision of training (see Section 4), public funding for skills enhancement within the screen industry is fragmented across different sectors and providers, and is not co-ordinated by any single statutory agency or Department.

9.3 Section 481 Training Provision

9.3.1 Overview

A specific requirement of the terms of reference was to examine the Section 481 training provision and assess its effectiveness. Section 481 of the Taxes Consolidation Act 1997 provides for a scheme to incentivise film production in Ireland. Prior to 2015, the scheme operated by giving tax relief to individuals investing in the film industry. From 2015, the scheme has provided direct support to film production companies in the form of a tax credit related to the cost of production of certain qualifying films. The credit is granted at a rate of 32% of the lowest of:

- eligible expenditure;
- 80% of the total cost of production of the film;
- €70,000,000.

The minimum amount that must be spent on the production is €250,000 and the minimum eligible expenditure amount to qualify is €125,000.

9.3.2 Training Provision

The tax credit available under S481 is subject to certain conditions, including the requirement to take on trainees on eligible productions. A minimum of two trainees for each €355,000 of corporation tax credit claimed, up to a maximum of 8 trainees, must be employed on projects availing of the S481 tax credit.

9.3.3 Effectiveness of S481 Training Provision

The general viewpoint of stakeholders consulted in relation to the S481 training provision is that it is an ineffective mechanism to deliver quality training opportunities for the industry. It is widely perceived as a paper exercise that relates to Revenue Commissioners' requirements rather than to serve the skills needs of the industry and those who work in it.

There are no requirements to set specific training plans or objectives for S481 trainees, and no monitoring of the quality of training, or the outcomes or impact of the placements. It is also perceived as inadequate and not structured to address the needs of creative talent development.

9.4 Findings and Recommendations

9.4.1 Findings: Funding Models

The key findings in relation to the funding of education and training for skills development for the audiovisual industry are as follows:

- Public funding for education is substantial but needs to be better distributed;
- Public funding for training and skills development is relatively low and is widely perceived by stakeholders as needing to increase significantly;
- The S481 training provision is universally acknowledged to be an inadequate and inappropriate mechanism for supporting training and skills development within the industry, and there is no means of determining whether it delivers any value;
- Options for future funding include:
  - Replacing S481 traineeships with a levy into a training fund;
  - Implementing an industry levy to fund training and development;
  - Enhanced Exchequer funding.

In relation to the above options, it is worth reflecting on the UK model, under which the film industry contributes to the Skills Investment Fund (SIF) via a production levy. This applies to films wholly or partially produced in the UK. The funds are used to directly support the next generation of talent, and the scheme operates as follows:

- Eligible companies will receive a pro forma invoice for **0.5% of the production's UK core expenditure** (in sterling), up to a **maximum contribution of £40,860**.
- Projects receiving public funding are required to pay the levy as a condition of access to this investment.
- Payment to the SIF should be made **prior to the first day of principal photography**. An invoice will be issued on receipt of payment.

- The Skills Investment Fund is managed by Creative Skillset on behalf of the industry and is actively supported by DCMS, the BFI, Pact, the MPA and BECTU.

Our belief is that a model similar to that in the UK (tailored to the needs of the industry in Ireland) might represent the fairest means of enhancing funding for skills development within the audiovisual sector in Ireland. This may be relatively straightforward to implement, within the context of recommendations made in Section 10 below in respect of structures and responsibilities. Such a levy arrangement would replace the S481 traineeships model and could operate either as a levy on S481 tax rebates or, alternatively, an across-the-board levy on all productions. Further work would be required on the precise design of the model – we make this recommendation at a strategic level only, in line with our terms of reference.

9.4.2 Recommendations: Funding Models

Our recommendations in relation to funding to support skills training within the audiovisual industry are as follows:

- **A more cohesive approach is required which ties in with national strategies for the screen industry, for higher education, and for skills development**
  - Funding for skills development for the audiovisual sector should align with the strategy and should support the provision of education and training in order to develop appropriate skills, which in turn will enable the sector to grow and remain competitive and creative.
- **There is a need for a rationalisation of provision (and associated funding) within the HE/FE sector:**
  - Associated with the recommendation to review how course provision operates in the HE/FE sector, changes to the funding for education courses aimed at the audiovisual industry should be aligned with regional and national skills needs and strategies.
- **The overall quantum of future funding requirements should be determined:**
  - This will be dependent on the identified strategy vision and census data, and we would also expect the economic analysis now being commissioned by the Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs to have influence on future decisions relating to funding for skills development.
- **A training fund should be established, using an industry levy approach** – this could operate as a levy of S481 tax rebates or as an industry-wide levy on all production. Further, more detailed analysis will be required to determine how precisely the model would operate. It would replace the current S481 traineeship model.

10 Overall Conclusions and Policy Recommendations

10.1 Strategic Imperatives

Before presenting our recommendations for the policy framework, it is important to reflect on some of the key themes emerging from our analysis, as presented in the preceding sections of this report. In essence, we pose the question: what objectives are we aiming to achieve? These are what we might refer to as the strategic imperatives which will underpin the policy, and these are as follows (in no specific order of priority):

- ***Innovation, creativity and agility*:** a core feature of skills development within the screen industry is ensuring its capability to adapt continuously and respond to new and emerging challenges, technologies, consumer preferences and other variable (and sometimes unpredictable or disruptive) factors. The capacity of the industry to learn new things, and the agility of the education and training system to support this, will be essential. Skills development must be agile and ever-changing. Simply teaching more of the same and replicating existing skills will not work.
- ***Strength in depth:*** the capacity of the industry also depends on having the right numbers of people – suitably skilled and experienced – in the right roles to enable the Irish screen industry to take advantage of future opportunities. In an industry which is often characterised by short-term contracts and workforce mobility, getting a proper handle on the numbers we have now and the numbers we may need in future will be highly important.
- ***Developing career paths:*** to retain our brightest talent, and to make the screen industry an attractive career destination which offers long-term prospects, it will be important to ensure that proper career paths can be developed and that investment in people at all stages of their careers is a centrepiece of the policy framework;
- ***Maximising the effective use of resources:*** delivering world-class education, training, and skills development in and to the screen industry means that we must concentrate our resources, focusing on centres of excellence to enable Irish screen talent to continue competing on a world stage, whilst eliminating the duplication or gaps in provision which may put future success at risk;
- ***Delivering on growth:*** the skills development framework should be clearly focused on continued growth within the industry, and should be informed by a broader strategy for the Irish screen industry;
- ***Making it happen:*** none of this will happen by itself, and whilst there has been good evidence to date of positive co-operation between stakeholders, there should be clear accountability for successful delivery and implementation of a new policy framework for skills development within the screen industry – ideally through a single organisation being mandated to drive change through multi-party collaboration.
- ***Designated funding for delivery:*** Secure funding will also be needed over a continuing future period to ensure effective delivery and implementation of the new policy framework – it will be unable to be delivered within existing resources.

These strategic imperatives inform the recommendations presented in Section 10.3.

10.2 Taking Account of Statutory Remits

Section 10.3 which follows presents our high-level strategic recommendations arising from the preceding analysis, with specific reference to the strategic imperatives discussed above. Section 10.4 then moves on to examine a series of strategy recommendations for more targeted actions, in line with – and in some cases deriving from – the high-level recommendations.

In setting out the policy framework and in making these recommendations, we are cognisant that some of what we are proposing is outside the statutory remit of both the IFB and the BAI. As reported earlier in this document, there are many stakeholders who are currently involved in skills development within the audiovisual sector, at various levels and in various capacities – Government, statutory agencies, production companies, educational institutions, training organisations, representative industry bodies, and others. Achieving meaningful and lasting improvements in developing and maintaining the skills which are essential for the continued success of the Irish audiovisual sector cannot be the responsibility of any one organisation. It will require collective effort and a truly cohesive approach involving all of these organisations, along with appropriate support and resourcing from Government.

This philosophy is very much in line with the focus of this assignment, which (as stated in our terms of reference) is a *National strategy for the development of skills and talent of those working within the audiovisual industry.* By definition, whilst the IFB and BAI will be centrally involved in implementing the recommendations arising from this report, many other aspects will not be within their remit, and other organisations will have a significant role to play.

Notwithstanding this factor and the need for collaboration and cohesion, there are also individual initiatives which can be taken by the IFB, the BAI, and other organisations either singly or collectively in the short to medium term, and these are presented in Section 10.4 below. These are targeted actions, designed to create the ground work for longer-term strategic initiatives. A key point to recognise is that whilst a central element of our recommendations relates to medium to long-term strategic developments (set out in Section 10.3 below), there are other actions which can be taken forward quite quickly by the IFB, the BAI and others, and which are not dependent on the high-level developments recommended below.

10.3 Recommendations for a Policy Framework

10.3.1 National Strategy for the Screen Industry

There is unanimity across those stakeholders whom we consulted during this study that a national strategy should be developed for the screen industry, covering all aspects of the industry from drama and documentary to animation, gaming and visual effects, from cinema to television to online. The general view from stakeholders was that a national strategy for the screen industry is an essential prerequisite for the development of skills within the industry: determining what skills and competencies should be developed within the workforce, by whom, and within what context, will depend very largely upon having real clarity with regard to what we expect our screen industry to be and its economic and cultural contribution to Irish society.

For that reason, we recommend that a national strategy for the screen industry in Ireland should be developed, and should provide the strategic foundation for ongoing development of policies and plans in respect of audiovisual sector skills. This reflects the strategic imperative ***Delivering on Growth*** as outlined above. The suggested national strategy should:

- be coherent, clear and implementable, setting out realistic targets over a five-year time horizon;
- be sponsored by a lead Minister operating under the authority of, and reporting regularly on progress to, the Taoiseach and Cabinet;
- be executed by a Central Government Department which is allocated the resources to ensure effective development and implementation of the strategy;
- be comprehensive in its coverage of all aspects of the industry, taking into account not just the historical scope of film and TV but also the recent rapid growth of the industry, technological developments, and changes in the viewing habits and preferences of consumers of content;
- provide a clear focus on what we expect our screen industry to be, and provide the necessary vision and strategic direction for the development of the industry in Ireland;
- set out the expectations and targets for job creation, foreign direct investment and the overall economic development of the screen industry in Ireland over the next five years;
- focus on creating and maintaining a balanced economy for Irish screen production involving the full diversity of stakeholders – Government (for strategy and policy, including tax relief on film and television production), public broadcasters (for commissioning), international partners (for co-production), distributors (for exhibition), and production companies (for delivery of the ideas and the finished product).

We recognise that the implementation of this recommendation is not within the gift of the IFB or of the BAI, but nonetheless we believe that this is a matter of major strategic importance for the screen industry and for the Irish economy. In our view, it demands mature reflection and consideration by the relevant central government departments and state agencies with an interest and involvement in these areas.

It is worth noting that this approach has already been taken within Northern Ireland, where Northern Ireland Screen published *Opening Doors: A Strategy to Transform the Screen Industries in Northern Ireland* covering the period 2014 to 2019. The Northern Ireland document covers a broad range of targets and topics – market influences, sectoral priorities, thematic priorities, partnerships, the role of the education sector, exhibitions and archives – and also considers the level of financial investment required over the lifetime of the strategy, particularly in terms of public funding support.

What is most noteworthy about the NI strategy is its ambition and its desire that Northern Ireland should have the "*strongest screen industry outside of London in the UK and Ireland within 10 years*". Northern Ireland already competes with the Republic for foreign direct investment in film and television projects, and has enjoyed considerable success through *Game of Thrones, The Fall* (which was also financially supported by the BAI), and other projects.

In that context, and with such direct competition from our nearest neighbour, we pose this question: can Ireland afford <u>not</u> to have a national strategy for its screen industry?

10.3.2 Importance of Digital Skills

Earlier (in Section 10.1), we identified ***Innovation, Creativity and Agility*** as one of the strategic imperatives underpinning the skills development policy framework. Given the huge importance of digital production within the audiovisual landscape, and the migration of many consumers to new viewing platforms, it will be essential that any new sectoral strategy should have major focus on the development of digital skills – whether at a technical level or in terms of awareness of how new technologies are shaping the industry in radical ways. It would also be worthwhile considering a separate strategic plan for the development of digital skills across the audiovisual sector.

10.3.3 Creating an Organisational Infrastructure to Support Skills Development

From our analysis and our extensive stakeholder consultations, it is clear that a cohesive approach is required if meaningful and sustainable improvements are to be achieved in the development of skills within the audiovisual sector. At present, responsibilities are fragmented and the authority to lead skills development within this sector is not allocated to anyone organisation or individual. Whilst many of the organisations involved are working hard to do a good job, there is no framework against which they can be measured, and there is no cohesive strategy for skills development which provides the direction for them to plan and deliver their work programmes.

Change is needed: creating and delivering a cohesive approach will not happen on its own or within a fragmented system. One organisational vehicle is required to drive the development of a new policy framework and an execution plan for audiovisual sector skills development. This reflects the strategic imperative ***Making It Happen*** as outlined earlier in this section of the report.

We have given extensive consideration to what that organisational vehicle might be, and this topic featured very heavily within our consultation programme leading up to the preparation of this report. It is important to report that the views of stakeholders across the sector were overwhelmingly positive with regard to this aspect, including:

- a very strong sense that responsibility for audiovisual sector skills development should not be fragmented or distributed across multiple organisations;
- instead, responsibility should be vested in one single entity given appropriate authority, accountability and resources;
- a strong sense of collaboration and cohesion must be fostered across all organisations involved in audiovisual sector skills development, with all parties focusing predominantly on the national needs of the industry rather than their own interests;
- whilst leadership would come from the centre, every stakeholder would have to play their part in working to the national agenda.

Within this context, it should also be noted that many stakeholders believed that, because of the limitations on resources available to them, none of the existing statutory agencies with an interest in audiovisual sector skills development would, within the remit currently accorded to them, be able to completely fulfil the role of driving a new enhanced policy framework leading to the implementation of the recommendations set out in this report.

10.3.4 *What Would the New Organisational Vehicle for Skills Development Do?*

We would foresee the new organisational vehicle referred to above as having a broad range of responsibilities, some of them mapping onto activities already happening within current structures, and others being new responsibilities and tasks not currently being taken forward by any organisation in a structured or serious way.

Overall, we see the key responsibilities as follows (recognising that a number of these do happen at present under the remit of the IFB / Screen Training Ireland, the BAI and other bodies, but in many cases not in a fully co-ordinated manner or with dedicated resources):

- Development, maintenance and update of national policies for audiovisual sector skills development;
- Leadership role for skills development including ideas generation, strategy development, planning over a five-year time horizon, promotion of skills development, etc.;
- Coordination of skills development across the audiovisual sector, including continuing structured engagement with all stakeholders;
- Regular industry census to identify numbers working within the audiovisual sector, their roles / jobs, their training and qualifications attained, and other demographics;
- Annual assessment of demand for skills development across the industry;
- Identification of specific training needs, and design and delivery of courses to meet those needs;
- Annual / ongoing collation of information regarding provision of education and training courses for the audiovisual sector, covering all providers;
- Annual mapping of demand and supply to identify where skills deficiencies exist, where they are likely to arise in coming years, and how best education and training provision can be aligned to meet future demand.

A significant role for the new organisational vehicle will be the mapping of demand and supply, which we believe is an essential prerequisite for informed decision-making and resource allocation. This addresses the strategic imperative ***Strength in Depth*** outlined above: although conducting a census and establishing a baseline will be in itself demanding of resources, we believe that it will be very difficult to make informed choices in future without an accurate and up-to-date baseline.

It is important to note that we see enhanced organisational arrangements providing a significant level of energy and coordination across the sector at a level significantly beyond that which is currently being done. We also recognise that those statutory organisations which are currently involved in this area of work, including the IFB/Screen Training Ireland and the BAI are not fully resourced to discharge many of the new responsibilities which are envisaged and would need their resources and remit enhanced to achieve this.

In that regard, a number of options exist with regard to the organisational vehicle required to drive the development of skills within the audiovisual sector. We have set out below what we believe to be the principal options, along with our consideration of their respective merits and limitations.

Option	Assessment
1. **New agency:** creation of a new statutory agency which would take sole responsibility for the development of skills within the audiovisual sector. This would inevitably involve absorbing existing responsibilities and staff from Screen Training Ireland, along with the allocation of new duties and resources to reflect the remit outlined above.	■ This option may have some merits in terms of dedicated focus, but it would also lack critical mass and may struggle to mobilise the necessary resources. ■ Current government policy tends not to favour the creation of new state bodies, and that therefore may be difficult to gain approval. ■ Statutory and legal issues surrounding the absorption of Screen Training Ireland may be time-consuming and expensive at a level disproportionate to any advantage gained.
2. **Allocate role to another existing public body:** options would include agencies within the audiovisual sector such as the BAI or IFB, or possibly Solas**.**	■ Adding these responsibilities to another body which has a much broader remit may not provide the necessary focus on skills development for this sector. ■ Many stakeholders would not be supportive of this type of arrangement as they see the responsibilities of organisations such as the IFB, the BAI or Solas as being predominantly focused on other matters.
3. **Strengthen Screen Training Ireland:** would involve adding these additional responsibilities to Screen Training Ireland, and resourcing it appropriately.	■ Screen Training Ireland as it is currently constituted has a relatively narrow remit and would not have the resource capacity to take on these new responsibilities – significant additional resources would be required, both in terms of staffing WTEs and costs of work to be commissioned (e.g. surveys). ■ The fact that Screen Training Ireland is part of the IFB may be problematic for some stakeholders, and its governance may need to be amended to reflect a broader perspective across the industry and a more inclusive approach. ■ May not be sufficiently inspiring to lead the changes required, unless Screen Training Ireland were to be relaunched and potentially rebranded.
4. **Industry body akin to UK Creative Skillset:** would involve establishing a body within the industry to take these responsibilities forward, with a	■ Establishing an industry body by consensus across a wide range of

Option	Assessment
permanent staff co-funded by the industry and/or the State.	stakeholders may take considerable time. ■ Greater clarity would be needed in respect of its responsibilities, and realism with regard to what might be able to achieve in the absence of formal powers and authority. ■ Agreeing funding mechanisms and governance may be complex or time-consuming to achieve. ■ As a body separate from the statutory sector, this entity may become or be perceived as more of a lobbying organisation lacking power or authority, rather than a body set up to drive change.

Our overall analysis is that whilst each of these options has merits and limitations, the most appropriate way forward would be for Screen Training Ireland to be significantly strengthened (as in Option 3) and to be given an additional remit in respect of the expanded duties and responsibilities outlined above. This would also be the option likely to be quickest and easiest to achieve, and avoids the necessity to delay matters unnecessarily through the need to make legislative change, as would be the case with establishment of a new agency (as in Option 1). Option 3 also builds upon the solid work done by Screen Training Ireland in recent years, although it is important to stress that its new remit would be significantly different from the present situation, and rebranding and/or relaunch should be considered.

10.3.5 Governance Arrangements

If Option 3 is to be implemented, we believe that change would be required in respect of the structures by which Screen Training Ireland is governed. At present, as an entity which is part of the Irish Film Board, Screen Training Ireland comes under the governance of the IFB.

However, if Screen Training Ireland were to be given these added responsibilities in respect of skills development across the audiovisual sector, its focus would become much more wide ranging, taking into account the perspectives of key people and organisations within broadcasting, higher education, industry, State entities, and other stakeholders. It would therefore be necessary for this revamped version of Screen Training Ireland to have a governance structure which reflects this diversity, while still remaining under the aegis of the IFB. At a practical level, this might include:

- The IFB Board being accountable for the budget, staffing, and overall discharge by Screen Training Ireland of its broad responsibilities;
- The head of Screen Training Ireland reporting to the CEO of the IFB in terms of routine line management responsibility (e.g. performance review, approval of annual leave, HR matters, etc.);
- The appointment of a separate Chair and Board of Screen Training Ireland who are not self-interested or conflicted, but who have a clear mandate to drive forward skills

development in line with, and deriving from, strategic plans for the growth of the industry;

- The Screen Training Ireland Board might include representation from the IFB Board and external representatives from industry, education, broadcasting, other State agencies / Government departments, etc.;
- The strategic agenda for Screen Training Ireland and its strategic plan would be set by its Board, independent of the IFB.

At this stage, we have simply provided an outline of the type of governance arrangements which might apply, and we would suggest that if Option 3 is seen to be potentially viable, further work might be undertaken to develop a more considered and detailed governance architecture for the revamped Screen Training Ireland. Ultimately, an overarching governance structure should be developed which ensures strong co-ordination between the various stakeholders, effective cohesion and positive action, but which also does not cloud accountability and responsibility.

A further consideration may be for the creation of advisory structures to support the work of Screen Training Ireland's Board. Whilst the Board will necessarily and correctly include representation from a variety of stakeholders, it is important that it should be of a size which facilitates effective working and agility – ideally, a Board of 8-10 members would achieve this. Of course, others who are not represented on the Board will wish to have their views taken into account, which brings into consideration the possibility of additional fora being created to support the Board, for example:

- **Sector Skills Council** – a less formal entity made up of a wider group of stakeholders who help to identify emerging and active issues within skills development for the audiovisual sector, and who help to shape the skills needs of the sector through the provision of advice to the Board of Screen Training Ireland;
- **Industry and Education Forum** – the 2011 Creative Capital report recommended the establishment of an Industry and Education Forum "*to assist in rationalising specific training and education at third level to eliminate duplication and waste*". Given the diversity of perspectives and interests in relation to this topic, establishment of a forum of this nature (which was not enacted following publication of Creative Capital) may have significant merit. This is in line with the strategic imperative ***Maximising the Effective Use of Resources*** as outlined in Section 10.1 above
- **Regional Hubs** – many stakeholders regard present skills development arrangements as being quite Dublin-centric, with activity also strong in Co. Galway, but other parts of the country less involved. There may be options for consideration creation of some form of regional hubs feeding into Screen Training Ireland, to ensure a greater degree of geographical balance.

10.3.6 Funding Arrangements for Screen Training Ireland

Adequate funding and staff resources should be provided to facilitate these changes in respect of Screen Training Ireland. We do not believe that Screen Training Ireland, as currently constituted, has adequate resources to take forward the new responsibilities which we have outlined earlier, and we believe that additional full-time staff will be required along with programme funding for one-off or occasional project based work (e.g. surveys, data gathering, independent analysis, etc.). Infrastructural investment in IT systems and software applications will also be required. At this stage, we have not sought to develop a detailed cost estimate for these additional resources, but we would envisage an annual budget of between €500k and €750k being required to cover all of these aspects.

This does not include the cost of any additional training programs or third level education courses which may be identified as necessary in future, and indeed the need for any additional investment should be subject to future detailed analysis and the development of appropriate business cases (particularly in the context of perceived oversupply of courses within the higher education sector, and the potential for rationalisation).

Notwithstanding the need to develop detailed cost estimates for a revamped Screen Training Ireland, it is very clear to us that its future funding must be secured and appropriate commitment given from Government over a multi-annual period. This is in line with the strategic imperative ***Designated Funding for Delivery*** as outlined in Section 10.1 above.

There are two dimensions to future funding needs for Screen Training Ireland within the overall model we are recommending. Firstly, Screen Training Ireland will require **financial support for its own organisational infrastructure** – staffing, premises, IT systems, externally-commissioned work (e.g. census surveys etc.), and other costs. This will need to be provided for by Exchequer funding, on a continuing / multi-annual basis.

Secondly, the **funding for design, development and delivery of training courses** will need to be provided for, and in that regard our primary recommendation is that this be supported by a levy model as discussed in Section 9 above. We would envisage this being administered by Screen Training Ireland, under the stewardship of its Board (reflecting a diversity and balance of perspectives).

Overall, we would envisage the revamped Screen Training Ireland requiring a budget for training projects in excess of the current sum of between €600k and €700k already provided by the Irish Film Board. The proposed Section 481 levy would be expected to deliver these additional resources for an expanded range of courses in line with the other recommendations contained in this report. This expenditure on training projects would also be separate from the annual budget required for STI's staffing and organisational infrastructure, which we earlier estimated at between €500k and €750k per annum.

10.4 Findings and Recommendations

10.4.1 Findings: Structures and Governance

The key findings in relation to the organisational model required to take forward skills development for the audiovisual industry are as follows:

- A new set of responsibilities is required to provide real leadership and implement lasting change with regard to the skills development within the audiovisual sector.
- These responsibilities are currently spread across existing stakeholder organisations and are not structured or resourced to the degree required to drive skills development forward effectively.
- A new organisational vehicle is required to move these matters forward with energy and innovation.
- Designated funding is required on a continuing basis.

10.4.2 Recommendations: Structures and Governance

Our recommendations in relation to the organisational vehicle required to take forward skills development within the audiovisual sector are as follows:

- **A revamped Screen Training Ireland represents the most appropriate vehicle to take on additional responsibilities, so as to provide real leadership and implement lasting change with regard to the skills development within the audiovisual sector.**
- **Under this arrangement, Screen Training Ireland would remain under the aegis and overall governance arrangements of the Irish Film Board, but would have a large degree of operational autonomy in relation to the discharge of its new duties.**
- **An appropriate governance structure, involving an independent Board and Chair, would need to be developed and agreed for the revamped Screen Training Ireland, reflecting input from both its parent organisation, the IFB, and from a wide range of external stakeholders.**
- **Relaunch and potentially rebranding of Screen Training Ireland may be required in order to make it clear that these responsibilities are much more broad and strategic than was previously the case.**
- **Additional resources will be required for Screen Training Ireland to have the capacity to discharge its new responsibilities, both in terms of its expenditure on training projects and its budget for staffing and other organisational investment.**

10.5 Additional Recommendations on Developing Capacities

Within the context of the recommendations presented above, our engagement with stakeholders has also highlighted a range of issues worthy of further consideration in respect of the development of skills and capacities within the audiovisual sector. These include the following:

- For many people embarking on a career within the screen industry, getting access to leading writers, directors, and producers can often be highly formative and can help to encourage people to aspire to an ultimate career goal. A number of stakeholders shared examples with us of situations where this had happened and had provided a positive inspiration to those at an early stage within their careers, particularly where there was a real opportunity to work with award-winning practitioners who were happy to provide their support *pro bono*. Where possible, this type of approach needs to be factored in as part of the development of local talent.
- A significant amount of joined-up thinking is required to ensure that the development of education and training courses is not just about isolated provision, but becomes part of a formal training and career development pathway for individuals who wish to pursue a long-term career within the screen industry. This addresses the strategic imperative ***Developing Career Pathways***, outlined earlier in Section 10.1. This sense of connectedness is essential under the proposed new policy framework and needs to be championed; the professional representative bodies and various guilds may have a part to play in this, perhaps under the auspices of the Sector Skills Council referred to above.

- Clear frameworks for the evaluation and accreditation of training, education and skills development courses for the screen industry need to be developed, and may also have a significant role to play within the establishment of clear career pathways. The attainment of recognised quality standards will also have a major influence on the employability of those successfully completing these courses.
- It is important that the skills development policy framework is seen as being for everyone within the industry: not just for graduates pursuing third level education courses, but also for those undertaking other types of courses. This will include school leavers, interns, apprentices (in respect of trades), and others pursuing vocational skills development opportunities in various support functions (e.g. administration).
- Related to this, the diversity of the workforce within the screen industry should be recognised, as investment in people should be all-inclusive across class, gender, and ethnic origin.
- Finally, whilst this policy framework will help create a highly practical model for the enhancement of skills across the screen industry, this should not detract from the responsibility of individual organisations (e.g. production companies, broadcasters, and others) from developing good models of human resource management practice and talent development at local level. In fact, it may be argued that the launch of a new policy framework for skills development will create the requirement for many organisations within the screen industry to develop more capacity for dealing with these matters at a professional level, for example by having a dedicated HR function or a senior individual with designated responsibility for HR management.

10.6 Summary of Recommendations

The following table presents a summary of all of the recommendations made earlier in this report, brought together in one single tabular format for ease of reference:

Report section	Recommendation
1	No recommendations – Introduction
2	No recommendations – Overview of the Irish Audiovisual Industry
3 Strategic Context	■ **There is a requirement to develop a national strategy for the screen industry, to provide the strategic foundation for ongoing development of policies and plans in respect of the audiovisual sector skills** ■ **A new policy framework for training and skills development for the audiovisual sector should be developed in line with national strategies for the screen industry, for higher education, and for skills development**
4 Demand for Education,	■ **A detailed census should be undertaken across the industry, similar to the work undertaken by Creative Skillset for the creative industries in the UK:**

Report section	Recommendation
Training and Skills Development	• This census should include a combination of hard data and qualitative / descriptive information in a common format to facilitate analysis; • The data should include output of work on role mapping by Screen Training Ireland; • Numbers of employees, freelancers, trainees, etc., and the roles in which they are working should be captured; • Gender, disability, and other diversity measures should be included; • Demographic and geographic profile of workforce and activity should be captured; • The first census should be undertaken in 2017 and should be updated annually thereafter.
5	No recommendations – Forces of Change
6 Current Provision	■ **The courses most relevant to the audiovisual sector should be identified:** • Whilst we have identified a wide range of courses, not all are directly pertaining to the audiovisual sector – it is an important first step to focus on the provision of courses deemed most relevant by reference to the data on demand within the industry. ■ **There is a clear need for a detailed census to be undertaken, covering the relevant courses:** • Census should include a combination of hard data and qualitative / descriptive information in a common format to facilitate analysis; • This process should ideally include co-ordination with the HEA and Solas in relation to the entities they fund; • First census should be undertaken in 2017 and should be updated annually thereafter. ■ **Models of good practice within the training sector should continue to be supported and should be considered for expansion in scope and capacity.**

<table>
<tr><th>Report section</th><th>Recommendation</th></tr>
<tr><td>7

Assessment of Linkages</td><td>

- **Improved coordination should be formalised between providers, both in the education sector and in training provision:**
    - This may be improved through the development of the regional clusters and links being fostered by the HEA;
    - Strategy for skills development should address ways to bring providers together in, for example, forums with each other and with industry.
- **Development and continuation of much stronger links between training and education providers and the audiovisual industry:**
    - Industry-education/training forum should be established to bring together the demand and supply sides of skills development;
    - Strengthen existing links such as those through Screen Training Ireland and the Skillnets operating in the industry.
- **Development of third-level courses should be in line with national and regional strategic priorities for the screen industry, for higher education, and for skills development.**
    - Course development in HEIs should not be entirely independent of national and regional considerations of demand for or provision of relevant courses;
    - The future skills needs of the audiovisual industry should influence the development and design of education and training courses.

</td></tr>
<tr><td>8</td><td>No recommendations – Learning from International Experience</td></tr>
<tr><td>9

Current Funding Arrangements</td><td>

- **A more cohesive approach is required which ties in with national strategies for the screen industry, for higher education, and for skills development**
    - Funding for skills development for the audiovisual sector should align with the strategy and should support the provision of education and training in order to develop appropriate skills, which in turn will enable the sector to grow and remain competitive and creative.
- **There is a need for a rationalisation of provision (and associated funding) within the HE/FE sector:**
    - Associated with the recommendation to review how course provision operates in the HE/FE sector, changes to the funding for education courses aimed at the audiovisual industry should be aligned with regional and national skills needs and strategies.
- **The overall quantum of future funding requirements should be determined:**

</td></tr>
</table>

Report section	Recommendation
	• This will be dependent on the identified strategy vision and census data, and we would also expect the economic analysis now being commissioned by the Department of Arts, Heritage, Regional, Rural and Gaeltacht Affairs to have influence on future decisions relating to funding for skills development. ■ **A training fund should be established, using an industry levy approach** - this could operate as a levy of s481 tax rebates or as an industry-wide levy on all production. Further, more detailed analysis will be required to determine how precisely the model would operate. It would replace the current s481 traineeship model.
10 Overall Conclusions and Policy Recommendations	■ **Screen Training Ireland should be revamped to provide real leadership and to implement lasting change with regard to skills development within the audiovisual sector.** ○ Screen Training Ireland would remain under the aegis and overall governance arrangements of the Irish Film Board, but would have a large degree of operational autonomy in relation to the discharge of its new duties; ○ An appropriate governance structure, involving an independent Board and Chair, would need to be developed and agreed, reflecting input from both its parent organisation, the IFB, and from a wide range of external stakeholders; ○ There may a need to re-launch and potentially rebrand Screen Training Ireland to make it clear that its responsibilities are much more broad and strategic than was previously the case; ○ Additional resources would be required for Screen Training Ireland to have the capacity to discharge its new responsibilities.

11 Next Steps

The recommendations presented within this report would, if implemented in full, provide a very sound basis for the effective development of skills across the audiovisual sector for many years to come, at a level which is not previously been seen in Ireland. For an industry which is growing, and in which Ireland has consistently "boxed above its weight" in recent years, the potential benefits in terms of future economic growth and job creation are very considerable. The rapid technological developments seen in recent years within the screen industry, along with platform convergence and changing customer/consumer preferences, mean that the industry must work hard to keep up with the pace of change, and this is particularly evident in respect of the development and maintenance of skills for those working within the sector.

Many of the recommendations which we have presented are strategic and will require careful consideration before being taken forward. Some of them may take some time to implement, particularly those which require discussion and negotiation between stakeholders.

By contrast, some of our recommendations are more focused on the short-term and can be implemented relatively quickly, in advance of the longer term strategic changes recommended elsewhere within this report. Actions which could be taken forward relatively soon, and where the IFB and the BAI could potentially take the lead, might include the following:

- Engagement with stakeholders on the content and recommendations of this report, with a view to obtaining feedback and determining how best the implementation process might be taken forward in a collaborative manner across the sector;
- The census recommended in respect of the demand and supply sides (Sections 4 and 6 of this report) – this is an essential prerequisite before any more substantive work can be taken forward;
- Analysis of courses most relevant to the audiovisual sector (Section 6 of this report) – this might be done in consultation with the industry, to help determine where investment might be best targeted;
- Consideration of potential accreditation models for training which might become industry standards;
- Further analysis of how stakeholders including the IFB and BAI prioritise and focus their respective funding for training and skills development and how this might change in future.

These actions are not intended to represent a definitive or exhaustive list, but merely to represent the potential for short-term actions to be taken which can then feed into some of the broader, more strategic changes which may take some time to implement.

Appendix 1: List of Consultees

As part of this assignment, we engaged with a wide range of stakeholders with an interest in the audiovisual sector, including the following:

- Irish Film Board
- Broadcasting Authority of Ireland
- Department of Communications, Energy & Natural Resources
- Department of the Taoiseach
- Culture Ireland
- Solas
- Creative Europe Desk - Dublin
- Screen Producers Ireland
- VFX Association of Ireland
- Dublin Film Festival
- Galway Film Centre
- LIR Academy
- Film in Cork
- Wicklow Film Commission
- IADT
- EO Teilifis
- Danú Media
- Magamedia
- Screen Training Ireland
- IDA
- Arts Council
- RTÉ
- UTV Ireland
- TG4
- Creative Europe Desk – Galway
- Animation Ireland
- SIPTU/Equity
- FilmBase
- Bow Street-Actors Academy
- Animation Skillnets
- Film Mayo
- Kerry Film Commission
- DKIT
- Tyrone Productions
- GMIT
- Gréasán na Meán Skillnet.

We also held a series of workshop-style focus group sessions in Dublin and Galway during the assignment, which were attended by around 40-50 individuals with an interest in the audiovisual sector, including producers, writers, academics, animators, and others.

Appendix 2: List of Education and Training Providers Identified in this Research

Ballyfermot College of Further Education
Blackrock Further Education Institute - BFEI
Bray Institute of Further Education
Castlebar College of Further Education
Colaiste Dhulaigh College of Further Education
Cork Institute of Technology
Dorset College
Dublin Business School
Dublin City University
Dublin Institute of Technology
Dun Laoghaire Further Education Institute
Dun Laoghaire Institute of Art, Design & Technology
Dundalk Institute of Technology
Filmbase
Galway City – VTOS
Galway Community College
Galway Technical Institute
Galway-Mayo IT – Galway
Gorey Community School
Griffith College Dublin
Inchicore CFE
Institute of Technology Blanchardstown
Institute of Technology Carlow
Institute of Technology Sligo
Institute of Technology Tallaght
Institute of Technology Tralee
Ionad Breisoideachais Ros Muc / Galway & Roscommon ETB
Kerry Training Centre
Kinsale College
Letterkenny Institute of Technology
Liberties College
Limerick College of Further Education
Limerick Institute of Technology
Limerick Institute of Technology - Tipperary
Mary Immaculate College
Maynooth University
Monaghan Institute of FE & Training
National College of Art & Design
New Media Institute
NUI Galway
Pearse College of Further Education

Pulse College
Sallynoggin College of Further Education
St. John's Central College and Cork ETB
St. Kevin's College Crumlin
Templemore College of Further Education
Trinity College Dublin
University College Cork
University College Dublin
University of Limerick
Waterford College of Further Education and Waterford & Wexford ETB
Waterford Institute of Technology
Westport CFE

Appendix 3: Education Sector Opinion

We conducted a survey of education providers, seeking quantitative and qualitative information on the provision of education courses for the audiovisual industry. Whilst too few responded to enable us to validate course or student numbers, a cross-section of institutions did participate and the opinions expressed by such stakeholders is summarised below.

Respondents

As can be seen in the diagram to the right, a total of 16 respondents participated in the survey, from a number of different institution types.

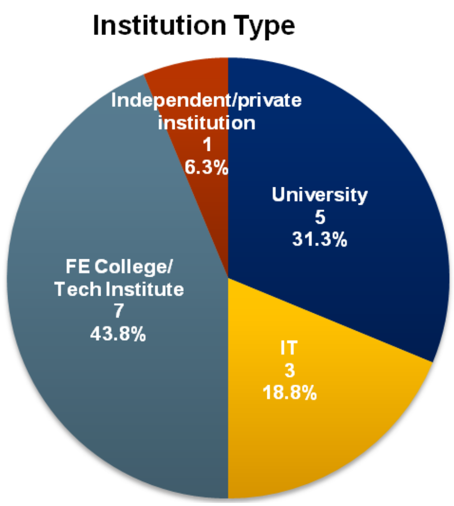


Figure 10.4.2-a

Opinion

We asked education providers to suggest some examples of best practice within Ireland or elsewhere

UK: Clear communication strategies to link up education/ training

Goldsmiths –Curzon Cinemas: State of the art cinema, curator, archive & research space

QQI: Awards

Nemeton/WIT model (a higher diploma in TV production run jointly between production company, IOT, and Údarás na Gaeltachta)

Tralee IT/ Ballyfermot College of Further Education: Industry-related focus of these institutions is excellent

UK: Close contact with production - sharing TV/film studios

University of Wales: BBC producers visit/ give feedback on student work

We also asked education sector respondents to indicate the changes in government policy and strategy they would like to see, the responses to which can be summarised as follows:

- Increased investment in the education sector for the provision of audiovisual courses: overall investment in third-level sector needs to be increased, as well as, for example, investment in technology, innovative teaching spaces, and equipment and support for placements and industry experience for students;
- Support for a closer relationship with industry, including development of apprenticeship schemes;
- Consideration of the role of national broadcaster in providing opportunities for students;
- Better progression pathways from FE sector into HE sector.

The education providers were asked to suggest ways in which industry could support and assist education providers, and a sample of typical responses includes the following:

- Staff and/or equipment sharing;
- The industry should clarify industry standards and key needs to allow the education sector to respond appropriately;
- More developed national links between the education sector and the audiovisual industry;
- Mandatory work placements for those undertaking education courses aimed at the audiovisual industry;
- Guest lecturers / "behind the scenes" events / mentoring;
- Fund research in shared areas of interest (integrated academic/professional teaching).

Additional comments and suggestions from education providers included:

"STI training programmes for recent graduates would be good"

"Developing education programs takes time/ money"

"Setting up work-group to find ways to get more 'economies of scale' regarding ensuring our students meet the future needs of the industry"

"Important that the work experience and consultation process be continued and expanded where appropriate and possible"

"State funded bodies in audiovisual should have to do placements/ open visits etc. into their productions."

"Offering learners more opportunities to do R&D into both the art and the science of creating and utilising audiovisual tools would be an interesting pathway"

"Cooperation and consultation between the two sectors is invaluable, so that courses are not only instinctive and intuitively designed to meet evolving industry needs, but also graduates are appropriately and comprehensively qualified to pursue a career in the audiovisual sector."

""Need a national forum/seminar for discussion about training/education"

"Universities are best positioned to offer a broader set of skills and to form subjects who are more than technicians"

"More dialogue/ flexibility from educational institutions and funding for linkage development/ use"

Appendix 4: Funding Models: UK Skills Development

Skills Investment Fund
The Skills Investment Fund is a collective investment in the skills of the Creative Industries for the future. Working in partnership with industry and informed by leading research, Creative Skillset directs this collective investment to create new and innovative training in priority skills and in-demand roles to ensure industry growth. Creative Skillset co-invests in organisations and individuals to support them to develop, deliver or receive training.

Production Company Development Grants are made possible by BFI as part of its film skills strategy with funds from the National Lottery, and through the Skills Investment Fund. Company Co-investment Grants are made possible by DCMS.

Creative Skillset's Film Skills Fund invests in the skills and training of the UK film industry to secure its growth and sustainability. The Film Skills Fund is backed by the British Film Institute (BFI) with the National Lottery through the Skills Investment Fund, a collective investment in the future of the UK's Creative Industries.

Creative Skillset Film Skills Fund
largest fund in the UK dedicated to supporting film-specific training. The Film Skills Fund invests in priority skills training areas identified by the film industry through its LMI research and by the senior employers on the Film Skills Council. It has a mix of funding packages:

Rolling funds:
New Entrants – funding of up to £1.5 million to facilitate training in new and evolving film skills needs across the film value chain.
Professionals – funding of up to £2.5 million to support the development and up-skilling of professionals in the UK Film industry.

Scholarships and bursaries for creative professionals:
Craft and Technical Bursaries – training grants of up to £800 for film professionals working in eligible craft and technical departments, to spend on training which meets key skills priorities.
International Scholarships – funding for training grants of up to £5,000 for experienced film professionals to attend intensive and high-level developmental programmes in the UK or overseas.
Management and Leadership Bursaries – funding for training grants of up to £1,000 for film professionals to spend on training and professional development in the area of management and leadership.

Funding for creative businesses:
Working in partnership with industry and informed by leading research Creative Skillset directs collective investment through the **Skills Investment Fund** (see more below) to create new and innovative training in priority skills and in-demand roles to ensure growth in the UK's Creative Industries.

Collective investment in future skills:
Creative Skillset invests grants directly into creative businesses so they can boost skills and develop talent in their companies.

Personnel Development Grants:
For applications directly from distribution, sales and exhibition companies for HR and training grants of up to £12,000 (with a 30% match requirement).

Company Development Grants:
Feature film production companies which have contributed to the Film Production Levy from 1 April 2014 can apply for grants of up to £8,000 to deliver creative and practical ways to boost skills and develop talent within companies.

Small to medium-sized VFX houses (under 250 staff) can apply for grants of up to £10,000 to train between three to ten staff. Training should meet the needs of the individual staff members as well as the immediate skills needs of the company, enabling it to meet its short to medium term business goals.

Company Co-investment Grants:
Animation | Children's TV | Film | Games | High-end TV | VFX
This call for co-investment (previously known as the Challenge Fund) helps companies deliver ambitious training in response to the priority skills needs in animation, children's TV, film, games, high-end TV and VFX.

Company Diversity Grants:
Company diversity grants provide companies with 80% of training costs for employees resident in England and from under-represented groups (up to £1200 per eligible individual or £1600 for disabled individuals).

Other Creative Skillset funding:
Funded training – provides 50% funding for employees and freelancers (through their employer or training provider) working in animation to attend short courses that meet established industry skills priorities.
International Fund (Market Mentoring) – investing up to £22,000 in companies to provide market mentoring to support junior sales and distribution executives in their first European or International market.
TV Writers Development Programme – provides up to £10,000 per project to independent production companies and broadcasters to develop and support emerging writers and script editors to help grow the diversity of stories and content in UK TV drama.
High-end TV Drama Producer Programme – aims to step up senior HoD grades across Scripted, Factual and other broadcast media, into the role of TV Drama Producer.

Other Potential Funding Models

A range of other funding models that have been successfully implemented in the UK and elsewhere include the following:

- Training levy (e.g. S4C – TAC partnership)
- Technology partners funding, (e.g. Nesta, Innovate UK, KTN, Nominet Trust, etc.)
- Cross-sectoral training / convergent models (e.g. Power to the Pixel, Filminteractive, etc.)
- Longer term strategic training - networking models (e.g. Eave, Inside Pictures, Cinematic, etc.)
- Industry “buy-in” models, e.g. UK SIF fund / SIF levy / Pact or TAC levy
- Specific funding for provision of identified need, e.g. Creative Skillset Challenge Fund
- Content-led up-skilling and CPD funding, e.g. broadcaster partnership funding

- Macro-economic and sectoral economic capacity building funding, e.g. public sector partnership funding - examples:
    - Welsh Government Digital Development Fund
    - Capital Cardiff fund (Cardiff CC/S4C joint development equity funding)
- International benchmarking/comparative skills co-funding model, e.g. Canadian sector support organisations (CFC / CFTPA / OMDC)
- International content partners model, e.g. Eave, Ace, Hubert Bals fund, Cine Regio, etc.)

Future Provision Funding Models

- Apprenticeships
- EU / Interreg Europe funding (building economic capacity)
- EU / Atlantic ARC funding (building economic capacity for Western Europe)
- Intra-nations funding – e.g. Celtic Games Group