



Northern Ireland Screen – Evaluation of the Irish Language Broadcast Fund

Final Report – August 2017

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1 EXECUTIVE SUMMARY

1.1 Introduction

This report presents the findings from the evaluation of the Irish Language Broadcast Fund (ILBF or 'the Fund') completed by RSM PACEC on behalf of Northern Ireland Screen. It covers five years of the ILBF from March 2011 to March 2016 (14 funding rounds).

1.2 Terms of Reference

The evaluation addresses the following issues:

- Outline the strategic context for the future operation of the Fund;
- Outline the aims and objectives of the Fund and assess the extent to which these are appropriate.
- Assess the extent to which the Fund's objectives have been achieved and set out any explanatory factors which may have led to any divergence from the outturns originally projected for the Fund;
- Assess the benefits delivered by the project including cultural, educational and economic;
- Assess project management and controls, including the extent to which the selection criteria was adhered to in the process of evaluating applications under the Fund;
- Assess the Value for Money and cost effectiveness delivered by the Fund;
- The evaluation must make recommendations, based on a series of consultations and other evidence, for any future government intervention in this sector, including the fund's operation, remit and future development to include:
 - The extent to which funded projects have delivered the ILBF programme priorities and objectives;
 - The inter-relationship between broadcaster and committee decisions;
 - The decision-making process for projects;
 - How committee views are incorporated within final editorial specifications;
 - Programme review and assessment, including quality of language and production values;
 - Training activity and its impacts on the sector and delivery of projects
 - The impact of the Fund on the development of the independent production sector;
 - Any changed circumstances and new emerging opportunities which may affect the remit, operation and priorities of the Fund.

1.3 Methodology

The evaluation methodology was agreed with Northern Ireland (NI) Screen in March 2017. It was agreed that the scope of the review would be 2011/12 to 2015/16. The following key stages of work have been completed:

- **Fund Familiarisation and Profiling of Data** - review of documents relating to the strategic context for the ILBF; internal Fund documentation (e.g. data on number of companies funded and hours of broadcasting produced by genre etc.); quarterly activity reports to the British Film Institute (BFI) detailing Fund performance; audience data for funded programmes; and documentation relating to the application process (e.g. Fund priorities, role of the committee etc.). This was used, alongside consultation feedback, to assess the performance of the Fund against its key objectives;

- **Stakeholder consultations** – interviews were carried out with broadcasters, committee members, Northern Ireland Screen and sector representatives (see Section 7 for full list of consultees) - consultations were carried out to gather feedback on rationale for and achievements of the Fund, the role of the Investment Committee and any areas for future development;
- **Survey of production companies supported by the ILBF** - online / telephone survey of 11 production companies that received funding from the ILBF which gathered feedback on the impacts achieved and the ongoing need for the Fund;
- **Survey of unsuccessful production companies** - online / telephone survey of 18 production companies that applied for but did not receive funding from the ILBF which gathered feedback on their views, opinions and experiences of the application process;
- **Survey of trainees supported by the ILBF** - online survey of 41 trainees that received support from the ILBF which gathered feedback on their views, opinions and experiences of the training scheme(s) provided by the ILBF as well the impacts achieved and the ongoing need for the Fund;
- **Review of the Project Assessment Process** - a desk review of a sample of successful and unsuccessful applications was completed to determine the completeness and quality of the assessments and the extent to which the specified selection criterion for the Fund was adhered to during this process;
- **Benchmarking** - review of the Sound and Vision Scheme (Ireland); BBC Alba (Scotland); S4C (Wales) and the Canadian Media Fund in relation to their scope, processes and outcomes achieved, identifying key learning for the ILBF; and
- **Analysis and Reporting** - analysis of the data and the development of a draft and final report

1.4 Conclusions and Recommendations

1.4.1 Strategic context for future operation of the ILBF

The ILBF was established as a result of political developments in NI and specifically the 1998 Belfast Agreement (“the Good Friday Agreement”). There is evidence of a future need for the Fund based on:

- Government policies and strategies which include aims and objectives for the promotion and development of the Irish Language in NI, for example the Department for Communities (DfC) Strategy to Enhance and Protect the Development of the Irish Language 2015 – 2035;
- The promotion of indigenous and monitoring languages is embedded in both the EU and NI strategic and policy environment. In particular the European Charter for Regional or Minority Languages advocates in Article II the need to (where appropriate) encourage and facilitate broadcasting on television and radio. As such the enhancement and protection of the Irish language is an adopted strategy of the NI Executive; and
- The BBC has Charter requirements to promote different cultures and make provisions for minority languages, however stakeholder feedback suggests it may not be able to broadcast ‘less commercial’ Irish language programmes (e.g. educational, heritage and historical) without the support of the ILBF.

Current ILBF KPIs are appropriate to the aims and objectives of the Fund, however they are focused on activity and output measures. Going forward future KPIs could also reflect the anticipated outcomes of the fund (see recommendation 2).

1.4.2 ILBF Operation and Delivery

Application / Assessment Process

The current process involves an assessment of applications by the Head of the ILBF and this assessment is then provided to the Investment Committee, along with the treatment plan, for review and final decision. Feedback from key stakeholders suggested that the application and assessment processes was rigorous and transparent, with the early engagement between production companies, broadcasters and the ILBF team helping to ensure that only suitable applications progressed for review by the ILBF Committee and were of a high quality

Feedback from production companies also indicates that most (55% of 11 respondents) found the application process easy or fairly easy¹ while 91% were satisfied with the post decision stage of the award process. It was also highlighted that there was good communication from the ILBF during the application process.

A review of a sample of applications found that in the majority of cases the assessment process was completed in its entirety and all applications were assessed against the same set of selection criteria based on the application form and treatment submitted by production companies.

Programme Management

Both production companies and key stakeholders provided positive feedback on the management of the ILBF. In particular stakeholder feedback highlighted that there was a *'lack of red tape, constructive feedback is provided to all applicants and there is good communication with potential applicants and funded companies'*. Moreover, feedback from production companies indicated high levels of satisfaction with the post award process, with 82% stating they were satisfied or very satisfied with the support available.

The benchmarking analysis found that both MG ALBA and BAI involve those with production experience in the assessment process and MG ALBA also involve their head of technical standards to reduce the risk of productions using the wrong camera angle and to avoid 'technical fails'. The ILBF Investment Committee has representation from broadcasters, the Irish language sector as well as NI Screen and BFI. While the Committee does not have a member responsible for technical standards, it includes members with a production background and as part of the application process CVs detailing technical experience for production personnel are submitted. Feedback from NI Screen management noted that use of the wrong camera angle or 'technical fails' have not been issues for the Fund and therefore not considered a high risk requiring a specific role on the Committee.

Relationship with broadcasters

There are good relationships established with all broadcasters with a remit to broadcast content in Irish² and feedback suggests that the ILBF is currently meeting broadcaster's expectations in relation to Irish language programming. It was suggested that broadcaster engagement with the fund would continue as without such support they would be unable to broadcast the same volume of Irish language programming. However it was highlighted that future programming must fit with their respective priorities and scheduling commitments.

The majority of production companies that responded to the survey (91%, n=10) rated the relationship between the ILBF and broadcasters as good or excellent.

¹ 36% stated it was neither easy nor difficult and the remainder (9%) stated the application process was fairly difficult

² BBC NI; RTE and TG4

1.4.3 ILBF Performance

The ILBF has performed well against its targets in each year from 2011/12 – 2015/16 and overall met or was on target to meet 95.3% of its KPIs during 2011/12 – 2015/16 (48.8% were met and 46.5% were on target to be met).

KPIs recorded as 'on target' include that: 'all individuals completing the training to secure employment in production sector at end of scheme'; however it is noted that 100% of trainees securing employment may not be realistic (see section 1.5).

In addition, BBC audience figures of 513,000 people were recorded (2011/12 – 2015/16) with an average viewing audience per production broadcast of 13,000. However figures for TG4 and RTÉ in NI are not available and therefore total figures are likely to be much higher.

Production companies, broadcasters and other key stakeholders all highlighted the positive impact of the ILBF.

1.4.3.1 Productions

Production Companies

Feedback from production companies that have benefitted from the ILBF highlighted that it had a positive cultural, educational and economic impact. Specifically:

- Cultural
 - 100% of 10 production companies indicated that without the ILBF the number of Irish language programmes they produced would have decreased (ranging from a 5% to 100% decrease), with one production company noting that *"as a minority language, it is hard to sustain a commercially viable Irish language TV company. Without the ILBF there would hardly be any Irish language TV output - that was the situation prior to the establishment of the ILBF"*.
- Educational
 - All respondents believed that the ILBF increased the skillset of their employees via the training schemes available, while also noting that the use of Irish language within the company had encouraged others to learn the language, as well as work in a sector they previously would not have had the opportunity to.
- Employment
 - The majority of respondents (n=10, 91%) reported that their number of employees increased as a direct result of the ILBF; and
 - Nine production companies (82%) reported that 54 jobs were created as a result of ILBF funding and 29 of these (54%) were Irish language-related roles
- Turnover

The majority of respondents (n=10, 91%) reported that:

- their turnover had increased as a result of the ILBF; and
- without the ILBF their company would have closed or would be operating at lower scale.

In addition, production companies indicated high levels of satisfaction with all respondents (n=11) stating they were very (91%) or fairly (9%) satisfied with the support provided by the ILBF.

Broadcasters / Other Key Stakeholders

Feedback from key stakeholders also highlighted that the ILBF is having a number of perceived impacts, including:

- Increasing the promotion and awareness of the Irish language in NI;
- Increasing the volume / number of hours of Irish language programming;
- Developing the level and scale of activity within the independent production sector in NI;
- Supporting and sustaining smaller production companies, job creation and retention and skill development;
- Educational benefits such as training for individuals, resource to support learning of the Irish language and educational resources; and
- Improving the quality of programming, with stakeholders indicating that the quality of output supported by ILBF was high and production values were highly regarded.

However consultees highlighted that in recognition of the quality of the programmes produced, there was scope to ensure this content (including educational) continued to be used in order to broaden audience reach and accessibility. This was noted as particularly important given the increasing use of interactive platforms and the growing significance of online viewing. This is an area that is currently being progressed by NI Screen as part of the BBC/NI Screen joint agreement with I-Player as well as increasing the Irish language content available on the Digital Film Archive (DFA).

1.4.3.2 Training

The ILBF has supported a wide range of training schemes over the evaluation period, including (but not limited to): the New Entrant Training Scheme; Trainee Producer scheme; Trainee Editor Scheme; Trainee Camera Operator Scheme; and the Trainee Assistant Producer Scheme. Trainees that responded to the survey highlighted a number of key impacts from the training provided including:

- 85% percent of trainees (n=20) stated that they used the skills they learnt in their first job after undertaking ILBF training; and
- 47% of respondents (n=19) felt that they would not have obtained their current job in the absence of the ILBF training scheme.

Qualitative feedback also highlighted that the training scheme(s) provided beneficial networking opportunities with one respondent noting that these were 'essential on [their] completion of the scheme and working on a freelance basis'. In addition, 41% felt that the training had met all of their expectations while 83% were either satisfied, or very satisfied with the career prospects offered.

1.4.4 Value for Money

The target average cost per minute across all ILBF programmes in 2015/16 Q4 was £725; previous targets were £695 in 2012/13 and £725 in 2014/15. The cost per minute achieved for the ILBF (from R2 2011 up to R3 2015, based on 127 projects³) was £774. This is higher than anticipated however compares favourably with the £1,107.59 cost per minute achieved for the USBF (up to March 2016 based on 52 projects).⁴

However cost per minute is a rough indicator and cannot be looked at in isolation from other issues such as type of project and quality of content when considering VFM. Others such as BAI do not use this measure instead preferring to assess if the final production content matches the agreed treatment

³ Note: the cost per minute could only be calculated for 127 of the 139 approved projects

⁴ PACEC (2016) *Strategic Review and Evaluation of the Ulster-Scots Broadcast Fund*

and the quality of the production etc. Furthermore, the cost per minute may be unrealistic as it has been in place for a number of years and could potentially increase due to both inflation and the enhanced emphasis on high production values in the Fund.

Across the 139 applications approved (from R2 2011 up to R3 2015) the ILBF contribution ranged from £3,320 to £400,000, totalling £11.31m, and the broadcaster/other match funding contribution totalled £8.39m. Therefore, across the 139 approved applications, £0.74 was leveraged for every £1 of ILBF monies spent. This also compares favourably with the USBF where across the 52 projects supported £0.44 was leveraged for every £1 of USBF monies spent (March 2011 to March 2016).⁵

1.4.5 Remit / Future Development

Evidence from the benchmarking analysis as well as feedback from production companies and key stakeholders suggested key areas for future development included:

- Broadening the remit of the ILBF to include a greater focus on interactive / digital (online) content in order to attract audiences not only in NI / Ireland but further afield;
- Consideration of the most appropriate medium to reach and engage with young people. The benchmarking analysis found that each of the other support mechanisms are developing ways to attract younger viewers in order to ensure sustainability / continuity into the future;
- Further development of greater local and international collaborations between broadcasters, funders and production companies in the development of programmes;
- Increasing the size of the ILBF to ensure parity of support with other minority / indigenous languages (comparisons were made with the per capita funding levels in Wales and Scotland)
- Providing long-term funding to promote sustainable development in the industry (e.g. BBC Alba provide a four year funding deal / 'multiyear production contracts'); and
- Broadening the range of programming supported by ILBF from "traditional" (culture, history, etc.) to other genres and reflecting that Irish is part of modern urban culture as well as a more traditional, rural outlook.

A key area for development highlighted by production companies was the desire for longer-term funding to promote sustainable development and growth in the industry. In addition, companies indicated there was scope to:

- increase the amount of funding required from broadcasters (suggesting a greater number of projects could be supported if there was a 50/50 funding structure);
- develop an ILBF marketing structure to maximise the benefit of ILBF programming; and
- provide production opportunities for less established companies / provide greater research and development funding.

⁵ PACEC (2016) *Strategic Review and Evaluation of the Ulster–Scots Broadcast Fund*

1.5 Recommendations

There is a continuing need for the fund and government intervention, as while the ILBF has been successful in developing the sector, the findings indicate that it is not self-sustainable and requires a supported ecosystem to ensure development and growth.

Recommendation 1: We therefore recommend that the ILBF continues to support the sector.

There are a number of areas that could be developed in any future fund and these are listed below.

Operation

Recommendation 2: In order to provide ongoing evidence of how funded companies / projects are delivering ILBF programme priorities and objectives we recommend that specific outcome measures are set to reflect the following:

- A broadening reach / wider audience - for example increase in people from all community backgrounds understanding the Irish language, heritage and culture;
- Irish language programmes as a percentage of broadcast time;
- Interactive / online content – Irish language content accessed; use of iPlayer, etc.
- Critical acclaim – press coverage, award nominations and wins etc.
- Development of the Irish language production sector – growth of production companies and number of Irish speakers employed etc.

The ILBF currently has a target that all individuals completing training are to secure employment in the production sector at end of scheme. While securing employment is important to the growth of the Irish language production sector in NI, the ILBF should consider if 100% securing employment is realistic.

Recommendation 3: We recommend that the ILBF review this KPI to become more achievable within an appropriate timescale, for example 80% to secure employment within 6 months. Additional KPIs for training for consideration could include:

- Numbers that complete the training schemes;
- Satisfaction with the training / learning provided;
- Increase in knowledge as a result of the training;
- How they have applied the knowledge / learning from their training in their subsequent job(s); and
- How the knowledge / learning from their training impacted or benefitted the company(s) they work for (if applicable).

Remit / Future Development

Recommendation 4: We recommend that interactive / digital content is incorporated as part of TV programming to support greater promotion and distribution of funded programmes.⁶ We recommend that a promotion plan is agreed with production companies as part of their letter of offer to incorporate this.

⁶ For example Canada Media Fund productions must include content intended for distribution on at least two platforms, one of which must be television, and the other, a digital media platform

Recommendation 5: We recommend that a specific percentage of the ILBF should be allocated to the development, production and marketing of content on interactive / digital platforms in order to reach younger audiences and ensure sustainability / continuity into the future.

Recommendation 6: We recommend that the fund continue to use and develop current collaborative activities (e.g. MIP trips⁷) to support the development of local and international relationships between broadcasters, funders and production companies in order to expand funding sources as well as reaching a wider audience.

Recommendation 7: We recommend that the fund consider developing a longer-term funding stream after consultation with sector on the likely appetite / demand for such support.

1.6 Management Response

The NI Screen Management response to the recommendations detailed in section 1.5, if any, are outlined below.

1.6.1 Response to Recommendations

There is a continuing need for the fund and government intervention, as while the ILBF has been successful in developing the sector, the findings indicate that it is not self-sustainable and requires a supported ecosystem to ensure development and growth.

Recommendation 1: We therefore recommend that the ILBF continues to support the sector.

NI Screen Response:

We welcome the recommendation that the ILBF continues to support the sector. It should be noted that in any assessment of the ILBF's past performance and future strategy, the scale of the Fund must be recognised and the merits/challenges of the Fund must be put into perspective within the overall media landscape of Northern Ireland and in the wider, complex question of Irish language in society.

The level of funding available has not increased since it was set at £3 million per annum in 2005. This is significantly less than the resources available to other indigenous funds and broadcasters in Scotland and Wales, specifically: £12 million per annum with an additional contribution of £8 million from BBC Scotland, (in the case of MG Alba); and £74.5 million for S4C in Wales, with an additional 520 hours of programming provided by BBC Wales.

An increase in the scale of the Fund and/or greater support from broadcasters would allow the Fund to further develop the sector, and in turn allow for the production of a wider selection of content across all platforms. It should be noted that some of the recommendations in this report have budgetary implications and are beyond the scope of the ILBF at its current level of funding.

⁷ NI Screen fund up to three Irish language producers to attend MIPCOM (entertainment content market in Cannes). Prior to attending the market, producers attend a pre-MIP day workshop in Northern Ireland Screen which outlines the most successful ways to approach the market. As well as having the opportunity to attend the various sessions at MIPCOM, attendees can arrange to meet other producers, sales agents and broadcasters at the various different stands. Northern Ireland Screen also sets up meetings and networking events for the producers with appropriate producers, distributors, broadcasters and sales agents at the event. This provides opportunities for the producers to showcase their back catalogue and current projects to potential funders and to provide an opportunity to work with other producers and broadcasters. Northern Ireland Screen liaise with MG Alba on these trips and they support two Gaidhlig producers to attend

Operation

Recommendation 2: In order to provide ongoing evidence of how funded companies / projects are delivering ILBF programme priorities and objectives we recommend that specific outcome measures are set to reflect the following:

- A broadening reach / wider audience - for example increase in people from all community backgrounds understanding the Irish language, heritage and culture;
- Irish language programmes as a percentage of broadcast time;
- Interactive / online content – Irish language content accessed; use of iPlayer, etc.
- Critical acclaim – press coverage, award nominations and wins etc.
- Development of the Irish language production sector – growth of production companies and number of Irish speakers employed etc.

NI Screen Response:

We welcome the recommendation to look at different outcome measures.

Measuring a broadening reach/wider audience requires separate audience research which we currently carry out every two years. We will continue to undertake this independent audience research. We also propose to look at Fios Físe, TG4's audience research programme which is managed by National University of Ireland Galway. As the audience panel has representatives in Northern Ireland we would seek access to this information in order to further tailor funding rounds to audience needs and wants.

Measuring the number of Irish language programmes as a percentage of broadcast time is not strictly within our control, as the number of Irish language programmes and Irish language online content is set by the individual broadcasters. While BBC and RTÉ have a number of Irish language slots, TG4 offers a full Irish language service.

We have funded a number of interactive projects and we do receive audience figures for this in terms of number of views etc. and will continue to monitor audience levels in this area. BBC i-Player figures are generally included in BBC audience figures.

Including details of critical acclaim is also a useful measure of success which we will adopt.

We are mindful of the role of the ILBF in the development and sustainability of the Irish language production sector and will ensure that this is reflected in measurements of success.

The ILBF currently has a target that all individuals completing training are to secure employment in the production sector at end of scheme. While securing employment is important to the growth of the Irish language production sector in NI, the ILBF should consider if 100% securing employment is realistic.

Recommendation 3: We recommend that the ILBF review this KPI to become more achievable within an appropriate timescale, for example 80% to secure employment within 6 months. Additional KPIs for training for consideration could include:

- Numbers that complete the training schemes;
- Satisfaction with the training / learning provided;
- Increase in knowledge as a result of the training;
- How they have applied the knowledge / learning from their training in their subsequent job(s); and

- How the knowledge / learning from their training impacted or benefitted the company(s) they work for (if applicable).

NI Screen Response:

We welcome the recommendation to review this KPI and agree that the target of 80% of trainees to secure employment within 6 months of leaving the scheme is a much more realistic target than the current one.

We also welcome the additional suggested KPI's which should provide a fuller picture of the impact of the training on the sector.

Remit / Future Development

Recommendation 4: We recommend that interactive / digital content is incorporated as part of TV programming to support greater promotion and distribution of funded programmes.⁸ We recommend that a promotion plan is agreed with production companies as part of their letter of offer to incorporate this.

NI Screen Response:

While we recognise the value of a dual platform approach and can encourage producers to submit applications for projects on dual platforms, this would need to be done in consultation with the broadcasters (if broadcasters are attached), as this would also have a budgetary impact on the projects. It may be more appropriate to look at this on a case by case basis.

We note that this recommendation is based on a case study of the Canada Media Fund, which has an annual budget of \$361.6 million Canadian dollars, a figure which dwarfs the £3 million per annum ILBF budget. A dual platform approach for each project would not be realistic in the context of the ILBF's current level of funding.

Recommendation 5: We recommend that a specific percentage of the ILBF should be allocated to the development, production and marketing of content on interactive / digital platforms in order to reach younger audiences and ensure sustainability / continuity into the future.

NI Screen Response:

The ILBF has a record of supporting interactive projects aimed at a younger audience. Several ILBF funded series aimed at a pre and primary school audiences are included in content for schools on the C2K website. This content is available to schools across Northern Ireland.

The ILBF Priorities also clearly state the Fund's wish to support content aimed at younger audiences, and interactive content. However, we welcome the recommendation to set aside a specific percentage of funding for this kind of content and will continue to ensure that this is communicated to the sector.

⁸ For example Canada Media Fund productions must include content intended for distribution on at least two platforms, one of which must be television, and the other, a digital media platform

Recommendation 6: We recommend that the fund consider ways to support the development of greater local and international collaborations between broadcasters, funders and production companies in order to expand funding sources as well as reaching a wider audience.

NI Screen Response:

This is an area that is already being addressed by the Fund and will continue to be a priority for us. We actively encourage local and international collaborations in funding applications. We encourage producers to focus on the production of content with high production values that can appeal to both a local and international audience.

We have supported three Irish language producers to attend MIPCOM in October 2016, a further three producers will attend in October this year. We worked closely with MG Alba on this trip and they supported two Gaidhlig producers to attend last year and will do the same this year. Two co-productions have come through the funding rounds as a direct result of the first trip to MIPCOM.

We have also supported a producer to attend the Sunnyside documentary festival in 2016.

Recommendation 7: We recommend that the fund consider developing a longer-term funding stream after consultation with sector on the likely appetite / demand for such support.

NI Screen Response:

We recognise that the provision of a longer term funding stream would provide more sustainability, particularly to the smaller production companies. We have had discussions with the broadcasters on the mechanics of providing funding for multiple series/a slate of programming and we did provide support to one production company for two series. This is an area we will continue to look at, particularly in light of the new funding strategy at TG4.

It is worth noting that both our assessment process and our collaborative approach with the sector also aims to ensure sustainability of the Irish language production sector.

2 TERMS OF REFERENCE AND METHODOLOGY

2.1 Introduction

Northern Ireland (NI) Screen appointed RSM PACEC via a competitive tendering exercise to conduct a review of the Irish Language Broadcast Fund (ILBF). The ILBF was set up to provide finance for the production of quality moving image product in the Irish language in Northern Ireland. The Fund's aim is to co-finance a wide range of moving image products capable of being delivered by present and developing delivery platforms – including analogue, online and interactive. This report provides a strategic review and evaluation of the Fund for the period 2011 – 2016.

2.2 Terms of Reference

The evaluation should address the following issues:

- Outline the strategic context for the future operation of the Fund;
- Outline the aims and objectives of the Fund and assess the extent to which these are appropriate.
- Assess the extent to which the Fund's objectives have been achieved and set out any explanatory factors which may have led to any divergence from the outturns originally projected for the Fund;
- Assess the benefits delivered by the project including cultural, educational and economic;
- Assess project management and controls, including the extent to which the selection criteria was adhered to in the process of evaluating applications under the Fund;
- Assess the Value for Money and cost effectiveness delivered by the Fund;
- The evaluation must make recommendations, based on a series of consultations and other evidence, for any future government intervention in this sector, including the fund's operation, remit and future development to include:
 - The extent to which funded projects have delivered the ILBF programme priorities and objectives;
 - The inter-relationship between broadcaster and committee decisions;
 - The decision-making process for projects;
 - How committee views are incorporated within final editorial specifications;
 - Programme review and assessment, including quality of language and production values;
 - Training activity and its impacts on the sector and delivery of projects
 - The impact of the Fund on the development of the independent production sector;
 - Any changed circumstances and new emerging opportunities which may affect the remit, operation and priorities of the Fund.

The Consultant must complete the following key stages of work:

- Fund Familiarisation and Profiling of Data to include wider policy context,
- Consultations – a series of consultations with key stakeholders within the Irish language sector: broadcasters, ILBF Committee members, Northern Ireland Screen staff and independent production companies and trainees. To look at the following areas:
 - How has the ILBF work engaged with and been received by the key stakeholders within the Irish language sector;
 - Explore the Committee's expectations of funded projects and the extent to which they fulfilled stated objectives, including cultural, educational and economic benefits;

- Examine how committee members understand their role and their assessment of the ILBF's impact and benefits, to include lessons learned and areas for development;
- Review broadcaster expectations and constraints; including their understanding and approach to Irish Language programming, how their definitions and priorities align with the ILBF objectives;
- Review production sector experience, confidence, and constraints; including their understanding and approach to Irish language programming and any difficulties they may have encountered and review the level and type of support provided by the ILBF;
- A review of audience data:
 - Assess the audience impact and appeal of the fund, making use of Broadcasters' Audience Research Board (BARB) data and feedback and assessing any correlation between different types of programming and the size and profile of the audience achieved
- Benchmarking with similar support mechanisms

2.3 Methodology

The evaluation methodology was agreed with NI Screen in March 2017. It was agreed that the scope of the review would be 2011/12 to 2015/16. The following key stages of work have been completed:

- [Fund Familiarisation and Profiling of Data](#) - review of documents relating to the strategic context for the ILBF; internal Fund documentation (e.g. data on number of companies funded and hours of broadcasting produced by genre etc.); quarterly activity reports to the British Film Institute (BFI) detailing Fund performance; audience data for funded programmes; and documentation relating to the application process (e.g. Fund priorities, role of the committee etc.). This was used, alongside consultation feedback, to assess the performance of the Fund against its key objectives;
- [Stakeholder consultations](#) – interviews were carried out with broadcasters, committee members, Northern Ireland Screen and sector representatives (see Section 7 for full list of consultees) - consultations were carried out to gather feedback on rationale for and achievements of the Fund, the role of the Investment Committee and any areas for future development;
- [Survey of production companies supported by the ILBF](#) - online / telephone survey of 11 production companies that received funding from the ILBF which gathered feedback on the impacts achieved and the ongoing need for the Fund;
- [Survey of unsuccessful production companies](#) - online / telephone survey of 18 production companies that applied for but did not receive funding from the ILBF which gathered feedback on their views, opinions and experiences of the application process;
- [Survey of trainees supported by the ILBF](#) - online survey of 41 trainees that received support from the ILBF which gathered feedback on their views, opinions and experiences of the training scheme(s) provided by the ILBF as well the impacts achieved and the ongoing need for the Fund;
- [Review of the Project Assessment Process](#) - a desk review of a sample of successful and unsuccessful applications was completed to determine the completeness and quality of the assessments and the extent to which the specified selection criterion for the Fund was adhered to during this process;
- [Benchmarking](#) - review of the Sound and Vision Scheme (Ireland); BBC Alba (Scotland); S4C (Wales) and the Canadian Media Fund in relation to their scope, processes and outcomes achieved, identifying key learning for the ILBF; and
- [Analysis and Reporting](#) - analysis of the data and the development of a draft and final report.

2.4 Report Outline

The following sections present the evidence collected during each stage of the methodology. The remainder of the report is structured as follows:

- Section 3 – sets out the current and strategic context for the future operation of the Fund;
- Section 4 – assesses project activity supported by the ILBF;
- Section 5 – presents feedback from production companies;
- Section 6 – presents feedback from trainees;
- Section 7 – presents feedback from key stakeholders;
- Section 8 - assesses ILBF fund management and processes;
- Section 9 – compares the activity of the ILBF with the Sound and Vision Broadcast Fund; BBC ALBA; S4C Wales and the Canada Media Fund; and
- Section 10 – presents the overall conclusions and recommendations from the review.

3 STRATEGIC CONTEXT / RATIONALE FOR THE FUND

3.1 Introduction

This section examines the background to the establishment of the ILBF, current and future strategic context and presents evidence regarding the continuing need for the Fund.

3.2 Background to the Establishment of the ILBF

The creation of the ILBF followed directly from several key political and cultural developments in the UK and Northern Ireland, specifically:

3.2.1 The Belfast / Good Friday Agreement

The 1998 Belfast Agreement (“the Good Friday Agreement”) committed the British Government to take all the necessary steps to secure the establishment of a fund for financial support for Irish language film and television production.

In particular the Good Friday Agreement suggested the establishment of a range of new bodies and contained a section on Economic, Social and Cultural Issues, in which there are some provisions relating to the Irish Language, including the following:

- All participants recognised the importance of respect, understanding and tolerance in relation to linguistic diversity, including in Northern Ireland, the Irish language, Ulster-Scots and the languages of the various ethnic communities, all of which are part of the cultural wealth of the island of Ireland.
- In the context of active consideration currently being given to the UK signing the Council of Europe Charter for Regional or Minority Languages, the British Government will in particular in relation to the Irish language, where appropriate and where people so desire it:
 - take resolute action to promote the language;
 - facilitate and encourage the use of the language in speech and writing in public and private life where there is appropriate demand;
 - seek to remove, where possible, restrictions which would discourage or work against the maintenance or development of the language;
 - make provision for liaising with the Irish language community, representing their views to public authorities and investigating complaints;
 - place a statutory duty on the Department of Education to encourage and facilitate Irish medium education in line with current provision for integrated education;
 - explore urgently with the relevant British authorities, and in co-operation with the Irish broadcasting authorities, the scope for achieving more widespread availability of Teilifís na Gaeilge in Northern Ireland;
 - seek more effective ways to encourage and provide financial support for Irish language film and television production in Northern Ireland; and
 - encourage the parties to secure agreement that this commitment will be sustained by a new Assembly in a way which takes account of the desires and sensitivities of the community.

3.2.2 The European Charter for Regional or Minority Languages

The European Charter for Regional or Minority Languages (1992), ratified by the British Government in 2001, embedded the use and promotion of minority languages. It set out eight fundamental principles and objectives applicable to all languages:

- Recognition of regional or minority languages as an expression of cultural wealth;
- Respect for the geographical area of each regional or minority language;
- The need for resolute action to promote such languages;
- The facilitation and/or encouragement of the use of such languages, in speech and writing, in public and private life.
- The provision of appropriate forms and means for the teaching and study of such languages at all appropriate stages.
- The promotion of relevant transnational exchanges.
- The prohibition of all forms of unjustified distinction, exclusion, restriction or preference relating to the use of a regional or minority language and intended to discourage or endanger its maintenance or development; and
- The promotion by states of mutual understanding between all the country's linguistic groups.

In particular Part III of the Charter sets out a list of specific actions that could be taken in support of a language, with Article 11 applying to media and Irish language programming specifically. The table below presents the detail contained in Article 11.

Table 3:1: European Charter for Regional or Minority Languages (2001): Article 11 – The Media

Article 11 – The Media
The Parties undertake, for the users of the regional or minority languages within the territories in which those languages are spoken, according to the situation of each language, to the extent that the public authorities, directly or indirectly, are competent, have power or play a role in this field, and respecting the principle of the independence and autonomy of the media:
To the extent that radio and television carry out a public service mission:
i. To ensure the creation of at least one radio station and one television channel in the regional or minority languages; or
ii. To encourage and/or facilitate the creation of at least one radio station and one television channel in the regional or minority languages; or
iii. To make adequate provision so that broadcasters offer programmes in the regional or minority languages;
i. To encourage and/or facilitate the creation of at least one radio station in the regional or minority languages; or
ii. To encourage and/or facilitate the broadcasting of radio programmes in the regional or minority languages on a regular basis;
i. To encourage and/or facilitate the creation of at least one television channel in the regional or minority languages; or
ii. To encourage and/or facilitate the broadcasting of television programmes in the regional or minority languages on a regular basis;
i. To encourage and/or facilitate the production and distribution of audio and audio-visual works in the regional or minority languages;
i. To encourage and/or facilitate the creation and/or maintenance of at least one newspaper in the regional or minority languages; or
ii. To encourage and/or facilitate the publication of newspaper articles in the regional or minority languages on a regular basis;
i. To cover the additional costs of those media which use regional or minority languages, wherever the law provides for financial assistance in general for the media; or
ii. To apply existing measures for financial assistance also to audio-visual productions in the regional or minority languages;
i. To support the training of journalists and other staff for media using regional or minority languages.

Article 11 – The Media

The Parties undertake to guarantee freedom of direct reception of radio and television broadcasts from neighbouring countries in a language used in identical or similar form to a regional or minority language, and not to oppose the retransmission of radio and television broadcasts from neighbouring countries in such a language. (...)

The Parties undertake to ensure that the interests of the users of regional or minority languages are represented or taken into account within such bodies as may be established in accordance with the law with responsibility for guaranteeing the freedom and pluralism of the media.

Source: *European Charter for Regional or Minority Languages (2001)*

3.2.3 The 2003 Joint Declaration by the British and Irish Governments

The 2003 Joint Declaration by the British and Irish Governments, stated that: “The British Government will continue to discharge all its commitments under the Agreement in respect of the Irish language. Specifically, in relation to broadcasting, the British Government will take all the necessary steps to secure the establishment as soon as possible, following receipt of the final business case in April, of a fund for financial support for Irish language film and television production... The two Governments will continue to work with the relevant regulators and broadcasting authorities to address the technical and other barriers with a view to increasing substantially the reception of TG4 in Northern Ireland.”

This Joint Declaration represented a public agreement towards the establishment of the ILBF. Following on from the above political commitment, DCAL commissioned a business case⁹ (including economic appraisal) of options to consider the establishment of an Irish Language Broadcasting Fund in Northern Ireland. The business case recommended that a fund of just over £12 million should be established to support the broadcasting of Irish language programming in Northern Ireland over a three year period. In October 2004 DCAL altered the ILBF funding budget from £12 million over three years to £12 million over five years. This was subsequently altered to £12m over four years from 2005 to 2009. Funding of the ILBF commenced, following European State Aid approval on 8 June 2005.

The business case and economic appraisal outlined that **‘a Fund of £12 million be expended over three years on an increasing basis, should be established to support Irish Language Television and Film Production in Northern Ireland’**.

3.2.4 Key changes since the establishment of the Fund in 2005

There have been a number of key developments in the strategic and policy landscape since the establishment of the ILBF, that have further strengthened the case for Government support of Irish language broadcasting, including:

- **Irish becomes an official language of the EU**

On 13 June 2005, EU foreign ministers including the UK Foreign Minister, voted to make Irish an official and working language of the European Union (EU). The new arrangements came into effect on 1st January 2007.

- **The ongoing drive for an Irish Language Act**

The drive for the establishment of the Irish Language Act reinforces the importance of the Irish Language in Northern Ireland. The proposed act designed to enhance and protect the development of the Irish language underwent consultation in 2006 and if implemented would effectively result in the Irish language becoming an official language in Northern Ireland, having equal validity with English and being recognised as an indigenous language.

⁹ Irish Language Broadcasting Fund – Business Case and Economic Appraisal Final Report to DCAL (August 2003).

• The Northern Ireland (St Andrews Agreement) Act 2006

Building on the Good Friday Agreement, the St Andrews Agreement (October 2006) committed the UK Government to work with the incoming Executive to protect and enhance the development of the Irish and Ulster-Scots languages. This commitment was consequently included in amendments to the Northern Ireland Act 1998, placing duties on the Executive to adopt a strategy setting out how it proposes to enhance and protect the development of the Irish language and Ulster-Scots culture, heritage and language:

“Strategies relating to Irish language and Ulster-Scots language etc.

(1) The Executive Committee shall adopt a strategy setting out how it proposes to enhance and protect the development of the Irish language.

(2) The Executive Committee shall adopt a strategy setting out how it proposes to enhance and develop the Ulster-Scots language, heritage and culture.

(3) The Executive Committee —

(a) must keep under review each of the strategies; and

(b) may from time to time adopt a new strategy or revise a strategy.”

3.3 Current and ongoing policies and strategies

This section examines the current and ongoing strategies and plans and presents evidence regarding the continuing need for the promotion and development of the Irish Language in Northern Ireland.

3.3.1 Draft PfG 2016 – 2021¹⁰

The Irish Language is discussed in relation to Outcome 5 ‘We are an innovative, creative society, where people can fulfil their potential’ and Outcome 9 ‘We are a shared society that respects diversity’

Under these outcomes, in order to ‘encourage greater social inclusion and cultural participation for all’ and ‘promote mutual respect and understanding’, the Draft PfG states that it will ‘Develop the potential of Northern Ireland’s Irish and Ulster Scots languages and cultures including establishing an Ulster–Scots Institute and Irish Language Academy’.

3.3.2 Languages for the Future NI Languages Strategy

An objective of the strategy is ‘to Sustain, Maintain and Promote our Linguistic and Cultural Identities and Uniqueness’. Under this objective the strategy states ‘it is important that each language be promoted as part of the shared cultural and economic wealth of Northern Ireland. It should furthermore be recognised that Irish and Ulster-Scots have differing needs and requirements and, where this is the case, it is fitting that these needs and requirements should be addressed independently and appropriately’.

One of the main recommendations from this strategy is that ‘the provisions of the European Charter for Regional or Minority Languages, ratified by the UK government, are fully applied and that, as an officially recognised indigenous language on an equal footing with Scottish Gaelic and Welsh, Irish should be afforded the full status and privileges that such standing entails’.

¹⁰ Source: Draft Programme for Government Framework 2016 – 21 supplemented with ‘Programme for Government Consultation Document’

3.3.3 Opening Doors: A Strategy to Transform the Screen Industries in NI

The Opening Doors strategy sets a number of sectoral priorities in regards to the ILBF and the promotion of the Irish Language sector, including:

- The Irish Language Broadcast Fund will continue to balance the respective needs of audience, companies, broadcasters and trainees through the support of 60 hours' programming a year and the continuation of the training programmes.
- The fund will continue to support a wide range of genres including a specific interest in both drama and children's programming.
- We will seek to extend the value and audience for Irish Language content by encouraging international co-production opportunities within the portfolio of projects supported.
- Northern Ireland Screen will explore the possibility of enhancing audience choice for Irish Language content through the development of an iPlayer-type portal for Irish Language content. Ideally this would be undertaken in collaboration with both TG4 and BBC NI.
- The fund will continue to deliver apprenticeship opportunities for new entrants and will regularly review the sectoral skills demands to best match the apprentices with the opportunities available.

The sectoral priorities set out by the Strategy underline a clear commitment from NI Screen for the continued support of the ILBF, both in terms of training and productions.

3.3.4 DfC Strategy to Enhance and Protect the Development of the Irish Language 2015 – 2035

This strategy sets out plans to enhance and protect the development of the Irish language to 2035, taking account of the needs of the Irish language community and international best practice. The strategy sets out a number of key aims and objectives. The key aims and objectives of this Strategy are:

Aim 1: Support quality and sustainable acquisition and learning of the Irish language.

- To increase the numbers of those acquiring the Irish language through Irish-medium education.
- To increase the numbers of those learning the Irish language in the English-medium education system.
- To increase the numbers of those learning the Irish language outside of formal education.
- To support an increase in the numbers of children being reared through Irish.

Aim 2: Enhance and protect the status and visibility of the Irish language.

- To meet all obligations towards the Irish language under the European Charter for Regional or Minority Languages.
- To increase access to quality Irish language media.
- To increase awareness of the economic and social value of the Irish language.
- To secure legislative protection for the Irish language.

Aim 3: Deliver quality and sustainable Irish language networks and communities.

- To develop sustainable and quality local community-based Irish language plans and initiatives.
- To provide opportunities to use Irish to as wide a range of people as possible by encouraging family, social and community-based language networks.
- To support an increase in the number of daily speakers of the Irish language.

Aim 4: Promote the Irish language in a way that will contribute towards building a strong and shared community.

- To increase positive attitudes to the Irish language throughout the community.
- To increase positive attitudes towards the Irish language in the Protestant Unionist Loyalist community.

The Irish Language Broadcast Fund contributes to the achievement of all four of the set key aims. Further, The ILBF is discussed under Aim 2: Enhance and protect the status and visibility of the Irish language, with the strategy stating that ‘considering the success of the ILBF and, in order to provide sustainability, long-term support for the ILBF should be put in place with an emphasis on the development of Irish language companies’.

3.3.5 The growth strategy for the Digital Media Sector in Northern Ireland, 2013-2015

The digital media industry refers to those companies that develop and deliver high value digital products and services for diverse markets including mobile and web content, software, digital animation and post-production, e-learning, digital publishing, games, film and television content and music.

This strategy is a forward looking sector strategy and action plan (with key milestones) for the development of the Digital Media industry in Northern Ireland over three years (2013-2015), to drive economic growth in the Digital Media sector in Northern Ireland.

The strategy also sets the long-term vision to 2020 as:

“by 2020, Northern Ireland will be an internationally acclaimed hub of technological and creative excellence in digital media - developing and distributing innovative digital media and technologies to global markets.”

The targets for 2020 as set out in the strategy include that there is potential for the digital media sector to grow to 250 Tier 2 businesses, with turnover in excess of £1m, 80% external sales including exports and for the sector to employ over 4,000 people by 2020.

The ILBF has the ability to contribute to the targets set for 2020, by supporting digital/interactive media sector businesses through the funding of Irish Language productions/projects across the digital/interactive media sector.

3.3.6 Success through Skills - Transforming Futures (The Skills Strategy for NI, 2011)

The aim of this skills strategy for NI is set out as: To enable people to access and progress up the skills ladder, in order to:

- raise the skills level of the whole workforce;
- raise productivity;
- increase levels of social inclusion by enhancing the employability of those currently excluded from the labour market; and
- secure Northern Ireland’s future in a global marketplace.

While no particular reference is made to Irish Language skills or broadcasting, the ILBF contributes to the aims of the skills strategy for NI by providing numerous training schemes aimed at raising the skills level of the Irish Language workforce with a focus on enhancing the employability of the workforce through trainee schemes such as the New Entrants Scheme.

3.3.7 ILBF International and Interactive Strategies¹¹

Looking to the future, the ILBF is focused on broadening audience access to ILBF content and interactive content; progress in these areas to date is detailed below.

Broadening audience access to ILBF content

The ILBF are actively encouraging production companies to think about an international audience when conceiving their Irish language content ideas.

- In 2016, 3 Irish Language producers were supported to attend the biggest international market in the world for television content (MIPCOM); this is intended to be repeated with 3 different producers this year.
- These Irish language producers were also joined at the market by 2 Gaidhlig producers from Scotland in a joint initiative with MG Alba and this has directly resulted in one joint commission between one of the Irish and Scottish companies and another Irish and Scottish co-production is in the offing.
- One production company (Paper Owl Films) is signing a distribution deal for international sales of a crime documentary (Racht 1 & 2).
- A Paris based distributor (Lagardère Entertainment) acquired the distribution rights to a crime thriller series (An Bronntanas (The Gift)); another production company (Tristar) have purchased the rights to make an English language version of the series.
- Aer Lingus has acquired a short film (Máthair), which was originally commissioned for the Irish language online magazine Nós.ie. The film will be shown on transatlantic flights, exposing it to a much wider audience.
- NI Screen are working with the BBC in an effort to ensure that all ILBF funded content will be made available to view permanently on BBC iPlayer as part of the BBC/Northern Ireland Screen Partnership Agreement.

Interactive Content

The steps that ILBF have taken to fund interactive content include:

- Supporting a workshop, Digi-dúchais in 2014, which aimed to give production companies an overview of the interactive content market and ideas on how to develop interactive content. This was followed up with one-to-one mentoring with 3 different companies.
- Funding 3 mobile phone applications – Bia Linn, which was a series of games based on the children’s cookery series for TG4; Filíocht Anois – a series of animations based on A-level Irish language poetry and Tootie Tobar –an interactive storybook for children.
- Funding Meoneile.ie, an online magazine offering a range of content, since 2011.
- Supporting a series of content #Faduda, a series of vlogs created by a young audience for a young audience and covering a myriad of topics, for BBC Gaeilge.
- Funded a short series of content for online magazine Nós.ie which has included the first lip dub in Irish and the short drama Máthair

¹¹ Source: ILBF International and Interactive (document provided by NI Screen, June 2017)

3.4 The Irish Language including Potential Audience for Irish Language Programming

The Irish language is one of the oldest languages in the world. It belongs to the Celtic branch of the Indo-European languages; other similar languages are Scottish Gaelic, Manx, Welsh, Breton and Cornish. The Irish language movement in Northern Ireland is essentially revivalist. The last native [historically] speakers of Irish died in the 1970s but, by then, Irish-speaking families had appeared in different parts of Northern Ireland, including a small cluster in Belfast. Irish is being transmitted inter-generationally in these families. Irish speakers are spread throughout Northern Ireland with the largest concentration in the greater Belfast area.

According to the Northern Ireland 2011 Census, 10.7 per cent (or 184,898 persons) of all persons aged three and over had 'some knowledge' of Irish. These figures make Irish the second most common spoken language in Northern Ireland.

Table 3:2: Knowledge of Irish by Age category

	Number	Some ability in Irish ¹²		No ability in Irish	
		N	%	N	%
All usual residents aged 3 and over	1,735,711	184,898	10.7%	1,550,813	89.3%
Aged 3 to 24	531,805	65,280	12.3%	466,525	87.7%
Aged 25 to 44	498,046	57,960	11.6%	440,086	88.4%
Aged 45 to 64	442,140	43,512	9.8%	398,628	90.2%
Aged 65 and over	263,720	18,146	6.9%	245,574	93.1%

Source: Census 2011

Looking specifically at 'knowledge of Irish' by age group, the figures indicate that those aged 3 – 24 are most likely to have some knowledge of Irish, with 12.3 per cent of that population grouping having 'knowledge of Irish'. Those aged 65 and over have least knowledge of Irish, at 6.9 per cent. With the youngest age group of 3 - 24 having the best knowledge of Irish, it is expected that the strength of knowledge of the language is likely to grow as this age group progresses.

Two research reports published by Millward Brown in 2011¹³ and 2015¹⁴ have identified some interesting findings with regard to use of Irish Languages and Irish Language television in particular:

- In 2015, 12% claimed to speak or understand the Irish Language, this is up 1 percentage point from 2011;
- The proportion of people who watch Irish Language TV that rated it as good fell by 6 percentage points between the 2011 and 2015 studies;
- The proportion of people who speak or understand Irish and watch Irish Language TV that rated it as good has increased by 7 percent points between the 2011 and 2015 studies;

¹² Note: 'Some ability in Irish' is any of the following; understanding Irish, reading Irish, speaking Irish or writing Irish.

¹³ Audience Research Report – Millward Brown Ulster (commissioned by NI Screen), 2011

¹⁴ Audience Research Report – Millward Brown Ulster (commissioned by NI Screen), 2015

- In 2015, a higher proportion (10 percent points higher) of those who watch Irish language television output stated that it had encouraged their interest in the Irish language when compared with 2011;
- Similar levels of respondents rated the cultural and educational value of TV output as high in 2011 and 2015;
- A slightly higher percentage (3 percent points higher) of respondents in 2015 stated that there is a need to increase the range of Irish Language programmes available to NI viewers than in 2011;
- A much higher proportion of respondents in 2015 (50%) felt that Irish language TV should be funded by government than in 2011 (36%), while roughly the same proportion felt it should be funded by broadcasters.

This would suggest that audience interest in Irish Language broadcasts has increased between 2011 and 2015, evidenced through increases in the proportion of respondents stating that there is a need to increase the range of programmes, as well as a higher proportion stating that Irish language TV output has encouraged their interest in the Irish Language. Further, the audience feedback suggests that quality of the productions has increased, with a higher proportion of those who speak or understand Irish rating programmes as good in 2015 than 2011.

3.5 BBC NI: role in relation to Irish Language broadcasting

BBC NI is the main broadcaster of Irish Language content in Northern Ireland and the call for applications issued by the ILBF often coincides with BBC commissioning rounds.

The current Charter¹⁵ states that the BBC exists to serve the public interest and that it shall be “independent in all matters concerning the content of its output, the times and manner in which this is supplied, and in the management of its affairs”. The agreement¹⁶ which accompanies the Charter outlines the public purpose of the BBC in representing the UK, its nations, regions and communities, specifically:

“In developing (and reviewing) the purpose remit for representing the UK, its nations, regions and communities, the Trust must, amongst other things, seek to ensure that the BBC:

- *(a) reflects and strengthens cultural identities through original content at local, regional and national level, on occasion bringing audiences together for shared experiences; and*
- *(b) promotes awareness of different cultures and alternative viewpoints, through content that reflects the lives of different people and different communities within the UK.*

In doing so, the Trust must have regard amongst other things to:

- *(a) the importance of reflecting different religious and other beliefs; and*
- *(b) the importance of appropriate provision in minority languages”.*

3.6 Appropriateness of Aims and Objectives for ILBF

The Irish Language Broadcast Fund (the ‘ILBF’) has been set up to provide finance for the production of quality moving image product in the Irish language in Northern Ireland¹⁷. The fund’s aim is to co-

¹⁵ Broadcasting: Royal Charter for the continuance of the British Broadcasting Corporation (2006)

¹⁶ Broadcasting: An Agreement Between Her Majesty’s Secretary of State for Culture, Media and Sport and the British Broadcasting Corporation (2006)
http://downloads.bbc.co.uk/bbctrust/assets/files/pdf/about/how_we_govern/agreement.pdf

¹⁷ Source: Northern Ireland Screen – Review Of Irish Language Broadcast Fund – Specification (2017)

finance a wide range of moving image product capable of being delivered by present and developing delivery platforms – including analogue, digital, online and interactive¹⁸.

The ILBF website and guidelines provides further details regarding the funds aims and priorities. Overall, the ILBF's aims are to promote production and broadcast of quality Irish language content for an audience in Northern Ireland and beyond and to help sustain the growth of the Irish language production sector in Northern Ireland^{19 & 20 & 21} A key criteria is clear evidence that the product will, once produced, reach a substantial audience in Northern Ireland. This audience reach will most usually be evidenced through the commitment of an appropriate broadcaster but may in certain cases be evidenced differently.

More specifically,²² particular priorities include the following:

- **Production Hours:** Funding for around 60 hours per year of programming.
- **Content:** applications for content that ensures prominence of the Ulster dialect, geography, history, society and culture welcomed.
- **Irish language spoken word:** minimum of 75% of the spoken word must be in the Irish language (and for every funded project to be sub-titled in English).
- **Genre:** The ILBF will consider any genre that meets its funding criteria, but **particularly welcomes content that is aimed at children and young people (preschool - teens)** including both original and re-versioned content from other languages. This could take the form of, for example, drama, magazine series, animation, documentary, light or factual entertainment.
- **Programming:** applications for factual and lifestyle programming, including new and existing formats welcomed.
- **Education:** Irish language learners make up a significant part of our audience and we welcome applications to fund educational programming aimed at any age group. Applicants should have some experience in producing educational content and be knowledgeable of the Northern Ireland curriculum.
- **Drama:** The ILBF wishes to support low-budget drama based in Northern Ireland with an aim to support one series over a two year period. Therefore the ILBF would like to support a new drama series with a production model that would provide training and experience to Irish speaking actors, writers, producers and directors.
- **Interactive:** The ILBF welcomes enquiries regarding funding for mobile phone applications, interactive games and website content, particularly those aimed at a youth audience and language learners. Consideration could be given to the translation to Irish of existing applications and games which have proven market success and/or reached a wide audience. In all cases applicants will have to provide evidence of extensive audience reach, and, if appropriate proven audience need or desire for this content, particularly if a traditional broadcaster is not attached.
- **Radio and Television:** The ILBF recognises the crossover of skills in radio and television production and therefore welcomes enquiries regarding funding for a training and content production scheme. It currently supports an Irish language radio content production and

¹⁸ Source: Northern Ireland Screen – Review Of Irish Language Broadcast Fund – Specification (2017)

¹⁹ Source: Management Response to ILBF Investment Committee Meetings Notes (Nov 2014)

²⁰ Source: ILBF Priorities (Downloaded from NI Screen Website, last accessed: 16/06/2017

<http://www.northernirelandscreen.co.uk/wp-content/uploads/2016/11/Priorities.docx>)

²¹ Source: ILBF Guidelines (Nov 2004, updated Aug 2016)

²² Source: ILBF Priorities (Downloaded from NI Screen Website, last accessed: 16/06/2017

<http://www.northernirelandscreen.co.uk/wp-content/uploads/2016/11/Priorities.docx>)

broadcasting scheme with strong training elements at its core and would seek to emulate this scheme.

- **Landmark Documentaries:** The ILBF will only consider applications for landmark documentaries/documentary series with tariffs exceeding those set out in the joint commissioning documents if the following information can be provided: evidence:
 - of broadcaster support (support from more than one broadcaster encouraged);
 - of significant audience reach (could the series reach a wider audience in a different territory?);
 - that other funding sources are being sought (BAI's Sound & Vision Scheme, Irish Film Board etc.);
 - that the proposed project necessitates the significant and extensive use of the following: drama reconstruction, archive, animation/graphics, travel, filming in areas with risk attached.
- **Relationship with broadcasters:** Interested applicants are also encouraged to examine the jointly produced commissioning documents which are updated on an annual basis. These provide more detail on the slots available and the specific genre and type of content that the individual broadcasters (BBC NI, TG4 & RTÉ) seek.

Underpinning the overall aims and priorities, each year, the ILBF set KPIs for the year ahead; a list of KPIs for 2011/12 to 2015/16 is available in Appendix 1. A summary of these – based most closely on 2015/16 - are detailed in the following table.

Table 3:3: ILBF Summary of KPIs (2015/16²³)

Category of Activity	Summary of KPIs – Indicative
<p>Production</p>	<ul style="list-style-type: none"> • Commissioning and provision of hours of additional TV across a wide range of genres. • Production of Irish language programmes for broadcast on BBC NI/RTÉ/TG4. • 100% of all programmes funded to be broadcast. • Audience of at least 25,000 in Northern Ireland • Quantitative audience figures collated from BARB & Nielsen • Qualitative research conducted • Average cost per minute across all programmes
<p>Training Schemes such as:</p> <ul style="list-style-type: none"> • New Entrant Training Scheme²⁴ • Trainee Researcher/AP²⁵ • Trainee Script Assistant Scheme²⁶ with Drama Production Companies • Trainee Editor Scheme²⁷ with Production Companies • Trainee Assistant Producer Scheme with Production Companies: • Trainee Producer scheme: • Trainee Director (Support) Scheme with Drama Production Companies • Trainee Producer /Director & Trainee Senior Producer Schemes²⁸ with Production Companies • Trainee Camera Operator Scheme • Trainee Video Journalist Scheme with Northern Visions²⁹ 	<ul style="list-style-type: none"> • Number individuals to complete the training scheme. • All individuals completing the training to secure employment in production sector at end of scheme.

²³ Source: ILBF Quarterly Activity Report to BFI (NI Screen, 3rd Quarter 2015/16)

²⁴ apprenticeship placements with Northern Visions and local production companies for 1 year

²⁵ Production of Irish language programmes for broadcast on NVTV/BBC NI/RTÉ/TG4. Two trainee Researcher/AP's will be placed on a 6 month rotation with NVTV and production companies from August 2015 for a one year period.

²⁶ support a year-long placement with an experienced drama production company

²⁷ apprenticeship with experienced picture editor for 1 year

²⁸ Production of Irish language programmes for broadcast on BBC NI/RTÉ/TG4. Apprenticeships with production companies for 2 years.

²⁹ apprenticeship with Northern Visions for 1 year

Category of Activity	Summary of KPIs – Indicative
Training and Broadcasting Scheme with Local TV Station NVTV³⁰	<ul style="list-style-type: none"> • Number of individuals to complete the training scheme • All individuals completing the training to secure employment in production sector at end of scheme • Number of minutes Irish language programmes produced by trainees to be broadcast on NVTV
MA in Film & TV Management; MA in Documentary Practice; MA in Script Writing³¹	<ul style="list-style-type: none"> • Uptake • Monitoring of progress
Skills Development Bursary Fund³²	<ul style="list-style-type: none"> • Applicants' progress to be monitored.
Group courses³³	<ul style="list-style-type: none"> • Applicants' progress to be monitored.
Radio Training³⁴ (Raidió Fáilte/ILBF Training & Production Scheme)	<ul style="list-style-type: none"> • Number of training sessions per year • Additional programme hours produced, broadcast and made available to other radio stations • Monitor progress of database

Source: ILBF KPIs 2011/12 to 2015/16 (NI Screen)

³⁰ Acting as a training & employment opportunity provider. Production of Irish language programmes for broadcast on local TV station NVTV. ILBF trainees shall be placed on a rotation cycle with NVTV. Essential criteria for entry - fluency in Irish. Trainees to produce Irish language programmes to be broadcast on NVTV.

³¹ To accelerate the development of television specific business skills within the sector and script writing skills. Two places available across three courses. Delivered by the University of Ulster in Coleraine. ILBF to fund places for Irish language speakers working in the production sector after assessing that applicants have appropriate language skills

³² Used to ensure first class industry focused skills in the Irish Language production sector. The ILBF Skills Development Bursary Fund is designed to assist Irish language speakers working within the production sector with financial support to participate in training courses. A key principle of the fund is that attendance at a training course should lead to advancement of skills, expertise and general career development. This in turn should have an impact on the Irish language production sector.

³³ To provide training in specific areas for groups of Irish language production people. Planned support for 2015/16 includes the areas of drama and writing for television. Funding is also made available for group courses based on sectoral need, with courses initially planned for the following areas: pitching of ideas, creating TV formats, digital strategies for TV content.

³⁴ In certain circumstances and only when a very strong training remit can be evidenced, funding may be made available for the production of Irish language radio programmes

In summary, the KPIs of the ILBF are typically measured through:

- Production including: hours of TV commissioned and provided; percentage of programmes funded that are broadcast; audience; average cost per minute of productions;
- Training and employment: number of trainees supported; trainees securing employment in production sector at end of scheme; and
- Radio: training sessions; programme hours produced and broadcast.

Whilst these measures are appropriate to the aims and objectives of the fund, they are focused particularly on activity and output measures. Looking ahead, it may be appropriate to give consideration to the impacts and outcomes that the fund seeks to achieve and to include other measures to capture these in some of the following areas, for example:

- Audience reach: reflecting broadening reach / wider audience, for example increase in people from all community backgrounds understanding the Irish language, heritage and culture;
- Irish language programmes as a percentage of broadcast time;
- Interactive / online content – Irish language content accessed; use of iPlayer, etc.
- Critical acclaim – press coverage, award nominations and wins etc.
- Development of the Irish language production sector – growth of companies etc.

3.7 Conclusion

Evidence supporting the ongoing and future need for the fund is grounded in:

- The current and ongoing strategies and plans present evidence regarding the continuing need for the promotion and development of the Irish Language in Northern Ireland.
- The provision of support for and the promotion of, indigenous and monitoring languages is embedded in both the EU and Northern Ireland strategic and policy environment. In particular the European Charter for Regional or Minority Languages advocates in Article 11 the need to (where appropriate) encourage and facilitate broadcasting on television and radio. As such the enhancement and protection of the Irish language is an adopted strategy of the Northern Ireland Executive.
- Census and market research findings suggest that clearly there is an audience for programmes broadcast in Irish language, and that there is room to increase viewing and interest in these products in terms of the proportion of the population who watch Irish language output with some degree of regularity.

4 FUND ACTIVITY

4.1 Introduction

This section provides an overview of the projects supported by the ILBF over the period 2011 – 2016. This analysis has been based mainly on an excel document received from NI Screen dated to March 2016 and containing information relating to 2011 Round 2 to 2015 Round 3. The remainder of the section conducts an analysis of:

- The number of projects supported and levels of ILBF investment made;
- Production companies and genres supported;
- Translation of funding into broadcasting activity;
- Promotion of Irish language and audience development
- Progress against targets; and
- Value for Money indicators, including cost per minute broadcast and evidence of compliance with the funding parameters set, match funding and levels of spend in Northern Ireland.

4.2 Projects supported & investments made

The table below outlines a summary of projects supported and investments made from each round (April 2011 to March 2016, up to and including Round 3 2015).

Table 4:1: Projects supported and investments (April 2011-March 2016)³⁵

Round / Year	Number of Investments	ILBF Investment	Average ILBF Investment per project
2011 R2	13	£996,227	£76,633
2011 R3	12	£931,752	£77,646
2012 R1	19	£1,292,143	£68,008
2012 R2	7	£584,680	£83,526
2012 R3	14	£705,738	£50,410
2013 R1	13	£1,437,612	£110,586
2013 R2	8	£628,674	£78,584
2013 R3	6	£414,000	£69,000
2014 R1	10	£1,093,694	£109,369
2014 R2	9	£620,423	£68,936
2014 R3	5	£366,851	£73,370
2015 R1	15	£1,648,443	£109,896
2015 R2	7	£572,607	£81,801
2015 R3	1	£20,000	£20,000
Total	139	£11,312,843	£81,387

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

³⁵ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive.

Initially the ILBF provided funding of £11,312,843 to 139 projects, an average of £81,387 of funding per supported project.

Consideration of the number of successful applications by each production company reveals a wide range of companies receiving funding from ILBF with a total of 28 applicants successfully receiving funding. The applicant with the largest number of funded projects is Below the Radar, accounting for 13.7% (n=19) of successful applications, all other companies had less than 10% of successful applications.

4.3 Commissions – Genre and Broadcaster

4.3.1 Commissions by Genre

In total 139 projects were approved for funding by the ILBF from April 2011 to March 2016³⁶. The table below outlines the breakdown of these by genre across each year.

Table 4:2: ILBF Commissions by Genre and Year (April 2011 – March 2016)³⁷

Genre	2011	2012	2013	2014	2015	Total	Total (%)
Animation	1	2	0	2	0	5	3.6%
Documentary	17	24	16	13	12	82	59.0%
Drama	2	1	1	0	1	5	3.6%
Education	1	0	0	0	0	1	0.7%
Entertainment	1	4	1	2	0	8	5.8%
Factual Entertainment	1	4	4	1	4	14	10.1%
Interactive / online	2	2	1	1	1	8	5.0%
Magazine Series	0	0	1	1	1	3	2.2%
Music	0	0	1	2	1	4	2.9%
Training	0	2	1	1	1	5	3.6%
Youth	0	1	1	1	2	5	3.6%
Total	25	40	27	24	23	139	100%
Total (%)	18.0%	28.8%	19.4%	17.3%	16.5%	100.0%	-

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

³⁶ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive.

³⁷ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive.

4.3.2 Spend by Genre

The table below sets out the ILBF spend by genre and year based on approved applications.

Table 4:3: ILBF Spend by Genre and Year (April 2011 – March 2016)³⁸

Genre	2011	2012	2013	2014	2015	Total	Total (%)
Animation	£28,684	£226,711	-	£166,775	-	£422,170	3.7%
Interactive / online	£135,315	£60,719	£150,000	£170,000	£170,000	£686,034	6.1%
Documentary	£768,952	£1,234,026	£1,071,827	£943,524	£872,002	£4,890,330	43.2%
Drama	£600,000	£10,000	£400,000	-	£20,000	£1,030,000	9.1%
Education	£46,263	-	-	-	-	£46,263	0.4%
Entertainment	£217,731	£370,276	£156,101	£151,235	-	£895,343	7.9%
Factual Entertainment	£131,034	£458,410	£367,000	£141,925	£497,994	£1,596,363	14.1%
Magazine Series	-	-	£135,000	£157,500	£315,000	£607,500	5.4%
Music	-	-	£50,000	£284,060	£147,000	£481,060	4.3%
Training	-	£120,000	£64,500	£60,000	£60,000	£304,500	2.7%
Youth	-	£102,418	£85,858	£5,950	£159,054	£353,280	3.1%
Total	£1,927,979	£2,582,561	£2,480,285	£2,080,969	£2,241,050	£11,312,843	100%
Total (%)	17.0%	22.8%	21.9%	18.4%	19.8%	100.0%	-

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

³⁸ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive.

Documentaries were the most commonly funded genre with 59.0% (n=82) of all projects and 43.2% (£4.9m) of the total funding allocated to this genre during 2011-2016. This is followed by factual entertainment which accounts for 10.1% (n=14) of all funded projects and 14.1% of the total funding (£1.6m). The profile of unsuccessful applications reveals that over two fifths of these were applications for funding to produce documentaries (n=33, 40.7%), followed by animation (n=14, 17.3%) and factual entertainment (n=10, 12.3%) series. This suggests a significant focus on two genres and therefore possibly a need to widen the range of genres being supported.

4.3.3 Commissions by Broadcaster

The table below sets out the approved applications by broadcaster up to and including Round 3 of 2015.

Table 4:4: Commissions per year by broadcaster (April 2011 – March 2016)³⁹

Broadcaster	2011	2012	2013	2014	2015	Grand Total	Total (%)
BBC	5	10	6	9	8	38	27.3%
BBC & TG4	2	2	5	2	2	13	9.4%
BBC & RTÉ	-	-	1	-	-	1	0.7%
N/A	-	3	1	1	1	6	4.3%
Online	1	-	-	1	2	4	2.9%
Raidió Fáilte	-	-	1	-	-	1	0.7%
RTÉ	1	1	-	1	-	3	2.2%
TG4	16	24	13	10	8	71	51.1%
TG4 & BBC Alba	-	-	-	-	2	2	1.4%
Grand Total	25	40	27	24	23	139	100.0%
Total (%)	18.0%	28.8%	19.4%	17.3%	16.5%	100.0%	-

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

The ILBF funded productions are broadcast by a wide range of broadcasters however the majority are with either TG4 or BBC. ILBF is heavily dependent on TG4 as a broadcaster as just over half (51.1%) of the 139 projects funded by the ILBF have TG4 as the only broadcaster and a further 15 projects involved TG4 with another broadcaster. However it should be noted that while TG4 have a full Irish Language schedule BBC and RTE have only a limited number of Irish Language slots available. Most other broadcasts are by BBC (or BBC with another broadcaster) (55 / 38.8% in total) and the ILBF co-funds all Irish Language television content on the BBC.

³⁹ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive.

4.3.4 ILBF Spend on Projects by Year and Broadcaster

The table below sets out the ILBF spend per year by broadcaster based on approved applications up to Round 3 of 2015.

Table 4:5: ILBF Spend per year (based on broadcaster; April 2011 – March 2016)⁴⁰

Broadcaster	2011	2012	2013	2014	2015	Total	Total (%)
BBC	£251,019	£864,753	£411,816	£766,111	£994,332	£3,288,031	29.1%
BBC & TG4	£432,825	£35,000	£646,101	£172,110	£169,488	£1,455,524	12.9%
BBC & RTÉ	-	-	£40,000	-	-	£40,000	0.4%
N/A	-	£175,132	£150,000	£60,000	£60,000	£445,132	3.9%
Online	£120,000	-	-	£170,000	£231,228	£521,228	4.6%
Raidió Fáilte	-	-	£64,500	-	-	£64,500	0.6%
RTÉ	£142,500	£120,000	-	£38,588	-	£301,088	2.7%
TG4	£981,635	£1,387,676	£1,167,868	£874,160	£674,752	£5,086,091	45.0%
TG4 & BBC Alba	-	-	-	-	£111,250	£111,250	1.0%
Total	£1,927,979	£2,582,561	£2,480,285	£2,080,969	£2,241,050	£11,312,843	100.0%
Total (%)	17.0%	22.8%	21.9%	18.4%	19.8%	100.0%	-

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

Overall, the ILBF have spent just over £5m on the 71 projects that have had TG4 as the sole broadcaster, accounting for 45.0% of ILBF funding; a further £1.56m of ILBF spend (13.8%) has been on projects that have TG4 as one of the broadcasters.

⁴⁰ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive.

4.4 Translation of funding into broadcasting activity

The table below sets out the number of projects and the minutes and hours produced under each round of the ILBF.

Table 4:6: Minutes / Hours produced - ILBF key statistics (2011 – 2015)

Round / Year	Minutes Produced	Hours Produced
2011 R2	2,008.0	33.5
2011 R3	2,038.0	34.0
2012 R1	1,541.5	25.7
2012 R2	1,834.0	30.6
2012 R3	721.0	12.0
2013 R1	2,140.0	35.7
2013 R2	989.0	16.5
2013 R3	510.0	8.5
2014 R1	2,242.0	37.4
2014 R2	1,676.0	27.9
2014 R3	386.0	6.4
2015 R1	2,753.0	45.9
2015 R2	546.0	9.1
2015 R3	-	-
Total	19,384.5	323.1

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

Overall the ILBF has supported the production of 19,384.5 minutes of Irish Language Programming, translating to 323.1 hours.

The numbers of productions approved and the corresponding number of minutes produced varies from round to round. The most hours of production came from Round 1, 2015 which resulted in 45.9 hours of production.

4.5 The promotion of the Irish language and audience development

4.5.1 Language development

The table below sets out the average percentage of spoken Irish of a sample of applications that had funding approved by the ILBF. This looks at a sample of 49 successful applications and takes the simple average of the percentage of spoken Irish indicated as part of their application for each year, as well as overall.

Table 4:7: ILBF Production Projects - % of spoken Irish (April 2011 – March 2016)⁴¹

Year	No of Production Projects in Sample	Average % Spoken Irish of Sample
2011/12	10	78%
2012/13	10	75%
2013/14	10	81%
2014/15	10	81%
2015/16	9	84%
Overall	49	79%

Source: Treatment and Application Assessment (Received from NI Screen)

The table shows that our sample of 49 applications had an average percentage of spoken Irish language of 79% (as indicated as part of their application)

4.5.2 Irish Language Speakers

See Section 5.4.3 for details of employment of Irish Language Speakers within ILBF supported productions. As part of the survey of successful production companies, we asked how many Irish language speakers there are in the organization and any increases as a result of involved in the ILBF.

4.6 Progress against Targets

The tables below are based on the data in the ILBF annual KPI reports provided by NI Screen for the period 2011/12 to 2015/16 (to Quarter 3).

These are produced annually and the KPIs vary from year to year (though fall within the same broad categories such as: production, training (across various training types that can vary year by year), as well as other areas such as nominations and emerging Irish Language companies. The total number of KPIs each year ranges from 11 to 25.

The first table is based on collating the total number of KPIs associated with each year and determining how many are met, on track or not met. Where KPIs have not been met, some evidence is included. Examples of KPIs that were not met are also included in the final column.

The second table provides some further detail with the broad categories of KPI included (in column one), along with some examples of the types of KPI that are included. A summary is included for each year to illustrate how many in each category are met, on track or not met. Supporting information – KPIs per year – is set out in Appendix 1.

⁴¹ Note: This contains details of a sample of approved projects from 2011 Round 2 to 2015 Round 3 inclusive.

Table 4:8: Performance against Target KPIs 2011/12 – 2015/16

Year	Number of KPIs	Met		Partial / On Target to be Met		Not met		KPIs not met	Evidence of KPIs not met
		N	%	N	%	N	%		
2011/12	8	7	87.5%	1	12.5%	0	0%	-	-
2012/13	25	8	32%	16	64%	1	4%	New Entrant Training Scheme with Production Companies: All individuals completing the training to secure employment in production sector at end of scheme.	Target not achieved, 7 of 8 currently employed in production sector.
2013/14	17	7	41%	9	53%	1	6%	NVTV: All individuals completing training to secure employment in sector at end of scheme	Six out of the seven 2012-13 New Entrants are employed within the sector
2014/15	20	12	60%	7	35%	1	5%	Trainee Director (Support) Scheme: At least 1 individual to complete the placement	No drama funded by ILBF in production, trainee reassigned as trainee researcher
2015/16 (at Q3)	16	8	50%	7 ⁴²	44%	1	6%	Average cost per minute across all programmes = £725	Average Cost per minute to ILBF from second funding round = £777.32
Total	86	42	48.8	40	46.5	4	4.6		

Source: ILBF KPI Reports

⁴² Note: This report comments on progress to achieve the KPIs up to Quarter 3 of 2015/16, therefore these KPIs are expected to be met by the end of Quarter 4.

Table 4:9: Performance against Target KPIs 2011/12 – 2015/16 – by category

Category of Activity / Examples of KPIs ⁴³	2011/12 ⁴⁴	2012/13 ⁴⁵	2013/14 ⁴⁶	2014/15 ⁴⁷	2015/16 ⁴⁸ - 3 quarters
Production: <ul style="list-style-type: none"> Commissioning and provision of between 60-70 hours of additional TV 100% of all programmes funded to be broadcast. Audience of at least 25,000 in Northern Ireland Quantitative audience figures collated from BARB & Nielsen Qualitative research conducted Average cost per minute across all programmes 	Total: 4 Met: 4 (100%) On target: 0 Not Met: 0	Total: 6 Met: 3 (50%) On target: 3 (50%) Not Met: 0	Total: 3 Met: 3 (100%) On target: 0 Not Met: 0	Total: 6 Met: 5 (83%) On target: 1 (17%) Not Met: 0	Total: 2 Met: 1 (50%) On target: 0 Not Met: 1 (50%)
New Entrant Training Scheme: <ul style="list-style-type: none"> Number individuals to complete the training scheme. All individuals completing the training to secure employment in production sector at end of scheme. 	Total: 1 Met: 1 (100%) On target: 0 Not Met: 0	Total: 2 Met: 0 On target: 1 (50%) Not Met: 1 (50%)	Total: 3 Met: 1 (33%) On target: 2 (67%) Not Met: 0	-	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0
Trainee Producer scheme: <ul style="list-style-type: none"> Number individuals to complete the training scheme. All individuals completing the training to secure employment in production sector at end of scheme. 	Total: 2 Met: 1 (50%) On target: 1 (50%) Not Met: 0	Total: 7 Met: 2 (29%) On target: 5 (71%) Not Met: 0	Total: 3 Met: 0 On target: 3 (100%) Not Met: 0	-	Total: 1 Met: 1 (100%) On target: 0 Not Met: 0

⁴³ Exact number and wording of KPIs varied each year, therefore this column provides details of key KPIs that were broadly same across all the years, however wording of these may vary.

⁴⁴ Comments on performance against targets as 31 March 2012. **Source:** Key Performance Indicators for 2011-2012 Financial Year (Excel file received in email from NI Screen)

⁴⁵ Comments on progress to date at half year and end year. **Source:** KPI against R.I.F.E Investment Plan, ILBF 2012/13 (Word file received in email from NI Screen)

⁴⁶ Comments on performance against targets for April 2013 to March 2014. **Source:** Key Performance Indicators for 2013-2014 Financial Year (Excel file received in email from NI Screen)

⁴⁷ Comments on Quarterly Progress for the period Apr 2014 to Mar 2015. **Source:** KPI against Investment Plan, ILBF 2014/15 (Word file received from NI Screen)

⁴⁸ This report comments on the progress till the 3rd quarter of 2015/16, therefore KPIs that were assessed to be on target are expected to be achieved by the end of Quarter 4. **Source:** Quarterly Activity Report To BFI - 3rd Quarter 2015/16 (Word file received from NI Screen)

Category of Activity / Examples of KPIs ⁴³	2011/12 ⁴⁴	2012/13 ⁴⁵	2013/14 ⁴⁶	2014/15 ⁴⁷	2015/16 ⁴⁸ - 3 quarters
Trainee Editor Scheme with Production Companies: <ul style="list-style-type: none"> Number individuals to complete the training scheme. All individuals completing the training to secure employment in production sector at end of scheme. 	-	-	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0	Total: 2 Met: 1 (50%) On target: 1 (50%) Not Met: 0	Total: 1 Met: 1 (100%) On target: 0 Not Met: 0
Trainee Camera Operator Scheme <ul style="list-style-type: none"> Number individuals to complete the training scheme. All individuals completing the training to secure employment in production sector at end of scheme. 	-	-	Total: 2 Met: 0 On target: 2 (100%) Not Met: 0	Total: 2 Met: 2 (100%) On target: 0 Not Met: 0	-
Training and Broadcasting Scheme with Local TV Station NVTV: <ul style="list-style-type: none"> Number individuals to complete the training scheme. All individuals completing the training to secure employment in production sector at end of scheme. Number of minutes Irish language programmes produced by trainees to be broadcast on NVTV 	Total: 1 Met: 1 (100%) On target: 0 Not Met: 0	Total: 3 Met: 0 On target: 3 (100%) Not Met: 0	Total: 3 Met: 1 (33%) On target: 1 (33%) Not Met: 1 (33%)	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0
Trainee Assistant Producer Scheme with Production Companies: <ul style="list-style-type: none"> Number individuals to complete the training scheme. All individuals completing the training to secure employment in production sector at end of scheme. 	-	-	-	Total: 2 Met: 1 (50%) On target: 1 (50%) Not Met: 0	Total: 1 Met: 1 (100%) On target: 0 Not Met: 0
Trainee Director (Support) Scheme with Drama Production Companies:	-	-	-	Total: 1 Met: 1 (100%) On target: 0	-

Category of Activity / Examples of KPIs ⁴³	2011/12 ⁴⁴	2012/13 ⁴⁵	2013/14 ⁴⁶	2014/15 ⁴⁷	2015/16 ⁴⁸ - 3 quarters
<ul style="list-style-type: none"> Number individuals to complete the training scheme. 				Not Met: 0	
MA in Film & TV Management; MA in Documentary Practice; MA in Script Writing: <ul style="list-style-type: none"> Uptake Monitoring of progress 	-	Total: 2 Met: 0 On target: 2 (100%) Not Met: 0	-	Total: 1 Met: 0 On target: 0 Not Met: 1 (100%)	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0
Trainee Script Assistant Scheme with Drama Production Companies: <ul style="list-style-type: none"> At least one individual to complete the training scheme. All individuals completing the training to secure employment in production sector at end of scheme 	-	-	-	-	Total: 1 Met: 1 (100%) On target: 0 Not Met: 0
Trainee Researcher/AP: <ul style="list-style-type: none"> At least two individuals to complete this scheme. All individuals completing the training to secure employment in production sector at end of scheme 	-	-	-	-	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0
Trainee Producer /Director & Trainee Senior Producer Schemes with Production Companies: <ul style="list-style-type: none"> At least two individuals to complete this scheme. All individuals completing the training to secure employment in production sector at end of scheme 	-	-	-	-	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0
Trainee Video Journalist Scheme with Northern Visions: <ul style="list-style-type: none"> At least one individual to complete this scheme. 	-	-	-	-	Total: 1 Met: 1 (100%) On target: 0 Not Met: 0

Category of Activity / Examples of KPIs ⁴³	2011/12 ⁴⁴	2012/13 ⁴⁵	2013/14 ⁴⁶	2014/15 ⁴⁷	2015/16 ⁴⁸ - 3 quarters
Skills Development Bursary Fund: <ul style="list-style-type: none"> Applicants' progress to be monitored. 	-	Total: 1 Met: 1 (100%) On target: 0 Not Met: 0	-	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0
Group courses: <ul style="list-style-type: none"> Applicants' progress to be monitored. 	-	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0	-	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0	Total: 1 Met: 0 On target: 1 (100%) Not Met: 0
Radio Training: <ul style="list-style-type: none"> Number of training sessions per year Additional programme hours produced, broadcast and made available to other radio stations Monitor progress of database 	-	Total: 3 Met: 2 (67%) On target: 1 (33%) Not Met: 0	Total: 2 Met: 2 (100%) On target: 0 Not Met: 0	Total: 3 Met: 2 (67%) On target: 1 (33%) Not Met: 0	Total: 2 Met: 2 (100%) On target: 0 Not Met: 0
Overall KPIs	Total: 8 Met: 7 (87.5%) On target: 1 (12.5%) Not Met: 0	Total: 25 Met: 8 (32%) On target: 16 (64%) Not Met: 1 (4%)	Total: 17 Met: 7 (41%) On target: 9 (53%) Not Met: 1 (6%)	Total: 20 Met: 12 (60%) On target: 7 (35%) Not Met: 1 (5%)	Total: 16 Met: 8 (50%) On target: 7 (44%) Not Met: 1 (6%)

Source: ILBF KPI Reports

Tables 4.8 and 4.9 show that of the 86 KPIs across the period 2011/12 to 2015/16, 48.8% (n=42) of these have been met, 46.5% (n=40) were partially completed or on track to be completed at the time of reporting, and 4.7% (n=4) of these KPIs were not met.

Regarding the KPIs that have not yet been met but are recorded as 'on target', a large number relate to a common KPI against a number of training schemes, stating that: 'All individuals completing the training to secure employment in production sector at end of scheme'; further a number of KPIs involved the ongoing monitoring of progress and as such have been recorded as 'on target'.

The report for 2015/16 reports on progress to Q3 2015/16 and as such a large number of KPIs are recorded as on track to be met, with the expectation that these will be completed by the end of Quarter 4.

4.7 VFM Indicators

A key indicator reflecting value for money is the average cost per minute of projects approved for funding, though it is important to bear in mind that this indicator should not be considered in isolation from other less tangible measures such as production type/genre and quality of content.

Of the 139 approved applications, it was possible to calculate the cost per minute to the ILBF for 127 of these projects.

The target average cost per minute across all programmes in 2015/16 Q4 activity report was £725 (previous targets were £695 in 2012/13 and £725 in 2014/15). The cost per minute achieved for the ILBF (from R2 2011 up to R3 2015, based on 127 projects⁴⁹) was £774.

The tables below provide further details of the cost per minute by year, genre, broadcaster and funding round for the ILBF.

It is important to note that the data discussed below covers successful applications from Round 2 2011 to Round 3 2015 inclusive. Therefore care should be taken when interpreting this data as it is acknowledged that data relating to the level of funding provided by the ILBF and the number of minutes of broadcast of successful applications may be subject to change as the project moves on from the applications stage. Therefore, the data presented in this section provides a snapshot of performance at a point in time, which is likely to develop further.

⁴⁹ Of the 139 approved applications, it was possible to calculate the cost per minute to the ILBF for 127 of these projects.

4.7.1 Cost per minute

The table below shows the average cost per minute⁵⁰ to the ILBF of projects receiving funding by genre and by year.

Table 4:10: ILBF Average Cost per Minute by Year and Genre (April 2011 to March 2016)⁵¹

Genre	2011		2012		2013		2014		2015 ⁵²		Total	
	Avg	N	Avg.	N	Avg.	N	Avg.	N	Avg.	N	Avg	N
Animation	£106	1	£2,178	2	-	-	£109	2	-	-	£936	5
Documentary	£524	17	£859	23	£796	16	£906	12	£853	12	£781	80
Drama	£1,378	2	-	-	£2,000	1	-	-	-	-	£1,585	3
Education	£428	1	-	-	-	-	-	-	-	-	£428	1
Entertainment	£605	1	£850	4	£434	1	£384	2	-	-	£651	8
Factual Entertainment	£728	1	£670	4	£816	4	£946	1	£1,016	4	£834	14
Magazine Series	-	-	-	-	£750	1	£875	1	£875	1	£833	3
Music	-	-	-	-	£500	1	£848	2	£362	1	£639	4
Youth ⁵³	-	-	£394	1	£318	1	-	-	£698	2	£527	4
Interactive / Online	£154	1	1,031	1	£227	1	258	1	258	1	£385	5
Training	-	-	-	-	-	-	-	-	-	-	-	-
Overall	£570	24	£903	35	£778	26	£744	21	£819	21	£774	127

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

The table indicates that:

- Drama were the most expensive to fund at £1,585 per minute (however it must be noted that this is based on a relatively small number (n=3) of funded projects);
- Animation were the second most expensive to fund at £936 per minute (based on 5 projects);
- Of those applicable⁵⁴, interactive/online productions had the lowest cost per minute at an average of £385 per minute (based on 5 projects).

The table below sets out the average cost per minute of approved applications to the ILBF by year and broadcaster.

⁵⁰ This was calculated by summing the cost per minute to the ILBF of each project across the genres and dividing this by the total number of projects funded under that genre.

⁵¹ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive.

⁵² Note: This includes details of successful applications for 2015 up to and including Round3, 2015.

⁵³ Note: This includes one online broadcast

⁵⁴ i.e. Not including training or development funds with no number of minutes of production

Table 4:11: ILBF Average Cost per Minute by Year and Broadcaster (April 2011 to March 2016)⁵⁵

Broadcaster	2011		2012		2013		2014		2015 ⁵⁶		Total	
	Avg.	N	Avg.	N	Avg.	N	Avg.	N	Avg.	N	Avg.	N
BBC	£630	4	£802	10	£769	6	£880	8	£901	8	£817	36
BBC & TG4	£1,235	2	£833	1	£980	5	£678	2	£631	2	£902	12
BBC & RTÉ	-	-	-	-	£678	1	-	-	-	-	£678	1
RTÉ	£792	1	£1,000	1	-	-	£106	1	-	-	£633	3
TG4	£485	16	£942	22	£754	13	£763	9	£905	7	£768	67
TG4 & BBC Alba	-	-	-	-	-	-	-	-	£554	2	£554	2
Online ⁵⁷	£154	1	£1,031	1	£227	1	£258	1	£639	2	£491	6
Overall	£570	24	£903	35	£778	26	£744	21	£819	21	£774	127

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

The table shows that projects that had both BBC & TG4 as broadcasters had the highest average cost per minute across the period April 2011 to March 2016 at £902 across 12 projects.

The table below sets out the average cost per minute of approved projects to the ILBF by funding round approved.

Table 4:12: ILBF Average Cost per Minute by Funding Round (April 2011 to March 2016)⁵⁸

Funding Round / Year	Number of Productions ⁵⁹	Average Cost per Minute
2011 R2	13	£531
2011 R3	11	£617
2012 R1	18	£1,009
2012 R2	7	£675
2012 R3	10	£873
2013 R1	13	£856
2013 R2	8	£697
2013 R3	5	£704
2014 R1	10	£690

⁵⁵ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive

⁵⁶ Note: This includes details of successful applications for 2015 up to and including Round 3, 2015.

⁵⁷ Note: This includes one 'Youth' project

⁵⁸ Note: This contains details of approved projects from 2011 Round 2 to 2015 Round 3 inclusive

⁵⁹ Note: the cost per minute could be calculated for 127 of the funded projects

Funding Round / Year	Number of Productions ⁵⁹	Average Cost per Minute
2014 R2	6	£641
2014 R3	5	£977
2015 R1	15	£756
2015 R2	6	£975
Overall	127	£774

Source: ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

The average cost per minute varied by funding round, with the highest average cost per minute being £1,009 in 2012 R1, and the lowest average cost per minute being £531 in 2011 R2.

4.7.2 Match Funding

A review of the 139 projects funded by the ILBF found that match funding was secured in all but 6 instances.

The ILBF contribution ranged from £3,320 to £400,000, totalling £11.31m, and the broadcaster/other match funding contribution totalling £8.39m. Therefore, across the 139 approved applications, £0.74 was leveraged for every £1 of ILBF monies spent.

4.7.3 Audience Data - Audience Numbers

One of the key performance indicators/targets of the ILBF is that programmes are broadcast to an audience of at least 25,000 in Northern Ireland during the year.

The ability to report on progress against this ILBF target is constrained by the availability of appropriate data. Where available we have analysed BBC audience figures against the productions broadcast.

Audience data was available up to and including Round 1 2015. 135 applications approved for funding during R2 2011 to R3 2015 were broadcast (whilst ILBF funded 139 projects, not all were for TV broadcast, some were for training, online content, development funds, etc. so are excluded here). Of these, 52 were broadcast on BBC and associated BBC audience data was available for 41 of these broadcasts.⁶⁰ The following table sets out the BBC consolidated average audience (000s) figures by production and summarises this data by funding round and year. The table also includes some descriptive information about the production, including run time and number of episodes / repeats in each year.

⁶⁰ Data provided by NI Screen included 52 applications that were funded and listed broadcaster as BBC. Cross-referencing this with audience data, 2 were development funds and so did not receive broadcast; 1 was additional funding and so did not translate to broadcast. This left 49 records – of these, BBC average audience data was available for 41; no data was given against 8 of these.

Table 4:13: ILBF Production Audience figures for BBC by funding round (R2 2011 to R1 2015)

Year/ Round project approved	Production Title	Production Genre	Minutes produced ⁶¹	Broadcasts per year ⁶²				Details	BBC Average Audience 000s ⁶³	Consolidated Audience
				2013	2014	2015	2016			
2011 R2	Wolfland	Documentary	60	-	-	-	-	2 episodes broadcast in Jan 2013	12	
2011 R2	Scup	Drama	240	8	-	-	-	8 episodes broadcast in Mar/Apr 2013	13	
2011 R2	2							Average⁶⁴	12.5	
2011 R3	Amhrain Uladh	Documentary	190	3	-	-	-	3 episodes broadcast in Sep 2013	4	
2011 R3	Michaela Mo dheirfiur	Documentary	60	1	-	-	-	1 episode broadcast in Jan 2013	16	
2011 R3	Aistear Na nGael	Documentary	60	-	-	-	-	1 episode broadcast in Feb 2014	11	
2011 R3	3							Average	10	
2011 Total	5 (32 approved in 2011)							Sum	56	
2012 R1	Voyage to Iona	Documentary	60	-	-	-	-	1 episode broadcast in Nov 2012	11	
2012 R1	Luí na Talún 3	Factual Entertainment	180	12	-	-	-	6 episodes broadcast Feb/Mar 2013 and repeated Jun/Jul 2013	5	
2012 R1	An Chultúrlann	Entertainment	180	6	-	-	-	6 episodes broadcast in May/June 2013	9	
2012 R1	It's a Blas!	Documentary	60	1	-	-	-	1 episode broadcast in Nov 2013	21	

⁶¹ This is the total minutes of production approved for each project

⁶² Where available this sets out the broadcasting information for the project, indicating the number of individual broadcast slots (where known) for which audience data has been analysed

⁶³ This is the average consolidated audience figure for each production to the nearest 1000. The consolidated audience is the sum of the live and timeshift audiences. If a production was broadcast a number of times (e.g. multiple episodes) then the average of the consolidated audience figures for each of these broadcasts was used to give an average audience figure for each production. This includes data relating to broadcast on any BBC channels.

⁶⁴ Using the approach taken from the Review of the ILBF in 2010, this is a simple average of the audience figures for this round.

Year/ Round project approved	Production Title	Production Genre	Minutes produced ⁶¹	Broadcasts per year ⁶²				Details	BBC Average 000s ⁶³	Consolidated Audience
				2013	2014	2015	2016			
2012 R1	Bliain i Saol na Cultúrlainne	Documentary	120	4	-	-	-	4 episodes broadcast Nov/Dec 2013	14	
2012 R1	5							Average	12	
2012 R2	Tomáí agus Art san Eoraip	Entertainment	180	8	-	-	-	4 episodes broadcast Apr 2013 and repeated Aug 2013	7	
2012 R2	1							Average	7	
2012 R3	Aistrúcháin Ar Ais	Documentary	50	-	-	-	-	1 episode broadcast in Dec 2013	12	
2012 R3	Things You Need to Know	Factual Entertainment	90	3	-	-	-	3 episodes broadcast Sep/Oct 2013	3	
2012 R3	Ar Thóir an tSean Uladh	Documentary	120	-	8	-	-	4 episodes broadcast Mar/Apr 2014 and repeated Jul 2014	9	
2012 R3	3							Average	8	
2012 Total	9 (66 approved in 2012)							Sum	91	
2013 R1	Bualadh Busk	Documentary	30	-	1	-	-	1 episode broadcast Oct 2014	9	
2013 R1	Scúp (Series TWO)	Drama	200	-	12	-	-	12 showings in Apr/May 2014	7	
2013 R1	Ar Bhealach na Gaeltachta	Factual Entertainment	120	-	4	-	-	4 episodes broadcast in May/Jun 2014	8	
2013 R1	Opry an Lúir (SERIES TWO)	Entertainment	360	6	-	-	-	6 episodes broadcast in Sep/Oct 2013	43	
2013 R1	4							Average	17	
2013 R2	Cónaí l gCarn	Documentary	60	-	-	-	-	2 broadcasts in Dec 2014	13	
2013 R2	Oíche na Gaoithe Móire	Documentary	59	-	-	1	-	1 showing in Jan 2015	13	
2013 R2	Hunting the Hound of Ulster	Documentary	60	-	-	-	-	1 episode broadcast Sep 2014	9	

Year/ Round project approved	Production Title	Production Genre	Minutes produced ⁶¹	Broadcasts per year ⁶²				Details	BBC Average 000s ⁶³	Consolidated Audience
				2013	2014	2015	2016			
2013 R2	I Lár an Aonaigh	Magazine Series	180	6	-	-	-	6 episodes broadcast Nov/Dec 2013	5	
2013 R2	Imirce	Documentary	60		1		-	1 episode broadcast Jan 2014	11	
2013 R2	5							Average	10	
2013 R3	Bronntanas na Beatha	Documentary	50	-	1	-	-	1 episode broadcast Oct 2014	11	
2013 R3	Gaeilgeoirí an Chogaidh Mhóir	Documentary	60	-	-	-	-	1 episode broadcast Mar 2015	20	
2013 R3	2							Average	16	
2013 Total	11 (56 approved in 2013)							Sum	149	
2014 R1	Áilleacht na Sléibhte	Documentary	120	-	-	4	-	4 episodes broadcast Feb/Mar 2015	11	
2014 R1	Coláistí na nGael san Eoraip	Documentary	120	-	-	1	-	1 broadcast Mar 2015	7	
2014 R1	I Lár an Aonaigh 2	Magazine Series	180	-	3	-	-	3 broadcasts Nov 2014	5	
2014 R1	Opry an Lúir 3	Entertainment	413	-	7	-	-	7 broadcasts Nov/Dec 2014	36	
2014 R1	Thuas Seal Thíos Seal	Documentary	25	-	-	-	-	1 broadcast in Oct 2015	2	
2014 R1	5							Average	12	
2014 R2	Scéal Folk Aduaidh	Music	180	-	-	3	-	3 broadcasts May/Jun 2015	13	
2014 R2	1							Average	13	
2014 R3	Saol Eoin Mhic Néill	Documentary	60	-	-	-	-	1 episode broadcast Mar 2016	28	
2014 R3	Faoi Gheall ag Éireann	Documentary	60	-	-	-	-	1 episode broadcast Apr 2016	17	
2014 R3	An t-Amhrán Gaeilge	Documentary	60	-	-	-	-	1 episode broadcast Sep 2015	9	
2014 R3	3							Average	18	

Year/ Round project approved	Production Title	Production Genre	Minutes produced ⁶¹	Broadcasts per year ⁶²				Details	BBC Average Audience 000s ⁶³	Consolidated Audience
				2013	2014	2015	2016			
2014 Total	9 (36 approved in 2014)							Sum	128	
2015 R1	Ar Scáth na Sléibhte 2	Factual Entertainment	120	-	-	-	-	First broadcast January 2016, then again in August 2016	6	
2015 R1	Ar Bhealach na Gaeltachta 2	Factual Entertainment	160	-	-	-	4	4 broadcasts Jul/Aug 2016	15	
2015 R1	I Lár an Aonaigh 3&4	Magazine Series	360	-	-	-	-	12 episodes broadcast Nov/Dec 2015 & May/Jun 2016	4	
2015 R1	Opry an Lúir 4	Music	406	-	-	-	-	7 episodes broadcast Jun/Feb/Mar 2016	34	
2015 R1	Múinteoirí	Documentary	180	-	-	-	3	3 broadcasts Sep/Oct 2016	7	
2015 R1	Píobairí Ard Mhacha	Documentary	90	-	-	-	4	4 broadcasts Oct 2016	10	
2015 R1	Ar Mo Bhealach Féin	Documentary	90	-	-	-	-	3 episodes broadcast Feb 2016	13	
2015 R1	7							Average	13	
2015 Total	7 (35 approved in R1 2015)							Sum	89	
Overall	41 (135 approved overall)							Average⁶⁵	13	
								Sum	513	

Source: ILBF Audience Data (excel files received from NI Screen)

⁶⁵ Using the approach taken from the Review of the ILBF in 2010, this is a simple average of the audience figures across all the projects set out in the table

BBC audience figures of 513,000 people were recorded (2011/12 – 2015/16) with an average viewing audience per production broadcast of 13,000. However figures for TG4 and RTÉ in NI are not available and therefore total figures are likely to be much higher.

The average audience numbers varied widely by production from a low of 2,000 for *Thuas Seal Thíos Seal* (a Documentary) in 2014 to a high of 43,000 viewers for *Opry an Iúir* (Series 2) (an Entertainment series) in 2013.

However it is important to note that in many cases the details regarding the broadcast date of productions was not available and so the data presented above sets out the consolidated audience figures by production for each funding round, rather than the year of broadcast. Furthermore the data only covers BBC audience figures in Northern Ireland. As a result of this it is not possible to calculate reliable audience figures for Northern Ireland for broadcasts and therefore comment on the progress towards achieving the KPIs regarding the audience of programmes broadcast in Northern Ireland by year of broadcast.

4.7.4 Audience Research

This section reviews the findings of previous audience research commissioned by NI Screen.

4.7.4.1 Audience Research Report – Millward Brown Ulster (commissioned by NI Screen), 2011

The research was conducted to establish the views, opinions and perceptions of three defined audiences within the ILBF constituency, as follows: General Northern Ireland population, Key stakeholders, and Programme trainees.

The general population survey involved interviewing 1,018 adults in 2011.

Size of the audience:

- 11% of the sample (110) claimed to speak or understand the Irish Language;
- 10% of the sample (101) people watch Irish Language Programmes;
- This provided the following sample sizes:
 - 110 who speak or understand the Irish Language
 - 101 who watch Irish Language Programmes
 - 159 who speak or understand the Irish Language OR watch Irish Language Programmes
 - 52 who speak or understand the Irish Language AND watch Irish Language Programmes

Programming:

- 59% of those who watch Irish Language TV rate it as good (either very or fairly) – compared to 46% in previous research;
- 48% of those who speak or understand Irish and/or watch any Irish Language programmes rate them as very good;
- 30% who watch Irish language TV state it has encouraged their interest in the language, most others felt it made no difference; and
- 23% who speak or understand Irish and/or watch any Irish Language programmes stated it encourage their interest.

Of those who understand Irish and/or watch Irish language television output:

- 64% rated the cultural value as high (either very or fairly);
- 53% rated the educational value as high (either very or fairly); and

- 52% felt there is a need to increase the range of Irish Programmes available to NI viewers.
- Regarding who should be responsible for funding Irish language programming, around a third believe it should be the government (36%) or the Broadcasters (33%).

4.7.4.2 Audience Research Report – Millward Brown Ulster (commissioned by NI Screen), 2015

Millward Brown Ulster was commissioned by the ILBF to carry out audience research to ensure that funded material is meeting the needs of the Irish speaking audience in Northern Ireland, and to ascertain any new programming needs. In total 3029 respondents participated in the research survey.

The key findings of this research report have been set out below.

Understanding of the Irish language:

- 12% claimed to be able to speak or understand the Irish Language to some extent.
- The incidence of speaking or understanding the Irish Language is significantly higher amongst younger respondents.

Irish Language TV:

- One in ten (10%) of all respondents stated that they watched Irish Language Programmes at least occasionally.

Attitudes and opinions regarding Irish language television:

- 53% of those who watch Irish language television output rated it as good (either very or fairly)
- 55% of those who speak or understand Irish and watch any Irish Language programmes rated them as very good
- 40% of those who watch Irish language television output stated that it had encouraged their interest in the Irish language, most others felt it made no difference.
- Among respondents who understand Irish and/or watch Irish language television output, there was general agreement that Irish language programmes are of value:
 - 63% rating the cultural value as high (either very or fairly); and
 - 51% rating their educational value as high (either very or fairly).

Opinions on the future of Irish language television:

- 55% of respondents who speak or can understand Irish or watch any Irish language programmes stated that there is a need to increase the range of Irish language programmes available to viewers in Northern Ireland. Educational programmes for children and teenagers were most in demand.

Responsibility for Irish language programming in NI:

- Half of those respondents who understand Irish and/or watch Irish language television believe it should be the government (50%) a further one third think it should be the responsibility of the broadcasters (31%).

4.7.4.3 Audience Research - Summary

The two research reports have identified some interesting findings with regard to use of Irish Languages and Irish Language television in particular:

- In 2015, 12% claimed to speak or understand the Irish Language, this is up 1 percentage point from the 2011;
- The proportion of people who watch Irish Language TV that rated it as good has fallen by 6 percentage points between the 2011 and 2015 studies;
- The proportion of people who speak or understand Irish and watch Irish Language TV that rated it as good has increased by 7 percent points between the 2011 and 2015 studies;
- In 2015, a higher proportion (10 percent points higher) of those who watch Irish language television output stated that it had encouraged their interest in the Irish language when compared with 2011;
- Similar levels of respondents rated the cultural and educational value of TV output as high in 2011 compared to 2015;
- A slightly higher percentage (3 percent points higher) of respondents in 2015 stated that there is a need to increase the range of Irish Language programmes available to NI viewers than in 2011;
- A much higher proportion of respondents in 2015 (50%) felt that Irish language TV should be funded by the government than in 2011 (36%), while roughly the same proportion felt it should be funded by the broadcasters.

This would suggest that audience interest in Irish Language broadcasts has increased between 2011 and 2015, evidenced through increases in the proportion of respondents stating that there is a need to increase the range of programmes, as well as a higher proportion stating that Irish language TV output has encouraged their interest in the Irish Language. Further, the audience feedback suggests that quality of the productions has increased, with a higher proportion of those who speak or understand Irish rating programmes as good in 2015 than 2011.

4.8 Conclusion

The fund activity presented throughout this section present a positive picture of both the nature of the activity supported by the ILBF and its impact on the sector in Northern Ireland. A summary of the findings from this review of activity across the evaluation period is set out below.

Approved Projects

- Between Round 2, 2011 and Round 3, 2015, the ILBF has supported 139 applications for funding, with a total ILBF investment of £11.3m.
- The ILBF has supported a range of projects covering a number of different genres targeting different audiences, including: Documentary (59%); Factual Entertainment (10.1%), Interactive / Online (5.0%); Animation (3.6%); and Youth (3.6%).
- The ILBF has also been successful in engaging with a number of Broadcasters over the evaluation period, including: 61.9% of approved applications had TG4 as one of the committed broadcasters; 38.8% of approved applications had BBC as one of the committed broadcasters.
- Over the evaluation period, the ILBF has supported over 323 hours of Irish Language production with the most hours of production from Round 1, 2015 which resulted in 45.9 hours of production.
- This resulted in an average cost per minute to the ILBF of £774 per minute.⁶⁶ However it is noted that the cost per minute has been in place for a number of years and could potentially increase due to inflation and the enhanced emphasis on high production values in the Fund.

⁶⁶ Note: The cost per minute could be determined for 127 of the 139 approved projects

- The ILBF contribution ranged from £3,320 to £400,000, totaling £11.31m, and the broadcaster/other match funding contribution totaling £8.39m. Therefore, across the 139 approved applications, £0.74 was leveraged for every £1 of ILBF monies spent.

Targets

- Review of the year end progress against KPIs for each year from 2011/12 to 2015/16⁶⁷ shows that of the 86 KPIs across the period, 48.8% (n=42) of these have been met, 46.5% (n=40) were partially completed or on track to be completed at the time of reporting, and 4.7% (n=4) of these KPIs were not met.
- KPIs that have not yet been met but are recorded as 'on target' are specified against a number of training schemes, stating that: 'All individuals completing the training to secure employment in production sector at end of scheme'; further a number of KPIs involved the ongoing monitoring of progress and as such have been recorded as 'on target'.

Audience

- Audience interest in Irish Language broadcasts has increased between 2011 and 2015. This is evidenced through comparing the findings of Millward Brown audience research reports between 2011 and 2015. Comparison reveals there has been:
 - An increase in the proportion of respondents stating that there is a need to increase the range of Irish Language programmes (3 percentage points more);
 - A higher proportion stating that Irish language TV output has encouraged their interest in the Irish Language (10 percentage points more); and
 - Increases in the quality of the productions, with a higher proportion (7 percentage points more) of those who speak or understand Irish rating programmes as 'good' in 2015 than 2011.

⁶⁷ This report comments on the progress till the 3rd quarter of 2015/16, therefore the KPIs that were assessed to be on target are expected to be achieved by the end of Quarter 4. **Source:** Quarterly Activity Report To BFI - 3rd Quarter 2015/16 (Word file received from NI Screen)

5 PRODUCTION COMPANY - FINDINGS

5.1 Introduction

This section presents findings from two surveys: one for production companies which had received funding from ILBF and one for production companies which were unsuccessful in their application for funding. As some production companies had both successful and unsuccessful applications, they completed both questionnaires.

5.1.1 Production Companies – Successful

Sections 5.1 – 5.7 sets out the findings from the survey carried out with production companies that had received funding from the ILBF between 2011/12 and 2015/16. (Several of the companies however have had prior involvement and funding before 2011). It sought to gather feedback on their experience of the ILBF, including the application process and management of the Fund; the impact of the fund including on their company as well as wider impacts (including cultural, educational and economic impacts). The survey was also used to assess to what extent the fund had met its objectives, as well as any divergence from objectives and reasons for this.

RSM PACEC developed a draft questionnaire that was reviewed and agreed with NI Screen; it was then piloted with three production companies. All 14 production companies that had received funding from 2011 – 2016 were invited to participate in a telephone interview and in total 11 interviews were completed (79% response rate).

5.1.2 Production Companies – Unsuccessful

Section 5.8 sets out findings from a survey of production companies that had at least one unsuccessful applications to the ILBF for funding during the period 2011/12 – 2015/16. In total, 18 production companies completed this questionnaire. (Note some production companies had both successful and unsuccessful applications thus they completed both questionnaires).

RSM PACEC developed a draft questionnaire that was reviewed and agreed with NI Screen. Thirty-two production companies that had at least one unsuccessful funding application between 2011 and 2016 were invited to participate in a telephone interview and in total eighteen interviews were completed (56% response rate).

5.2 Company characteristics

This sub-section describes the company characteristics of successful production companies. The 11 production companies responding to the survey represented a range of company locations and dates of establishment.

Sixty-four percent of production companies operate out of Belfast. The remaining third operated out of Dublin⁶⁸ (9%), Down (18%), and Derry (9%).

The table below presents date of establishment for the production companies to determine if the production company was established as a result of the funding or had already been in existence prior to the current round of funding (under review). The establishment dates have been grouped into three categories, those established prior to ILBF funding availability (i.e. before June 2005), those established during initial funding (i.e. from June 2005 to March 2011) and those established during the current round

⁶⁸ Note: This Company would have been involved in co-production with a Northern Ireland based company.

of funding (i.e. from April 2011 onwards). This will determine to what extent the current funding round (2011-2016) has impacted on the creation of new production companies.

Table 5:1: Production Company Establishment Date

Responses	Frequency Responses	of	% of responses
Established before June 2005		6	55%
Established between June 2005 and March 2011		3	27%
Established April 2011 onwards		2	18%

Source: RSM PACEC, 2017

The table shows that 55% (n=6) of the production companies were established prior to the Fund (i.e. before June 2005); 27% (n=3) were established after the Fund commenced and before the period of funding which is the subject of this review (i.e. between June 2005 and March 2011) and 18% (n=2) have been established during the period of funding which is the subject of this review (i.e. since April 2011).

For those companies established since April 2011 (n=2), when asked to what extent the establishment of their company was a direct result of the ILBF, both respondents stated that:

“Without the ILBF the company would not have been established”

Overall, the Fund was an influencing factor in the establishment of all of the production companies formed in 2011 or later in Northern Ireland. The two production companies formed in 2011 or later explained how ILBF has benefitted their company:

“Having this [funding] work in our first year of existence was vital, and it is fair to say that without this early commitment and support from the ILBF we would not be in existence today. We are an international production company that has grown from a kitchen table start up to a company with 20 staff, 5 edit suites, online and post sound facilities working on projects that will be viewed all over the world. The support of the ILBF has been a central part on our exciting journey”

“I was bringing in broadcast work for another company which was thriving due to ILBF money and therefore saw an opportunity to take greater control myself through setting up my own company.”

5.3 Use of the ILBF / Process – application, assessment and production

5.3.1 Number of Applications

In total, the 11 respondents to this survey reported that they had made approximately 144 applications to the ILBF since 2011, an average of 13 applications per Production Company. Overall, just under half (45%) of the respondents had made fewer than 10 applications, with 27% making between 10 and 19 applications and the remaining 27% making in excess of 20 applications (refer to table below). The lowest number of applications made by a production company was 1 and the highest number was 25.

Table 5:2: Total Number of Applications

Number of Applications	Frequency of Response	% of Respondents
1-9 Applications	5	45%
10-19 Applications	3	27%
20+ Applications	3	27%
Total	11	100%

Source: RSM PACEC, 2017

A summary of applications and success rates by respondent are detailed in the table below:

Table 5:3: Funding Application Success Rate

Respondent	Total Number of Applications	Total Number of Successful Applications	% of Successful Applications
1	25	25	100%
2	1	1	100%
3	13	12	92%
4	7	7	100%
5	8	6	75%
6	20	19	95%
7	17	15	88%
8	7	6	86%
9	6	6	100%
10	25	14	56%
11	15	12	80%
Total	144	123	85%

Source: RSM PACEC, 2017

Across the 11 companies, there was a good level of success in making applications: of 144 applications submitted, 123 were successful, an overall success rate of 85% and therefore only 15% of applications made being unsuccessful.

Four respondents had a 100% success rate with their applications; the other seven had success rates between 56% and 95%. Of the seven respondents that also had unsuccessful applications, a variety of reasons (n=10) were given, including:

- Lack of funding available (20%, n=2 responses);
- Insufficient developmental work undertaken (40%, n=4); and
- Other (40%, n=4) - not relevant enough / suitability of the presenter and not enough Irish language content)

5.3.2 Support from ILBF and Broadcasters

Production companies were asked a series of question regarding the support they received from ILBF and the broadcaster to assist with idea development and the application process (across all applications they had made). When applying, all successful broadcast companies discussed their application with the ILBF prior to submission. Respondents reported that the advice and comments provided by the ILBF included:

- Information on type of programming they wanted to broadcast and fund / their specification;
- Advice on suitability of projects, whether similar projects from other companies were in the same territory or had already been developed, whether talent or idea was strong enough to appeal to committee;
- Guidance about contributors and subjects covered in previous programmes;
- Getting commissions with other broadcaster or possibility of co-productions between two broadcasters. If an idea is refused they would give advice and their thought on where they thought the idea was weak and how it can be improved; and
- Budgetary feedback and advice which informs whether to go forward with application.

Qualitative feedback also included:

“ILBF have been extremely helpful in helping us develop ideas and direct in their view of whether they would be happy to fund certain ideas. This is hugely helpful in not wasting time on vast amounts of research. This can act as a great learning tool in submitting proposals to funding bodies and broadcasters”

“The ILBF always provides clear and constructive feedback on ideas in a very objective way. This feedback is always presented fairly and with the interests of the fund in mind. This creative and constructive feedback provides an insight that greatly helps steer the development of the project”

Production companies described receiving the following types of support from broadcasters when they were applying to ILBF:

- The setting of parameters: a three way talk with broadcaster, ILBF and company;
- Discussion around the changing needs and desires of the broadcaster; and
- Support regarding budget from broadcasters in my ILBF application process. This is generally clarification on partnership funding and broadcaster fee and the breakdown between broadcaster cash and in-kind.

5.3.3 Ease of Applying, Satisfaction with ILBF Application Process; Broadcaster and ILBF relationship

When asked about the overall **ease of the application process**, the majority (55%) of production companies who had successful applications believe that the application process is fairly easy. Thirty-six percent believe that it is neither easy nor difficult, and the remainder (9%) believed the application was fairly difficult. The respondent who felt it was difficult stated that “the degree of research and development

required to get a project green-lit with no budget at this stage is a massive drain on the resources of a small company”.

The majority of respondents (91%) were either satisfied or very satisfied with the **post-decision stage of the application process**. The remaining 9% were neither satisfied nor dissatisfied.

The majority of respondents (82%, n=9) were either satisfied or very satisfied with the **post award process**. The remaining 18% were neither satisfied nor dissatisfied.

While 82% of respondents being satisfied with the ILBF, some respondents (n=3) stated they were dissatisfied with the **post award** process due to:

- Paperwork which was reported as ‘very time consuming’;
- The time associated with legal services and solicitors; and
- The detail required in the submission.

The production companies were also asked about the **relationship between the ILBF and broadcasters**. 91% (n=10) of respondents rated the relationship as good, or excellent. The remaining 9% (n=1) rated it as fair.

Ways in production companies (n=3) believe the relationship between broadcasters and the ILBF could be developed include:

- development of relationships with more commercial channels (UTV, TV3 etc);
- open days/events between broadcasters and companies to help build relationships further; and
- if broadcasters were to put in more than 25% depending on the project, with one respondent noting that “the broadcasters are very reliant on the 75% from the ILBF and only putting in 15% real cash themselves. More projects might be supported if this became more of a 50/50 structure”.

In relation to the first point, feedback from NI Screen management has noted that while the ILBF previously funded a coproduction between UTV and TG4, UTV’s focus on commercial content limited the amount of minority language programming broadcast. Moreover, it is not yet clear if its acquisition by ITV will impact the amount of local programming produced. TV3 is not available to the vast majority of the audience in Northern Ireland and therefore would not meet the ILBF funding criteria.

5.4 The Impact of the ILBF

This section provides an overview of production company activity, employee skillset, and quality of Irish language production.

5.4.1 Company involvement in the sector prior to the ILBF

This section provides an overview of the different production companies’ involvement with Irish language productions prior to involvement with the ILBF.

In total just 18% (n=2) of production companies were involved in Irish language productions prior to 2005. Both of these companies had worked primarily with TG4.

In total seven production companies provided their employment details (in relation to their situation prior to receiving funding from ILBF). The average number of employees per company was 12. Of total employees (n=85), 35% of employees spoke Irish.

5.4.2 Impact on volume of Irish language productions

This section provides an overview of the total number of Irish Language productions produced by production companies on a yearly basis. The table below provides an overview of total productions per year:

Table 5:4: Number of Productions

Production Company	Number of Productions
1	4
2	20
3	2
4	-
5	1
6	6
7	2
8	3
9	2
10	2
11	2
Total	44

Source: RSM PACEC, 2017

In total 10 production companies⁶⁹ provided details on the number of productions. The 10 respondents reported producing 44 productions through the Irish medium on a yearly basis, an average of four per production company, and the number of productions ranged from one to twenty.

Ten respondents also stated that without the ILBF, the number of productions they produced for broadcast in Ireland would have been reduced. Estimated reductions by broadcast companies ranged from a 5% decrease to a 100% decrease. Qualitative feedback on why production companies believed the ILBF had an impact on their productions include:

“As a minority language, it’s hard to sustain a commercially viable Irish language TV company. Without the ILBF there would hardly be any Irish language TV output - that was the situation prior to the establishment of the ILBF”

“The ILBF brings valued financial investment to broadcasters. Without this partnership funding, so much of the creative, exciting and challenging filmmaking in the Irish language from NI would simply not exist. Without its partnership funding with broadcasters from the south, so much less Irish language programming would be made and there would be no representation of Irish language in NI to the rest of the country”

“The ILBF has allowed our company to develop and grow in this market, providing employment and training”

⁶⁹ Note: One production company (shown as ‘4’ in the table) did not provide a response to this question.

“Without funding from the ILBF we would not be broadcasting. 95% of our work relies on funding from the ILBF”

When asked whether they expected to increase, decrease, or produce the same number of productions in the future, most Production companies were positive about the future outlook as illustrated in the table below:

Table 5:5: Expected Change in Company Growth

Company Activity	Number of Responses
Increase	70%
Decrease	10%
Stay the Same	20%

Source: RSM PACEC, 2017

70% percent of respondents expect their company activity to increase, 20% expect it to stay the same, and the remaining 10% expect their company activity to decrease.

Both production companies that felt their activity would remain the same stated that it was due to their business size and issues with capacity.

One production company expected their activity to decrease (n=1) as their Northern contact had ceased trading, meaning that they will be ineligible to apply for funding from the ILBF.

5.4.3 Impact on company turnover and sustainability

The key findings in terms of turnover and survival are:

- 91% (n=10) of companies reported that their turnover had increased as a result of the ILBF; and
- 91% (n=10) indicated that without the ILBF their company would have closed or would be operating at lower scale.

Since receiving funding in 2011, 91% (n=10) reported that company turnover increased. Increase in turnover ranged from 10% to 100%. When asked whether or not ILBF had a direct impact on company survival results the majority (91%) believed that ILBF had a direct impact on survival. Responses are detailed below:

Table 5:6: Impact of ILBF on Survival of Company

Statement	Percentage of Respondents
Yes, without the ILBF the company would have closed.	36%
Yes, the company would have continued operating but at a lower scale	55%
No, the company would have continued operating at the same scale.	9%

Source: RSM PACEC, 2017

Thirty-six percent of production companies believe that without the ILBF their company would have closed. The majority (55%) believe that they would operate but on a lower scale and 9% believe that they would operate at the same scale.

5.4.4 Impact on Employment and Employee Skillset

When asked about employment, most respondents (n=10, 91%) reported that their number of employees increased as a direct result of the ILBF. Change in total number of employees ranged from 27% to 560%. This group of respondents also reported that the number of Irish language speakers within the companies also increased between 25% and 400% (among those who responded). In total, production companies (n=9) reported 54 jobs created as a result of ILBF funding. Twenty-nine of these jobs (54%) are in Irish language-related roles.

All respondents believed that the ILBF increased the skillset of their employees. Reasons provided include that it:

- Gives a cultural identity and provides space to work through Irish that would previously not be there;
- has provided vital skills training for employees;
- has resulted in more Irish Language speaking and knowledge;
- has increased the use of Irish in the office and has encouraged non-speakers to begin to learn;
- meant English language staff have benefited and had the chance to work in a sector they previously would not have the opportunity to; and
- contributed to the career development of the younger staff, while training days like 'voiceover scripting' were also beneficial to senior staff.

5.4.5 Additionality of the Fund

Whilst the figures above suggest a strong and growing sector, there is still considerable reliance on ILBF funding. Of the total respondents (n=11) only one company said there would be no impact if ILBF funding ceased. Just under two thirds (64%) stated that the number of Irish language productions would decrease (partial additionality). The remaining 27% stated that their company would cease trading (full additionality). This is detailed below.

Table 5:7: Production Companies - Impact on activity if ILBF no longer available

Statement	Percentage of respondents
No impact, company would continue to produce same number of Irish Language Productions per year in NI.	9%
Company would reduce the number of Irish Language productions per year in NI.	64%
Company would cease trading.	27%

Source: RSM PACEC, 2017

When asked by what percentage Irish language productions would decrease without the ILBF five respondents provided a percentage. Responses are summarised below, along with commentary from respondents:

Table 5:8: Estimated reduction of Irish Language Reductions (should ILBF funding cease)

Estimated Reduction	Number of Respondents	Explanation
50%	2	<ul style="list-style-type: none"> Broadcasters are more interested in projects that they can part fund instead of fully fund; All our Irish Language productions to date have had ILBF funding and without it we would expect the commissions to be less or the number of episodes to be reduced.
75%	1	<ul style="list-style-type: none"> I feel that our opportunities with the broadcasters in ROI would be greatly reduced (or reliant on other 3rd party funding such as the BAI) and therefore we would be focusing on the BBC locally.
90%	1	<ul style="list-style-type: none"> The only other funding for Irish Language programmes is TG4
100%	1	<ul style="list-style-type: none"> ILBF is very significant for the company and the wider sector. ILBF fund around 75% of Irish language productions within NI
Don't know	6	<ul style="list-style-type: none"> We would seek funding elsewhere. It would however have a significant impact on work overall elsewhere TG4 provide a lot of funding and therefore the company can keep going. However with no Belfast partner support it is hard to break in the market, being based out of Dublin; There are few opportunities to tell stories about NI today and yesterday. BBC NI is not a broadcaster but an "opt out" service that relies on current affairs, sport and politics for an audience. Thanks to the ILBF, it enables BBC NI and RTÉ to tell stories in other genres, documentary, animation and drama, which reflect our society and our experiences. The ILBF serves the people of NI in a way that no one else does. Broadcasters cannot afford to commission Irish language programming to the scale that they do with ILBF funding. Therefore without this support the company would probably cease to be in existence.

Source: RSM PACEC, 2017

5.4.6 Wider impact and significance of the ILBF

Whilst the ILBF has a specific commitment to supporting the growth of the independent production sector in Northern Ireland, it also has a role to play in terms of wider impacts. Therefore, in addition to looking at the specific impact of the ILBF on the production companies supported, feedback was also sought on the wider impact and significance of the ILBF.

All respondents (n=11) agreed that the presence of the fund was very significant for developing an Irish language broadcasting industry within Northern Ireland, and also that it is important to the promotion of the Irish language.

- 100% rated the significance of the ILBF to the promotion of the Irish language in Northern Ireland as very significant.

- 100% rated the significance of the ILBF to the development of Irish language broadcasting in Northern Ireland as very significant.

Specific feedback from production companies demonstrates the significance of ILBF to development of the Irish language broadcasting industry within Northern Ireland, and to the continuation and promotion of the language. Qualitative feedback includes:

“the ILBF gives exposure and presence of Irish to media and those who work in it. It strengthens commitment to the Northern Irish language market within the BBC and provides a platform in a similar way as TG4 in the Republic of Ireland”;

“Irish language is now cool, contemporary, desirable, achievable, fun and accessible thanks to programming funded by the ILBF. It has kept the language alive in NI”;

“The ILBF has focused support on small local companies which then form the basis for placing new entrants and other trainees. NI companies have now become solid providers of content across many broadcasters”;

“Having a strong presence of the language across popular media, TV, radio and the web is vital to the growth of the language. With an increasing number of young Irish speakers coming through Irish medium education this is also a growing audience and full of potential future media professionals”; and

“From nowhere the ILBF has contributed to a thriving Irish language production sector in NI. The funding provided is the lifeblood of so many projects. It is fair to say that without the funding provided by the ILBF the future of the Irish language production sector could be in jeopardy”.

Overall 82% of the companies (n=9) rated Irish language productions broadcast in Northern Ireland as either very high, or high quality.

5.5 Levels of satisfaction

The results of the survey indicate high levels of satisfaction amongst the production companies which have been supported. All fund recipients (n=11) reported being **very (91%), or fairly (9%) satisfied with the performance of the ILBF.**

5.6 What worked well / Areas for Development

Participants were asked if there were any areas relating to the ILBF that could be improved. Potential areas of development and suggestions include:

- Provide long-term funding to promote sustainable development in the industry, e.g. BBC Alba who provide a four year funding deal/ provide language budgets more similar to Scotland and Wales. This could allow for greater growth, team building, and maintenance;
- Reduce the amount of paperwork;
- Make the three years of funding more permanent;
- Build relationships with RTÉ and build capacity with other Irish language companies;
- Provide training in areas where there are shortage of Irish speakers (e.g. Irish language editors, entry level, and series producers);
- Increase turnaround surrounding legality;
- Communicate with broadcasters to increase their funding amounts - this will improve the standard of television;
- Create an ILBF marketing structure to maximize the benefit of ILBF programming;

- Provide production opportunities for less established companies; and
- Provide more R and D funding.

5.7 The Future

In order to inform the future development of the Fund, production companies were asked to provide their views on forms of support and priorities for Irish Language production.

All respondents (n=11) believed that there is a need for government support of the Irish language. Identified forms of support include:

- Increase funding to be more in line with Scots and Welsh Gaelic funding;
- Increase incentives to promote sustainability within the sector, and to promote skilled Irish language employee uptake; and
- Incentivise Irish language broadcasting (i.e. encourage increased outputs from BBC and other broadcasters) to promote culture.

When asked what the priorities for Irish Language production supported by the government should be, respondents offered a range of responses: primarily that funding should be increased, and that continued up skilling and education of the workforce occurs. Further suggestions include that a quota is set for the number of Irish language hours to be aired per channel; that work is down to increase Irish in the mainstream media, and to normalise the language; and that an export strategy is put in place for Irish language productions/ films.

5.8 Unsuccessful Production Companies

This section contains information on a survey of production companies that were unsuccessful in (some of) their applications to ILBF for funding.

5.8.1 Production Company Characteristics

In total, 18 out of 32 production companies contacted completed this questionnaire (response rate 56%). Fourteen of these production companies provided details about their company. To be eligible for the questionnaire all respondents had to have applied and failed to receive ILBF funding on one occasion between 2011 and 2016.

In total 29% of unsuccessful production companies operate in County Down. The majority (57%) operate in Belfast. The remaining production companies operate in Galway and Armagh. Fourteen companies provided details on the origin. The oldest company was founded in 1986, the newest company was founded in 2015: (57%, n=8) were established prior to June 2005 when the ILBF began; 3 (21%) were established in between June 2005 and March 2011, and 3 were established in the current funding period (April 2011-2016).

5.8.2 Applications to ILBF and Success Rate

In total, 13 respondents out of 18 (72% response rate) provided details on applications made. In total the 13 respondents have made 101 applications to the ILBF since 2011, suggesting an average of 8 applications per Production Company. All of these companies had at least 1 unsuccessful application.

Table 5:9: Percentage of Successful Applications

Respondent	Number of Overall Applications	Number of Successful Applications	% of Successful Applications
1	1	0	0%
2	17	14	82%
3	6	5	83%
4	2	0	0%
5	1	0	0%
6	13	10	77%
7	2	1	50%
8	2	1	50
9	2	1	50%
10	30	22	73%
11	2	1	50%
12	12	11	92%
13	12	9	75%
Total	102	75	74%

Source: RSM PACEC, 2017

Whilst 26% (n=27) of the applications were unsuccessful, overall 74% (n= 75) of applications made by the unsuccessful production companies were successful. Success rates ranged between 0% and 92%. ILBF application dates ranged from 2011 to 2015.

5.8.3 Funding Secured from Other Sources

Of the 27 unsuccessful applications above, 4 (15%) were successful in applying for funding elsewhere. Details on production, and additional funding is provided below:

Table 5:10: Additional Source of Funding

Name of Production	Name of Company	Funding
Lomax in Éirinn	Aisling Productions	BAI: £75,000
Cairde	Triplevision	BBC: £59,000
Lá Dár Saol	Macha Media	BAI: £30,000
Pablo	Paper Owl	BBC and others: £982,054

Source: RSM PACEC, 2017

5.8.4 Re-Submitting Unsuccessful Applications to ILBF

When asked whether or not they resubmitted their unsuccessful application to the ILBF, seven of the thirteen (54%) production companies said that they had. All of these applicants were successful when resubmitting.

5.8.5 Satisfaction with Guidance Provided by ILBF

When asked about the guidance provided by the ILBF during the application process the production companies (n=13) provided various answers including: very satisfied (62%, n=8), fairly satisfied (15%, n=2), fairly dissatisfied (8%, n=1), and very dissatisfied (15%, n=2).

5.8.6 Perception of Application Process to ILBF

Production companies (n=13) also provided feedback on how easy they found the overall application process. In total over half (54%, n=7) participants found the application process fairly easy. Just under a third (31%, n=4) found it neither difficult nor easy, and the remaining 15% (n=2) found it fairly difficult.

5.8.7 Reasons for Unsuccessful Funding Applications

When asked why they thought their applications were unsuccessful, production companies offered a range of reasons (n=12), which are listed below (respondents could give more than one response):

Table 5:11: Reason Application was Unsuccessful

Reason Application was Unsuccessful	Percentage of responses
Lack of funding	25%
Lack of interest from suitable broadcasters	17%
Insufficient developmental work undertaken	17%
We had everything including a commission for a programme series TG4 actually wanted so we are baffled.	8%
Lack of communication and foresight. ILBF believed an online learning platform would not be useful or needed	8%
Think that they did not like our company structure	8%

Reason Application was Unsuccessful	Percentage of responses
Withdrawal of presenter at late hour	8%
Other Projects on the table	8%

Source: RSM PACEC, 2017

The most common reason provided for applications being unsuccessful is a lack of funding (25%, n=3). Other common reasons include: a lack of interest from broadcasters (17%, n=2); insufficient developmental working having been undertaken (17%, n=2). Less commonly cited reasons included: lack of communication and foresight between Production Company and the ILBF; withdrawal from the agreed presenter at a late hour; other projects were on the table; ILBF did not like the company structure; and for additional reasons unknown to the production company (8%, n=1).

5.8.8 Feedback Provided by ILBF on Unsuccessful Applications

Of fourteen respondents, 79% reported that after their unsuccessful application ILBF provided feedback. When asked whether or not they were satisfied with this feedback, the majority (90%) of respondents (n=10) were either very (30%), or fairly (60%) satisfied.

5.8.9 Application Process: Suggested Improvements

When asked for ways in which the application process could be improved, respondents stated that there should be greater:

- Clarity on whether an idea / project is viable at an early stage to avoid too much time and cost being invested in developing an idea; and
- Better communication between the ILBF and broadcasters, with one respondent noting that they had a letter of commitment, but were declined by ILBF on the basis of staffing.

6 TRAINEE SCHEMES - ACTIVITY AND FINDINGS

6.1 Introduction

In addition to supporting the growth of the independent Irish production sector through the provision of funding for production purposes, the ILBF also supports the growth of the sector through skills development. Its main approach to skills development for the sector is via the funding of a number of training programmes.

The sections below provide: an overview of training programmes; objectives and targets associated with training programmes; and data on participation in the training programmes. Feedback on the training programmes from consultation with trainees and with production companies.

6.2 Overview of the training delivered and supported by the ILBF

The following paragraphs present an overview of the training supported by the ILBF

6.2.1 ILBF Training Schemes

The schemes supported are generally yearlong schemes aiming to provide hands-on, apprentice style training where the trainees are based with a production company or local TV station. The trainees' salaries are paid by the ILBF and/or the production company.

Trainees will work on content produced by the production companies and will be mentored and practically supported by the company. Trainees will also be supported by the ILBF to attend any appropriate short courses in production throughout the year long scheme. Fluency in Irish and a proven interest in media and/or practical media experience are requirements for the scheme.

The training areas the ILBF focus on are based on sectoral need and have in the past included the following: new entrant, producer, assistant producer, camera and editing. The schemes generally run from September to August each year and are advertised widely.

The schemes have included:

- New Entrant Training Scheme
- Trainee Producer scheme
- Trainee Editor Scheme
- Trainee Camera Operator Scheme
- Training and Broadcasting Scheme
- Trainee Assistant Producer Scheme
- Trainee Director (Support) Scheme
- MA in Film & TV Management
- MA in Documentary Practice
- MA in Script Writing
- Trainee Script Assistant Scheme
- Trainee Researcher/AP
- Trainee Producer /Director
- Trainee Senior Producer Scheme
- Trainee Video Journalist Scheme
- Skills Development Bursary Fund
- Group courses
- Radio Training

6.2.2 Skills Development Bursary

The ILBF Skills Development Bursary Fund is designed to assist Irish language speakers working within the production sector with financial support to participate in training courses. A key principle of the fund is that attendance at a training course should lead to advancement of skills, expertise and general career development. This in turn should have an impact on the Irish language production sector.

Bursaries are available for short term training courses and for some postgraduate courses.

6.3 Objectives and targets related to training

The table below sets out an overview of the common KPIs associated with training. Across each of the years there exists some variation in the training associated KPIs, for a full list please see Appendix 1. The specific targets associated with these are generally the number of individuals who complete the scheme / qualification and progression to employment in the production sector afterwards. See Section 4.6 for discussion of performance against targets.

Table 6:1: Training - Key Performance Indicators

Category of Activity / Examples of KPIs ⁷⁰
New Entrant Training Scheme: <ul style="list-style-type: none">• Number individuals to complete the training scheme.• All individuals completing the training to secure employment in production sector at end of scheme.
Trainee Producer scheme: <ul style="list-style-type: none">• Number individuals to complete the training scheme.• All individuals completing the training to secure employment in production sector at end of scheme.
Trainee Editor Scheme with Production Companies: <ul style="list-style-type: none">• Number individuals to complete the training scheme.• All individuals completing the training to secure employment in production sector at end of scheme.
Trainee Camera Operator Scheme <ul style="list-style-type: none">• Number individuals to complete the training scheme.• All individuals completing the training to secure employment in production sector at end of scheme.
Training and Broadcasting Scheme with Local TV Station NTV: <ul style="list-style-type: none">• Number individuals to complete the training scheme.• All individuals completing the training to secure employment in production sector at end of scheme.• Number of minutes Irish language programmes produced by trainees to be broadcast on NTV
Trainee Assistant Producer Scheme with Production Companies: <ul style="list-style-type: none">• Number individuals to complete the training scheme.• All individuals completing the training to secure employment in production sector at end of scheme.
Trainee Director (Support) Scheme with Drama Production Companies: <ul style="list-style-type: none">• Number individuals to complete the training scheme.

⁷⁰ The exact number and wording of KPIs varied each year, therefore this column provides details of the key KPIs that were broadly the same across all the years, however the wording of these KPIs may vary.

Category of Activity / Examples of KPIs⁷⁰

MA in Film & TV Management; MA in Documentary Practice; MA in Script Writing:

- Uptake
- Monitoring of progress

Trainee Script Assistant Scheme with Drama Production Companies:

- At least one individual to complete the training scheme. All individuals completing the training to secure employment in production sector at end of scheme

Trainee Researcher/AP:

- At least two individuals to complete this scheme. All individuals completing the training to secure employment in production sector at end of scheme

Trainee Producer /Director & Trainee Senior Producer Schemes with Production Companies:

- At least two individuals to complete this scheme. All individuals completing the training to secure employment in production sector at end of scheme

Trainee Video Journalist Scheme with Northern Visions:

- At least one individual to complete this scheme.

Skills Development Bursary Fund:

- Applicants' progress to be monitored.

Group courses:

- Applicants' progress to be monitored.

Radio Training:

- Number of training sessions per year
- Additional programme hours produced, broadcast and made available to other radio stations
- Monitor progress of database

Source: ILBF KPI Reports

6.4 ILBF recorded data: participants in training and progression from training

The table below sets out the numbers of participants under each training scheme. The table draws on findings from review of data received from NI Screen containing details of ILBF trainees⁷¹, supplemented with the relevant ILBF KPI Reports⁷² where appropriate.

⁷¹ ILBF Trainees - training 2011-16 (excel received from NI Screen)

⁷² ILBF KPI Reports 2011/12 – 2015/16 (received from NI Screen)

Table 6:2: ILBF Training Participants 2011/12 – 2015/16

Training	2011/12 ⁷³	2012/13 ⁷⁴	2013/2014 ⁷⁵	2014/15 ⁷⁶	2015/16 ⁷⁷
New Entrant Training Scheme with production companies ⁷⁸	8	7 ⁷⁹	6	-	4
Training and Broadcasting Scheme with Local TV Station NVTV (trainees under this scheme are also captured within the New Entrant scheme above) ⁸⁰	2	2	4	3	4
Trainee Producer Scheme with production companies	4	4	3	2 Trainees <ul style="list-style-type: none"> • 1 (2nd year) • 1 (assistant) 	7 trainees <ul style="list-style-type: none"> • 2 (assistant producer) • 2 (producer/director) • 3 (senior producer/director)
MA in Film & TV Management; MA in Documentary Practice; MA in Script Writing at Queen's University, Belfast ⁸¹	-	2 (attending not graduated)	1	-	-

⁷³ KPIs for 2011–12 Financial Year, supplemented with ILBF Trainees - training 2011-16 (excel received from NI Screen)

⁷⁴ KPI against R.I.F.E Investment Plan Irish Language Broadcast Fund 2012/13, supplemented with ILBF Trainees - training 2011-16 (excel received from NI Screen)

⁷⁵ KPIs for 2013 – 14 Financial Year, supplemented with ILBF Trainees - training 2011-16 (excel received from NI Screen)

⁷⁶ KPI against Investment Plan Irish Language Broadcast Fund 2014/15, supplemented with ILBF Trainees - training 2011-16 (excel received from NI Screen)

⁷⁷ Quarterly activity report to BFI 3rd quarter 2015/16, supplemented with ILBF Trainees - training 2011-16 (excel received from NI Screen)

⁷⁸ Based on number of completers in each year

⁷⁹ 8 trainees started the scheme however one dropped out and was not replaced

⁸⁰ Annual KPI Report (2011/12 to 2015/16)

⁸¹ Based on date of graduation

Training	2011/12 ⁷³	2012/13 ⁷⁴	2013/2014 ⁷⁵	2014/15 ⁷⁶	2015/16 ⁷⁷
MA in Film & TV Management; MA in Documentary Practice at University of Ulster, Coleraine	-	-	-	-	-
Skills Development Bursary Fund	6	8	4	4	2
Radio Training	-	50 hours' of radio content produced & broadcast 14 training workshops held	50 hours' of radio content produced & broadcast 13 training workshops held	50 hours' of radio content produced & broadcast 14 training workshops held	50 hours' of radio content produced & broadcast 13 training workshops held
Trainee Directors	-	-	-	1	-
Trainee Editor	-	-	3	3	0
Trainee Researcher	-	-	-	1	0
Trainee Video Journalist	-	-	-	4	0
Camera Operator	-	-	1	-	-

Source: ILBF Trainees - training 2011-16 (excel received from NI Screen) and ILBF KPI Reports 2011/12 – 2015/16 (received from NI Screen)

Furthermore, a number of group courses were run for trainees across the evaluation period. Details of the group courses are set out by year in the table below.

Table 6:3: Group Courses (2011 – 2016)

Year	Group Courses	
2011	<ul style="list-style-type: none"> • Core Research Skills (FÁS) • Story Developing and Pitching - BBC Academy • BBC Introduction to Production 	<ul style="list-style-type: none"> • Michael Quinn Camera Technique - DV self-shooting • Single Camera Directing Course
2012	<ul style="list-style-type: none"> • Single Camera Directing BBC • Engine Room Pitch workshop • TV Production, Direction & Presentation Training (Park Studio) • BBC Introduction to Production • Essential Interviewing Skills 	<ul style="list-style-type: none"> • Core Research Skills Course • BBC Advanced Production Course • Developing Ideas - Frank Ashe • TV PRESENTATIONS SKILLS BBC Academy
2013	<ul style="list-style-type: none"> • Presentation Skills Course • On the Job - Being freelance and working on contract & CV workshop • BBC Advanced Production Course 	<ul style="list-style-type: none"> • Cillian Fennell Scriptwriting workshop • Introduction to Production BBC
2014	<ul style="list-style-type: none"> • Digital Media Workshop - Digi-Dúchas) • Single Camera Directing • Preparation and Delivery of Ideas Development and Pitching Course 	<ul style="list-style-type: none"> • BBC Advanced Production Course • Production Manager Bootcamp • Production Management Course • FCPX course
2015	<ul style="list-style-type: none"> • Writing for Drama Workshop Darach Mac Con Iomaire • Script writing workshop - Niall Mac Eachmharcaigh 9/05/2015 • ILBF Trainees' course on freelancing • BBC Introduction to Production Course 	<ul style="list-style-type: none"> • Raidió Fáilte Radio Training • Raidió Fáilte Advanced Training course • Single Camera Directing
2016	<ul style="list-style-type: none"> • BBC Advanced Production Course • Researcher Masterclass with Colin Savage • Single Camera Directing (BBC) • Documentary Making with Vanessa Gidea - Film Base, Dublin 	<ul style="list-style-type: none"> • The Practical Side of Factual Writing for TV - Screen Training Ireland • Experience the markets at MIP

Source: ILBF Trainees - training 2011-16 (excel received from NI Screen)

The table below sets out the proportion of trainees that completed training and then secured employment.

Table 6:4: Participants that completed the training / secured employment 2011/12 – 2015/16

	Number of participants that started training	Completers as a % of starts	Continued training or secured employment in the production sector as a % of starts
2011/12	12	100%	83%
2012/13	13	92%	83%
2013/14	13	100%	77%
2014-15	10	100%	80%
2015/16	11	100%	82%

Source: ILBF KPI Reports 2011/12 to 2016/17 (received from NI Screen)

6.5 Consultation with Trainees

In order to examine in further detail the quality, appropriateness and impact of the training funded by the ILBF, consultation was completed with the trainees. This consultation was completed via a survey designed to capture information on trainee background and awareness of the programme prior to taking part; the development of their placement; the training received; the impact of participation and satisfaction with the programme. The traineeships were completed during the 2011-2016 training period.

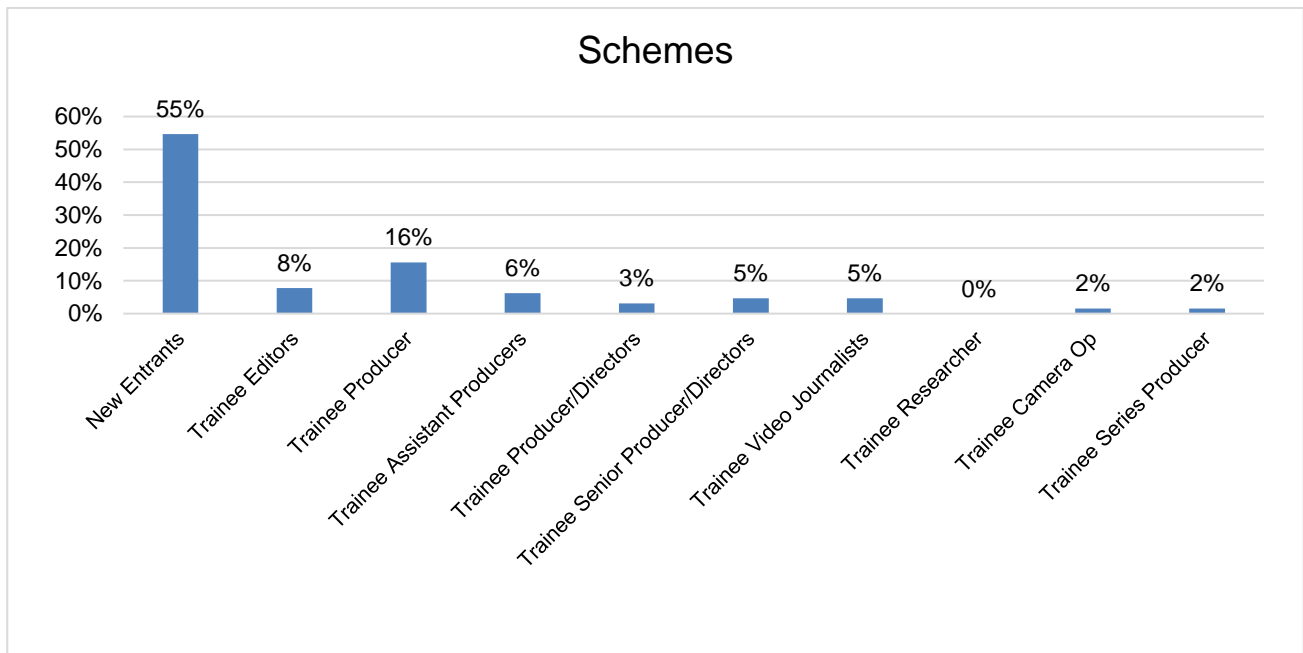
NI Screen provided contact details for 51 trainees who were contacted up to 5 times in order to request them to access the online survey to provide their views and describe their experiences. In addition, we contacted all of the participants by phone to provide more flexibility to the potential respondents to complete the survey. In total forty-one trainees out of the fifty-one (80%) contacted completed the survey either online or over the phone. Contact details provided indicate that between 11 and 13 traineeships occurred per year. Some of the trainees undertook several traineeships and a greater proportion of responses relate to those undertaken in the 2011-2013 period (total respondents=26, 63%).

6.5.1 Participants' Background and Rationale for Participation

This section details which schemes trainees took part in and when, how trainees first heard about the schemes, as well as background information on their previous employment and Irish language proficiency.

The findings suggest that the ILBF was successful in attracting people to the sector, with 59% not having prior involvement in Irish language production or broadcasting in NI; of those that had, the involvement was varied and not primarily focused on production.

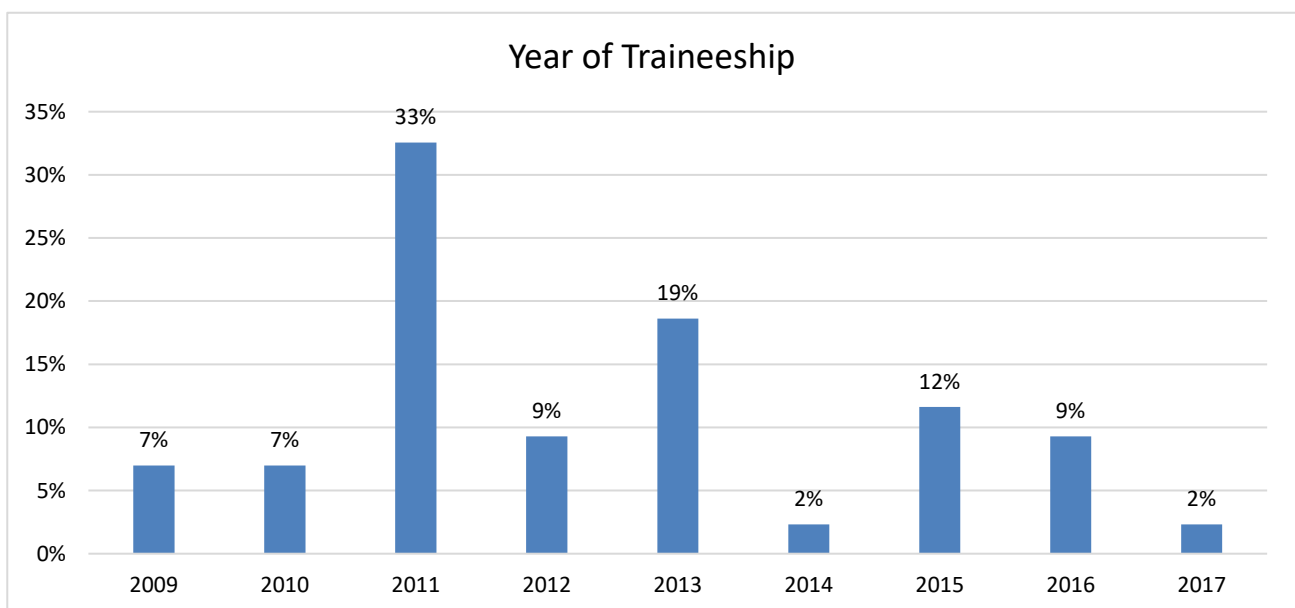
Figure 6:1: Trainee Schemes



Source: RSM PACEC, 2017

In total the 41 trainees participated in 64 schemes, averaging 1.6 schemes per trainee. The graph above highlights that 55% of all trainee schemes attended were new entrant schemes. This was by far the most common scheme. The second largest group were trainee producers (16%, n=10), followed by editors (8%, n=5), and assistant producers (6%, n=4). No trainees reported taking part in the researcher traineeship.

Figure 6:2: Year of Traineeship

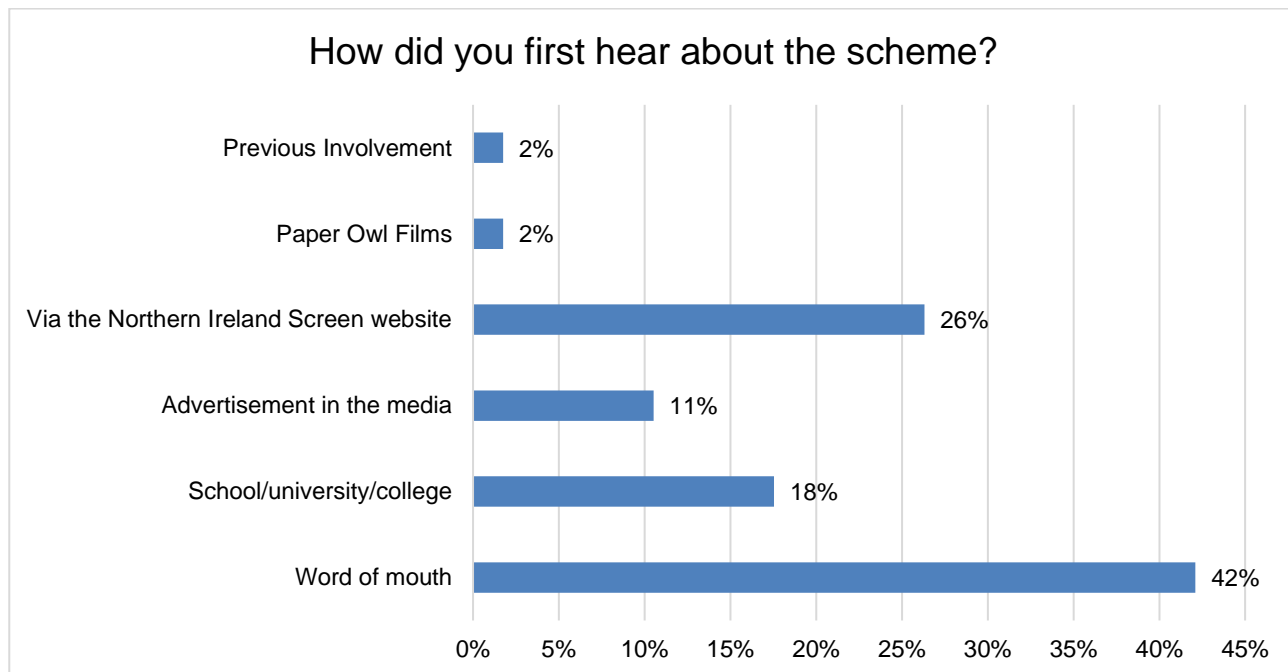


Source: RSM PACEC, 2017

In total, the 41 trainees reported taking part in 43 traineeships between 2009 and 2017. A third of these (n=14) were in 2011. Just under a fifth (19%, n=8) started their traineeship in 2013. Between 7% (n=3)

and 12% (n=5) of traineeships were in each of the other years, apart from 2014 and 2017. These years had the lowest number of traineeships (2%, n=1); the latter is not surprising, given that the survey was completed in the early part of 2017 and thus could only consider part of the year whereas other years give consideration to full years.

Figure 6:3: How participants heard about the scheme



Source: RSM PACEC, 2017

The trainees had heard about the traineeship in various ways. The question was structured so that respondents could provide multiple responses (“tick all that apply”). In total 42% of respondents (total n=57) reported that they heard about the traineeship through word of mouth; this was the most commonly cited response. Over a quarter (26%) found out about the scheme via the Northern Ireland Screen website. Eighteen percent of participants heard about the scheme through school/ university, and 11% heard about the scheme through the media. Additional means by which trainees heard about the traineeship include: through involvement with Paper Owl Films, or through being previously linked to the scheme (2% respectively).

When asked why they got involved in the traineeships, survey respondents were given the opportunity to provide three reasons. The following table sets out the reasons (n=120) given by respondents for participating in the scheme.

Table 6:5: Reason for Entering Traineeship

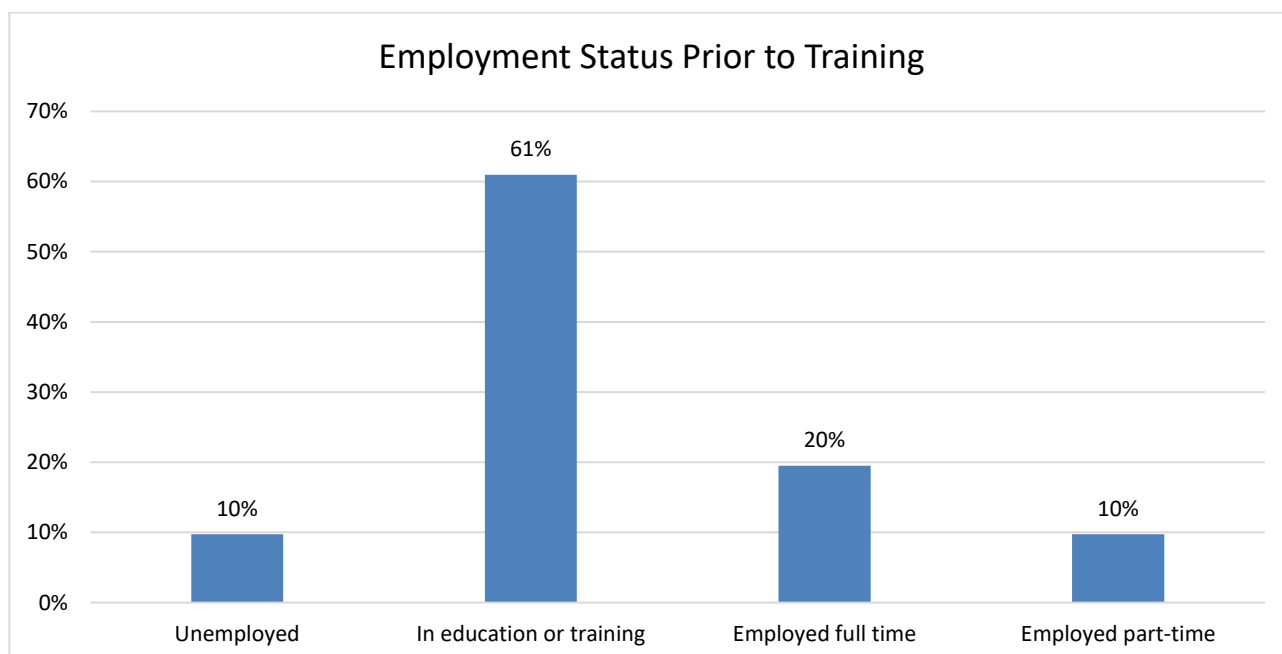
Main Reasons	No. of Responses	% of Responses
Gain Skills/ Experience	26	22%
Interest in Media or to start a career in media	20	17%
Interest to work through Irish	19	16%
Paid Employment/ Training	12	10%

Main Reasons	No. of Responses	% of Responses
Next Step After University	11	9%
Work in Irish Media	9	8%
Progress In Career	7	6%
Heard Good things about it	6	5%
Good Opportunity	3	3%
Experience a new city	2	2%
Try something new	2	2%
Work with People	1	1%
Meet Like-Minded Film Makers	1	1%
Good experience on previous scheme	1	1%
Total Responses (41 respondents)	120	100%

Source: RSM PACEC, 2017

The main reason for participation given by the respondents was “to gain skills or experience” (22, n=26%), followed by ‘interest in media, or to start a career in media (17%, n=20), and having an interest to work through Irish (16%, n=19). Ten percent of responses (n=12) relate to gaining employment or training. Nine percent of respondents (n=11) saw it as the next logical step after university.

Figure 6:4: Employment Status Prior to Training



Source: RSM PACEC, 2017

Prior to involvement with the scheme, 61% of respondents (n=41) were involved in education or training. A fifth were in full-time employment, and the remainder were either in part-time employment (10%), or unemployed (10%).

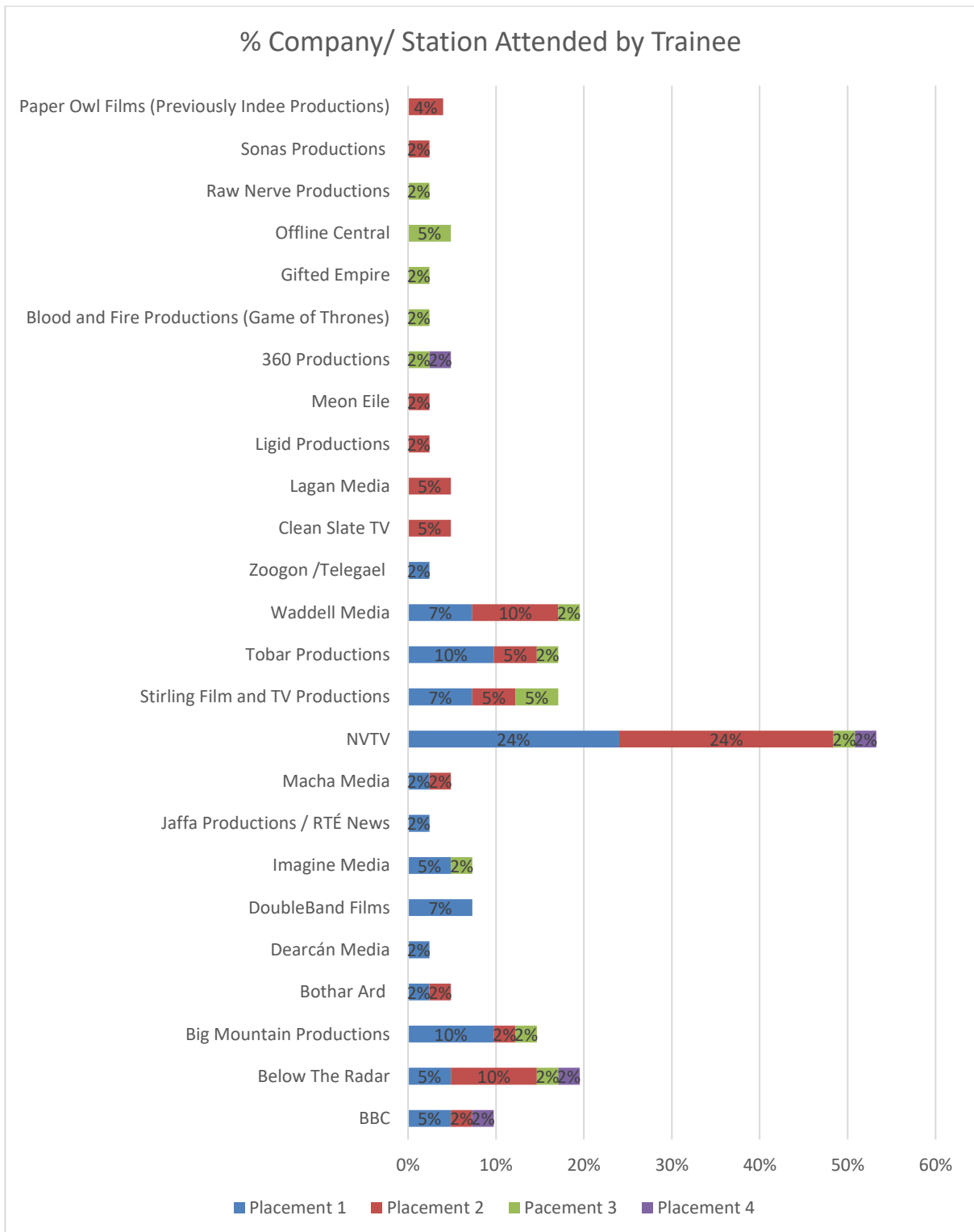
Fifty nine percent of all respondents had not been involved in Irish language production or broadcasting in Northern Ireland prior to starting the training scheme. However, forty-one percent of all respondents (n= 17) reported that they had previous experience working in Irish language production in Northern Ireland. The nature of this involvement varied and was not primarily focused on production. Some of the previous roles, and occupations include:

- Editor role at TG4;
- Volunteer presenter/ producer at Radió Feirste/ Radió Fáilte/ Iúr FM;
- BBC Training in Irish radio department;
- Producer role at production company;
- BBC Blas content assistance;
- Runner on music series Opry an Iúr;
- Presenter role on TG4 and the BBC;
- AD and sound trainee with experience working with TG4 and RnaG;
- Actress on an Irish language kids' show;
- Researcher; and
- Animator.

6.5.2 Placement

Recognising that trainees may have changed company throughout the training programme, we invited them to list the company/ companies they were placed with, the length of time and their job role. The following graph and table provides details of the companies that hosted participants of the New Entrants Scheme (and who responded to this survey).

Figure 6:5 Production Company Placements



Source: RSM PACEC, 2017

Figure 6.5 illustrates where trainees undertook their placements (some completed up to four placements). For each the percentage is related to total survey sample size (n=41)

- Placement 1: Ninety-eight percent of trainees (n=40) provided the name of the company where they undertook initial training. In total, 14 companies provided placements to 40 trainees. Placements varied from two and a half months to two years. NVTV provided 10 trainees with their initial training, training the largest percentage of trainees (24%).
- Placement 2: 34 trainees undertook a second placement period. In total, 15 companies provided placements to 34 trainees. These placements ranged from two months to two years. NVTV provided the largest number of placements (n=10). The second largest provider of second placements was Below the Radar (n=4).
- Placement 3: 16 trainees undertook a third placement which ranged between one and thirty-six months. Paper Owl Films, Stirling Productions, and Offline Central provided the highest proportion of traineeships (n=2). In total, 12 companies provided placements to 16 trainees.
- Placement 4: 4 trainees undertook an additional traineeship. These lasted between two and a half months and one year. In total 4 companies provided placements to 4 trainees.

Roles within the traineeships included the following, illustrating a diverse range of roles offered to trainees.

Table 6:6: Placement Roles

Job Role	Placement 1		Placement 2		Placement 3		Placement 4	
	N	%	N	%	N	%	N	%
Animation Trainee	0	0%	0	0%	1	6%	0	0%
Assistant	0	0%	1	3%	0	0%	0	0%
Assistant Producer/ Trainee Assistant Producer	3	8%	2	6%	1	6%	0	0%
Camera Work	1	3%	2	6%		0%	0	0%
Development	0	0%	1	3%	0	0%	0	0%
Editor	0	0%	1	3%	2	13%	0	0%
Film Maker	1	3%	0	0%	1	6%	0	0%
Non-descript	1	3%	1	3%	0	0%	0	0%
Producer	0	0%	2	6%	2	13%	0	0%
Production Assistant	7	18%	3	9%	2	13%	0	0%
Production Trainee	0	0%	1	3%	0	0%	0	0%
Prop Trainee	0	0%	0	0%	1	6%	0	0%
Researcher	7	18%	4	12%	2	13%	2	50%
Senior Producer	1	3%	0	0%		0%	1	25%
Trainee (misc.)	12	30%	9	26%	2	13%	0	0%
Trainee Editor	1	3%		0%	2	13%	0	0%
Trainee Editor	0	0%	1	3%	0	0%	0	0%

Job Role	Placement 1		Placement 2		Placement 3		Placement 4	
Trainee Producer	2	5%	2	6%	0	0%	0	0%
Video Editing	1	3%	0	0%	0	0%	0	0%
Video Journalist	3	8%	4	12%	0	0%	1	25%
	40	100%	34	100%	16	100%	4	100%

Source: RSM PACEC, 2017

Forty trainees provided details about their first placement. The most common role was “trainee” (30%, n=12), the second most common roles were researcher and production assistant (18%, n=7). Thirty-four trainees provided details on their second placement role. As with first placement, the most common role was trainee (26%, n=9). The second most common roles were researcher and video journalist (12%, n=4). Under half of overall trainees (n=16) completed a third placement. The most common roles were editor, producer, production assistant, researcher, trainee, and trainee editor (13%, n=2). Just four trainees undertook a fourth placement. Half of these were research roles (n=2). The other roles include video journalist and senior producer.

6.5.3 Training Received During Placements

This section of the report summarises the overall experience of trainees in relation to training received during their placements. Consultees noted that they took part in a **range of training courses during their placements**. The table below outlines **how satisfied** the trainees (total response n=39) were with the “on-the-job” training they received. There was a high level of satisfaction: in total 85% of all respondents were either very satisfied, or fairly satisfied with the “on-the-job” training they received. Just 8% were fairly dissatisfied.

Table 6:7: Trainee Satisfaction with On the Job training - Overall

Level of Satisfaction	% of respondents
Very Satisfied	44%
Fairly satisfied	41%
Neither satisfied or dissatisfied	8%
Fairly dissatisfied	8%
Very Dissatisfied	0%

Source: RSM PACEC, 2017

Several respondents took part in multiple training programmes. The general themes of these programmes, and total number of trainees attending are outlined below:

Table 6:8: Training Provided by Theme

Training	Total number of Trainees	Percentage of Overall Training
Advanced Production	11	13%
Directing	11	13%
Additional Production Training	10	12%
Introduction to Production	9	11%
Misc Course (Unidentified)	7	8%
Researching	6	7%
Entry Level Training	5	6%
Presenting	4	5%
Sound and Light	4	5%
Tender/ Proposal/CV Writing	4	5%
Editing	3	4%
Camera Training	2	2%
Writing Training	2	2%
Animation	1	1%
Costume Course	1	1%
Documentary Course	1	1%
Health and Safety	1	1%
Masters Course	1	1%
Radio Skills	1	1%
Total Number of Courses Attended (multiple courses per trainee)	84	100%

Source: RSM PACEC, 2017

The largest percentage of trainees took part in advanced production, and directing training (13%, n=11). Additional training was received in additional production training (12%, n=10), and introduction to production training (11%, n=9). In total, 30 trainees took part in production related courses (26%).

The providers of the above training courses are detailed in the following table – there were at least 16 different providers mentioned as well as individuals and independents (several in both categories).

Table 6:9: Training by Provider

Name	Total Courses per Provider	% of Total
BBC	38	54%
Individuals	8	11%
NVTV	8	11%
ILBF	3	4%
Screen Training Ireland	3	4%
Belfast Met	1	1%
FÁS	1	1%
Gréasán na Meáin	1	1%
Independent	1	1%
Lagan Media	1	1%
National Film and Television School	1	1%
Puma Events and Training	1	1%
Raidió Fáilte	1	1%
Raw Nerve Productions	1	1%
VET	1	1%
Total number of courses provided (trainees attended multiple courses)	70	100%

Source: RSM PACEC, 2017

The providers of the above training courses are detailed below. Over half of all training courses were provided by the BBC (54%). The second most commonly mentioned provider of training was NVTV (11%). A further 11% received training from specific individuals (at least 7 of these). These included: Nigel Maslin (Single Camera Directing Course); Michael Simon and John Carlin (BBC Introduction to Production); and other non-specified training was provided by four others as part of the New Entrant Scheme.

When asked **how relevant trainees found the above courses**, responses were very favourable: the vast majority of respondents (90% (n=41)) thought it was either extremely (54%), or somewhat (37%) relevant. The remaining 10% did not provide a response.

The table below summarises to what extent trainees felt the training impacted upon their ability to undertake their job.

Table 6:10: Ability to Undertake Job

Statement	Percentage of Trainees
I would have been able to complete my job but not as well	54%
The training had no impact on my ability to undertake my job	15%
I would have been unable to undertake my job without this training	24%

Over half of trainees (54%) felt that they would be able to undertake their job without the provided training, but that they would not be able to perform as well. Nearly a quarter of trainees felt they would be unable to undertake their job. The remaining 15% who answered stated that the training would not impact on their ability to do their job. The remaining 7% of respondents did not respond.

6.5.4 Non-completers

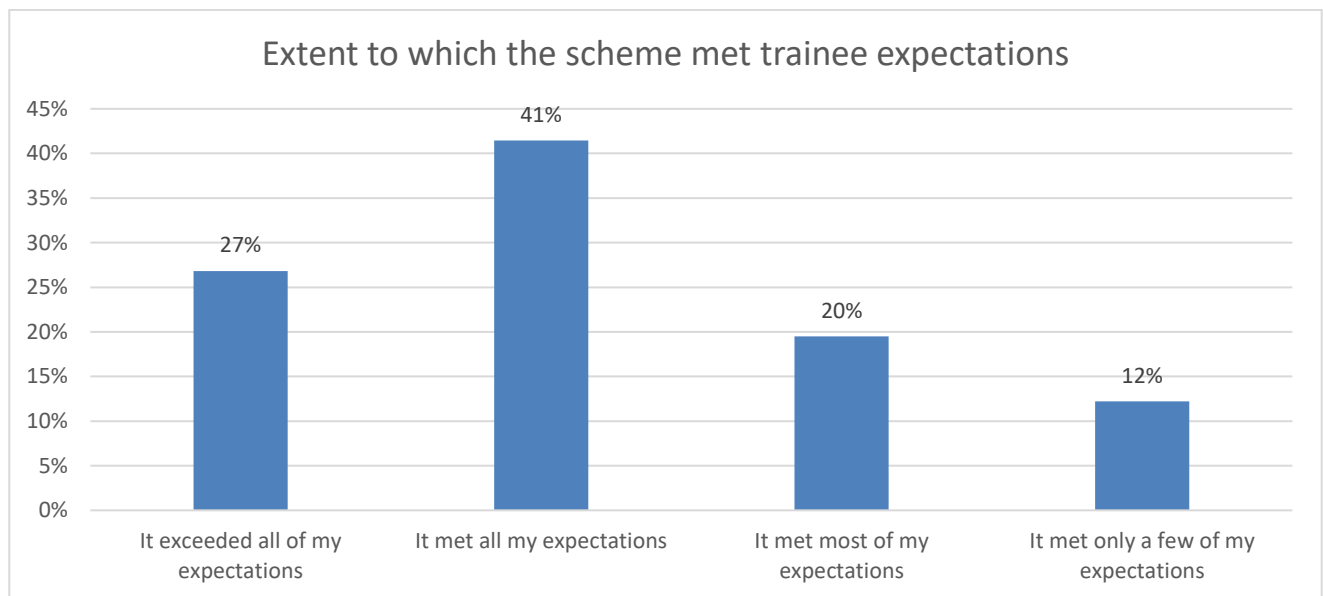
The vast majority of trainees completed the scheme. In total 5% (n=2) of respondents reported that they did not complete the training programme;

- One trainee left after completing 5-10 weeks of the course. The trainee did not disclose why they left and did not regret the decision, stating that they did what they had to do.
- Another trainee left 31-40 weeks into the training, stating that they left due to the lack of training and development opportunities, which they had been promised. The trainee regretted leaving the second placement / scheme as their previous experience with the New Entrants scheme was positive. Their second scheme, senior producer/ director scheme, however was very negative.

6.5.5 Outcomes

The following section details to what extent the ILBF schemes met the expectation of trainees. It also provides detail on career progression and next steps.

Figure 6:6: Extent to which the scheme met trainee expectation



Source: RSM PACEC, 2017

Over a quarter of trainees (27%) felt that the scheme exceeded their expectations. Just over two fifths (41%) felt that it met all of their expectations. A fifth felt that it met most of their expectations, and the remaining 12% of respondents believed the various schemes met only a few of their expectations.

Reasons provided by trainees as to why only a few, or most of their expectations were met, include:

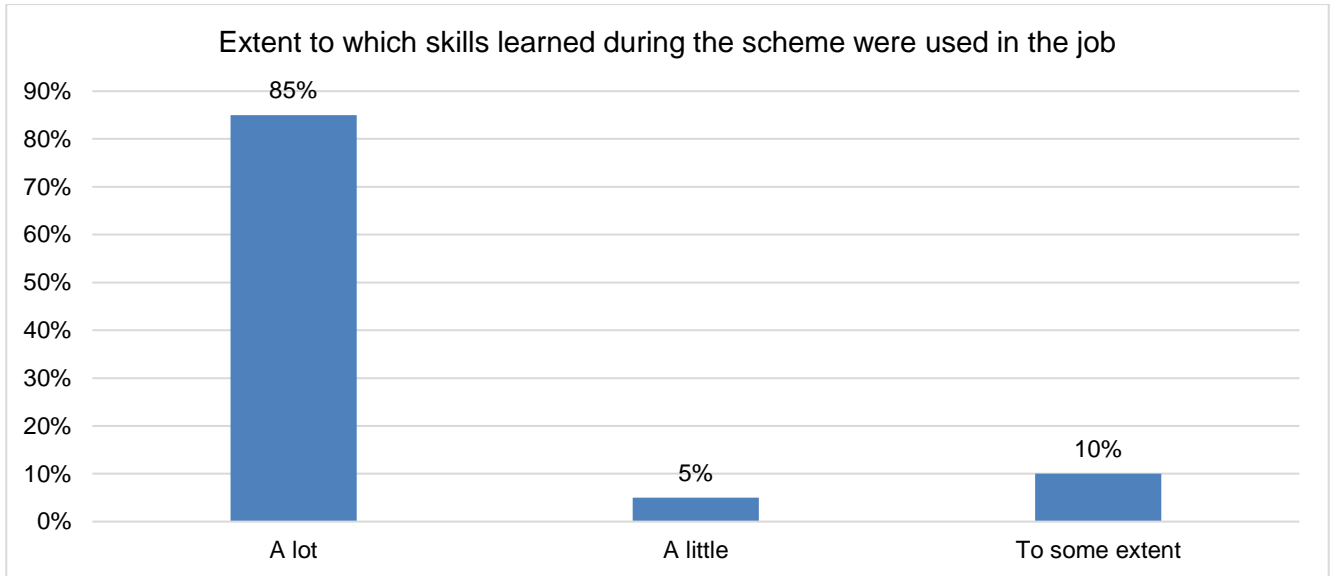
- It was perceived that payment for the scheme was low and resulted in a lack of interest by trainees to remain in the industry;
- There were limited Irish language production projects which limited trainee development in this area;
- Inconsistency between placements with regard to practical experience; and
- There is limited feedback provided by placement companies and ILBF.

Of trainees that undertook the scheme 46% (n=19) remained with their placement company after the ILBF scheme. Several trainees undertook several roles within the company, summarized below:

- Assistant Producer (n=4);
- Producer (n=4);
- Editor (n=3);
- Production Assistant (n=2);
- Video Journalist (n=2);
- Costume Assistant (n=1);
- Production Manager (n=1)
- Researcher (n=1); and
- Series Producer (n=1).

In total 20 trainees responded when asked to what extent the skills learnt during the scheme were used while in employment. Responses are summarized below:

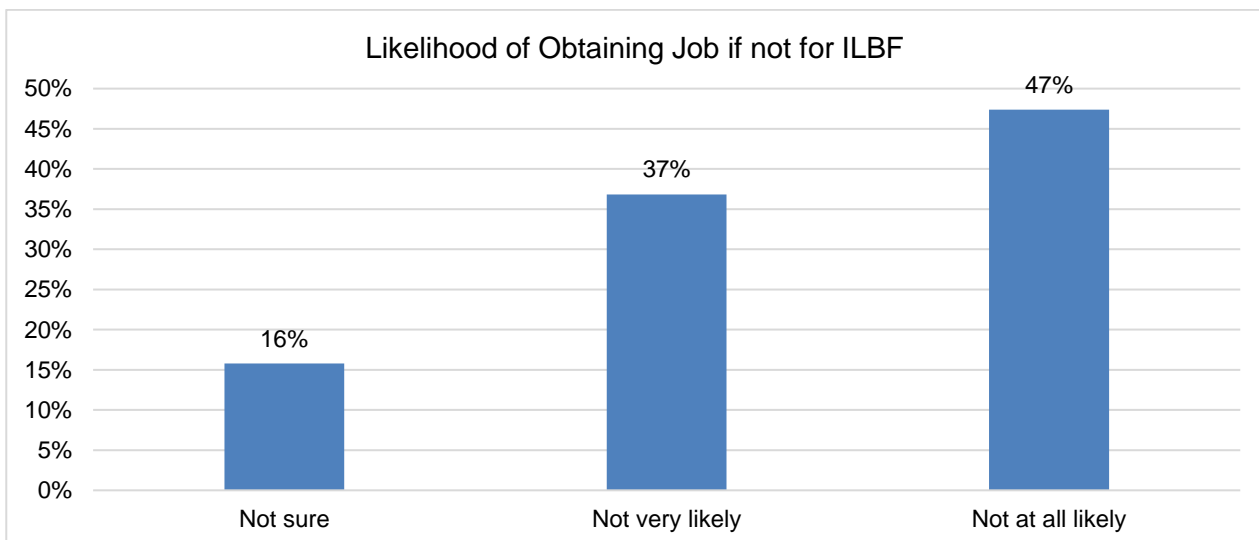
Figure 6:7: Extent to which skills learned during the scheme were used in the job



Source: RSM PACEC, 2017

Eighty-five percent of trainees (n=20) use the skills they learnt through the ILBF a lot in their first job (with the placement company) after undertaking ILBF training. Ten percent used their skills to some extent, whereas the remaining 5% use their skills only a little.

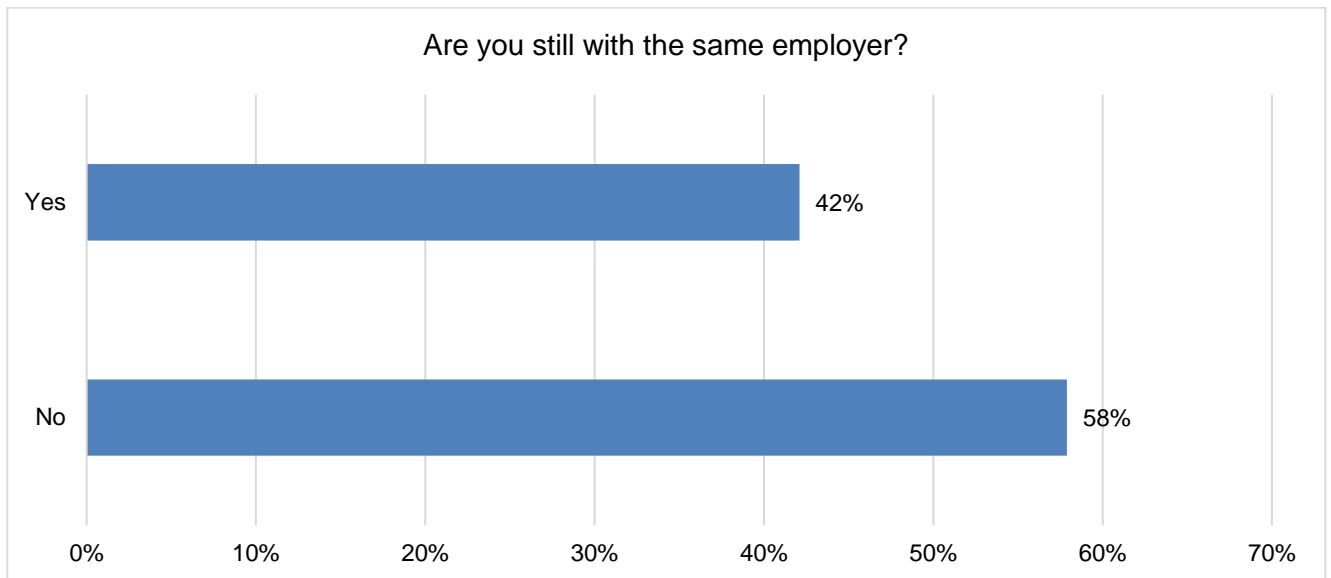
Figure 6:8: Likelihood of Obtaining Job if not for ILBF



Source: RSM PACEC, 2017

Nineteen participants provided a response when asked how likely it would be for them to get a job if not for the ILBF. Nearly half (47%) of respondents (n=19) felt that they would not have obtained their current job if not for the ILBF training they received. A further 37% felt it was not very likely, and 16% were not sure whether they would have got the job or not.

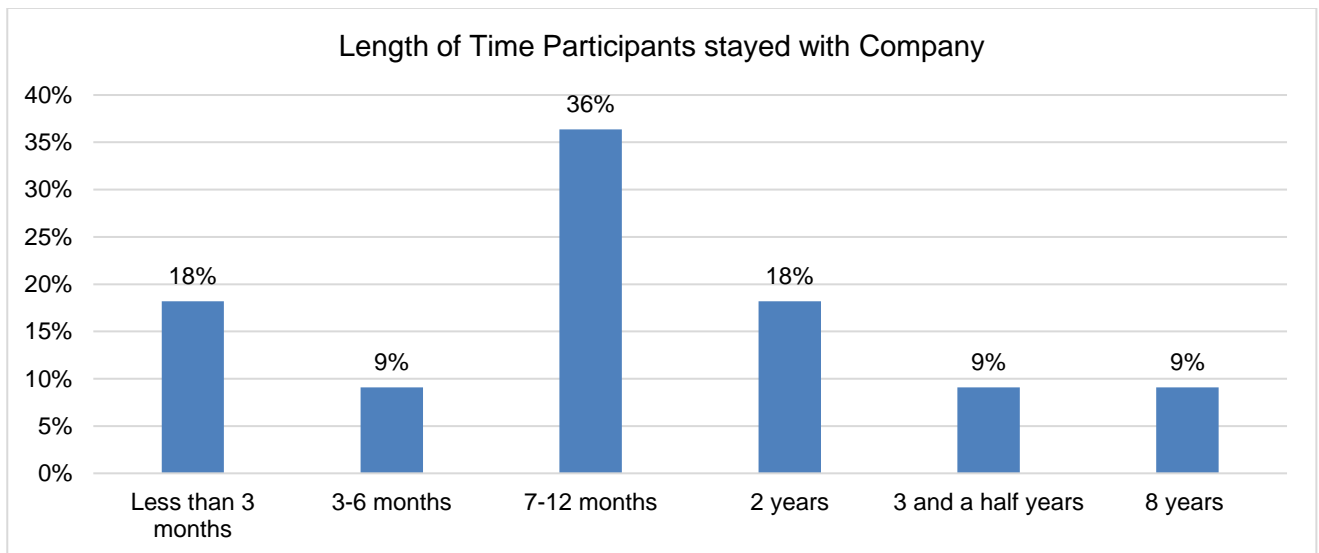
Figure 6:9: Are you still with the same employer?



Source: RSM PACEC, 2017

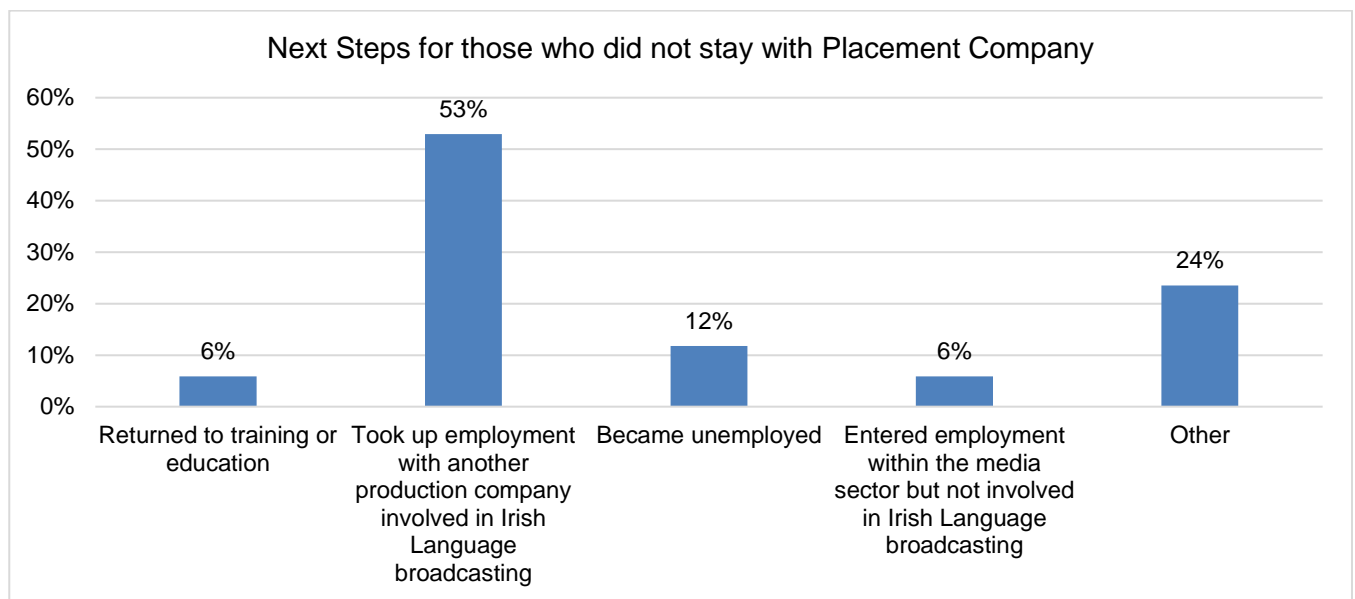
Nineteen participants responded when asked whether they were still with the same employer as at the time of ILBF training. When asked if they were still with the same employer, 42% (n=8) of ILBF trainees said that they were. Those that have left (n=11), stayed in the role from between three months and eight years. This is detailed in the graph below which shows that 63% stayed for less than a year:

Figure 6:10: Length of Time Participants stayed with Company



Source: RSM PACEC, 2017

Figure 6:11: Next Steps for those who did not stay with Placement Company



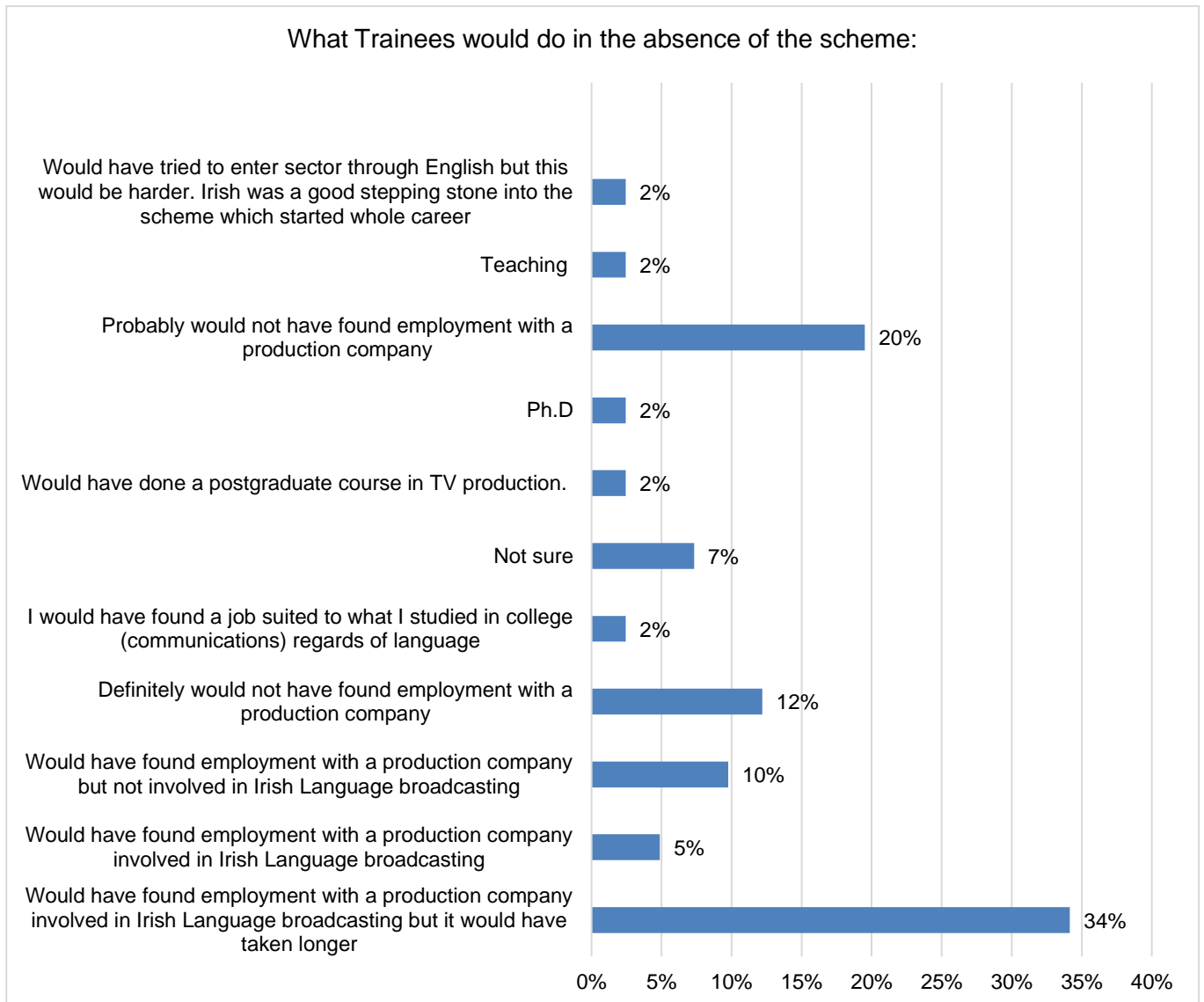
Source: RSM PACEC, 2017

In total 53% of trainees continued to work in the media through Irish. An additional 6% of trainees (n=1) returned to education, or entered English language media and two respondents became unemployed while the remaining 24% provided other reasons.

6.5.6 What trainees would do in the absence of the scheme

This section covers what trainees would have done in the absence of the programme. Trainee responses (n=41) are detailed in the table below:

Figure 6:12: Trainee Outcome in Absence of Scheme



Source: RSM PACEC, 2017

Overall these results show that the ILBF has achieved the following:

- **Full additionality**⁸²: 12% of respondents definitely would not have found employment with a production company;
- **Partial additionality**⁸³: 70% of respondents would have found employment but later and/or via a different route or probably would not have proceeded: consisting of
 - 34% would have found employment with a production company in Irish but it would have taken longer;
 - 10% would have found employment with production company, but not Irish;
 - 2% would have tried to enter the sector through English;
 - 2% would have sought a job related to their qualifications (communication);
 - 2% would have done a postgraduate course in TV production;
 - 20% probably would not have found employment with a production company;
- **Deadweight**⁸⁴: 5% of respondents would have found employment with a production company in Irish, this suggests few individuals would be undertaking these activities without the ILBF. Furthermore, it is noted that while these respondents may have found employment in a production company without the support of the scheme, the company may have received financial support from the ILBF.

The remaining 4% would have pursued another qualification, either a doctorate (2%) or PGCE (2%).

6.5.7 Participants satisfaction with aspects of the training scheme

The table on the following page lists the nine ILBF placement types in which the 41 respondents participated. For each scheme (and overall), the table also includes trainee satisfaction across the five areas of: work involved, career prospects, level of responsibility, pay, as well as training and development opportunities. On average across the nine schemes, over 80% of respondents were satisfied or very satisfied with various elements as follows:

- 90% of trainees were satisfied, or very satisfied with the type of work they did. Only 6% were either dissatisfied, or very dissatisfied.
- 83% of respondents were either satisfied or very satisfied with the **career prospects** offered by the courses. Only 7% were either dissatisfied or very dissatisfied.
- Similarly, 83% of respondents were either satisfied, or very satisfied with the **responsibility** they were given.

When asked about **training and development offered**, 86% were either satisfied, or very satisfied with the resources offered. Just 9% were either dissatisfied, or very dissatisfied. However a higher proportion of trainees were dissatisfied, or very dissatisfied, with 27% believing the pay was not adequate. Just under half (48%) were either satisfied, or very satisfied.

Satisfaction ratings for each individual scheme are detailed on the following page. Green shading indicates that the majority of respondents were satisfied; amber shading indicates that most respondents were indifferent; and red indicates that most respondents were dissatisfied. This is followed by an overview of trainee satisfaction in the areas of: scheme content, organisation and delivery, as well as skills.

⁸² **Full additionality** - Programme's benefits are wholly attributable to it, i.e. deadweight & displacement are zero

⁸³ **Partial additionality** - activity would have been carried out earlier, or on a larger scale or to a higher specification or has displaced existing activity.

⁸⁴ **Deadweight** - activity that would have occurred regardless of the policy

Table 6:11: Trainee Schemes Level of Satisfaction: Type of Work, Career Prospects, Level of Responsibility, Pay, and Training

Scheme	Satisfaction: Type of Work	Satisfaction: Career Prospects	Satisfaction: Level of Responsibility	Satisfaction: Pay	Satisfaction: Training and Development
New Entrants	<ul style="list-style-type: none"> Very Satisfied: 49% Satisfied: 43% Neither: 5% Dissatisfied: 3% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 32% Satisfied: 51% Neither: 11% Dissatisfied: 5% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 43% Satisfied: 35% Neither: 16% Dissatisfied: 5% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 16% Satisfied: 32% Neither: 30% Dissatisfied: 19% Very Dissatisfied: 3% 	<ul style="list-style-type: none"> Very Satisfied: 41% Satisfied: 54% Neither: 0% Dissatisfied: 3% Very Dissatisfied: 3%
	N=37	N=37	N=37	N=37	N=37
Trainee Producer	<ul style="list-style-type: none"> Very Satisfied: 64% Satisfied: 36% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 50% Satisfied: 42% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 8% 	<ul style="list-style-type: none"> Very Satisfied: 67% Satisfied: 33% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 8% Satisfied: 33% Neither: 17% Dissatisfied: 33% Very Dissatisfied: 8% 	<ul style="list-style-type: none"> Very Satisfied: 42% Satisfied: 42% Neither: 17% Dissatisfied: 0% Very Dissatisfied: 0%
	N=14	N=12	N=12	N=12	N=12
Trainee Editor	<ul style="list-style-type: none"> Very Satisfied: 67% Satisfied: 22% Neither: 0% Dissatisfied: 11% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 50% Satisfied: 50% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 50% Satisfied: 50% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 33% Neither: 17% Dissatisfied: 17% Very Dissatisfied: 33% 	<ul style="list-style-type: none"> Very Satisfied: 29% Satisfied: 67% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 17%
	N=9	N=6	N=6	N=6	N=7
Trainee Assistant Producer	<ul style="list-style-type: none"> Very Satisfied: 20% Satisfied: 60% Neither: 0% Dissatisfied: 20% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 25% Satisfied: 50% Neither: 25% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 50% Satisfied: 25% Neither: 0% Dissatisfied: 25% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 25% Satisfied: 50% Neither: 0% Dissatisfied: 25% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 33% Satisfied: 67% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0%
	N=5	N=4	N=4	N=4	N=3
Trainee Video Journalists	<ul style="list-style-type: none"> Very Satisfied: 50% Satisfied: 25% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 25% Satisfied: 25% Neither: 25% Dissatisfied: 0% Very Dissatisfied: 25% 	<ul style="list-style-type: none"> Very Satisfied: 75% Satisfied: 0% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 25% 	<ul style="list-style-type: none"> Very Satisfied: 25% Satisfied: 0% Neither: 25% Dissatisfied: 25% Very Dissatisfied: 25% 	<ul style="list-style-type: none"> Very Satisfied: 50% Satisfied: 25% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 25%
	N=4	N=4	N=4	N=4	N=4
Trainee Senior Producer/Directors	<ul style="list-style-type: none"> Very Satisfied: 67% Satisfied: 0% Neither: 0% Dissatisfied: 33% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 50% Satisfied: 25% Neither: 0% Dissatisfied: 25% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 50% Satisfied: 25% Neither: 0% Dissatisfied: 25% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 50% Neither: 25% Dissatisfied: 0% Very Dissatisfied: 25%
	N=3	N=4	N=4	N=4	N=4
Trainee Producer/Director	<ul style="list-style-type: none"> Very Satisfied: 67% 	<ul style="list-style-type: none"> Very Satisfied: 100% 	<ul style="list-style-type: none"> Very Satisfied: 100% 	<ul style="list-style-type: none"> Very Satisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0%

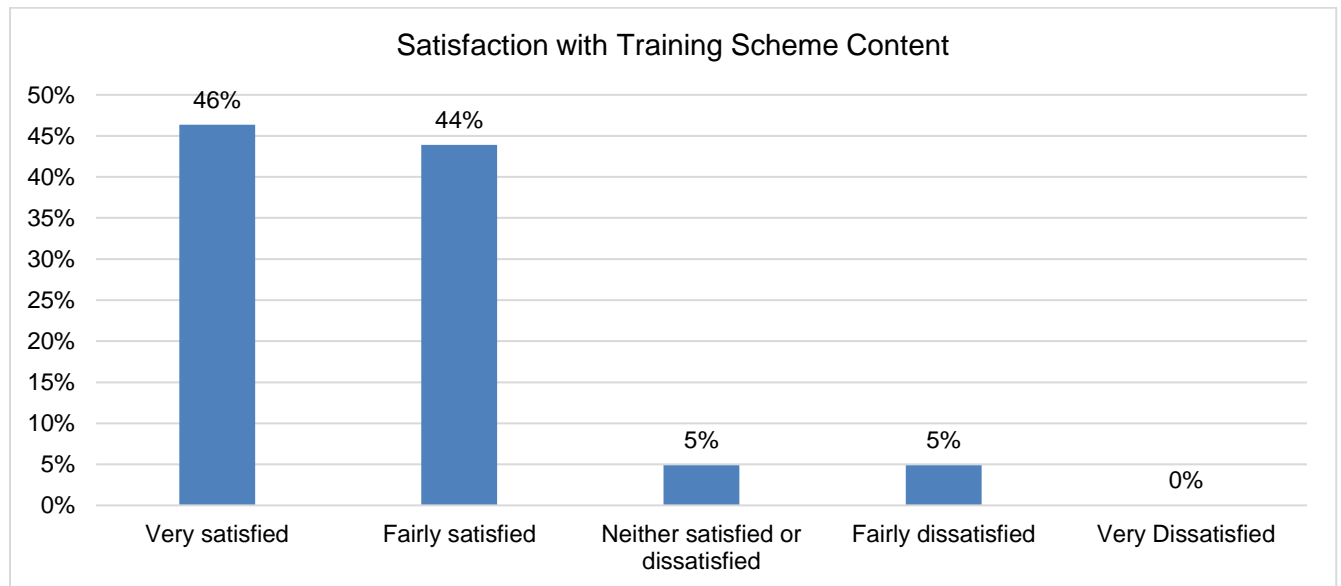
Scheme	Satisfaction: Type of Work	Satisfaction: Career Prospects	Satisfaction: Level of Responsibility	Satisfaction: Pay	Satisfaction: Training and Development
	<ul style="list-style-type: none"> Satisfied: 33% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Satisfied: 0% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Satisfied: 0% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Satisfied: 50% Neither: 50% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Satisfied: 33% Neither: 33% Dissatisfied: 33% Very Dissatisfied: 0%
	N=3	N=3	N=3	N=2	N=3
Trainee Researcher	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 0% Neither: 100% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0%
	N=1	N=1	N=1	N=1	N=1
Trainee Camera Op	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 0% Neither: 100% Dissatisfied: 0% Very Dissatisfied: 0% 	<ul style="list-style-type: none"> Very Satisfied: 0% Satisfied: 100% Neither: 0% Dissatisfied: 0% Very Dissatisfied: 0%
	N=1	N=1	N=1	N=1	N=1
Total Trainee Schemes	<ul style="list-style-type: none"> Very Satisfied: 52% Satisfied: 38% Neither: 4% Dissatisfied: 5% Very Dissatisfied: 1% 	<ul style="list-style-type: none"> Very Satisfied: 39% Satisfied: 44% Neither: 10% Dissatisfied: 4% Very Dissatisfied: 3% 	<ul style="list-style-type: none"> Very Satisfied: 51% Satisfied: 32% Neither: 10% Dissatisfied: 6% Very Dissatisfied: 1% 	<ul style="list-style-type: none"> Very Satisfied: 13% Satisfied: 35% Neither: 25% Dissatisfied: 20% Very Dissatisfied: 7% 	<ul style="list-style-type: none"> Very Satisfied: 35% Satisfied: 51% Neither: 6% Dissatisfied: 3% Very Dissatisfied: 6%
	N=77	N=72	N=72	N=71	N=1

Note: Where the majority of responses are satisfied or very satisfied, the text is shaded green; where the majority of responses are dissatisfied or very dissatisfied, the text is shaded red. Where the majority have selected neither satisfied nor dissatisfied the shading is amber

Source: RSM PACEC, 2017

When asked about the **content of the training scheme**, 90% of respondents (n=41) were satisfied with the training scheme. The remaining 10% were neither satisfied, nor dissatisfied (5%), or fairly dissatisfied (5%) This is outlined in the table below:

Figure 6:13: Satisfaction with Training Scheme Content



Source: RSM PACEC, 2017

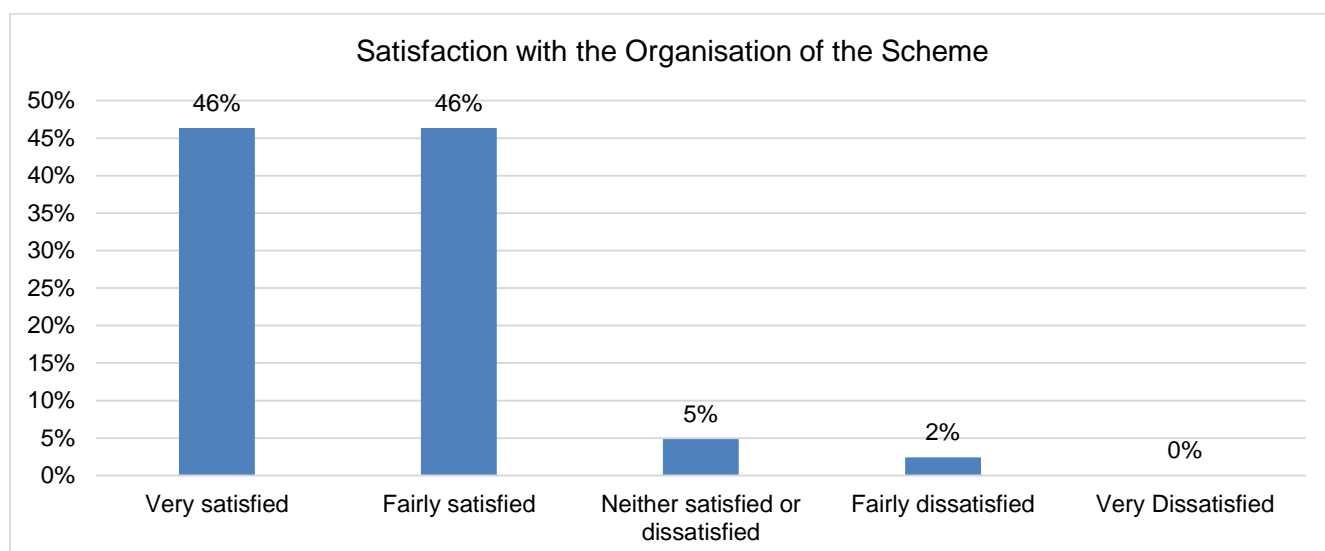
Reported reasons why trainees were satisfied include:

- The ILBF were supportive throughout;
- It provided opportunities to create work for network audiences;
- The scheme was well organised and efficient;
- Content is in-depth and mentors are supportive;
- It allowed for relationship building within the sector;
- The scheme is important for training in the Irish language sector.

Reported reasons why trainees were dissatisfied include:

- There was no real emphasis on training as per the title of the job role;
- No hands on training;
- Content of the training scheme was not well defined; and
- The new entrant scheme was too focussed on people who want to be producers.

Figure 6:14: Satisfaction with Scheme Organisation



Source: RSM PACEC, 2017

When discussing scheme organisation, 92% of respondents were either very satisfied (46%) or satisfied (46%) with **how the scheme was organised**. A further 5% were neither satisfied nor dissatisfied, and the remaining 2% were dissatisfied.

Reported reasons why trainees were satisfied include:

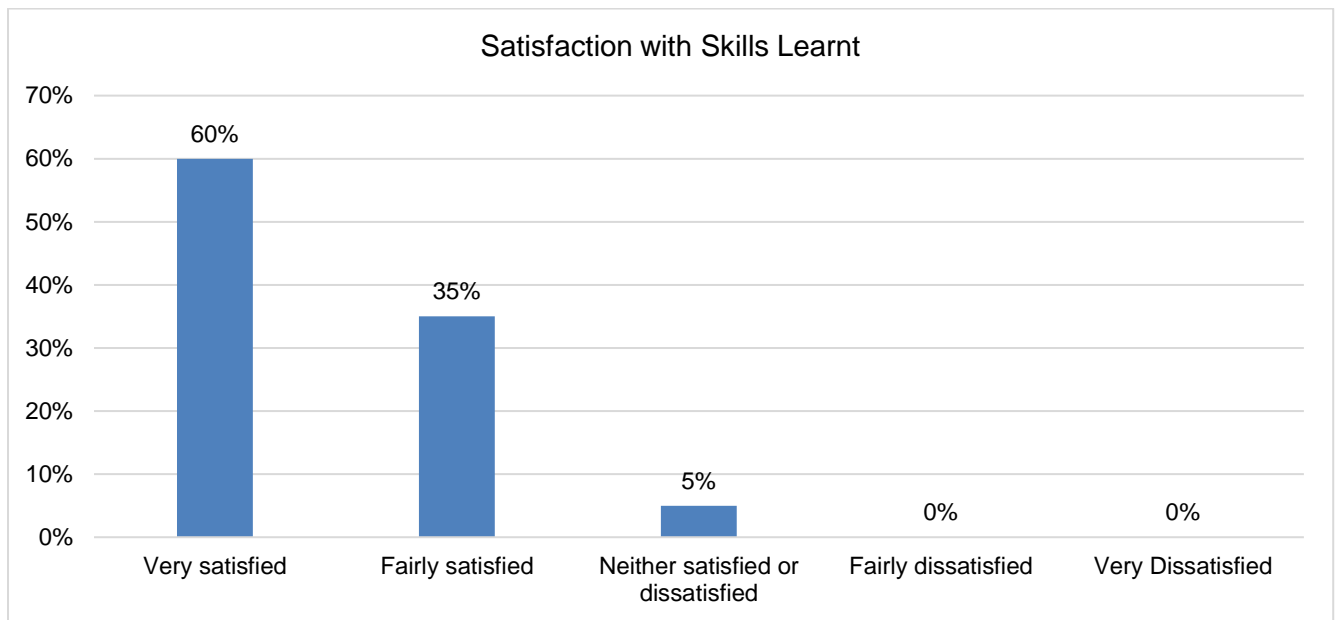
- There was a good combination of training and work which kept the scheme interesting;
- It provided valuable training throughout companies in Belfast, which helped build networking skills and provided confidence to find work independently;
- NI Screen were professional, friendly, and efficient, and took the skills and interest of trainees into account; and
- When there were issues surrounding trainees' relationships with companies the scheme mentor set up a meeting and clearly defined boundaries within the company.

Reported reasons why trainees were dissatisfied include:

- One trainee stated they would like external mentoring in addition to the support provided by the production companies;
- One trainee would have liked a review / appraisal of their performance;
- One trainee felt that inappropriate comments from a training provider were not satisfactorily dealt with; and
- Respondents felt they would like greater support and monitoring from NI Screen/ ILBF and the production company.

When asked how satisfied they were with the **skills they obtained**, 95% were either very satisfied (60%), or satisfied (35%). The remaining 5% were neither satisfied nor dissatisfied.

Figure 6:15: Satisfaction with Skills Learnt

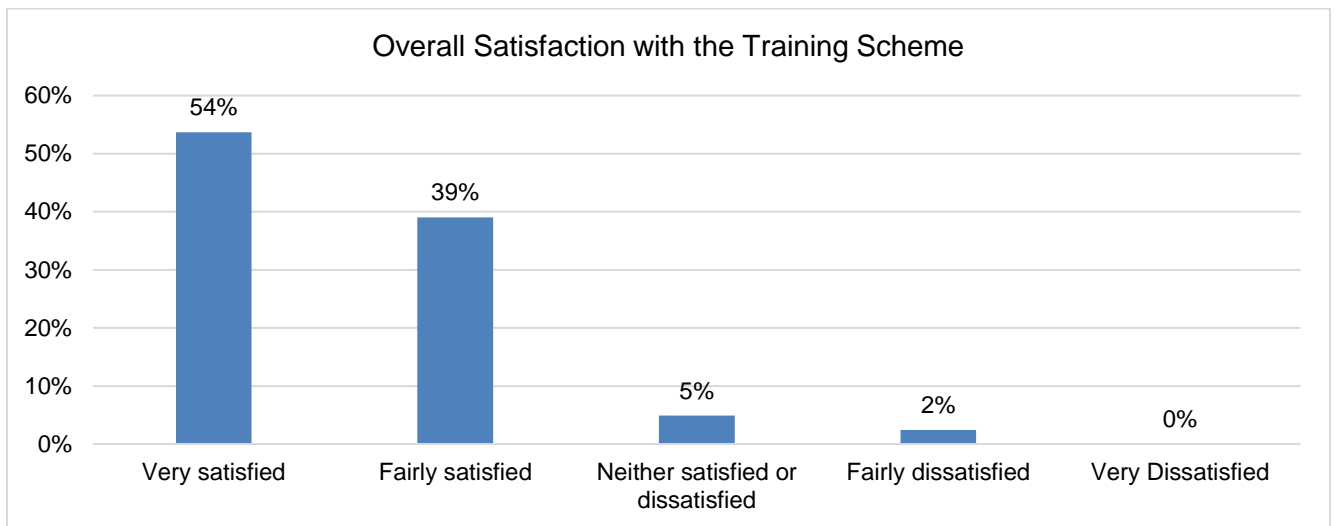


Source: RSM PACEC, 2017

Reported reasons that trainees were satisfied include:

- They were taught a wide variety of skills have been taught relevant to media;
- They were given the opportunity to use practical skills within the placement company;
- The skills obtained were useful in both production, and post-production, and have been practiced thoroughly;
- The ILBF scheme provided experience in offline and online editing, as well as editing and grading;
- The scheme provided skills training and allows networking with the 'best in the industry'; and
- The placement company were supportive of their skill development.

Figure 6:16: Overall Satisfaction with the Training Scheme



Source: RSM PACEC, 2017

Regarding the **training scheme as a whole**, the majority of respondents were either very satisfied (54%), or satisfied (39%). Just 2% were dissatisfied, and the remaining 5% were neither satisfied nor dissatisfied.

Reported reasons that trainees were satisfied include:

- It provided a great start in a difficult industry, providing experience in dealing with all issues relating to TV production;
- The training extends beyond media and has impacted a general level of professionalism and appreciation of culture and language;
- It provided direct experience in production companies and created future work opportunities and contacts;
- This scheme has been hugely beneficial in not only creating long term employable, skilled workers, but it also in sustaining the Irish language broadcast industry within Northern Ireland.

6.5.8 The Future

The following subsection provides feedback from trainees with regard to the further development of the ILBF trainee schemes. In total 73% of the 41 respondents believe that the ILBF scheme can be developed. Suggestions made by trainees to improve the overall quality of the ILBF include:

- Clearly define trainee role within the production company so both production company and trainee know their role;
- More visits to placements from ILBF staff;
- Offer guidance on available courses for trainees;
- Increased pay for trainees;

- Better align Irish language content with the demands of the Irish language community;
- Provide support post-scheme to help guide trainees into employment;
- Have a more concrete structure to the scheme so both trainees and production companies can plan accordingly;
- Have more face to face feedback; and
- Provide a more hands on, combined approach between NI Screen and the production companies.

When asked if they would recommend the training scheme to others, 95% (of 40) respondents said that they would. Reasons for this include:

- It opens doors to a huge amount of contact and companies in NI;
- It is a great platform for young professionals getting started in the industry;
- These schemes offer world class training and are a key factor in developing the future of Irish language media;
- It provides a good foothold into the industry for those without a media background, with lack of connections, or who are restrained financially;

6.6 Production Company Feedback

This section includes findings taken from the production company survey (n=11 responses, outlined in section 5), and details their experience of the training scheme supported by ILBF between 2011 and 2016. The table below provides an overview of the different trainee schemes that responding companies took part in:

Table 6:12: Training schemes that production companies participated in

Name of Scheme	Number of Companies	Percentage of all Schemes in which all responding companies participated
New Entrants	7	25%
Trainee Editors	5	18%
Trainee Producer	5	18%
Trainee Assistant Producers	3	11%
Trainee Producer/Directors	3	11%
Trainee Senior Producer/Directors	1	4%
Trainee Video Journalists	0	0%
Trainee Researcher	1	4%
Trainee Camera Op	1	4%
Series Producer (other)	1	4%
Voice-over scripting training (Other)	1	4%
Total	28	100%

Source: RSM PACEC, 2017

In total, the 11 production companies which responded to the survey provided details of 28 different traineeships between 2011 and 2016. A quarter of production companies (25%, n=7) participated in the New Entrants, 18% (n=5) participated in the trainee editors and trainee producer schemes and 11% (n=3) participated in the Trainee Assistant Producer and Trainee Producer/Director schemes (11%, n=3).

Nine production companies provided details of the roles undertaken by 26 trainees, as detailed in the table below.

Table 6:13: Job role of trainees at production companies

Job Role	Trainee 1	Trainee 2	Trainee 3	Trainee 4	Total
New Entrants	3	1	0	1	5
Trainee Assistant Producer	2	1	0	0	3
Camera Trainee	1	0	0	0	1
Senior Producer	0	0	1	0	1
Trainee Editors	1	2	0	2	5
Trainee Researcher	0	0	0	1	1
Trainee Producer	1	1	3	0	5
Trainee Producer/Director	0	1	2	0	3
Series Producer	0	0	0	1	1
Various	1	0	0	0	1
Total	9	6	6	5	26

Source: RSM PACEC, 2017

When asked the reason why they got involved in the ILBF training scheme production companies provided a range of answers. Reasons include:

Table 6:14: Reason for Taking in Trainees

Reason for Participation	Percentage of Overall Responses
Looking to recruit employees	35%
Bring new skills into the company	20%
Benefits for current employees (e.g. via mentoring)	10%
Fulfilled a skills gaps in the business	25%
Encouraged to take part. Also gets work done at a reasonable price	5%
High calibre of language	5%

Source: RSM PACEC, 2017

In total, respondents (n=11) provided 20 reasons for participating in the training aspect of the ILBF. The most common reason was to recruit new employees (35%). This is followed by: to fulfil a skill gap in the business (25%); to bring new skills into the company (20%); to benefit current employees, as well as for the high calibre of language, and as they were encouraged to take part.

As part of the scheme, nine companies (82%) provided training. Training opportunities included:

- Opportunity to work with experienced producers and editors on location- providing participants with a broad overview of location function and editing;
- Opportunity to work with AVID editing;
- One day training course in Dublin, as well as funding involvement in an SRC course; and
- Practical on the job training as per role.

6.6.1 Need for the ILBF training scheme(s)

When asked about demand for Irish language production opportunities, all respondents believe that there is a demand in the sector. Ninety-one percent of respondents believed that there is a skills shortage within the sector. Areas that respondents reported skill shortages are detailed below:

Table 6:15: Skills Shortage

Role	% of production companies
Editors	55%
Directors	55%
Senior Producer	45%
Producer	45%
Series Producer	45%
Researcher	27%
Assistant Producers	9%
Video Journalists	9%
Trainee Camera Operators	9%
Higher Skills	9%
Sound	9%
Managerial roles - office management and accounts	9%
Location	9%

Source: RSM PACEC, 2017

The above table indicates that 55% of production companies that received ILBF funding believed that there was a shortage in editor and director roles. A further 45% of production companies suggest that there is a shortage in producer, series producers, and senior producer roles. Three production companies reported shortages in research roles (27%). Additional shortages were reported in assistant producer, video journalist, trainee camera operator, sound, managerial and location roles (9%).

When asked what additional training should be offered, seven production companies provided feedback. This included:

- Bring in intensive training at a high level;
- Encourage more specialist workers, i.e. crew, post-production;
- Provide longer term placements; and
- Provide writing/ VO scripting.

6.6.2 Impact of the training scheme(s)

The table below details the identified benefits of the training schemes for production companies:

Table 6:16: Benefits of Training Scheme

Benefit	% of production companies
Trainee was retained in the company	45%
Brought new skills to the company	27%
Helped to win new work	36%
Increased company turnover	27%
Increased the number of Irish speaking personnel in your company	55%
Helped to increase the number of Irish language productions produced	36%
Has not benefitted my company	0%
Staff younger. New dynamic	9%
Benefits pool of professionals, keeps them in sector	9%
Freed up some of my own time to work more strategically.	9%
2 most senior trainees still in company. One is very good and will someday on their own company. A natural leader	9%

Source: RSM PACEC, 2017

In nearly half (45%) of scenarios trainees were retained within the company. In over a third of companies (36%) trainees have helped win new work, and increased the number of Irish language productions. In over half the companies (55%) it has increased the total number of Irish speaker. Twenty-seven percent of companies report that the ILBF traineeship has increased turnover. A further 9% report that the traineeship has brought in younger staff,

brought in new professionals, freed up time within the company, and in one instance, that the trainee will one day go on to own their own company.

6.6.3 Satisfaction with the trainee / training scheme

This section details how satisfied production companies were with the allocated trainees across three main areas: the work they were able to undertake, their ability to carry out their role, and the level of responsibility they could manage:

Table 6:17: Satisfaction with Traineeship

Response	
The type of work they were able to undertake:	
Very satisfied	45%
Satisfied	45%
Neither	9%
Their ability to carry out the role:	
Very satisfied	45%
Satisfied	45%
Neither	9%
The level of responsibility they were able to manage:	
Very satisfied	40%
Satisfied	50%
Neither	10%

Source: RSM PACEC, 2017

90% respondents were either satisfied or very satisfied with the type of work undertaken; with the trainees ability to carry this out; and with the level of responsibility respondents were able to manage. No production companies were dissatisfied. The remainder were neither satisfied nor dissatisfied.

All respondents (n=10) were either fairly satisfied (30%), or very satisfied (70%) with the training opportunities offered under ILBF.

6.6.4 The Future

When asked if they would offer training opportunities again, of the total respondents (n=10), 100% would offer the ILBF training opportunity again. All production companies (n=10) would also recommend training schemes to other production companies.

Qualitative feedback on why production companies would offer training opportunities again and/or recommend to ILBF training scheme to other production companies include:

“Trainees enhance the companies they are placed with. They bring fresh ideas and an energy that adds vibrancy to the creative sector. They usually have a good level of Irish language skills which are very useful and are keen to learn from their mentors”

“It was a chance for us to gain new skill and increase productions levels through gaining more commissions”

“It is a great way for a company to work with new talent while getting financial support”

Sixty percent of production companies (n=10) reported that they benefitted from additional training support from the ILBF. These include:

- Language courses (n=1);
- Production courses (n=2);
- Workshops (n=1);
- Editing courses (n=1);
- Camera training (n=1);
- Health and safety (n=2); and
- A Masters in Documentary Practice from Coleraine University (n=1).

Areas where production companies would like additional training include:

- Senior level editing (n=1);
- Distribution marketing (n=1);
- Production/ Direction (n=1);
- Production Management (n=1); and
- More training in sound/ editing/ camerawork (n=1).

7 STAKEHOLDERS AND BROADCASTERS – FINDINGS

7.1 Introduction

This section presents key findings from consultations completed with key stakeholders including ILBF Committee members, Chair and Fund Administrator, representatives from TV broadcasters in Northern Ireland the Republic of Ireland and stakeholders involved in the promotion of the Irish language and culture in NI.

7.2 Stakeholders Consulted

The stakeholders consulted as part of the review are outlined in the following table

Table 7.1: Stakeholders Consulted

Category	Number	Name/Role	Organisation
ILBF Committee Members	5	Róise Ní Bhaoill (Acting Chair)	Ultach
		Karen Kirby (Broadcaster)	BBC
		Pádraic Ó Ciardha (Broadcaster)	TG4
		Nuala Ní Scolláin (Irish Language sector representative)	Foras na Gaeilge
		Jacáí De Brún (Independent Representative)	-
ILBF Fund Administrator	4	Rotha Johnston (Chair)	NI Screen
		Richard Williams (CEO)	
		Linda Martin (Director of Finance and Corporate Services)	
		Áine Walsh (Head of ILBF)	
Funder	1	Liane Gillet	British Film Institute
Irish language sector	5	Niall Comer (President)	Conradh na Gaeilge
		Seán Ó Coinn (CEO)	Foras na Gaeilge
		Gordon McCoy	East Belfast Mission
		Réamonn Ó Ciaráin	Gael-Linn
		Janet Muller	Pobal
Broadcasters	6	Karen Kirby(Editor) - consulted as part of committee	BBC
		Rónán Mac Con Iomaire (Group Head of Irish language)	RTÉ

Category	Number	Name/Role	Organisation
		Colm O'Callaghan (Head of Irish Language programmes, education and science)	
		Alan Esslemont (Director General)	
		Pádhraic Ó Ciardha (Deputy Head) - consulted as part of committee	TG4
		Marilyn Hyndman	NVTV

Areas covered included general topics, main benefits and impacts of the Fund, what would have occurred in its absence, quality of programming, management of the fund and areas for improvement and future issues, including the continued need for public intervention in the sector. Some specific issues were also discussed with particular groups (Committee, Broadcasters and Irish Language sector).

7.3 ILBF Committee

The committee welcomed the range of genre, quality and volume of applicants coming forward to seek funding. They felt that the rigorous and transparent assessment process and the early engagement between production companies, broadcasters and the ILBF team helped to ensure that only the most suitable applications got to committee stage and were of a high quality. There was a high degree of scrutiny of all applications. The committee felt that funded projects delivered on objectives including cultural, educational and economic benefits (see Section 7.6 for more details).

Regarding their understanding of committee role, ILBF committee members were content with their role and remit. Processes and roles were clearly laid out for all involved and at all stages of the application and assessment process.

7.4 Broadcasters

As public service broadcasters, BBC NI, RTÉ and TG4 all have remit to broadcast content in Irish; NVTV is a local community broadcaster and also seeks to broadcast some content in Irish (and also in Ulster Scots).

The broadcasters welcome the existence of the Fund as a catalyst which opens possibilities for production companies. Broadcasters welcome the availability of Irish language content and in particular the ILBF which facilitates the production of Irish language programme content (including catering for Ulster dialect), as this goes some way to fulfilling their obligations. All offer access to their schedules for Irish language programming and seek to include Irish language scheduling opportunities at prime-time to facilitate mainstreaming of the language rather than it being perceived as niche or minority interest. All expressed a willingness to engage with and work with the fund and production companies but are clear that the programming must fit with their priorities and scheduling commitments.

In relation to meeting **expectations**, broadcasters are broadly positive about the programming – and noted that without the ILBF supported productions, it would be difficult to meet audience needs in relation to drama and programming for children and young people. It was recognised that some programming – for example drama – was very expensive to produce and within the constraints of the fund, there was limited scope to support this to any great extent. The programming for children and young people was positively received. There was also positive

feedback in relation to programming which was able to provide broader reach – for example country music programmes which appealed to a broad audience base across all sections of the community and which helped to raise awareness/visibility of Irish language. Some felt that it was important to have a broad reach and that there was perhaps an over-reliance on factual material which could be impenetrable to a non-Irish speaking audience. There were suggestions in relation to content that could help to increase the reach of Irish language programming (for example sport⁸⁵ or country music concerts) though a recognition that whilst these might bring in larger audience numbers, they might not align with the ILBF objectives and priorities (particularly in relation to percentage of spoken Irish). Some broadcasters also highlighted the need to produce more educational and also scientific programming.

Constraints in relation to Irish language programming include availability of funding, people and skills to work in the sector and a pipeline of projects. The existence of the ILBF goes some way to addressing these issues. The language itself is also viewed as a potential constraint with the future of minority language programming very clearly linked to the strength of language itself.

It is important to note that working relationships and engagement with the ILBF were highlighted as being positive with minimum/no red tape or administrative burden and a good level of feedback provided to production companies. The Fund is widely regarded as being run efficiently.

The **approach to Irish language programming** is set in the context of an evolving and ever changing environment for broadcast media (which is not unique to Irish language) as well as the broader socio-political context for the Irish language. Issues include:

- **Fragmentation of audiences**, increasing use of **interactive platforms** and the growing significance of online viewing, raising issues when addressing requirements of both real time audiences and non-live audiences. It also raises questions about value for money measures / KPIs.
- **Collaborative/co-operative working** for example between broadcasters as well as production companies and funders. This is not without challenges and there is a natural reluctance for partners to engage due to the need to accommodate and reconcile differing objectives. However with increasingly scarce resources, collaboration and co-operation are ever more recognised as a necessary approach to deliver quality and maintain reach/scale and thus compromises are being sought and found. Partnership working was highlighted between RTÉ and TG4 in relation to interactive content; also the potential for greater partnership working in NI – for example BBC and TG4 working to get Irish language content available on iPlayer. There is also potential to partner with organisations with an interest in promoting the Irish language.
- **Using and sharing content (linked to interactive and collaborative working)** stakeholders stated that this raises interesting opportunities in relation to using and sharing content (licensing rights to do this) which has the potential to provide greater value for money and requires some negotiation around who creates and who broadcasts /makes content available and the reward.
- Irish language **maintaining relevance to current issues in society**

⁸⁵ TG4 has live rights available through Ulster GAA which are not currently used.

7.5 Irish Language Sector

Consultees from the Irish language sector were broadly positive about the work of the ILBF and referred to many benefits and impacts. However in some cases, there was a lack of clarity on which content and programming was the direct result of ILBF funding. As such, there is perhaps an argument for the ILBF to raise its profile and awareness of the work that it supports – particularly within the sector.

The Irish language sector is characterised by a wide range of organisations with varying remits to promote the Irish language. Due to the number and diversity of these interest groups, there is no obvious umbrella body which provides an overarching sector voice. The ILBF seeks to engage with the sector – through for example the mix of representatives on the ILBF Committee. However given the fragmented nature of the sector, there is perhaps scope for improving this engagement and ensuring that the range of views and opinions from the sector are heard.

7.6 Main impacts and benefits of ILBF

Across all consultees, the following benefits of the Fund and the impact it has had on a number of areas were identified.

7.6.1 Promotion of the Irish language

Consultees indicated that the Fund has had a strong and positive impact on the promotion of the Irish language in NI. They reported that broadcasting programmes supported through the Fund provided visibility for the Irish language and raised the profile of the language amongst the Irish-speaking population as well as among the mainstream English-speaking population. In particular, the consultees from the Irish language interest bodies all agreed that this increased visibility helps with the “normalisation” of the Irish language by placing it within the context of everyday life and making it accessible and non-threatening and part of modern society rather than tied to particular culture. One consultee highlighted that in relation to language acquisition – the first step is awareness; without awareness people will not begin to learn the language.

Some consultees also commented on the impact of the ILBF in creating a positive perception of the Irish language including offering strong role models for young Irish speakers and learners of the language. This included presenters and “personalities” who are well known amongst Irish-speaking communities (particularly school aged children and young people). This also helped to raise awareness and reinforce the idea of a viable career pathway for Irish speakers in the media (and thus broader career options than teaching). Consultees felt that the educational programmes produced are of particular importance for learners of the language and provide a valuable resource for schools.

7.6.2 Impact on Irish language broadcasting

Consultees agreed that a key impact on Irish language broadcasting has been an increase in the volume or number of hours of Irish language programming; some consultees also commented that in particular this was Irish language programming in the Ulster dialect. A significant aspect of this for NI has been the increase in the number of hours shown on BBC NI. The Fund has also helped to give NI, and the NI production sector, a higher profile on BBC NI, TG4 and RTÉ.

Whilst these broadcasters have a remit to provide Irish language programming, the ILBF supplements their core activity and funding levels, thus increasing the number of hours of Irish language programmes produced and broadcast.

7.6.3 Impact on the independent Irish Language production sector

There was widespread agreement that the ILBF has had a substantial impact on the independent production sector in NI and in particular the **level and scale of activity**.

It was noted that whilst there had initially been significant growth in the number of Irish language production companies in recent years there has been some consolidation with the number of companies decreasing from 20 (including sole traders) to possibly six or seven.

Stakeholders also noted a number of additional benefits related to the **labour market** that accrue from a well-developed production sector, including the creation of jobs and career pathways for new entrant trainees which will help retain them, and their skills, in Northern Ireland. They also noted that the increasing skill levels improves the professionalism and proficiency of the sector and increases the visibility of talent in Northern Ireland.

Further benefits reported include the stimulation of competition between production companies which helps **increase standards and quality of programme-making**. At an overall level the growth of the sector **contributes to the NI economy**.

7.6.4 Impact on audience numbers

As noted in Section 4.7 support from the Fund has enabled Irish language to attract sizeable audiences when in mainstream / evening slots and in direct competition with other primetime programmes.

7.6.5 Summary of impacts & benefits

In summary the benefits of the ILBF include:

- Economic
 - Significant impact on smaller production companies – support to create and sustain these which in turn contribute to the wider economy.
 - Job creation/retention
 - Skills development through training schemes which:
 - Attract new people into the sector that would not otherwise have an opportunity to gain experience;
 - Creates jobs opportunities for young Irish speakers; and
 - Helps to develop the production sector in NI.
- Education
 - through training for individuals
 - resource to support those who are learning the language
 - resource for those in school (pre-school, primary and post-primary)
- Cultural – raising awareness of Irish Language, seeking to reach wider audience;

7.6.6 Additionality of the ILBF

Stakeholders agreed that without the ILBF, none of the above impacts or benefits would have been realised. Specifically, in the absence of the Fund:

- The independent production sector in NI would not have developed or grown to the same extent;
- Fewer Irish language programmes would have been produced and broadcast;
- There would be a negative impact on people with appropriate skills to work in the sector; this would be significantly smaller as the number of people being trained would be reduced and thus fewer people would enter the sector.
- There would be no incentive to produce Irish language programming in the Ulster dialect
- Broadcasters would lose opportunities to broadcast productions that are usually deemed less commercial, including particular styles of programming such as educational, heritage and historical.

Many stakeholders referred to the public service broadcasting remit pointing out that this is not viable without intervention – even at scale. For example the BBC would not be self-sustaining and could not continue without income from the licence fee. Therefore it would not be viable to consider that a smaller minority language could be self-sustaining in terms of developing content.

7.7 Quality of Programming

There was a broad consensus amongst stakeholders that the quality of the output supported by ILBF is very high with production values being highly regarded. The standard of the teen, school and pre-school programmes in particular, was particularly highlighted. A number of stakeholders also noted that many of the productions supported by the ILBF have been nominated for awards, which is evidence of their quality. It was felt that the growth and maturity of the sector as well as the sustained level of funding has helped to increase competition and drive up standards within the NI sector.

7.8 Management of ILBF

All stakeholders were positive about the way in which NI Screen have managed the ILBF. Feedback on the ILBF management team was complimentary and it is clear that there are good working relationships with all broadcasters as well as with production companies. A lack of “red tape”, constructive feedback to applicants and communication were particularly highlighted as positive attributes.

In terms of promoting the programmes they support, it is recognised that there are time and budget constraints on NI Screen however some felt that there was scope to do more.

7.9 ILBF – Looking to the Future

7.9.1 Continued need for support

The level of government support in NI is small compared to the other jurisdictions, which also have more established indigenous language production sectors.

All stakeholders agree that there will always be a requirement for government intervention in Irish language broadcasting in NI. They believe that minority language broadcasting has never, and can never, be commercially viable. This is true of all minority languages and not specific to NI. All stakeholders believed that any reduction or loss of the Fund would have a negative impact on the independent production sector in NI and there is a continued need to develop more indigenous talent in NI.

Stakeholders also agreed unanimously that government intervention is required as no other private funder would take its place or offer the same level of funding. It was also stated that if the fund was to cease, most of the social, economic and cultural benefits that have accrued over the last few years would disappear.

7.9.2 Areas for improvement

Stakeholders were asked to recommend improvements to the Fund and the most common themes were:

- Increase in the scale/level of funding available
- Ensuring that the development of skills in the Irish language production sector were retained within NI and ideally within the Irish language sector. It was suggested that this was not always the case with some trainees moving back to the Republic of Ireland after completing their training or moving into the English language production companies
- Increasing awareness of existing interactive/online platforms (e.g. I-Player and content on the DFA) to maximise VFM through repeat usage of the programming funded and increase audience reach.

It was also felt to be important that the standard of Irish language in programming was maintained at a high level.

7.9.3 Future Opportunities

Future opportunities for the ILBF highlighted by stakeholders were:

- Considering the nature of programming and most appropriate channel to reach and engage with young people;
- Recognising and taking advantage of increasing trends towards collaboration between broadcasters, funders and production companies in the development of programmes;
- Increasing the size of the ILBF to ensure parity of support with other minority / indigenous languages (comparisons were made with the per capita funding levels in Wales and Scotland, for example); and
- Broadening of the range of programming supported by ILBF from “traditional” (culture, history, etc.) to other genres and reflecting that Irish is part of modern urban culture as well as a more traditional, rural outlook.

7.10 Summary / Key Findings

Feedback from key stakeholders (representatives of the ILBF Committee, Broadcasters and Irish Language Sector) highlighted that the ILBF has had a positive impact and the key findings include:

- High satisfaction with the assessment process – stakeholders felt that the rigorous and transparent assessment process and the early engagement between production companies, broadcasters and the ILBF team helped to ensure that only the most suitable applications got to committee stage and were of a high quality. There was a high degree of scrutiny of all applications.
- Programming is meeting the expectations of stakeholders - broadcasters were broadly positive about the programming produced and noted that without the ILBF supported productions, it would be difficult to meet audience needs in relation to drama and programming for children and young people. However it was also suggested that there is an over-reliance on factual programming which may have a specific audience.
- The ILBF is having a number of perceived impacts:
 - Increasing the promotion and awareness of the Irish language in NI
 - Increasing the volume or number of hours of Irish language programming, in particular Irish language programming in the Ulster dialect
 - Development of the level and scale of activity within the independent production sector in NI
 - Economic impacts reported included supporting and sustaining smaller production companies; job creation and retention; and skill development
 - Education impacts reported included training for individuals; and resource to support learning of the Irish language and educational resources
- Quality of programming - there was a broad consensus amongst stakeholders that the quality of the output supported by ILBF is very high with production values being highly regarded.
- All consultees felt that there is a continued need for support / a requirement for government intervention in Irish language broadcasting in NI. It was believed that minority language broadcasting has never, and can never, be commercially viable.

8 FUND MANAGEMENT AND CONTROLS: REVIEW OF THE PROJECT ASSESSMENT PROCESS

8.1 Introduction

This section examines the ILBF management process, the extent to which the specified selection criterion for the Fund was adhered to during the evaluation of applications and the transparency and consistency of the processes.

8.2 Fund Management

The ILBF is managed by the Investment Committee and staff within Northern Ireland Screen.

8.2.1 Investment Committee⁸⁶

The Investment Committee (the 'Committee') has delegated authority within Northern Ireland Screen to make funding decisions regarding the ILBF. The committee makes funding decisions on a biannual basis although in exceptional circumstances decisions may be made outside of this time framework.

The Investment Committee is made up of 6 members, including the chair who is a NI Screen Board Member. The other members of the Investment Committee are a nominated member from BBC NI and TG4, respectively, who represent broadcasting interests generally, as well as a nomination from Foras na Gaeilge, and two independent representatives on behalf of the Irish Language speaking audience in Northern Ireland.

The BFI, which provides government funding for the ILBF will have observer status on the committee.

8.2.2 Northern Ireland Screen Resources

The ILBF is administered by Northern Ireland Screen and the CEO of Northern Ireland Screen is the relevant Accounting Officer. Staff resources within Northern Ireland Screen involved in the ILBF are the CEO, Director of Finance and Corporate Services, the Head of the ILBF and the ILBF officer.

⁸⁶ ILBF Guidelines, 5 November 2004 (updated 22nd August 2016)

The budget each year from 2011/12 to 2015/16 has remained the same at £3,000,000. The table below sets out spend each year by productions, overheads and administration.

Table 8:1: ILBF Budget and Spend 2011/12 to 2015/16

Year / Area of Spend	2011-12		2012-13		2013-14		2014-15		2015-16	
	£	%	£	%	£	%	£	%	£	%
Productions	2,492,134	83.1	2,515,444	83.8	2,523,345	84.1	2,498,404	83.3	2,465,383	82.2
Salaries	80,309	2.7%	87,365	2.9%	117,657	3.9%	97,489	3.2%	101,065	3.4%
Training	265,632	8.9%	253,758	8.5%	209,729	7.0%	231,121	7.7%	250,759	8.4%
Marketing, Legal & Other	51,925	1.7%	33,433	1.1%	49,269	1.6%	48,808	1.6%	47,791	1.6%
Administration	110,000	3.7	110,000	3.7	100,000	3.3	124,178	4.1	135,002	4.5
Total	3,000,000	100	3,000,000	100	3,000,000	100	3,000,000	100	3,000,000	100

Source: ILBF Budget Spend (excel file received from NI Screen)

The table shows that spend was in line with the budget (£3m) each year. Spend by category has remained consistent over the period with spend against each category differing by no more than 1 percentage point each year.

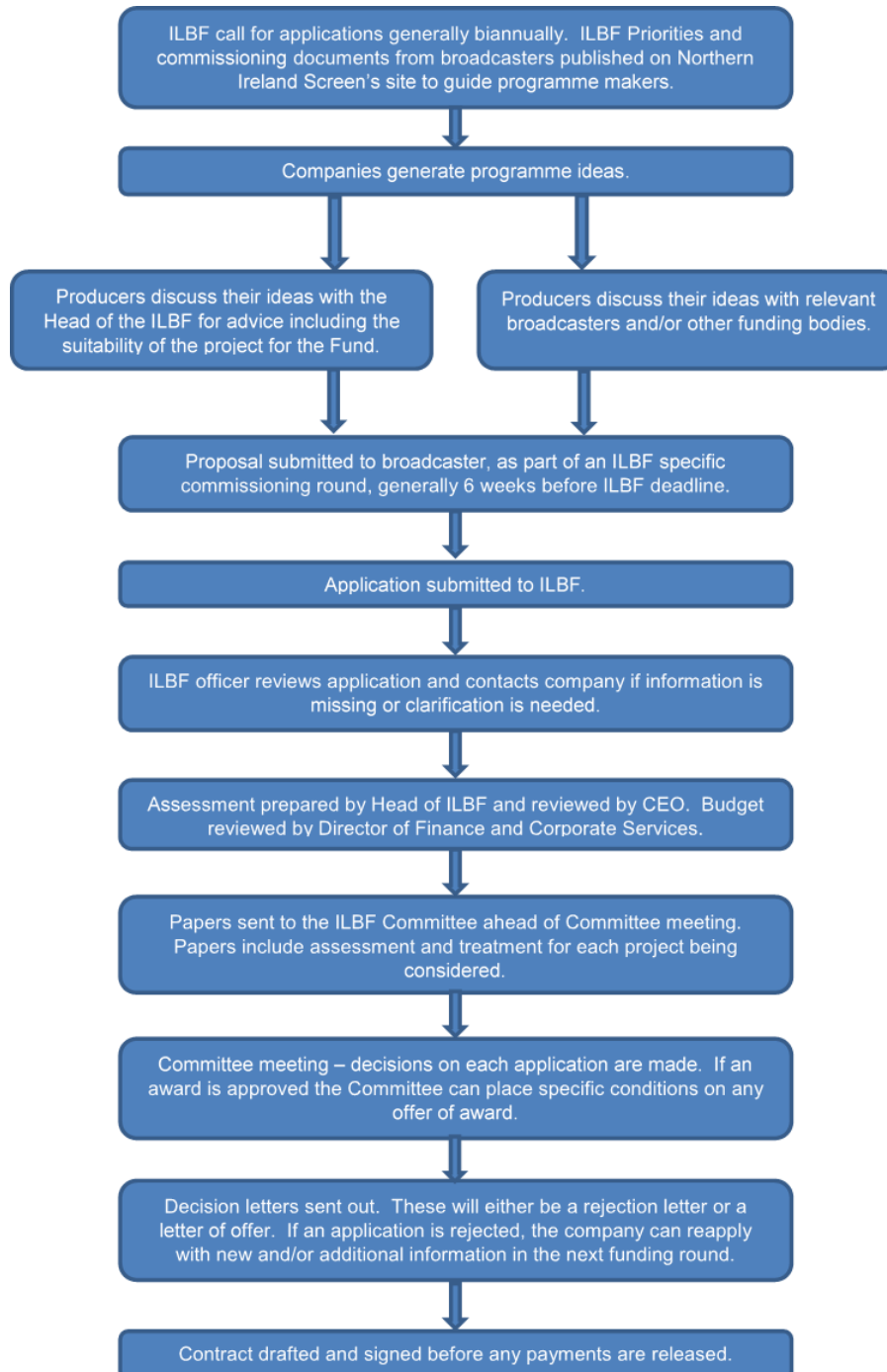
The total spend for salaries (i.e. the allocation of time from Northern Ireland Screen staff to administer the Fund) between 2011/12 and 2015/16 has been between 2.7% and 3.9% of the annual ILBF budget, therefore below the norm of approx.10% allocated to staff/ overheads on funded programmes.

8.3 Project Management and Controls

8.3.1 Process Overview

An overview of the process followed to develop, assess and award funding is provided in the figure below.

Figure 8:1: Overview of the ILBF Process



Source: RSM PACEC, based on information received from NI Screen (2017)

8.3.2 Call for Proposals

The Irish Language Investment Committee (the ‘Committee’) chaired by a Northern Ireland Screen Board Member will make funding decisions on a biannual basis although in exceptional circumstances decisions may be made outside of this time framework.

To date (March 2016) there have been 14 funding rounds and a total of 226 applications received⁸⁷.

8.3.3 Assessment Process⁸⁸

Applications which meet the following prerequisite criteria are considered by the Investment Committee:

- The minimum Irish language content requirement of 75% of the spoken word is clearly evidenced in the application
- Evidence of match funding, and if appropriate, evidence that the project is additional to current programming levels of the broadcaster are provided.

When making its decisions the Investment Committee have due consideration for the following criteria:

- That the project complies satisfactorily with the Priorities set
- The quality of the proposal and the audience appeal
- Value for money/maximising the resources within the ILBF
- Accessibility within the broadcaster’s schedule/maximising audience access.
- Contribution to the stability and sustainability of the Irish language independent production sector in NI; through employment of Irish speaking production personnel, promotion of co-production and/or co-broadcast or incorporating training and development elements into the proposal.

8.3.4 Grant Aid Intensity⁸⁹

The Fund will invest between £10,000 and £400,000 up to a ceiling of 75% of the overall agreed project costs and will require that no less than 70% of those project costs is spent in Northern Ireland. However, a maximum of 50% of the overall number of projects will be funded at 75% aid intensity with the balancing 50% of projects funded at less than 50% aid intensity.

Where the aid intensity is 75%, at least 70% of costs must be spent in Northern Ireland. Where the aid intensity is at a lower level, the percentage spend in Northern Ireland must be equivalent to the percentage aid intensity for example if the aid intensity is 50%, at least 50% of costs must be spent in Northern Ireland.

Projects which will be entitled to the higher level of aid intensity will have to meet the Department for Culture, Media & Sport’s (DCMS) definition of small and difficult films. Projects

⁸⁷ ILBF Funds Information April 2011 – March 2016 (Excel file provided to RSM PACEC by Northern Ireland Screen, March 2017)

⁸⁸ ILBF Guidelines, 5 November 2004 (updated 22nd August 2016)

⁸⁹ Source: ILBF Guidelines (Nov 2004, updated Aug 2016)

which will be entitled to the lower level of aid intensity will include re-versioned productions, dual language co-productions and/or other projects being predominantly financed by the broadcaster.

8.3.5 Monitoring⁹⁰

The ILBF require cost reporting in line with the standard practice of the attached broadcaster. As a minimum, cost reporting will be required prior to interim and final payment stages.

The ILBF require approval and sign off during pre-production, production and post production of the project in line with the standard practice of the attached broadcaster.

The ILBF reserves the right of access to financial reports throughout the life of the production and in all cases for no less than five years after the delivery date. An external audit may be undertaken for the ILBF by a third party on any funded project.

8.4 Completeness Assessment

This section presents a summary of a review of the assessment process carried out by Northern Ireland Screen of 49 projects that were awarded funding and 10 projects that were not across the period 2011/12 to 2015/16.

A completeness assessment (see section 8.3.3 for the assessment criteria) was carried out by reviewing the Northern Ireland Screen assessment forms (including Head of ILBF Assessment, Treatment Documents and where available Broadcaster Assessments) to determine if all applications were reviewed against the criteria outlined in the ILBF Guidelines (Nov 2004, updated Aug 2016).

It should be noted that there were a number of changes to the assessment criteria following an ILBF meeting in October 2014⁹¹. In line with what was agreed at the meeting, the following will no longer be used as assessment criteria when making a funding decision, as they are considered to be necessary requirements before an application is considered:

- Project must contribute to the status and promotion of the Irish language by ensuring a minimum language level of 75% is evident.
- There must be satisfactory evidence of match funding and that the project is additional to programming levels already undertaken by the broadcaster.

8.4.1 Successful Applications

We reviewed 49 successful applications for funding across the period 2011/12 to 2015/16 as follows:

- 2011/12, 2012/13, 2013/14 and 2014/15: 10 successful applications from each year reviewed; and
- 2015/16: 9 successful application reviewed

⁹⁰ ILBF Guidelines, 5 November 2004 (updated 22nd August 2016)

⁹¹ Source: Management Response to ILBF Investment Committee Meeting Notes (November 2014)

The review found that for the most part, the assessment process has been completed in its entirety and all applications were assessed against the same set of selection criteria based on the application form and treatment submitted by production companies.

However there were a few exceptions in which slight variations in the assessment process were identified but the application still went on to be approved for funding:

2011/12

- One application did not provide any evidence of match funding. This application was for training and requested funding from the ILBF to cover the full project cost.
- One application made no indication in their application of target audience and therefore this assessment could not be fully completed; and
- One application assessment in which the VFM was only partially covered, the financial info was set out but no explicit call on whether this provides VFM or not was made.

2014/15

- In three instances the additionality to the current programming levels of the broadcaster was not assessed as part of the application. However this is likely due to a change in the assessment criteria to remove this criteria, following an ILBF meeting in October 2014⁹².

8.4.2 Unsuccessful Applications

We reviewed 10 unsuccessful applications for funding across the period 2011/12 to 2015/16.

The review found that, for the most part, the assessment process has been completed in its entirety and all applications were assessed against the same set of selection criteria based on the application form and treatment submitted by production companies. However in one instance match funding was not provided / assessed.

⁹² Source: Management Response to ILBF Investment Committee Meeting Notes (November 2014)

9 BENCHMARKING SUMMARY FINDINGS

9.1 Introduction

This section delivers on the terms of reference requirement to compare ILBF with similar support mechanism. Those selected for review and agreed with NI Screen were:

- **Broadcasting Authority of Ireland - Sound and Vision Scheme:** a funding scheme managed by the Broadcasting Authority Ireland (BAI). The scheme offers grant funding to new television and radio programmes which deal with the themes of Irish culture, heritage and experience; improving adult or media literacy; raising public awareness and understanding of global issues impacting on the State and countries other than the State; and/or any of the above in the Irish language.
- **Gaelic Media Services in Scotland – BBC ALBA:** MG ALBA (Meadhanan Gàidhlig Alba - Gaelic Media Scotland) delivers BBC ALBA (the Gaelic language television channel) in partnership with the BBC (from 5 August 2008). It makes, schedules and commissions programmes and was also given the authority to seek a broadcast license. In relation to training, MG ALBA's funding is focused on building Gaelic language capability within the sector. It is therefore different from ILBF but offers opportunities to share learning.
- **S4C Wales -** S4C commissions and broadcasts independent producers from across Wales in Welsh Language. S4C also supports the development of skills and training within the industry in Wales in conjunction with Creative Skillset Cymru and by working with TAC (Teledwyr Annibynnol Cymru) and Welsh-medium training provider Cyfle. S4C requires that production companies have training plans for staff.
- **Canada Media Fund -** The Canada Media Fund (CMF) fosters, promotes, develops and finances the production of Canadian content and relevant applications for all audiovisual media platforms. The Canada Media Fund (CMF) delivers financial support to the Canadian television and digital media industries through two streams of funding: 1. the support of diverse languages in regions of Canada and 2. the creation of convergent television and digital media content

The following section provides an overview of the key findings and further detail on each of the benchmarks is in Appendix 3.

9.2 Comparison Information

The funds / schemes reviewed represent a range of support mechanisms for the promotion of culture, heritage and experience as well as minority languages. They exemplify differing broadcasting landscapes, variation in size, scope and remit which means it is not possible to accurately compare the results achieved with those of the ILBF, however they illustrate the different approaches taken and processes followed.

The following table outlines the operational and delivery elements of the Sound and Vision Scheme, MG ALBA, S4C and the Canada Media Fund. It should be noted that none are directly parallel to the ILBF.

Table 9:1: Comparison of Operation and Delivery Elements

	ILBF	Sound and Vision Scheme	MG ALBA	S4C	Canada Media Fund (CMF)
Size of Fund	The budget each year from 2011/12 to 2015/16 is £3,000,000	Current scheme will provide up to €62 million ⁹³ between 2015 - 2019, therefore €15.5m annually	Scottish Government core funding £11.8m + £1m. UK Government provided £1m in 2014/15 and 2015/16. Therefore total average funding PA is £13.8m	S4C is not a specific fund - it is a Welsh-language public-service television channel. Therefore Income / turnover of £84,712,000 in 2015/16 ⁹⁴	The CMF contributed \$361.6M to Canadian television and digital media projects in 2016-2017 ⁹⁵ . Supports both official languages as well as in Aboriginal and other minority language
Funding per capita	£1.6 ⁹⁶	€3.3 ⁹⁷	Not directly applicable	Not directly applicable	\$10.3 ⁹⁸
What is funded	Moving image product – including analogue, digital, online and interactive. Training schemes are also funded	Television and radio programmes	Funding for television programmes via 3 types of funding: 1. Multi-year production contracts 2. Commissioning Rounds each year 3. Bespoke co-finance details	Commissions and licenses content from production companies	Television and digital media. Two streams of funding: 1. Experimental Stream (11.5% of funding) 2. Convergent Stream (88.5% of funding)
SMART objectives / targets	✓	X	✓ ⁹⁹	✓	✓

⁹³ €8m for radio and €54m for television

⁹⁴ S4C's public funding is derived from the Licence Fee, through the BBC Trust and grant in aid provided by DCMS. S4C also generates commercial revenues through activities including advertising sales and programme sponsorship.

⁹⁵ Development, production and marketing of screen-based media are supported through a variety of financing tools including license fee top-ups, equity investments, recoupable investments, advances, and non-recoupable contributions. CMF investments and repayable advances made up 30.9% of all CMF funding, an increase from last year's 30.2%.

⁹⁶ Northern Ireland population at 30 June 2016 was estimated to be 1,862,100

(<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/populationestimates/bulletins/annualmidyearpopulationestimates/latest>)

⁹⁷ Republic of Ireland population in 2016 was estimated to be 4,673.7 million

(<http://www.cso.ie/en/releasesandpublications/er/pme/populationandmigrationestimatesapril2016/>)

⁹⁸ Population of Canada was estimated to be 35,151,728 in 2016

⁹⁹ Annual Operational plan with quantitative KPIs / measures for that year

	ILBF	Sound and Vision Scheme 3	MG ALBA	S4C	Canada Media Fund (CMF)
Assessment Criteria	✓	✓	✓	X ¹⁰⁰	✓
Assessment of applications	Qualitative	Quantitative	Quantitative + Qualitative	Qualitative ¹⁰¹	Quantitative + Qualitative
External assessors / advisors	✓ (Investment Committee)	✓ (two external and one internal assessor)	X ¹⁰²	X ¹⁰³	✓ ¹⁰⁴
Letter of commitment from a broadcaster	✓	✓ ¹⁰⁵	N/A – MG ALBA is the broadcaster	N/A – S4C is the broadcaster	X
Review process	1. Cost reporting in line with the standard practice ¹⁰⁶ 2. Require approval and sign off during pre-production, production and post production of the project.	1. Final production assessed by a small group against the agreed treatment. ¹⁰⁷ 2. Feedback from the broadcaster	Undertake economic impact assessments	1. Ongoing review of viewing figures 2. Meeting with production companies to discuss performance / basis for any recommission 3. Editorial opinion	Must comply with the Canada Media Fund Accounting & Reporting Requirements (ARR) ¹⁰⁸

Source: ILBF Guidelines (August 2016); Sound and Vision 3: A Broadcasting Funding Scheme Guide for Applicants (May 2017) / information provided by BAI to RSM PACEC (June 2017); S4C Annual Report and Accounts 2015-16 / S4C 3-year Content Strategy 2017/18 – 2019/20 / information provided by S4C to RSM PACEC (June 2017); information provided by the Canada Media Fund to RSM PACEC (June 2017)

¹⁰⁰ Supplier relationship based on an 'annual shopping list of content needs'

¹⁰¹ Applicants are required to submit a summary of their idea (in no more than 100 words) as well as a detailed description. In general, the description should be limited to 300 words noting key points such as the names of producers and directors and estimate of cost per hour. Applicants may discuss ideas informally with a member of S4C's Commissioning Team before submitting an idea

¹⁰² Applications are assessed by GIOBA (team) ALBA

¹⁰³ Assessed by the S4C Commissioning Team

¹⁰⁴ Funding in all Experimental Stream programs is allocated according to a selective process using an evaluation matrix. Projects at the production stage are assessed by a jury of Canadian and international industry experts.

¹⁰⁵ BAI requires: 1. Budget & Finance Plan; 2. Treatment; 3. Programme and Grant Details; 4. Insurance Policy; 5. Broadcaster Confirmation letter; 6. No Set off letter from the relevant Bank; and 7. Tax Clearance Information

¹⁰⁶ As a minimum, cost reporting will be required prior to interim and final payment stages.

¹⁰⁷ This is outsourced to the Irish Film Institute who watch the programme against the treatment and provide a report which is then reviewed by BAI alongside

¹⁰⁸ http://www.cmf-fmc.ca/en-ca/global-assets/forms/reference/appendix_b_2014_2015.aspx

9.3 Key Findings

Overall the ILBF compares favourably with other funds / support mechanisms and there are a number of similarities / differences, specifically:

- **Scope** – the remit of the ILBF is similar to that of the BAI which also provides funding for programmes based on Irish culture, heritage and experience. This is different to MG ALBA and S4C both of which commission, license and broadcast programmes (in Gaelic and Welsh respectively). However while the ILBF has SMART objectives and targets the Sound and Vision scheme does not set quantitative targets such as cost per minute broadcast- it measures quality, additionality, Irish-language and heritage objectives. Overall the ILBF funding per capita is lower than the supports provided by BAI Sound and Vision (MG ALBA and S4C were not comparable).
- **Structure of the delivery model** – each of the interventions has a differing approach to the assessment of applications / process for funding programming. While the ILBF process involves a qualitative assessment (assessment by the Head of ILBF + recommendation to the Committee followed by a Committee decision) the Sound and Vision scheme has a more rigorous approach which involves 4 phases: Preliminary Evaluation; Qualitative Assessment; Strategic Assessment; and Formal Ratification. However the evaluation¹⁰⁹ of Sound and Vision II suggested that this was overly complicated and resource intensive. Specifically, it was highlighted that the same process operates for simple, low-budget radio projects as for high-value, complex screen productions and that the level of information required from applicants is considerable for small projects, small funding amounts or where an applicant has applied on many previous occasions. While feedback from Investment Committee members and production companies highlighted that the ILBF application and assessment process currently works well. A comparison of assessments suggests that ILBF could provide more detail for example if it assesses an application as VFM, detail could be provided both in the Northern Ireland Screen assessment form as well as more detailed notes of the Investment Committee assessment against the funding criteria for each application. In addition, while the ILBF Investment Committee has representation from broadcasters, the Irish language sector as well as NI Screen and BFI, both MG ALBA and BAI also involve those with production experience in the assessment process. MG ALBA said that it was useful to have their head of technical standards involved in the assessment process as it reduced the risk of productions using the wrong camera, avoid technical fails etc. and this may be an area ILBF wish to consider.
- **Outputs** – the ILBF has a number of quantitative activity targets for television production (n=3) and training (n=12).¹¹⁰ However there is scope to include KPIs that measure the quality of the productions funded, for example the BAI Sound and Vision scheme does not assess e.g. cost per minute broadcast however it carries out a review of the final production against the agreed treatment by assessors who provide a quality rating of the

¹⁰⁹ Crowe Horwath (2013) Statutory Review of the Sound and Vision Scheme

¹¹⁰ 2015/16 KPIs

programme content. . ILBF measure the cost per minute (S4C measure the cost per user/ cost per genre)

- **Outcomes** – the ILBF and BBC Alba provide a comprehensive range of support that includes both programming and training to develop television production skills. Skill development and the monitoring / reporting of this is a key strength of the ILBF.

The review of other support mechanisms for the production of language, culture and heritage also identified the following areas for consideration regarding the ILBF:

- **Need to reach younger viewers / increase interactive / digital content** – each of the other support mechanisms are developing ways to attract younger viewers in order to ensure sustainability / continuity into the future. For example, the S4C 3-year Content Strategy 2017/18 – 2019/20 states that it aims to ‘increase the size of the core audience and reduce dependency on the 10% who do 76% of the viewing’ as well as:
 - Increase the number of 45-64 year viewers to secure the channel’s short-term future
 - Increase the number of 16-34 year viewers to safeguard the channel’s long-term future

Going forward it plans to develop its digital offering and sets out its future focus in ‘Pushing the Boundaries’.¹¹¹ This states that it aims to become a ‘future-fit media content provider [delivering] a tailored service provision on TV and digital platforms – with the flexibility to launch on new platforms as necessary.’ It also states that S4C must become a Welsh language Public Service Media (PSM) provider on all popular platforms – broadcast, Smart TVs, social media, short-form video sites, online long-form, etc. and to achieve this will include developing a ‘digital one-stop-shop which enables our audience to access all S4C content in one place, including archive content where relevant rights can be secured’. This is similar to MG Alba and BAI which also plan to develop the promotion and distribution of funded programmes (e.g. how to share content on Facebook), for example it is currently part of the finance agreement with producers that a promotion plan is agreed (e.g. external filming required to be able to send via Instagram etc.). The Canada Media Fund incorporates digital programming into both of its funding streams:

- Convergent stream- productions must include content intended for distribution on at least two platforms, one of which must be television, and the other, a digital media platform
 - Experimental stream- specifically focused on the development, production and marketing of leading edge, interactive and innovative content and applications created for the Internet, wireless and other digital platforms and/or devices.
- **International Collaborations** – the BAI Sound and Vision scheme have undertaken a number of collaborative projects that include working with other international funds, most recently the Canada-Ireland Co-Development Incentive (a collaboration between the Canada Media Fund (CMF) and the BAI to fund the co-development of eligible audio-visual projects between producers from Canada and Ireland). A total of €150,000 is being made available to support Irish and Canadian producers to develop co-productions for broadcast

¹¹¹ S4C (2017) Pushing the Boundaries

on Irish and Canadian television services.¹¹² There is some evidence of ILBF funded productions reaching an international audience, for example some series have been viewed internationally and one production company reported that *“as a company we produce content that appeals to both Irish and international markets and relentlessly push our content on international platforms to broaden our worldwide recognition and brand. We take all our content to MIPCOM in Cannes annually including our documentary content as well as productions such as Na Cleamairí, which looks at how the ancient tradition of mumming has survived in Ireland through modern-day activities, has also been screened privately by the group themselves as they tour the world performing, across mainland Europe and Scandinavia, as well as the southern States of the U.S.”* However there is further scope for production companies applying for ILBF funding to partner with international broadcasters in order to obtain other sources of funding and audiences outside of NI.

¹¹² <http://www.bai.ie/en/broadcasting/funding-development-3/>

10 CONCLUSIONS AND RECOMMENDATIONS

10.1 Introduction

This section summarises the key findings of the review and draws on consultation and other evidence to provide recommendations on future government intervention in this sector. It also includes progress against recommendations from the previous review of ILBF in 2010.

10.2 Progress against Recommendations from Review of ILBF 2010

Table 10.1 presents the recommendations from the review of the ILBF in 2010 and progress that has been made against these.

Table 10:1: Review of ILBF 2010 – Progress against recommendations

	Recommendation	Progress
		<p>While the results suggest that the ILBF has been successful in developing and growing the independent production sector in NI, it is clear that if funding was to be withdrawn at this stage the sector would all but disappear in NI. This suggests that going forward there is a need for funding to have an increased focus on improving the sustainability of the sector. However the ILBF cannot be expected to achieve this in isolation. While the Fund can in some ways look to improve sustainability by seeking to maximise broadcaster support, ensuring high quality productions and seeking to develop those production companies who have a genuine interest and potentially a long term future within the sector (while at the same time fostering new talent where appropriate), there is also a need to:</p>
1	<p>Develop a sustained level of commitment from broadcasters both in terms of the quantity of productions broadcast and their contribution to funding these broadcasts. Broadcasters should ensure that the ILBF does not displace their commitment to support the minority language sector;</p>	<p>ILBF funded productions are broadcast by several broadcasters, however, the majority of are with either TG4 or BBC. ILBF is heavily dependent on TG4 as a broadcaster: just over half (51.1%) of the 139 projects funded by the ILBF have TG4 as the only broadcaster. Furthermore, 15 projects involved TG4 and another broadcaster. Most other broadcasts are by BBC (or BBC with another broadcaster) – 55 in total (38.8%). However it is noted that while TG4 have a full schedule of Irish language content, BBC and RTÉ only have a limited number of slots available for Irish language programming.</p> <p>The ILBF contribution ranged from £3,320 to £400,000, totalling £11.31m, and the broadcaster/other match funding contribution totalling £8.39m. Therefore, across the 139 approved applications, £0.74 was leveraged for every £1 of ILBF monies spent. This is compared to a figure of £0.58 being leveraged by the sector between 2007 and 2009.</p>
2	<p>Build the business based capacity of independent production companies</p>	<p>Findings from surveys suggests that the business based capacity of independent production companies has increased. With seventy percent of production company respondents expecting their company activity to increase, 20% expect it to stay the same, and the remaining 10% expect their company activity to decrease.</p> <p>Furthermore 25% of production company respondents to the trainee survey stated that one of their main reasons for participation in the trainee scheme was to fulfil skills gaps in the business.</p>
3	<p>Consider the development of a cluster based approach to the sector, seeking to develop links within the sector and without the sector to the Irish language speaking community</p>	<p>The ILBF has not led any cluster based initiative however many of the production companies are based in Belfast and two production companies have set up offices in the Cultúrlann in Belfast, and another company is based in the Cultúrlann in Derry, both of which would be natural hubs for the Irish language speaking community in these areas.</p>

	Recommendation	Progress
4	Develop and raise the audience for productions, through promotion of broadcasts to industry levels standards. The focus of promotion should be audience development rather than showcasing industry expertise and developments and be targeted in appropriate way for the audience. Productions funded under ILBF should be promoted 'as far as possible' in the same manner as comparable programme on mainstream channels; and	A number of steps have been taken by NI Screen to broaden audience access to ILBF content. The ILBF are actively encouraging production companies to think about an international audience when conceiving their Irish language content ideas. Further promotion is occurring through the supported (by ILBF) attendance of production companies at international events (See Section 3). The ILBF has also supported a number of marketing campaigns, in conjunction with the broadcasters for ILBF funded content. Northern Ireland Screen is also working with the BBC to ensure all ILBF funded content is available indefinitely on the BBC iPlayer. This is part of the new joint partnership agreement between BBC and NI Screen.
5	Seek to tie productions with wider minority and indigenous language production and broadcasting companies throughout Europe and further afield – increasing expertise and learning while at the same time opening up opportunities for income generation.	Steps have been taken as set out in Section 3, including: <ul style="list-style-type: none"> • In 2016, 3 Irish Language producers were supported to attend the biggest international market in the world for television content (MIPCOM), this is intended to be repeated with 3 different producers this year. • These Irish language producers were also joined at the market by 2 Gaidhlig producers from Scotland in a joint initiative with MG Alba and this has directly resulted in one joint commission between one of the Irish and Scottish companies and another Irish and Scottish co-production is in the offing. • One production company (Paper Owl Films) is signing a distribution deal for international sales of a crime documentary (Racht 1 & 2). • A Paris based distributor (Lagardère Entertainment) acquired the distribution rights to a crime thriller series (An Bronntanas (The Gift)), further another production company (Tristar) have purchased the rights to make an English language version of the series. • Aer Lingus has acquired a short film (Máthair), which was originally commissioned for the Irish language online magazine Nós.ie. The film will be shown on transatlantic flights, exposing it to a much wider audience.

	Recommendation	Progress
		<ul style="list-style-type: none"> NI Screen are working with the BBC in an effort to ensure that all ILBF funded content will be made available to view permanently on the BBC i-Player, this is part of the BBC/Northern Ireland Screen Partnership Agreement.
6	<p>There is also a need to set targets for the Fund that are measurable. In particular while it is vital that the productions supported are appealing and achieve high levels of satisfaction within the target audience the setting of defined targets to measure satisfaction and audience numbers is restrained by the availability of data</p>	<p>NI Screen have commissioned Audience Research Reports from Millward Brown Ulster in both 2011 and 2015 to capture feedback.</p>

Source: ILBF Review 2010

10.3 Conclusions and Recommendations

This section summarises the key findings of the evaluation and draws on consultation and other evidence to provide recommendations on future government intervention in this sector

10.3.1 Strategic Context for future operation of the ILBF

The ILBF was established as a result of political developments in NI and specifically the 1998 Belfast Agreement (“the Good Friday Agreement”). There is evidence of a future need for the Fund based on:

- Government policies and strategies which include aims and objectives for the promotion and development of the Irish Language in NI, for example the Department for Communities (DfC) Strategy to Enhance and Protect the Development of the Irish Language 2015 – 2035;
- The promotion of indigenous and monitoring languages is embedded in both the EU and NI strategic and policy environment. In particular the European Charter for Regional or Minority Languages advocates in Article II the need to (where appropriate) encourage and facilitate broadcasting on television and radio. As such the enhancement and protection of the Irish language is an adopted strategy of the NI Executive; and
- The BBC has Charter requirements to promote different cultures and make provisions for minority languages, however stakeholder feedback suggests it may not be able to broadcast ‘less commercial’ Irish language programmes (e.g. educational, heritage and historical) without the support of the ILBF.

Current ILBF KPIs are appropriate to the aims and objectives of the Fund, however they are focused on activity and output measures. Going forward future KPIs could also reflect the anticipated outcomes of the fund (see recommendation 2).

10.3.2 ILBF Operation and Delivery

Application / Assessment Process

The current process involves an assessment of applications by the Head of the ILBF and this assessment is then provided to the Investment Committee, along with the treatment plan, for review and final decision. Feedback from key stakeholders suggested that the application and assessment processes was rigorous and transparent, with the early engagement between production companies, broadcasters and the ILBF team helping to ensure that only suitable applications progressed for review by the ILBF Committee and were of a high quality

Feedback from production companies also indicates that most (55% of 11 respondents) found the application process easy or fairly easy¹¹³ while 91% were satisfied with the post decision stage of the award process. It was also highlighted that there was good communication from the ILBF during the application process.

A review of a sample of applications found that in the majority of cases the assessment process was completed in its entirety and all applications were assessed against the same set of selection criteria based on the application form and treatment submitted by production companies.

Programme Management

Both production companies and key stakeholders provided positive feedback on the management of the ILBF. In particular stakeholder feedback highlighted that there was a *‘lack of red tape, constructive feedback is provided to all applicants and there is good communication with potential applicants and*

¹¹³ 36% stated it was neither easy nor difficult and the remainder (9%) stated the application process was fairly difficult

funded companies'. Moreover, feedback from production companies indicated high levels of satisfaction with the post award process, with 82% stating they were satisfied or very satisfied with the support available.

The benchmarking analysis found that both MG ALBA and BAI involve those with production experience in the assessment process and MG ALBA also involve their head of technical standards to reduce the risk of productions using the wrong camera angle and to avoid 'technical fails'. The ILBF Investment Committee has representation from broadcasters, the Irish language sector as well as NI Screen and BFI. While the Committee does not have a member responsible for technical standards, it includes members with a production background and as part of the application process CVs detailing technical experience for production personnel are submitted. Feedback from NI Screen management noted that use of the wrong camera angle or 'technical fails' have not been issues for the Fund and therefore not considered a high risk requiring a specific role on the Committee.

Relationship with broadcasters

There are good relationships established with all broadcasters with a remit to broadcast content in Irish¹¹⁴ and feedback suggests that the ILBF is currently meeting broadcaster's expectations in relation to Irish language programming. It was suggested that broadcaster engagement with the fund would continue as without such support they would be unable to broadcast the same volume of Irish language programming. However it was highlighted that future programming must fit with their respective priorities and scheduling commitments.

The majority of production companies that responded to the survey (91%, n=10) rated the relationship between the ILBF and broadcasters as good or excellent.

10.3.3 ILBF Performance

The ILBF has performed well against its targets in each year from 2011/12 – 2015/16 and overall met or was on target to meet 95.3% of its KPIs during 2011/12 – 2015/16 (48.8% were met and 46.5% were on target to be met).

KPIs recorded as 'on target' include that: 'all individuals completing the training to secure employment in production sector at end of scheme'; however it is noted that 100% of trainees securing employment may not be realistic.

In addition, BBC audience figures of 513,000 people were recorded (2011/12 – 2015/16) with an average viewing audience per production broadcast of 13,000. However figures for TG4 and RTÉ in NI are not available and therefore total figures are likely to be much higher.

Production companies, broadcasters and other key stakeholders all highlighted the positive impact of the ILBF.

10.3.3.1 Productions

Production Companies

Feedback from production companies that have benefitted from the ILBF highlighted that it had a positive cultural, educational and economic impact. Specifically:

- Cultural

¹¹⁴ BBC NI; RTE and TG4

- 100% of 10 production companies indicated that without the ILBF the number of Irish language programmes they produced would have decreased (ranging from a 5% to 100% decrease), with one production company noting that *“as a minority language, it is hard to sustain a commercially viable Irish language TV company. Without the ILBF there would hardly be any Irish language TV output - that was the situation prior to the establishment of the ILBF”*.
- Educational
 - All respondents believed that the ILBF increased the skillset of their employees via the training schemes available, while also noting that the use of Irish language within the company had encouraged others to learn the language, as well as work in a sector they previously would not have had the opportunity to.
- Employment
 - The majority of respondents (n=10, 91%) reported that their number of employees increased as a direct result of the ILBF; and
 - Nine production companies (82%) reported that 54 jobs were created as a result of ILBF funding and 29 of these (54%) were Irish language-related roles
- Turnover

The majority of respondents (n=10, 91%) reported that:

- their turnover had increased as a result of the ILBF; and
- without the ILBF their company would have closed or would be operating at lower scale.

In addition, production companies indicated high levels of satisfaction with all respondents (n=11) stating they were very (91%) or fairly (9%) satisfied with the support provided by the ILBF.

Broadcasters / Other Key Stakeholders

Feedback from key stakeholders also highlighted that the ILBF is having a number of perceived impacts, including:

- Increasing the promotion and awareness of the Irish language in NI;
- Increasing the volume / number of hours of Irish language programming;
- Developing the level and scale of activity within the independent production sector in NI;
- Supporting and sustaining smaller production companies, job creation and retention and skill development;
- Educational benefits such as training for individuals, resource to support learning of the Irish language and educational resources; and
- Improving the quality of programming, with stakeholders indicating that the quality of output supported by ILBF was high and production values were highly regarded.

However consultees highlighted that in recognition of the quality of the programmes produced, there was scope to ensure this content (including educational) continued to be used in order to broaden audience reach and accessibility. This was noted as particularly important given the increasing use of interactive platforms and the growing significance of online viewing. This is an area that is currently being progressed by NI Screen as part of the BBC/NI Screen joint agreement with I-Player as well as increasing the Irish language content available on in the Digital Film Archive (DFA).

10.3.3.2 Training

The ILBF has supported a wide range of training schemes over the evaluation period, including (but not limited to): the New Entrant Training Scheme; Trainee Producer scheme; Trainee Editor Scheme; Trainee Camera Operator Scheme; and the Trainee Assistant Producer Scheme. Trainees that responded to the survey highlighted a number of key impacts from the training provided including:

- 85% percent of trainees (n=20) stated that they used the skills they learnt in their first job after undertaking ILBF training; and
- 47% of respondents (n=19) felt that they would not have obtained their current job in the absence of the ILBF training scheme.

Qualitative feedback also highlighted that the training scheme(s) provided beneficial networking opportunities with one respondent noting that these were 'essential on [their] completion of the scheme and working on a freelance basis'. In addition, 41% felt that the training had met all of their expectations while 83% were either satisfied, or very satisfied with the career prospects offered.

10.3.4 Value for Money

The target average cost per minute across all ILBF programmes in 2015/16 Q4 was £725; previous targets were £695 in 2012/13 and £725 in 2014/15. The cost per minute achieved for the ILBF (from R2 2011 up to R3 2015, based on 127 projects¹¹⁵) was £774. This is higher than anticipated however compares favourably with the £1,107.59 cost per minute achieved for the USBF (up to March 2016 based on 52 projects).¹¹⁶

However cost per minute is a rough indicator and cannot be looked at in isolation from other issues such as type of project and quality of content when considering VFM. Others such as BAI do not use this measure instead preferring to assess if the final production content matches the agreed treatment and the quality of the production etc. Furthermore, the cost per minute may be unrealistic as it has been in place for a number of years and could potentially increase due to both inflation and the enhanced emphasis on high production values in the Fund.

Across the 139 applications approved (from R2 2011 up to R3 2015) the ILBF contribution ranged from £3,320 to £400,000, totalling £11.31m, and the broadcaster/other match funding contribution totalled £8.39m. Therefore, across the 139 approved applications, £0.74 was leveraged for every £1 of ILBF monies spent. This also compares favourably with the USBF where across the 52 projects supported £0.44 was leveraged for every £1 of USBF monies spent (March 2011 to March 2016).¹¹⁷

10.3.5 Remit / Future Development

Evidence from the benchmarking analysis as well as feedback from production companies and key stakeholders suggested key areas for future development included:

- Broadening the remit of the ILBF to include a greater focus on interactive / digital (online) content in order to attract audiences not only in NI / Ireland but further afield;
- Consideration of the most appropriate medium to reach and engage with young people. The benchmarking analysis found that each of the other support mechanisms are developing ways to attract younger viewers in order to ensure sustainability / continuity into the future;

¹¹⁵ Note: the cost per minute could only be calculated for 127 of the 139 approved projects

¹¹⁶ PACEC (2016) *Strategic Review and Evaluation of the Ulster–Scots Broadcast Fund*

¹¹⁷ PACEC (2016) *Strategic Review and Evaluation of the Ulster–Scots Broadcast Fund*

- Further development of greater local and international collaborations between broadcasters, funders and production companies in the development of programmes;
- Increasing the size of the ILBF to ensure parity of support with other minority / indigenous languages (comparisons were made with the per capita funding levels in Wales and Scotland)
- Providing long-term funding to promote sustainable development in the industry (e.g. BBC Alba provide a four year funding deal / 'multiyear production contracts'); and
- Broadening the range of programming supported by ILBF from "traditional" (culture, history, etc.) to other genres and reflecting that Irish is part of modern urban culture as well as a more traditional, rural outlook.

A key area for development highlighted by production companies was the desire for longer-term funding to promote sustainable development and growth in the industry. In addition, companies indicated there was scope to:

- increase the amount of funding required from broadcasters (suggesting a greater number of projects could be supported if there was a 50/50 funding structure);
- develop an ILBF marketing structure to maximise the benefit of ILBF programming; and
- provide production opportunities for less established companies / provide greater research and development funding.

10.4 Recommendations

There is a continuing need for the fund and government intervention, as while the ILBF has been successful in developing the sector, the findings indicate that it is not self-sustainable and requires a supported ecosystem to ensure development and growth.

Recommendation 1: We therefore recommend that the ILBF continues to support the sector.

There are a number of areas that could be developed in any future fund and these are listed below.

Operation

Recommendation 2: In order to provide ongoing evidence of how funded companies / projects are delivering ILBF programme priorities and objectives we recommend that specific outcome measures are set to reflect the following:

- A broadening reach / wider audience - for example increase in people from all community backgrounds understanding the Irish language, heritage and culture;
- Irish language programmes as a percentage of broadcast time;
- Interactive / online content – Irish language content accessed; use of iPlayer, etc.
- Critical acclaim – press coverage, award nominations and wins etc.
- Development of the Irish language production sector – growth of production companies and number of Irish speakers employed etc.

The ILBF currently has a target that all individuals completing training are to secure employment in the production sector at end of scheme. While securing employment is important to the growth of the Irish language production sector in NI, the ILBF should consider if 100% securing employment is realistic.

Recommendation 3: We recommend that the ILBF review this KPI to become more achievable within an appropriate timescale, for example 80% to secure employment within 6 months. Additional KPIs for training for consideration could include:

- Numbers that complete the training schemes;
- Satisfaction with the training / learning provided;
- Increase in knowledge as a result of the training;
- How they have applied the knowledge / learning from their training in their subsequent job(s); and
- How the knowledge / learning from their training impacted or benefitted the company(s) they work for (if applicable).

Remit / Future Development

Recommendation 4: We recommend that interactive / digital content is incorporated as part of TV programming to support greater promotion and distribution of funded programmes.¹¹⁸ We recommend that a promotion plan is agreed with production companies as part of their letter of offer to incorporate this.

Recommendation 5: We recommend that a specific percentage of the ILBF should be allocated to the development, production and marketing of content on interactive / digital platforms in order to reach younger audiences and ensure sustainability / continuity into the future.

Recommendation 6: We recommend that the fund continue to use and develop current collaborative activities (e.g. MIP trips¹¹⁹) to support the development of local and international relationships between broadcasters, funders and production companies in order to expand funding sources as well as reaching a wider audience.

Recommendation 7: We recommend that the fund consider developing a longer-term funding stream after consultation with sector on the likely appetite / demand for such support.

¹¹⁸ For example Canada Media Fund productions must include content intended for distribution on at least two platforms, one of which must be television, and the other, a digital media platform

¹¹⁹ NI Screen fund up to three Irish language producers to attend MIPCOM (entertainment content market in Cannes). Prior to attending the market, producers attend a pre-MIP day workshop in Northern Ireland Screen which outlines the most successful ways to approach the market. As well as having the opportunity to attend the various sessions at MIPCOM, attendees can arrange to meet other producers, sales agents and broadcasters at the various different stands. Northern Ireland Screen also sets up meetings and networking events for the producers with appropriate producers, distributors, broadcasters and sales agents at the event. This provides opportunities for the producers to showcase their back catalogue and current projects to potential funders and to provide an opportunity to work with other producers and broadcasters. Northern Ireland Screen liaise with MG Alba on these trips and they support two Gaidhlig producers to attend

10.5 Management Response

The NI Screen Management response to the recommendations detailed in section 1.5, if any, are outlined below.

10.5.1 Response to Recommendations

There is a continuing need for the fund and government intervention, as while the ILBF has been successful in developing the sector, the findings indicate that it is not self-sustainable and requires a supported ecosystem to ensure development and growth.

Recommendation 1: We therefore recommend that the ILBF continues to support the sector.

NI Screen Response:

We welcome the recommendation that the ILBF continues to support the sector. It should be noted that in any assessment of the ILBF's past performance and future strategy, the scale of the Fund must be recognised and the merits/challenges of the Fund must be put into perspective within the overall media landscape of Northern Ireland and in the wider, complex question of Irish language in society.

The level of funding available has not increased since it was set at £3 million per annum in 2005. This is significantly less than the resources available to other indigenous funds and broadcasters in Scotland and Wales, specifically: £12 million per annum with an additional contribution of £8 million from BBC Scotland, (in the case of MG Alba); and £74.5 million for S4C in Wales, with an additional 520 hours of programming provided by BBC Wales.

An increase in the scale of the Fund and/or greater support from broadcasters would allow the Fund to further develop the sector, and in turn allow for the production of a wider selection of content across all platforms. It should be noted that some of the recommendations in this report have budgetary implications and are beyond the scope of the ILBF at its current level of funding

Operation

Recommendation 2: In order to provide ongoing evidence of how funded companies / projects are delivering ILBF programme priorities and objectives we recommend that specific outcome measures are set to reflect the following:

- A broadening reach / wider audience - for example increase in people from all community backgrounds understanding the Irish language, heritage and culture;
- Irish language programmes as a percentage of broadcast time;
- Interactive / online content – Irish language content accessed; use of iPlayer, etc.
- Critical acclaim – press coverage, award nominations and wins etc.
- Development of the Irish language production sector – growth of production companies and number of Irish speakers employed etc.

NI Screen Response:

We welcome the recommendation to look at different outcome measures.

Measuring a broadening reach/wider audience requires separate audience research which we currently carry out every two years. We will continue to undertake this independent audience research. We also propose to look at Fios Físe, TG4's audience research programme which is managed by National University of Ireland Galway. As the audience panel has representatives in Northern Ireland we would seek access to this information in order to further tailor funding rounds to audience needs and wants.

Measuring the number of Irish language programmes as a percentage of broadcast time is not strictly within our control, as the number of Irish language programmes and Irish language online content is set by the individual broadcasters. While BBC and RTÉ have a number of Irish language slots, TG4 offers a full Irish language service.

We have funded a number of interactive projects and we do receive audience figures for this in terms of number of views etc. and will continue to monitor audience levels in this area. BBC i-Player figures are generally included in BBC audience figures.

Including details of critical acclaim is also a useful measure of success which we will adopt.

We are mindful of the role of the ILBF in the development and sustainability of the Irish language production sector and will ensure that this is reflected in measurements of success.

The ILBF currently has a target that all individuals completing training are to secure employment in the production sector at end of scheme. While securing employment is important to the growth of the Irish language production sector in NI, the ILBF should consider if 100% securing employment is realistic.

Recommendation 3: We recommend that the ILBF review this KPI to become more achievable within an appropriate timescale, for example 80% to secure employment within 6 months. Additional KPIs for training for consideration could include:

- Numbers that complete the training schemes;
- Satisfaction with the training / learning provided;
- Increase in knowledge as a result of the training;
- How they have applied the knowledge / learning from their training in their subsequent job(s); and
- How the knowledge / learning from their training impacted or benefitted the company(s) they work for (if applicable).

NI Screen Response:

We welcome the recommendation to review this KPI and agree that the target of 80% of trainees to secure employment within 6 months of leaving the scheme is a much more realistic target than the current one.

We also welcome the additional suggested KPI's which should provide a fuller picture of the impact of the training on the sector.

Remit / Future Development

Recommendation 4: We recommend that interactive / digital content is incorporated as part of TV programming to support greater promotion and distribution of funded programmes.¹²⁰ We recommend that a promotion plan is agreed with production companies as part of their letter of offer to incorporate this.

NI Screen Response:

While we recognise the value of a dual platform approach and can encourage producers to submit applications for projects on dual platforms, this would need to be done in consultation with the broadcasters (if broadcasters are attached), as this would also have a budgetary impact on the projects. It may be more appropriate to look at this on a case by case basis.

We note that this recommendation is based on a case study of the Canada Media Fund, which has an annual budget of \$361.6 million Canadian dollars, a figure which dwarfs the £3 million per annum ILBF budget. A dual platform approach for each project would not be realistic in the context of the ILBF's current level of funding.

Recommendation 5: We recommend that a specific percentage of the ILBF should be allocated to the development, production and marketing of content on interactive / digital platforms in order to reach younger audiences and ensure sustainability / continuity into the future.

NI Screen Response:

The ILBF has a record of supporting interactive projects aimed at a younger audience. Several ILBF funded series aimed at a pre and primary school audiences are included in content for schools on the C2K website. This content is available to schools across Northern Ireland.

The ILBF Priorities also clearly state the Fund's wish to support content aimed at younger audiences, and interactive content. However, we welcome the recommendation to set aside a specific percentage of funding for this kind of content and will continue to ensure that this is communicated to the sector.

¹²⁰ For example Canada Media Fund productions must include content intended for distribution on at least two platforms, one of which must be television, and the other, a digital media platform

Recommendation 6: We recommend that the fund consider ways to support the development of greater local and international collaborations between broadcasters, funders and production companies in order to expand funding sources as well as reaching a wider audience.

NI Screen Response:

This is an area that is already being addressed by the Fund and will continue to be a priority for us. We actively encourage local and international collaborations in funding applications. We encourage producers to focus on the production of content with high production values that can appeal to both a local and international audience.

We have supported three Irish language producers to attend MIPCOM in October 2016, a further three producers will attend in October this year. We worked closely with MG Alba on this trip and they supported two Gaidhlig producers to attend last year and will do the same this year. Two co-productions have come through the funding rounds as a direct result of the first trip to MIPCOM.

We have also supported a producer to attend the Sunnyside documentary festival in 2016.

Recommendation 7: We recommend that the fund consider developing a longer-term funding stream after consultation with sector on the likely appetite / demand for such support.

NI Screen Response:

We recognise that the provision of a longer term funding stream would provide more sustainability, particularly to the smaller production companies. We have had discussions with the broadcasters on the mechanics of providing funding for multiple series/a slate of programming and we did provide support to one production company for two series. This is an area we will continue to look at, particularly in light of the new funding strategy at TG4.

It is worth noting that both our assessment process and our collaborative approach with the sector also aims to ensure sustainability of the Irish language production sector.