

An Comhchoiste um Thurasóireacht, Cultúr, Ealaíona, Spórt agus Meáin
20 Márta 2024

TG4 will deliver our opening statement in Irish.

A more detailed English language outline of the regional aspects of our Statement of Strategy 2023-27 is outlined overleaf. Also attached in English are our full Statement of Strategy 2023-27 and a draft proposal for a S481 regional uplift based on Ireland's Gaeltacht. We welcome questions in Irish and in English.

Ráiteas Tosaigh TG4

Cheadaigh an Dáil in 2023 Ráiteas Straitéise 2023-27 TG4 agus a phlean maoinithe mionsonraithe, a léiríonn infheistíocht agus toradh. Is straitéis í a bhfuil sé mar aidhm aici cur le tábhacht na meán Gaeilge inár éiceachóras PSM. Is straitéis í a bhfuil sé mar aidhm aici an éagothroime maoinithe atá le sárú ag TG4 in Éirinn le fada an lá a chur ina cheart. I gcomhthéacs deachleachtas na hEorpa maidir leis na meáin mhionteangacha, tá Éire i bhfad ar gcúl. Ar an drochuair agus gan choinne, tugadh buiséad do 2024 beagnach €6M níos lú ná an méid atá leagtha amach sa Ráiteas Straitéise atá ceadaithe ag an Dáil.

Is é TG4 phríomh-mhaoinitheoir na hearnála scáileáin i réigiúin na hÉireann i gcomhlachtaí Éireannacha atá lonnaithe lasmuigh de Bhaile Átha Cliath/Chill Mhantáin. Tá an infheistíocht seo ina thiománaí forbartha san eacnamaíocht chruthaitheach réigiúnach, ag leagan síos bonn láidir don nuálaíocht dhigiteach agus theicniúil. D'fhéadfadh eacnamaíocht chruthaitheach agus chultúrtha rathúil i réigiúin na hÉireann íomhá na réigiún a athrú ó bhonn, dóibh siúd a chónaíonn agus a oibríonn ann agus dóibh siúd a thugann cuairt. Is féidir leis an tionscal cruthaitheach closamhairc tionchar a imirt ar thurasóireacht, na healaíona, cultúr, spórt agus an Ghaeilge agus iad a threisiú, chomh maith le cur leis na tionscail chruthaitheacha trí clusters agus comhshuíomh.

Maraon le toradh cruthaitheach agus eacnamúil ar infheistíocht TG4, tá toradh teanga le fáil ar an infheistíocht freisin (Linguistic Return on Investment). Déanann TG4 infheistíocht ar 80% dá caiteachas léiriúcháin taobh amuigh de Bhaile Átha Cliath agus 70% i gceantair Gaeltachta. In 2023 amháin, chaith TG4 €29m leis an earnáil léirithe neamhspleách ins na réigiúin (€32m go náisiúnta). Léiríonn ainilís ó 2022 go dtacaíonn TG4 le fostaíocht do suas le 400FTE san earnáil chlos amharc. Do gach post in TG4, tá 4 phost eile ins an earnáil neamhspleách, agus tá formhór na fostaíochta sin i gceantair Ghaeltachta.

Molann TG4 na deontais 'nationwide' réigiúnacha atá tugtha isteach ag Fís Éireann. Áfach tá na buntáistí céanna ar fáil do chomhlachtaí atá bunaithe taobh istigh de 65km ó Shráid Uí Chonaill agus atá ag an chuid atá bunaithe taobh amuigh den limistéar 65km. Leanann sé seo patrún láidir, leanúnach de bhuntáistí maidir le maoiniú stáit agus tíreolaíocht atá ar fáil do chomhlachtaí closamhairc atá lonnaithe taobh istigh de cheantar Bhaile Átha Cliath/ Cill Mhantáin.

I gcomhthéacs Straitéis 20 bliana an stáit don Ghaeilge creideann TG4 go bhfuil deis ann ardú Gaeltachta ar Alt 481 a thabhairt isteach do chomhlachtaí atá lonnaithe i nGaeltacht na hÉireann agus tá mioneolas ar an moladh seo le fáil mar cheangaltán leis an ráiteas tosaigh seo.

Creideann TG4 freisin go bhfuil tábhacht faoi leith maidir le tallann nua a fhorbairt sna réigiúin. Tá scéimeanna rathúla forbartha againn le Údarás na Gaeltachta, le intéirnígh bliana, atá bunaithe ar shaineolas NI Screen sa réimse seo agus tá breis is 70 duine tagtha tríd na scéimeanna intéirnígh ó 2018. Tá deis ann dlús a chuir leis an fhorbairt tallainne sa Ghaeltacht agus moladh againn straitéis aontaithe idir TG4, Údarás na Gaeltachta agus Screen Ireland le seo a bhaint amach.

Mar chlabhsúr, ba mhaith le TG4 díriú ar trí sprioc a chuirfeadh borradh breise faoi an earnáil closamhairc sna réigiúin:

- Scála maoinithe TG4 a mhéadú le tacú le straitéis TG4 agus infheistíocht TG4 san earnáil léirithe a mhéadú.
- Ardú Gaeltachta a thabhairt chun cinn faoi S481.
- Straitéis páirtíochta idir TG4, Fís Éireann agus Údarás na Gaeltachta le dlús a chur le forbairt na h-earnála closamhairc Gaeltachta agus Gaeilge.

Go raibh maith agaibh as éisteacht leis an ráiteas tosaigh seo i nGaeilge agus cuirfidh muid fáilte roimh cheisteanna i nGaeilge agus Béarla.

Le meas,



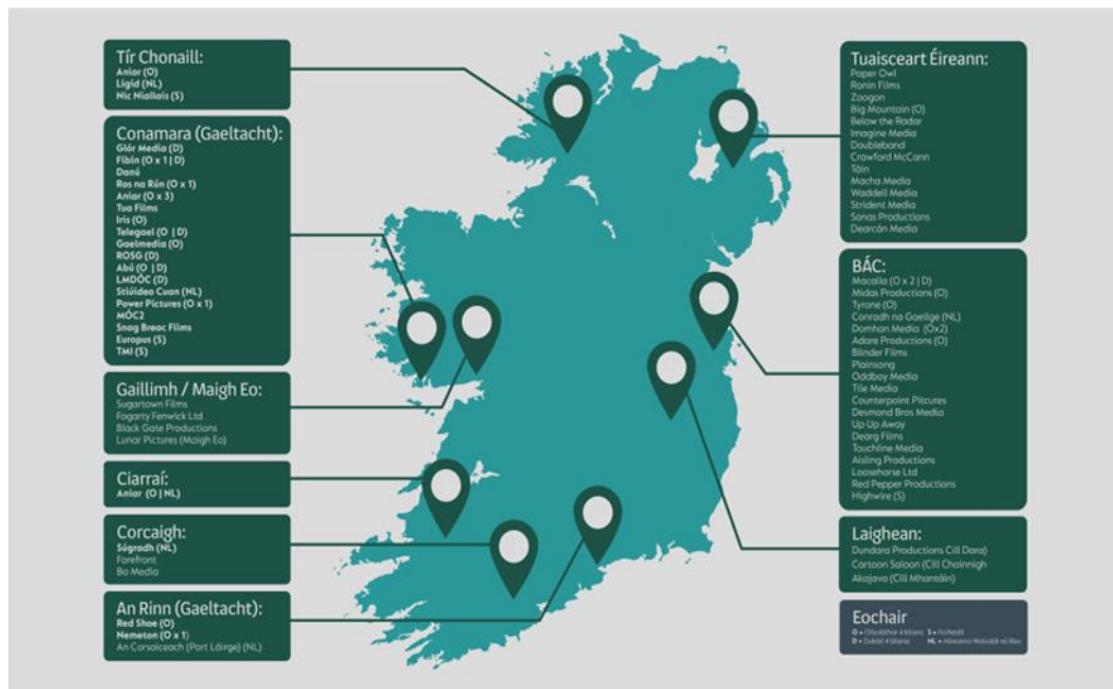
Alan Esslemont, Ard-Stiúrthóir/Director General TG4.

Regional aspects of TG4 Statement of Strategy 2023-27

TG4's Statement of Strategy 2023-27 and its detailed funding model, demonstrating investment and return, was approved by the Dáil in 2023. It is a strategy which aims to build the importance of Irish language media in our PSM ecosystem. It is a strategy which aims to correct the longstanding funding imbalance faced by TG4 in Ireland and also in the context of European best practice regarding minority language media. Figures in our statement today refer to figures in our Statement of Strategy. Unfortunately and unexpectedly, our allocated budget for 2024 fell almost €6M short of the amount contained in the approved Statement of Strategy.

EBU research¹ shows that public service media has long played a central role in the European creative sector, using its funding for content creation and to support creative industries. European PSM organisations are catalysts for content creation spending on average, €19.5 billion per year across the EBU area. With 84% of this spend allocated to original content, they are leading investors in European original content.

As the principal funder of the screen sector in Ireland's regions based outside of Dublin/Wicklow, a direct impact of more funding for TG4 would be an additional €22.25m investment by 2025, in the Irish independent production sector. This would be a driver of development in the regional creative economy, building a strong basis for digital and technical innovation. A thriving creative and cultural economy in Ireland's regions could transform the image of the regions, for those who live and work there and for those who visit. The creative audio-visual industry can impact and energise tourism, arts, culture, sport and the Irish language, as well as enhancing the creative industries through clustering and co-location.



TG4's plan would result in additional investment in independent production sector skills and talent development and deliver an estimated 300-400 new jobs in the sector by the end of 2025, particularly in the regions.

Regional incentives for the audiovisual sector have proved to be an unwelcome headache for the state. Most audiovisual companies of scale, which have a track-record of attracting foreign direct investment, are based in Dublin/Wicklow. These companies, and indeed the audiovisual agencies of the state, have been very effective in ensuring that state incentives be classified as 'nationwide', thus ensuring that centralism will prevail in our industries. TG4 also believes that one way to create a new axis which favours companies not based in the centre can grow out of a S481 Uplift based on Ireland's Gaeltacht. A draft proposal is attached.

New Industry Talent

In addition to investment in new commissioned content which supports talent development throughout the sector, TG4 would continue to invest in talent development schemes. We estimate that the further development of 155-175

¹ Funding of Public Service Media 2020 (EBU, December 2020)

individuals can be supported through TG4's commissioning development schemes in addition to training schemes such as *Scéim Forbartha Oiliúna* and TG4 internships etc., all of which are funded in conjunction with other stakeholders. This would have a positive impact on the emergence and development of local creative and technical talent in the audio-visual and creative sectors, particularly in the regions. TG4's proposals would also have an impact on the development of regional journalistic talent through our investment in a new children's Irish language news service and enhanced TG4 news and current affairs services.

Grow Regional Jobs & Economic Impact

TG4's increased investment in content and services from the independent production sector, in addition to increased spend with other Irish creative services, would increase TG4's contribution to national output and its employment impact. TG4's contribution to national output (direct, indirect and induced) is projected to be €114m in 2025. Of this, €100m would be the contribution to regional output. TG4's expenditures in the economy in 2025 are estimated to have a national jobs impact of 1,650 full-time equivalent jobs (direct, indirect & induced), of which 1,450 would be regional jobs. This represents a 59% increase in contribution to regional output and a 49% increase in regional jobs impact compared to 2022. It should be noted that multiplier analysis is an annual snapshot and does not feature cumulative impact of successive years of additional investment. It also excludes additional catalytic impacts (spill-overs) such as skills development, social and cultural benefits etc.

As TG4's planned investment would mainly impact Gaeltacht and regional areas, there are significant benefits for Ireland's regions. In addition to the full and part-time jobs, TG4's commissions from production companies in the regions would have supply chain and capital formation benefits.

Between 90% and 100% of production budgets are spent directly in the local areas and many production companies in the regions have policies of hiring and purchasing from their local areas first and from other locations in proximity to their base, second². Services and suppliers include set-building and painting supplies, catering and accommodation, taxis and other transport services, clothing supplies for costumes, cleaning services for the studios etc. electrical supplies and electricians, vehicles, repairs and servicing, among many others, all of which are purchased in local areas wherever possible. In addition, production staff not living locally stay in rented and other accommodation which is a benefit to the local property and hospitality sector, particularly during the off-season in the tourism sector.

There is also significant investment in capital formation by the production sector with companies investing in production facilities, studios, technical equipment and other infrastructure. For example, production companies such as Danú Media, Fíbin Media and Telegael in Galway, and Nemeton TV in the Waterford Gaeltacht, have invested heavily in production infrastructure including soundstages, production studios and facilities, office buildings and technical equipment etc. The scale of investment in high-quality, technical infrastructure and facilities enhances the image of the areas, portraying them as progressive and creative areas in which to work. Their presence attracts talent and supplier businesses to the regions and contributes to the development and regeneration of the areas. The scale of this investment has a positive impact on suppliers and service providers in the local economy.

These potential benefits are important in the context of Ireland's regional competitiveness. EU research³ shows that Ireland is the 9th most competitive economy in the EU27 with a competitiveness score of 112.6 versus an EU average of 100. The three regional areas of the Northern and Western Region, Eastern and Midland Region and Southern Region were assessed individually. Eastern and Midland Region ranks 24th of 234 regions, Southern Region ranks 90th and the Northern and Western Region ranks 113th. The Northern and Western Region has a competitiveness score of 98.2 versus the EU average of 100. It scored only 34.1 on infrastructure and 91.1 on innovation compared to the EU average score of 100. However, it scored 134.4 on technological readiness, well exceeding the EU average score of 100. TG4's strategy can deliver significant benefits for the region in supporting further development of its competitiveness.

In summary, it would:

- Expand skilled technical and creative employment in Gaeltacht and regional areas and help retain talent in these areas.
- Stimulate further investment in production sector capital formation. E.g., studio, production and post-production facilities etc.
- Increase expenditure with local supply services such as production services, accommodation, transport, catering etc.
- Help keep young Irish speakers in regional areas.
- Potentially support development of film / production-related tourism in Gaeltacht and other regional areas.

² Based on TG4's analysis of additional investment in the Irish Independent Production Sector (2019).

³ EU Regional Competitiveness Index 2.0 2022 edition.

Supports Government Cultural & Irish Language Strategies

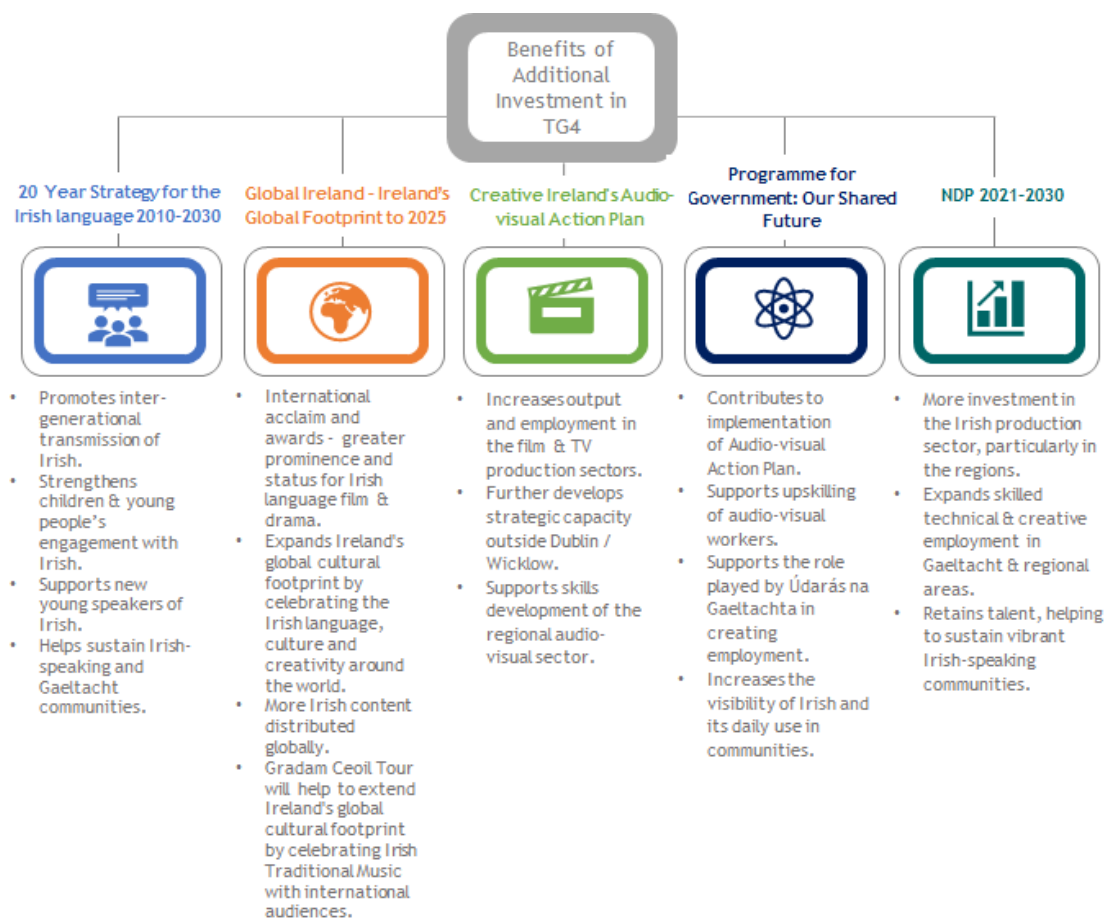
TG4's investment proposals also support delivery of other Government national economic, audio-visual and Irish language policies / strategies, namely:

1. 20 Year Strategy for the Irish language 2010-2030.
2. Global Ireland - Ireland's Global Footprint to 2025.
3. Creative Ireland's Audio-visual Action Plan.
4. Programme for Government: Our Shared Future.
5. National Development Plan (NDP) 2021 - 2030.

TG4's strategy alignment with these policies / strategies is described in the diagram below.

In addition to alignment with the above national policies and strategies, TG4's strategy is also fully aligned with the recommendations of *the Future of Media Commission*. The Commission has made 50 recommendations which provide a strategic platform for the transformation of Ireland's media sector. Many of these recommendations align with the priorities of TG4's ASPC 2023. For example: editorial control for TG4 over our news services; investment in independent production; environmental sustainability; and, diversity and inclusion among many others. One of the recommendations of the Future of Media Commission (7-2) is a *comprehensive review of the provision of Irish language services and content across the media system, with a focus on institutional structures and opportunities for innovation and collaboration*. TG4 looks forward to engaging with this review and we anticipate that it would be framed in the context of Language Planning Strategies aimed at combatting Irish language shift and preserving our ecosystem of linguistic diversity in Ireland for this generation and for future generations.

Summary of Benefits for Delivery of Other Government Policies / Strategies



Linguistic Return on Investment

Gaeltacht Development Policy (GDP) cannot rely on regional economic development measures alone as the principal policy instrument to recreate the necessary conditions for inter-generational language transmission. GDP must form part of an overall spatial approach to integrated development and combine linguistic, socio-political and economic objectives. Linguistic proofing needs to be designed into public policy interventions ex ante and be sensitised to, and structured against, any developments which are or could potentially be harmful for Irish language vitality.

A development model based on the concept of a “Linguistic Return on Investment” (LROI) recognises the impact of one set of public policy interventions (economic) on the capacity to sustain and develop a separate but related set of public objectives (linguistic).

An LROI model would consider how development policy contributes systematically to reinforcing and building the resource capacity within the Gaeltacht communities to successfully complete repeated rounds of intergenerational transmission of the minority language. Gaeltacht Development Policy must be designed and implemented to support integrated development of Gaeltacht communities. It must focus on sectors which can best contribute to the economic and linguistic development of the Gaeltacht. These include the language sector, cultural, educational or creative tourism, the knowledge economy, the CREATech sector, and natural resource development etc. As a development sector, the Irish language audio-visual/screen production represents a key economic, social and linguistic resource which can be managed and developed through proactive state planning. This is argued not only because of the sector’s capacity to create and sustain enterprise and employment opportunities but also because the sector is language-based and directly supports the strengthening of Irish as a working, community language.

TG4 thanks you for considering our thoughts and proposals and will welcome any questions and any further enquiries.

Le meas,



Alan Esslemont, Ard-Stiúrthóir/Director General TG4.