



MUSIC FOR SCREEN

An examination of
the music for film &
TV sector in Ireland

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ABOUT THE REPORT AUTHOR



Sarah Glennane is an independent music supervisor working in the Irish audiovisual industry and has a focus on sourcing, clearing and licensing music for film and TV productions. She is currently completing work on an Irish/Canadian co-production “Birthmarked” and has worked in all areas of music supervision across a number of feature films, documentaries and TV productions.

Sarah’s background is in music management and arts marketing. She has worked with many notable Irish musicians for over ten years in the live performance sector.

Through working with bands and composers to deliver music to the audiovisual sector, she developed a passion for music for screen. She has completed a certificate in Music Supervision at the renowned Berklee College (online), Boston, USA. Sarah has delivered modules in music for film and business related aspects of music for film as a guest lecturer at Dublin’s Pulse College Scoring for Film and Visual Media (MA) and Filmbase Film Production (MA). She has participated on panel discussions for the Irish Music Rights Organisation, Screen Training Ireland and Hard Working Class Hero’s industry events.

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IN IRELAND

SUMMARY REPORT

INTRODUCTION

Music is at the heart of the Irish cultural identity. With a rich heritage of internationally-renowned composers and writers across a multitude of genres, an ever-growing host of world-class performers, and a thriving live music scene, Ireland's music sector forms a cornerstone of our reputation on the global stage and continues to enhance cultural life at home and abroad.

But what of the Irish music for screen sector? How well-known and regarded are our film composers and their work? How is the craft of bringing music to screen understood and rated within the audiovisual and music industries in Ireland, and internationally?

Film and TV, as with all types of audiovisual productions, are enhanced by music and the creative energy of engaging music creators; likewise, music can be heard in a new way, and by new audiences, through its inclusion in an audiovisual product. Consider Sean Ó Riada's seminal score for George Morrison's film, 'Mise Éire' – this internationally recognisable orchestral work has evolved into a major cultural asset for Ireland, a remarkable feat when one considers that prior to 'Mise Éire', Ó Riada had never composed for film. More recently, Glen Hansard and Marketa Irglova's music for the film 'Once' has received major international recognition, including an Oscar. These are just two examples from the myriad of rich contributions Irish composers have made to the music for screen sector.

This report seeks to examine the status of music creation for screen in Ireland today, the adequacy of the supports in place to foster the development of this sector, and the sector's position within the wider audiovisual and music industries. The report focuses primarily on film and TV audiovisual production, but also looks at advertising and video game production.

Specifically, the report is intended to spark a dialogue which will help to:

- Understand how public investment in audiovisual

production is trickling down to music creators here;

- Identify new ways in which music creators can be supported to develop their offering for screen;
- Develop strategies to capitalise on the growth envisaged for the audiovisual sector in Ireland and to enhance the visibility of this sector to funders and other stakeholders.
- Explore paths of access for Irish composers to overseas film and TV productions.

The analysis is compiled from:

- qualitative interviews with a wide-ranging group of stakeholders from the music and audiovisual industries, including the agencies which fund and support them;
- a quantitative research survey of composers for screen working in or from Ireland;
- secondary research on the Irish and international music for screen sectors.

With clear Government intent to invest in audiovisual production, and with a recognition of the economic potential for Ireland from the development of music for screen, now is a timely opportunity to assess the status of this growing sector.

SECTOR OVERVIEW

Music is a creative element of a production and holds an inherent intellectual property through copyright.

Music is used in conjunction with the other elements in a production to help deliver the overall narrative and tone of the production. It can serve to stimulate emotional reactions in the audience, to anchor the story in a specific era or geographic location, to communicate about the characters and their moods, to create a soundscape (i.e. music playing from a radio), and to help bridge a transition in the narrative. These creative functions span drama, comedy, animation, documentary and biography in film and TV and have similar impacts within video games and advertising. Irrespective of media or budget, music plays a critical role in the quality of productions.

Screen composers score and create

unique music for use in visual media. They compose, perform, orchestrate, conduct, record and supply music to the required technological and creative specifications within time and budget constraints.

The past ten years have seen a growth in content production for audiovisual globally, including Ireland. There has been particular growth in the original content for the TV production and video on demand (VOD – Netflix, Amazon Prime, Hulu etc) sectors. Irish composers for screen should therefore be experiencing similar growth in demand for their services, and revenue from the exploitation of their musical works. However, there are a number of factors hampering progress:

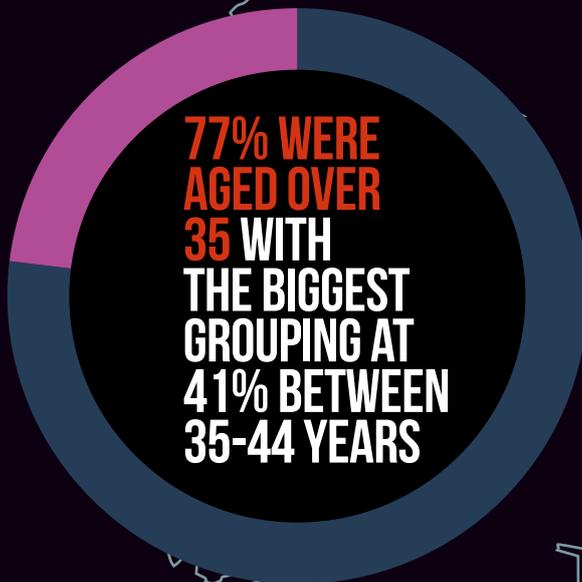
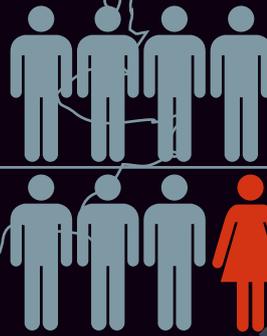
- Falling fees
- Digital disruption
- Fall in value for music, including composed score
- Growth in overseas competition

These threats and barriers which are hampering the development of the

music for screen sector are being recognised internationally. In other territories, composers are taking action to secure the sector - organising themselves at a professional level via guild type bodies to collectively promote the value of original music composition, as well as engaging in other activities such as commissioning research on market conditions, lobbying for recognition from public funders involved in audiovisual industries, and working to maintain quality standards and a fair return for their work. There is an urgent need for the Irish audiovisual and music industries to follow suit and assist this sector to foster talent at a domestic level, to support composers in an increasingly competitive market, and to help generate greater access to opportunities at an international level.

DOMESTIC SECTOR PROFILE

It is estimated that there are currently up to 100 Irish screen composers operating within Ireland or outside of Ireland. Of this number, less than 20 are earning a fulltime living from composing for screen. The remainder – the vast majority – either also create for music performance or supplement their income in another area of music production, or from an activity outside of music.





REPORT FINDINGS

1. The Music For Screen sector is a distinct area of creative talent which services the audiovisual content production industry and contributes to the overall quality and output of that industry. There is the potential to grow this sector domestically and to export to a global market.
2. Music for screen can fall between the music and audiovisual industries, being fully serviced by neither and not seen to be represented at policy level in either.
3. The audiovisual industry is currently experiencing growth in Ireland with clear Government and industry support to develop it further.
4. Music is a creative element of audiovisual content creation and needs to be represented within this industry at a stakeholder, policy and funding level.
5. There is no reference to music creation within Ireland's Section 481 tax incentives, whilst partner territories tax incentives do award value to music creation. Music is not an element of the cultural test for Section 481.
6. Irish publishers and music supervisors are struggling to compete with larger international competitors who are entering and operating with ease within the Irish market.
7. For career development, screen composers need access to work and credited experience. The industry is risk averse and a major obstacle to growth or entry for a composer is achieving enough credited work to attract further work. There are few opportunities for on-the-job training and development for composers.
8. Broadcasters, both as commissioners and funders, play an important role in what music is used and how, holding influence in the development of the screen music sector and individual composer's career. This role and its significance needs to be recognised and strategies identified to enable communication and interaction between music providers and broadcasters/funders.
9. There is an opportunity to increase collaboration between existing resource organisations. Screen composers' organisations prove invaluable for delivering visibility, best practice, and support for composers in other similar audiovisual territories including Canada, UK, Australia and New Zealand. All these regions have professional organisations which offer similar services to their members and the industry. They operate to create best practice, offer practical support to audiovisual customers and research and monitor the sector. Similar benefits can be seen with professional guilds representing other creative sectors in the audiovisual industry in Ireland, including Animation Ireland and the Screen Directors Guild of Ireland.
10. Every piece of audiovisual content, created and produced in Ireland, provides a potential opportunity for one or multiple music creators to have their music used within it, whether through commissioning of original works, or adoption of existing works.
11. Music usage brings economic and professional development opportunities for music creators and, potentially, for a wider group of performers, music support professionals and services.
12. Irish TV content production is not affording domestic composers the level of opportunity that it could be. The study finds that large scale drama productions and international co-productions are hiring composers from outside of Ireland, while smaller scale productions, unable to fund composers, are relying on production music and blanket licences. Irish composers are seen to be losing out on high-value Irish commissioned and, at least part-funded, TV drama and international co-productions to composers from other territories at a disproportionate rate.

REPORT RECOMMENDATIONS

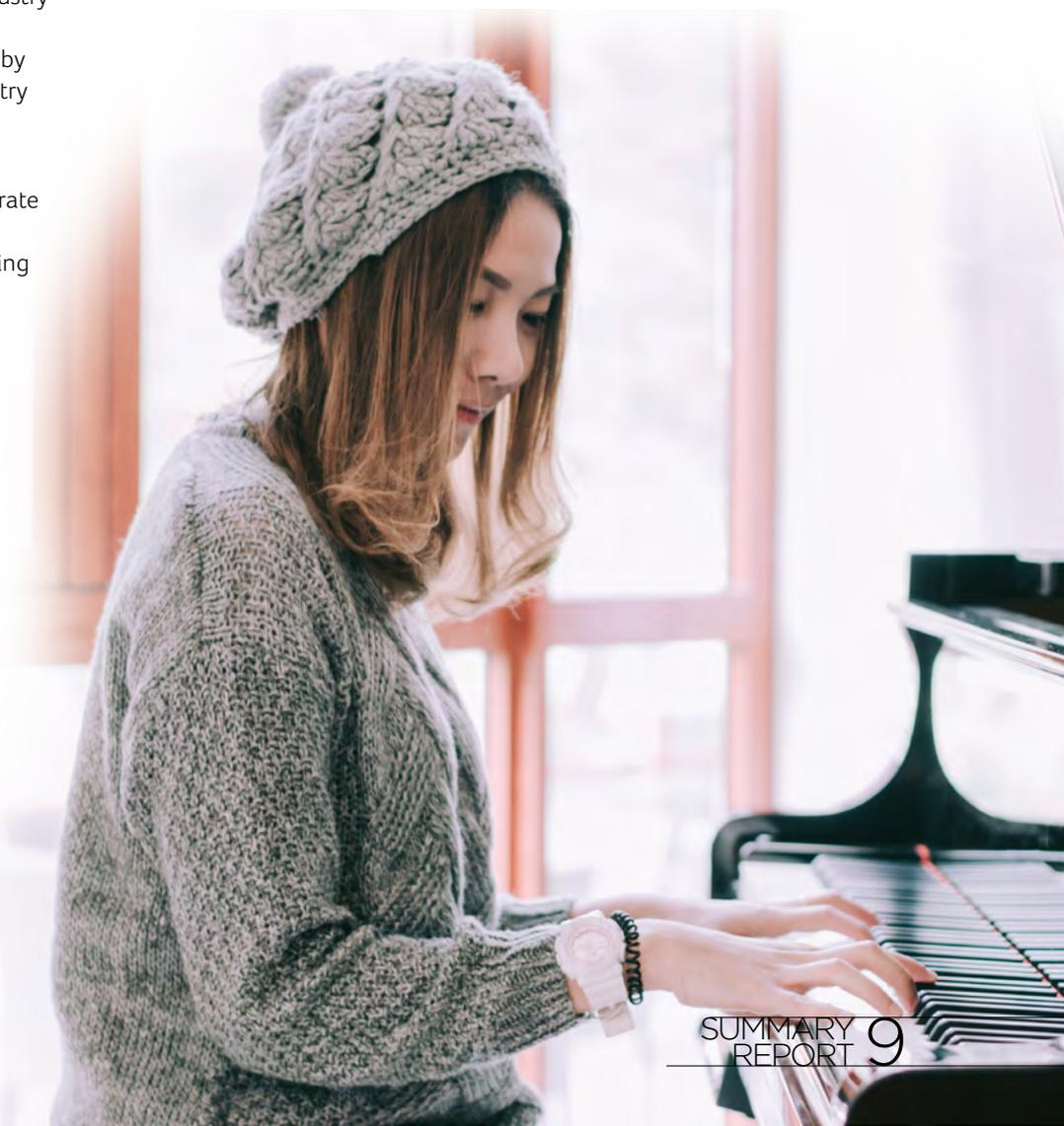
1. Establish a dedicated Screen Composers Guild that represents and promotes Irish Screen composers and music for screen. The body would be similar to the Screen Directors Guild of Ireland, Animation Ireland and Screen Composers Guilds in other territories.
2. Without investment, the potential for the music for screen sector, and the Irish creative economy more broadly, to lose out on opportunities to external competitors is inevitable
3. Communicate the value of a vibrant music for screen sector in Ireland and examine funding strategies for same.
4. Include music as a provision of the Section 481 tax incentive (whether through its inclusion in the cultural test or in another capacity) that recognises and rewards the value of spend on music creation and performance in Ireland and is competitive with partner territory incentives.
5. Establish a fund to augment music budgets within audiovisual productions.
6. Ensure return on investment in original music through robust copyright legislation that delivers adequate remuneration for creators and production companies.
7. Make available legal and business advisory services to music creators and audiovisual producers.
8. Establish clear and accessible pricing guidelines for music commissioning and budgeting.
9. Leverage domestic music supervision and publishing professionals and help them create collective strategies to promote their services.
10. Assist networking opportunities between domestic music publishing services and Irish production companies in film/TV and animation.
11. Establish a comprehensive training framework for composers for screen, in partnership with organisations such as Screen Training Ireland and Filmbase.
12. Establish an online searchable database of copyright owners for music registered in Ireland, for use by productions seeking to licence music.
13. Develop and implement strategies to make the process of syncing Irish music easier, supported by both skills and funding.
14. Promote Irish music for sync through the existing channels of IASCA, CMC and First Music Contact, to introduce new Irish music to audiovisual producers and follow up promotion of music usages to media and wider audiences through tailored playlists and social media engagement.
15. Communicate to music creators the benefits of the broadcaster blanket licence and identify strategies to enhance the music user experience when using independent Irish tracks with the blanket licence.
16. Assist networking between domestic music publishing services and Irish production companies in film/TV and animation..
17. Establish an apprentice mentorship programme similar to that of the Screen Composers Guild of Canada, which partners entry level composers with established composers. It offers experience and one-to-one mentorship to the apprentice, who must have at least one commercial job completed and be a member of the Guild to qualify. This offers the established composer access to an additional pair of hands for a busy production. The programme has been successful and well received by the composer community. The current trainee requirement for the Section

481 tax incentive is another area that could be examined for composers gaining access to on the job training. This could be in composing and also music creation or performance and even in the sound department, offering a first-hand opportunity to see how music is treated once it passes from the composer to post production team.

18. The broader Irish music industry can facilitate the growth of the music for screen sector by offering assistance at industry level in the research and negotiation of tracks.
19. There is a need to demonstrate and promote the value of sync opportunities for existing

commercial Irish tracks to both industry and funders, and to promote good practice in licensing of music.

20. Market Irish music in a proactive, audiovisual industry focused way to unlock opportunities for Irish composers to compete for sync opportunities, benefitting both the music and audiovisual industries and Ireland Inc.



SECURING THE SECTOR

This study revealed a paucity of references to music creation for screen in reports or strategy documents developed for the audiovisual industry, and little from the music industry. Music for screen is an area which appears to be lost between the two creative industries and is not being supported, to any great extent, by either.

Without investment, the potential for the music for screen sector, and the Irish creative economy more broadly, to lose out on opportunities to external competitors is inevitable. A deficit already exists in the level of Irish music contribution to international co-productions where Ireland is a partner. Furthermore, a significant number of publicly funded domestic TV productions are opting for international composers or other non-Irish music sources such as production music libraries, over Irish composers. This represents a loss of opportunity to this sector, loss in intellectual property revenue and a loss for the overall creative profile of Ireland.

By engaging in meaningful dialogue on foot of the recommendations provided in this report, stakeholders from the music and audiovisual industries, together with policy stakeholders, can ensure that the potential of the music for screen sector in Ireland is realised.

Download the full report here:

<https://www.imro.ie/about-imro/research/music-screen-ireland/>

