



MUSIC FOR SCREEN

**AN EXAMINATION OF THE MUSIC FOR FILM &
TELEVISION SECTOR IN IRELAND**

SEPTEMBER 2017



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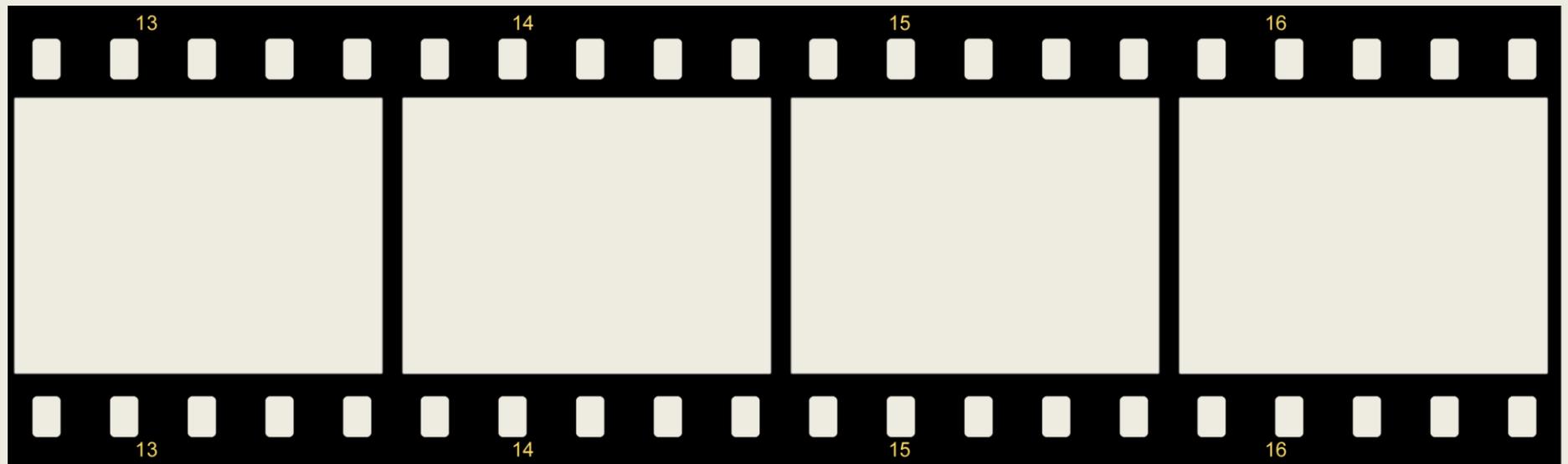
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1. ABOUT THE AUTHOR

Sarah Glennane is an independent music supervisor working in the Irish audiovisual industry and she 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.



2. INTRODUCTION

Music is at the heart of the Irish cultural identity. With a rich heritage of internationally-renowned composers and songwriters 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?

IRISH MUSICIANS AND COMPOSERS HAVE MUCH TO CONTRIBUTE TO THE MUSIC FOR SCREEN SECTOR

Film and TV productions, 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 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.

3. EXECUTIVE SUMMARY

“Through Creative Ireland, we want to develop Ireland as a centre of excellence for media production. We know we have the talent, and I think by taking a co-ordinated cross sector approach there are huge opportunities to expand our film and TV sector here. Ireland is a nation of storytellers; I want us to maximise these skills to drive significant growth in the film, TV and animation production sectors in the years ahead. The Irish audio visual sector is a growing industry with huge potential. 2016 has been a fantastic year for the film industry, with wide international acclaim for a number of Irish productions. Our animation sector has been going from strength to strength in recent years and the increasing demand for high quality TV productions also provides new opportunities.

While we know that the audio visual sector supports thousands of jobs, I believe there is significant potential for further growth in the years ahead. It has also been a number of years since a comprehensive study of the sector was carried out. This economic analysis will consider the scale and economic contribution of the screen-based creative industries and examine its potential to expand further”

Heather Humphreys TD, Minister for Arts, Heritage, Regional and Gaeltacht

The value of the audiovisual content production industry in Ireland is currently under examination, with a Department of Culture, Heritage and the Gaeltacht commissioned report into the sector’s economic significance due by the end of 2017.

The Government provides significant support to the audiovisual sector, not just by funding the Irish Film Board, but also through Section 481, the tax incentive which helps to attract international productions to Ireland as well as being a very important source of financial assistance for domestic productions.

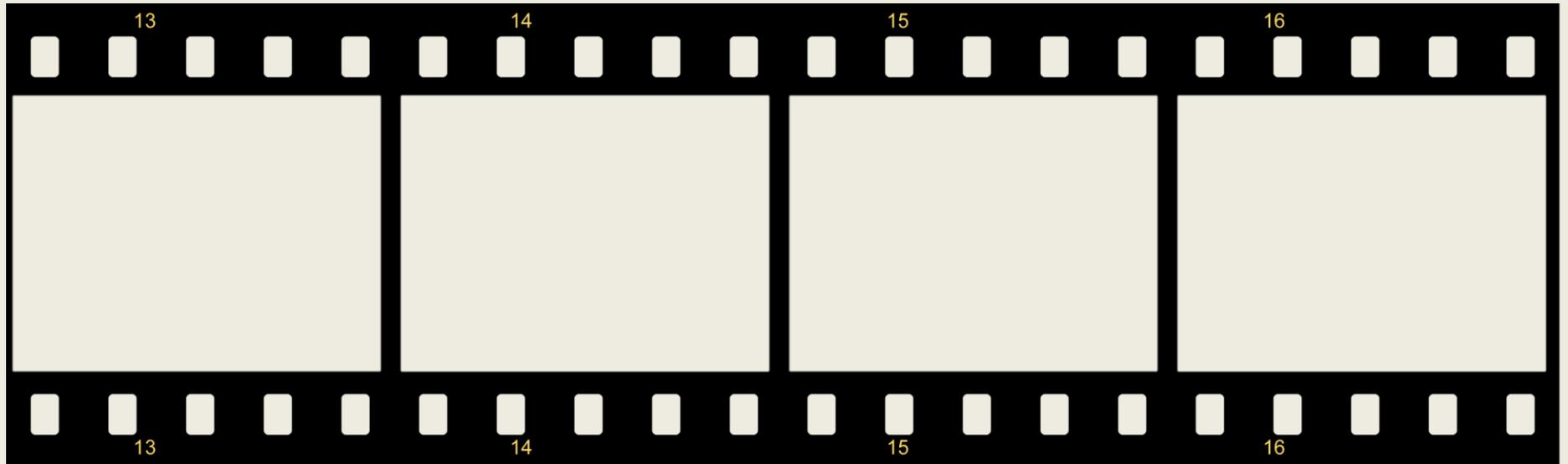
With clear Government intent to invest in audiovisual production, and a recognition of the economic potential for Ireland from the development of the music for screen sector, now is a timely opportunity to assess the status of this growing sector. Specifically, this report is intended to spark a dialogue which will help to:

- Understand how public investment in audiovisual production is trickling down to music creators in Ireland;
- 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.

4. REPORT FINDINGS

- 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.
- 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.
- The audiovisual industry is currently experiencing growth in Ireland with clear Government and industry support to develop it further.
- Music is a creative element of audiovisual content creation and needs to be represented within this industry at a stakeholder, policy and funding level.
- 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.
- Irish publishers and music supervisors are struggling to compete with larger international competitors who are entering and operating with ease within the Irish market.
- 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.
- 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.
- 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.
- 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.
- Music usage brings economic and professional development opportunities for music creators and, potentially, for a wider group of performers, music support professionals and services.
- 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.



5. REPORT RECOMMENDATIONS

- 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.
- 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
- Communicate the value of a vibrant music for screen sector in Ireland and examine funding strategies for same.
- 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.
- Establish a fund to augment music budgets within audiovisual productions.
- Ensure return on investment in original music through robust copyright legislation that delivers adequate remuneration for creators and production companies.
- Make available legal and business advisory services to music creators and audiovisual producers.
- Establish clear and accessible pricing guidelines for music commissioning and budgeting.
- Leverage domestic music supervision and publishing professionals and help them create collective strategies to promote their services.
- Assist networking opportunities between domestic music publishing services and Irish production companies in film/TV and animation.
- Establish a comprehensive training framework for composers for screen, in partnership with organisations such as Screen Training Ireland and Filmbase.
- Establish an online searchable database of copyright owners for music registered in Ireland, for use by productions seeking to licence music.
- Develop and implement strategies to make the process of syncing Irish music easier, supported by both skills and funding.
- 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.
- 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.
- Assist networking between domestic music publishing services and Irish production companies in film/TV and animation..
- 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.

- 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.
- 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.
- 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.



6. MUSIC AS AN ELEMENT OF AUDIOVISUAL PRODUCTIONS - OVERVIEW

SOURCING MUSIC FOR AN AUDIOVISUAL PRODUCTION HAS CREATIVE, FINANCIAL AND LEGAL ELEMENTS

Music is a key 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.

6.1 VOICES OF IRISH COMPOSERS FOR SCREEN:

Below is a selection of comments from composers for screen collected through this research:

“It's a competitive, challenging and rewarding business; it takes continuous work and development even to get on the first rung of the ladder. The rewards are invariably worth it, even at a small scale.”

“In Ireland, there is a lot of outsourcing overseas... agencies and production companies should have more awareness of domestic composers”

“With regard to low to medium budget projects, there is a need for the Irish film industry to allocate greater budget to original music composition and ensure adequate remuneration for composers. Furthermore, the larger scale Irish/International TV and Film co-productions are employing teams of composers and musicians based outside of Ireland when all the music resources required to score these projects exist within Ireland.”

“More risk should be taken with commissioning new talents.”

“I find myself looking at credit rollers for the music credit and seeing the composers credit as the 3rd, 4th or 5th position on productions for C4, BBC etc. and often no credit at all for domestic independent productions for RTE, ergo, the input of the composer is significantly undervalued.”

“The establishment of a ‘Composers for Screen’ union, would be a great resource for both composers and producers to be able to benchmark industry agreed rates for commissioned music. Access to legal advice would also be useful.”

“There is a decline in return for commissioned music used in commercials.”

“It is definitely harder for females to get work in this area. Time and time again I've witnessed less experienced males get work ahead of me.”

“Professional affordable studio spaces should be made available for collectives. Most of my international work comes from being in such a collective space in Berlin. Working in the same space as other composers has also led to many collaborations and a general sharing of knowledge which has upped my game infinitely.”

“Music needs to be given proper consideration at the pre-production budgeting stage and not subsequently 'eaten into' by the over-run in the shoot or the edit (the most common excuse for the paltry fee).”

“I think directors probably need more education in the role of music in media productions, and we need more ways of establishing contacts between composers and media professionals.”

“Producers don't really understand the cost of recording quality music. Working as a composer for the domestic market is not viable when budgets are so low and yet composers are expected to forfeit our copyrights to production companies along with publishing interests.”

“I would love to do much more. It's getting into the inner circle that is the problem.”

“I would love to see some kind of grant system or incentive scheme for advertisers and film makers to commission original music.”

“I am never taken as seriously or treated as professionally or with as much respect on the job from Irish producers as internationally - in particular Irish companies never seem as willing to pay promptly and sometimes not to the extent discussed verbally.”

“Although technology has clearly developed to allow for the creation of highly professional work, there is a strong lack of appreciation of the 'human performance' element required in executing a score that contains the authenticity the project requires.”

“Irish productions will use international composers ahead of Irish composers in spite of skills.”

6.2 SCREEN COMPOSERS: SECTOR OVERVIEW

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.

Screen composers service the audiovisual industry, and are a key creative talent group in media content production, creating an element which has a unique value and creates an economic return through its intellectual property. The scale of music for screen projects varies according to size and budgets of productions, from the epic soundtrack with full orchestra performance to a single composer delivering a computer-generated soundtrack.

The market for composed music for screen includes film, TV, advertising, video games and multi-media productions. Composing for screen sits between two creative industries of music and audiovisual.

6.3 MARKET AND INDUSTRY FACTORS

Situated between both music and audiovisual industries, composing for screen is affected by multi-market conditions, with greater reliance on the audiovisual industry for growth and economic return. 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 sector.

The preliminary findings of the Olsberg SPI report note that: ***“The international market for Irish produced content has increased substantially with a growing capacity for significant further growth.”***

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.

Following the downturn in revenue from music performance and a growth in the level and demand for audiovisual content, composing for screen has become a more attractive area for anyone looking for a career in music.

Moreover, the physical barriers to entry for a composer have become lower with the cost of setting up a small home pro-studio operation coming in at a couple of thousand Euro rather than the tens of thousands it would have cost twenty years ago. Finally, the

marketplace has become more globalised with online capabilities meaning composers can now find and reach potential clients anywhere.

An over-supply of lower level entry composers, however, along with the depression of the overall music industry and the general economic recession, have all contributed to a worldwide decrease in fees for composed music over the past decade. This is seen across all media and genres. The value attached to original compositions is seen to have fallen and composers are being asked to cede more of their music rights to producers, who are becoming more educated in the potential earnings from intellectual property rights, including music royalties.

Digital disruption is impacting this sector through the effects on the wider audiovisual and music industries. Royalties are considerably lower from digital distribution of film/TV content across online platforms. Likewise, trends in advertising - moving more work to online media in place of traditional platforms - is leading to lower rates for composers. Development of new technologies and online marketplaces has led to a growth in the supply of library music which has resulted in an improvement in quality and functionality for users.

While the barriers to entry may be reducing, the barriers to growth and career progression are high and increasingly so. The AV industry is risk averse and composers find it difficult to establish a profile. Career development is reliant on informal channels, for example opportunities arising through existing relationships with directors, or finding a producer willing to take a risk.

6.4 SECURING THE SECTOR

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. Looking at the UK, Canada, New Zealand and Australia, Ireland is one of the only territories not to explicitly deal with the hiring of Irish/EU composers within international co-production agreements which seek to access public funded financial support or tax incentives. It is also the only territory that does not have a dedicated professional body for screen composers.

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.

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.



7. COMPOSERS FOR SCREEN IN IRELAND

Notable Irish composers working in the audiovisual industry currently include:

- **Stephen Rennicks**, creator of the score for the Oscar nominated '**Room**', and the award winning co-production '**Viva**'.
- LA based Irish composer, **Brian Byrne** who composed and orchestrated the music for '**Albert Nobbs**' featuring Golden Globe nominated song '**Lay Your Head Down**', sung by **Sinead O' Connor** and an orchestral performance by the **RTÉ Concert Orchestra**.
- **Eimear Noone**, the world-renowned conductor and orchestrator who has worked on some of the biggest budget video games including '**World of Warcraft**', '**Starcraft II**' and '**Zelda**'.
- '**Love/Hate**' and '**The Young Offenders**' composer **Ray Harman**.
- Irish music band **Kíla** who performed and co-composed the traditional soundtrack to Oscar nominated animation films '**Secret of Kells**' and '**Song of the Sea**'.
- **Darren Hendley** who has contributed to music for hundreds of children's animation programmes.
- Irish composer **Stephen McKeon**, is making waves with music on high profile TV show's '**Poirot**', '**Black Mirror**', '**Jack Taylor**' and '**Primeval**' as well as international animation hits including '**Norm of the North**'.
- Working composers **Niall Byrne**, **Michael Fleming**, **Dean Valentine**, **Brian Crosby**, **Hugh Drumm**, **Steven Lynch** and **John Gerald Walshe** have all contributed to multiple domestic and international, film, TV and commercial productions.

7.1 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.

- Males outnumber females at a ratio of 7 to 1;
- 77% were aged over 35 with the biggest grouping at 41% between 35-44 years;
- 61% are based in Dublin with a further 10% elsewhere in Leinster, and Connacht having twice as many as Munster and Ulster which shows a regional distribution in line with other aspects of the audiovisual industry.

The majority of composers researched work alone, either from home studios or, to a much lesser extent, from a separate studio space. Composers operate mainly as sole traders, with a small number of those surveyed holding limited companies.

Irish composers work on a variety of productions, with the greatest number having completed short films followed by composing for advertising. Composing for video games has the least transference to other types of productions as this area is seen as quite

specialised, requiring additional skills in coding and game development. Only a minority of Irish composers have engaged in work for video or animation. Composers who have worked in animation tend to have been most prolific, demonstrating a trend towards animation studios working repeatedly with a small number of composers.

Advertising campaigns are seen to be an important source of income for composers working in the sector, and nearly all of the composers surveyed working solely within this area have completed multiple advertising jobs.

7.2 COMPOSING FOR SCREEN SKILLSET

The skills involved in composing for screen go well beyond musical creation. A composer for screen must have the capacity to work in close collaboration with all other elements and contributors to the project to ensure the best outcome.

Core requirements are identified as follows:

- Knowledge of music composition / editing software and hardware which is compatible to industry norms;
- Capacity to create and record music, including hiring and supervising any additional performers;
- Capacity to orchestrate a score and access to an orchestra if required;
- Strong communication skills to interpret input from directors (often delivered using non-musical terminology) and translate this into a score which meets the creative vision;
- Strong time management and project management skills in order to deliver to tight deadlines;
- Flexible and capacity to handle a fast-paced, often high-pressure, working environment;
- Commercial acumen to negotiate and budget in order to maximise what can be delivered within a production budget, as well as the ability to manage their own business affairs, whether operating as a sole trader or running a company.

7.3 INCOME

Composers for screen earn income through fees for music compositions and through royalty income earned from the exploitation of their music rights, otherwise known as 'backend income'. Backend income is earned from the copyright or intellectual property element, from the broadcast or performance and synchronisation of music within a production. This is collected and distributed via performance rights collection organisations of whom composers must be a registered member.

Fees for hiring composers differ widely across media and classification of production, the amount of music required and the profile of the composer. Most composers researched earn under €20,000 per annum from their music compositions. In some cases, income can reach six figures annually, generally in a situation where a composer is engaged in a mix of domestic and internationally sourced work. Composers earning at this level in Ireland, however, are very much in the minority.

Costs relating to the creation of music include:

- capital investment in purchasing and updating technology and studio equipment;
- overheads involved in running a studio;
- fixed costs related to individual music creation, including hiring performers and equipment.

Of those interviewed, 79% said they hire performers when composing, with some absorbing this cost themselves.

7.4 EDUCATION AND TRAINING

Composers for screen enter the sector in a variety of ways, resulting in a wide spectrum of skillsets. Most composers are self-taught. Some have come from the contemporary performance music sector and some are classically trained musicians. Others, such as those in gaming, may enter from first being involved in audiovisual production.

There has been a rise internationally in third level and private colleges supplying full-time professional training, specific to composing for visual media. In Ireland, Pulse College in association with DIT offers a full-time 1 year MA course at a cost of €28,000, based in Windmill Lane studios. This course, which has a mainly international student profile, includes tuition in music composition, technology and recording, arrangement, orchestration and business training. Of the Irish composers researched for this study, however, over half of respondents have no formal training.

In terms of professional development training, Screen Training Ireland in collaboration with IMRO run a number of dedicated music for screen courses, workshop events and panels annually. Of particular note is the annual IMRO/RTÉ Scoring for Film Programme which brings together four short film makers and composers who create a score to be performed by the RTÉ Concert Orchestra. There are also several day or half day workshops aimed at directors, producers and composers and focused on creative usage of music in film. However, it is noted that these offerings tend to be under-represented by professionals from the audiovisual side. This points to the need to look at mechanisms to enhance integration between these groups.

Training in business acumen was identified by the composers surveyed as the greatest need for composers. Currently, there are no courses offered specifically in this area.

7.5 PROFESSIONAL REPRESENTATION

INDUSTRY MEMBERSHIPS

None of the composers interviewed were found to be a member of a musicians' union such as the musicians' branch of Irish trade union SIPTU. Just two respondents listed memberships with IASCA (the Irish Association of Songwriters, Composers and Authors); two cited memberships with CMC (the Contemporary Music Centre); and a number mentioned non-domestic organisations. With regard to performing rights organisations (PROs), 94% of respondents are members of IMRO (the Irish Music Rights Organisation), with the remainder aligned to UK or US based PROs. **72% believe there is a need for a professional organisation to represent screen composers.**

AGENTS

Agents source work for a composer in addition to negotiating fees and contracts. Ideally, they should also orchestrate networking opportunities for composers to drive new business.

Of the composers interviewed:

- 22% are signed to agents based outside of Ireland
- 11% are signed to Irish agents
- 47% said they did not have an agent but would like to attract one
- 22% did not believe they have a current need for an agent.

PUBLISHERS

Publishers administer rights in return for royalties from the copyright of original music. Their responsibility is to identify opportunities to exploit compositions and to create new opportunities for the music creators. An active domestic music publishing sector is crucial to retain revenue in Ireland and generate more opportunities for Irish composers.

- 41% of respondents said that their work remains unpublished
- 18% have set up their own company to self-publish
- 15% are signed exclusively to an independent Irish based publisher
- 9% are signed to an independent publisher based outside of Ireland
- 9% are signed to a major label publisher
- 12% have signed non-exclusive deals with independent publishers outside of Ireland and 3% non-exclusive deal with independent Irish publisher.



7.6 DIRECTORS INPUT: AN INSIGHT INTO CREATIVE COLLABORATION

A director will dictate a musical identity or narrative for a production, in line with the other narrative elements. The level of involvement by directors in the musical process thereafter will vary.

Previous working relationships factor very highly in many directors' choice of composer, with a mutual language already developed and an established working rapport. There are significant benefits seen in returning to and developing upon an existing creative relationship, as is the case in the collaboration between Oscar nominated director Lenny Abrahamson, producer Ed Guiney and composer Stephen Rennicks.

This team have worked on multiple film and TV productions together, including 'Adam and Paul', 'Garage', 'What Richard Did', 'Frank' and Oscar winning 'Room'. The value Lenny ranks in having Stephen on board as a composer is such that he will fight to retain and continue to have Stephen compose where possible. The same can be said about the sound and editing team. Lenny believes in the quality of skills and talent in Ireland at post production level and music is on par with any international standard.

Lenny values Stephen's skills highly, his capacity to not only create music but his sensitivity to the overall project's needs including his ability to say when he thinks music should not be present. The development of this collaboration has also been greatly facilitated

by having a very creatively minded producer on board, putting the creative needs of the project to the fore, and protecting it from outside pressure brought with international financing including what composer to hire for a project.

Their collaboration has resulted in strong musical scores, which work well across narratives and styles. For the film 'Frank', where the music required writing original tracks for a band, there was the option to work with some well-known bands whom Lenny respected, however ultimately the quality of the collaborative connection with Stephen outweighed this alternative and Stephen was brought on board to compose and write the band songs with Lenny in addition to scoring the soundtrack. This example of director/composer collaboration was also seen in last year's domestic hit, 'The Young Offenders', with director Peter Foote writing the lyrics to one of the tracks with composer Ray Harman.

From the composer side, Stephen Rennicks sees this creative relationship as a contributing reason for his career as a composer for screen. Trained as an architect, it was not in the original plan, but with a love and talent for music creation and importantly access to opportunities for work, he developed a full-time career in the area. Rennicks gained experience in advertising, features and drama. Working with Lenny and the international recognition these projects have accrued culminating in the Oscar success of 'Room' has helped advance Stephen's career and visibility internationally to the stage where he has attracted LA representation and is receiving work offers from big budget productions, and co-productions locally. It also allowed him to the opportunity of working with the RTÉ Concert Orchestra for the score of 'Room', an experience he greatly enjoyed and has left him with high praise for both the quality of the orchestra and the top-class studio facilities available in RTÉ's Donnybrook headquarters.

Stephen's success and visibility, along with other rising Irish composers, has the potential to contribute to attracting international attention to the quality that can be delivered by the wider group of Irish based composers and performers and should be capitalised upon by the sector. There is a vine like quality to how creative relationships and collaborations within audiovisual production can provide opportunities across the creative areas and promote Ireland as a convincing proposition as a location and supplier for both production and post production at an international level. This should be supported at industry and public funding level in both audiovisual and music, an ethos that the newly formed Creative Ireland appears to support.

7.7 ATTRACTING NEW WORK

Access to work is crucial in developing a composer's career, growing their list of credits and opening up co-composing opportunities. To compete effectively, composers need to be visible to audiovisual producers and possess the skills and channels to promote themselves in the specific language of the audiovisual industry.

Beyond finding work through existing relationships, the capacity to attract new work through self-promotion and networking is vital for a composer, as well as the ability to pitch compositions effectively. Websites, IMDB profiles and social media all play an important part in attracting new work.

In terms of promotion, the Irish music for screen sector is fragmented. A definitive Irish Composers for Screen database is not available online and producers report difficulties in finding out about new composers or existing talent, leaving them to rely on informal routes and word of mouth. In undertaking this study, it was difficult to establish a list of the composers operating in the sector, and at what level. This is in contrast to current practice in other territories.

7.8 FUNDERS

The Irish audiovisual film and TV content production industry is largely reliant on public funding. An examination is merited to understand how this trickles down to composers and to assess funders' views of this sector. This study did not identify written policies or strategies regarding spend on music or hiring of personnel from any agencies involved in funding the audiovisual industry currently.

The Irish Film Board (IFB) has a mechanism in place to connect producers with composers and a number of the respondents in this study noted having found work through this path. The IFB stated that it has a policy of supporting the employment of Irish creative talent for Irish projects in receipt of IFB funding and that the organisation will assist in sourcing Irish crew for international co-productions.

The number of Broadcasting Authority of Ireland (BAI) funded and broadcaster commissioned TV productions that either do not have a composer contracted for the project, or have engaged a composer from outside of Ireland, is a concern and requires further research. BAI sound and vision funding applications do not require information on whether a composer is being engaged for a project. According to some of the producers interviewed, however, TV productions relying solely on BAI funding can rarely afford to commission an original score and either rely on using the broadcaster blanket licence or production library music. Composers note considerable frustration in relation to this point as they would relish the opportunity for more work in this area. Similarly, it is frustrating for producers and directors who cite original score as preferred to library.

Project funders are seen to be risk averse and inclined to hire composers who have previous credits. While this is understandable from a financing point of view, it creates barriers to entry and growth for composers and can result in talent from abroad being favoured. No evidence exists of communication channels between the domestic composing sector and funders/ broadcasters currently, and this presents an opportunity for the establishment of a platform to allow composers to promote their work and which would act as a resource to funders and broadcasters seeking project partners.

The existing level of broadcaster commissioned drama was discussed at a recent Creative Ireland Audiovisual event, where Dee Forbes, Director General of RTÉ, talked about the need to increase the number of domestically produced drama projects, increasing the funding for this, and ensuring these productions are used as vehicles to “*nurture domestic creative talent*”.

While the talent referred to here is likely to be writers and directors in the first instance, publicly funded and broadcaster commissioned TV productions, also present opportunities to nurture Irish composer talent.

‘Striking Out’, the RTÉ commissioned drama series, which is examined in the commercial music section of this report and commended for its strong usage of Irish music, hired a UK composer, brought on by the Swedish director. Similarly, UK composers were engaged for the BBC/ RTE co-production ‘Redwater’ and TV3’s landmark drama series ‘Redrock’. To have high-profile drama work such as this, which is funded or part funded by Irish bodies, turning to international composers is worrying and requires further investigation. This is particularly important given that the talent and skill set is domestically available, according to respondents in this study. The use of international composers also represents a loss to the Irish economy from direct employment and intellectual property rights earnings.

7.9 BUDGETING FOR COMPOSED MUSIC

Composers researched as part of this study repeatedly cited under-budgeting for music as one of their biggest frustrations with the domestic industry. They also noted a lack of negotiating power when agreeing contracts and believe there is a ‘take it or leave it’ attitude among some producers. The standard composer contract utilised in Ireland is a ‘full package deal’, meaning that the fee agreed with the composer will cover all costs associated with creating and delivering the music, including hiring performers and recordings. In some cases, they may also be asked to licence additional tracks from their budget. What is left after the costs constitutes the composer’s fee, which in some cases can be negligible. This fact, as well as the tendency of composers to hire performers and spend on music services from their budget, should be recognised at public funding level when considering the value of spend on composers and how it translates to the wider music industry.

Clear and transparent music pricing for audiovisual funders and producers is required, along with greater clarity on the value of spend in this area to the overall production and the negative effects of under-funding music.

Some composers, eager to gain experience, report working at a loss or for rates well below the minimum wage. Some respondents cited receiving sums as low as €2,000 for full feature film scores, while payments as low as €500 were received by some for a TV series episode. The sector should collectively develop pricing guidelines that are communicable to the audiovisual production customers and their funders.

A perception also exists across the sector, as reported by composers, publishers and music supervisors, that where a UK or other international composer is brought into the project, producers will expect to pay more than would be paid to an Irish composer of similar status and experience. This perception, whether accurate or not, is unhealthy for the market and should be addressed.

Professional screen composer organisations in the UK, Canada, New Zealand and Australia all help develop and advise on rates for composing and promote and disseminate this to audiovisual funders and industry. In addition, a number of bodies have conducted research on fees received in order to offer baseline guides and measure market changes.

7.10 COMPOSER CONTRACTS AND RIGHTS

Composer contracts can be complex legal documents and composers require access to training or professional guidance to help best represent themselves. Composer guilds in other territories have guide contracts available and will provide support and advice to their members.

Composers surveyed for this report cite increasing demands in terms of usage rights without relative fee increases as a growing trend in both film/TV and advertising contracts. The producer may seek to retain publishing rights or negotiate a share in them, thereby entitling them to earn backend income from royalties. This is particularly common in animation where royalty revenue can be highest. The principle of retaining publishing rights should be considered during the negotiation of the composer's upfront fee; the higher the fee, the more share in rights the producer can negotiate and vice versa. A low upfront fee should equate to a composer keeping all rights.

Audiovisual companies contract publishers to administer their share of the music rights. There are reports of international publishers becoming more active in the Irish market as they seek to work with production companies and establish relationships. Publishers will then pitch their catalogue of composers for future work. The possibility of an advance payment from the publisher to support the music budget also arises.

7.11 MUSIC PUBLISHING RIGHTS IN FILM AND TV PRODUCTIONS

Music creation derives a value from copyright, which earns a royalty income based on the public distribution of the audiovisual production, of which the music is an element. As distribution mediums and territories have increased, so too has the international return on music rights. This is evident in IMRO members' increased international returns in recent years.

Music rights are divided into the composer or author's share and a publishing share. Audiovisual producers may negotiate to retain the publishing share of the copyright, thereby entitling them to 50% of the backend revenue from the exploitation of the copyright. In recent years, producers are increasingly seeking to retain these rights in composer contracts and contracting music publishers to administer their rights on a commission basis.

From an international perspective, there has been growth in the number of music publishers seeking this classification of work and enticing audiovisual companies with offers of funding or advances for music budgets.

Irish music publishers report increased activity from larger international publishers in the Irish marketplace in recent years. Aside from the loss of revenue for Irish publishers, a concern associated with this trend is that as international publishers establish relationships with Irish production companies, they will seek to bring international composers into Ireland for project opportunities. Where a production company has contracted an international publisher, who is offering assistance in music budget funding, is an added incentive to hire a composer represented by that publisher. Supports are required to assist local publishers and music supervisors to enhance their offering to compete with larger international competitors.

While it may be difficult for domestic publishers to compete effectively against large international publishers present in multiple territories, this is an area that should be considered when looking at how music is funded in Irish audiovisual productions.

7.12 INTERNATIONAL CO-PRODUCTIONS

Ireland boasts a strong and growing co-production sector, facilitated by the Irish Film Board, domestic broadcasters, BAI and part-funding via Section 481. There are a number of international treaties in place to facilitate European co-production with Australia, New Zealand, South Africa and Canada.

These co-production agreements were established to:

- facilitate cultural and creative exchange between the co-production countries;
- allow the co-production countries to share the risk and cost of production;
- increase the output of high quality productions.

“To qualify as an official co-production under these agreements, there must be a co-producer in each country and there must be a balance between the Irish financial and creative contribution.” – Source: Irish Film Board

On closer examination, Irish music creators are not faring so well from the co-production sector. An examination of Irish-Canadian productions reveals that within the past ten years, only two of 11 productions had Irish composers attached to the project. (One of these productions is the Oscar nominated film ‘Room’). Greater emphasis is placed on attracting the principle photography element to Ireland. This means that the post production spend, and music spend, is likely to go to the partner territory. This is true of the major TV productions that Ireland has attracted in recent years including ‘Peaky Blinders’, ‘Vikings’ and ‘Penny Dreadful’. The absence of Irish composing talent and performers involved in these productions is a lost opportunity and points to an urgent need to enhance the promotion of the domestic music for screen sector.

A similar trend is seen in the animation sector where, as far as possible, Irish spend will be on production of animation to help support the growing studios here. The result in the case of productions that are co-financed is that music and post production spend will nearly always leave the country.

Section 481 is a tax credit (32%) which is used to part finance creation of film and TV content in Ireland, a mechanism which attracts many co-productions to Ireland.

The absence of a reference to music creation or performance within the guidelines, or in the cultural test for Section 481, is highlighted in the recommendations from the IMRO/Deloitte report, '[The Socio-Economic Contribution of Music to the Irish Economy](#)', published in 2015. The report recommended that "*Film tax relief guidelines should be amended to encourage the engagement of Irish/EU based music components financed under the scheme.*"

While some respondents in this study felt that the culture test here is sufficiently open to support hiring composer talent, without an overt mention to the music component, and where the partner territory awards 'points' for hiring a composer (as is the case for Canada, New Zealand and the UK), it appears likely that the music element will go to the partner country. This represents a real and significant loss to Irish composers and music production in Ireland, through loss of employment opportunities for composers, music performers and other services associated with music production. Furthermore, there is a corresponding impact on the Irish economy through the loss of intellectual property earnings derived from music.

An analysis is required to assess what opportunities exist to attract more of the music component in audiovisual creation to Ireland (or the EU), by presenting not only the skill sets of composers and music creators but the full offering of performers, including orchestras, sound recordists and music engineers which exist in Ireland.

The delivery of the soundtrack for 'Room' and 'Albert Nobbs' amongst others, which as well as using Irish composers, included performances by the RTÉ Concert Orchestra, are indicative of the capacity and talent within Ireland to deliver high quality music for audiovisual. The RTÉ Concert Orchestra offers a full buy out at competitive rates, particularly where Section 481 financing can be used. The Orchestra boasts world class performers, high-quality instruments, and access to a state-of-the-art recording facility.

This talent pool, in conjunction with the availability of financing through Section 481, positions Ireland as a highly competitive location for delivering the full music component for film. Surprisingly, however, there is little evidence of international promotion of the sector. An exploration of international promotional opportunities for Ireland's music for screen offering, in line with other post production services; visual FX and sound, to present a complete post production package, is warranted.

While integrating music into the overall audiovisual industry is the first step, establishing ties to post-production and positioning music as part of a post-production offering also presents opportunities to attract international work. The more exposure Irish composers and music performers have to bigger budget international work, the more they can develop their individual careers, which benefits the sector overall and the Irish economy.

The possibility of creating collaborations between Irish and international composers through international co-productions is an area that could be further explored and has the potential to offer training and development opportunities for Irish musicians.

For the Oscar nominated 'Secret of Kells' and 'Song of the Sea', Irish musicians Kíla worked with internationally renowned French film composer Bruno Coulais to create the soundtrack. As an international co-production with the majority of Irish spend going on the production of the animation, spend on the music component had to be channelled to France as a partner territory. The Irish producer and director were keen to involve Irish band Kíla, and have traditional Irish instrumentation in the score. They introduced Kíla to composer Bruno Coulais who initially brought them on as performers. Over the course of the project the relationship grew to include co-writing collaborations. This in turn led to a greater level of collaboration on the follow-up and also the Oscar nominated production 'Song of the Sea'. This year Kíla are beginning work with Bruno Coulais on a new French based production, work they may not have attracted without the introduction through the two Cartoon Salon animations.

The Kíla experience is a model that could be replicated to bring Irish performers and musicians into contact with partner territory composers who are brought on to score international co-productions being shot in Ireland. Using traditional Irish instrumentation and players helps evoke 'Irishness' in the score, something Canadian composer for the film 'Brooklyn', Michael Brook, talked about in an interview in Hollywood Reporter. *"We wanted to give a little bit of a sense of place between Ireland and America, but in a subtle way. We didn't want to do standard Irish or Gershwin-y type tunes. But we wanted to give a nod towards those things, so there's a little bit of mandolin in many of the Irish sections, and there's a little bit of clarinet or upright bass in the American parts."*

The authenticity of films based on an Irish story, or placed in an Irish location, can be significantly enhanced through music that is delivered by an Irish composer, or Irish performers.

The fact that major productions are happening on our doorstep and there is no concerted effort to create opportunities for composers, performers, publishers, supervisors and additional music for screen personnel based here, when there is evidence that opportunities could exist, represents a lost opportunity.



8. ORIGINAL SCORE FOR ADVERTISEMENTS

Composing for advertising is seen as a means of entry into the sector but advertising revenue also provides vital income for established composers. Composers may enjoy the creative challenge and focus of working on a drama or feature film more, but they are certainly conscious of the value of the advertising market.

Having a composer create music specific to a campaign allows the music to react to the creative. Music can strengthen the visual message. For a typical TV/radio campaign, advertisers expect to pay somewhere between €3,000 – €15,000 for original music, with the profile of the composer and the size of the campaign influencing overall spend.

Advertisers, producers and directors use existing relationships when looking for composed work, but respondents in this study noted that they are always interested to hear from new composers. Ireland is seen to have a good offering in high quality composers working in this field, and Irish composers appear to be able to serve the majority of the market needs.

Composers will be invited to pitch to a creative spec. The pitch will be a piece of music which can then be completed to higher quality - if chosen for the ad. This allows new composers entry with little risk to the client, compared to TV and film where clients feel bringing on an unknown composer with few credits can be very risky.

Traditionally, the pitch process is limited to a relatively small number of invited composers, with a nominal fee of €500 or less paid to those that are unsuccessful. This is intended to cover the cost of creating the music. As one composer interviewed for this study remarked, however, preparing a pitch can be as much work as delivering the job so it is important that composers have a reasonable chance of success if selected to participate, and that they are adequately remunerated for their efforts if unsuccessful.

With more composers operating in the market and online opportunities allowing ease of entry to international composers, there has been a notable increase in the number of composers being invited to participate in the pitch process, with no payment for work that does not progress to campaign inclusion. This is frustrating composers and making working in advertising less attractive.

This is evident internationally also; *“The basic economies of over-supply and the availability of quality musical work for free critically injured the industry. The desperate move to offer work for free meant it became expected in some cases. Some renowned commissioners of ad music refused to pay for music demos. This drove the risk for the commissioners to almost zero. It has become easy to get multiple music pitches for a single project as a strategy to ensure that someone nails the brief. It also allowed commissioners to get compositions made as a back-up plan for their project, whilst attempting to clear the use of commercial music (e.g. a famous track).”*Source: **Discordant: on the state of music in advertising – Paul Reynolds, Creative Review Jan 2016.**

Similar to other areas of music composition, licensing and composing fees are falling, giving rise to a perceived threat to the value of music. Composers are being asked to negotiate on rights and to become involved in unpaid pitching processes with little clarity on their chances of winning the work.



8.1 COMPOSING FOR GAMES

The gaming industry in Ireland is still relatively fledgling, with increased Government focus and investment in this area expected. Demand for music from this industry is driven by larger international development companies who have established a presence in Ireland, and from the domestic game development industry.

Music tends to be sourced from suppliers who have the capacity to also deliver sound effects and dialogue and have the necessary coding skills to incorporate the sound element into the game play. Composers tend to be embedded in the gaming industry, in that they also have an interest in game development and may even have transitioned from that area. A number of diploma and certificate level courses for composing for games exist, aiming to bridge the skill gap between music and gaming.

This study finds that larger international game developers with a presence in Ireland are currently not sourcing music in Ireland but there is potential to attract some of this work. Internationally renowned composer and conductor Eimear Noone, who has worked on some of the most successful games in the world, is an excellent ambassador in this sector. Big budget games, similar to big budget films, use powerful, often orchestrated scores.

9. COMMERCIAL TRACKS PLACEMENT: SYNC OPPORTUNITIES IN FILM AND TV

A 'sync' is the inclusion of a piece of music in a production, where the music is synchronised within visual media. A commercial track is one that is pre-existing and has been released commercially, example: using a Hozier track playing on a car radio in a TV drama.

The usage of any commercial track as a sync, where the existing recording is played within the audio-visual, will involve the clearing of both the composition rights and the sound recording rights. Rights owners can be multiple and may include a mix of music publishers, record labels and artists. The market for sync opportunities has seen continued growth over the past decade in contrast to the decline in sales of physical recorded music. This represents an important aspect in realising the potential of the intellectual property within recorded music for the creators and rights owners. The growth in audiovisual content distribution has increased demand for all types of content including music, meaning the return from royalty revenues for syncs has also increased.

9.1 PRICING

Pricing for licencing music is nuanced and complex, with fees negotiated per track and per usage. Price will be based on the type of usage, e.g. played over opening or closing title will command a higher fee, the duration of the usage, licence length and scale of territories and media distribution (cinema, DVD, TV, online, video on demand services). Price will also be negotiated based on the existing commercial success of track, with an international top ten hit commanding well into the tens of thousands to licence, while an unknown independent track may be licenced for less than a thousand euro.

9.2 LICENCING

Licences are negotiated on term of usage, territories for exploitation and distribution media and tracks can be licenced for some or part of the above for specific amounts, i.e. a well-known track can be licensed for a much smaller fee, for festival only distribution in limited territories for 1 year, to allow a film to be shown at festivals where upon securing distribution deals and further funding will allow the producers to buy more options for the track. Price is not the only factor in determining whether a production can obtain the rights to a track, the copyright holder may refuse to licence their music to a production for any reason or a legal dispute over title of ownership may make it impossible to licence.

9.3 MUSIC SUPERVISORS

Having access to the services of a music supervisor or publisher is of significant benefit to a production, bringing a wealth of creative knowledge of what music is available and the skills to research, find and negotiate with rights holders. These skills are essential for domestic music creators who will have limited visibility to music supervisors based outside of Ireland. The cost of bringing on a music supervisor is seen as high, but the value that a music supervisor brings offsets this initial expense and deliver savings down the line. A surge in creative music supervision brought about with the expansion of TV drama and mini-series has seen a growth in music opportunities for existing and new bands across territories.

9.4 BENEFITS TO MUSIC CREATORS

Irish music creators who have their track used in an audiovisual context such as film/TV production, advertisement or game, benefit financially, professionally, and in promotional terms.

9.5 REVENUE SOURCE

For Irish music creators, as with their international contemporaries, sync opportunities for their music have become more important as a potential revenue stream. A sync usage will bring not only the possibility of an initial licencing fee; it delivers back-end performance royalties upon each broadcast. This revenue opportunity also extends to the master rights owner where this is a record label and to the publishers, if they exist as separate entities, for both the writer and the master side.

9.6 CAREER DEVELOPMENT OPPORTUNITIES

Attracting a music sync can help an artist attract better professional support; if an agent, label or publisher sees a musician attracting audiovisual usages they will be more interested in signing or representing the artist, and their commercial potential will grow, which in turn may attract more investment and support for their career.

9.7 EXPOSURE

Having your music used can also provide opportunities for musicians to connect with existing and potential audiences, with music consumption becoming as much a visual as an aural experience with the growth in online distribution channels. A feature usage; where the duration of the music is over 60secs, is not competing with too much dialogue or additional sounds and is played over an important narrative transition i.e. the love scene montage or the end of programme action into end titles can provide breakthrough opportunities for artists and be very impactful. The usage of Damien Rice's song Blowers Daughter in the movie 'Closer' is a good example of this.

Free Music – Exposure Kills...

Sometimes content makers can use the opportunity of 'exposure' to look to music creators to provide their music without fee in return for exposure. This represents an unfair value exchange for the composer. Musicians, publishers and music supervisors interviewed for this study noted this as an ongoing issue in the domestic market. The idea that music can be obtained for free or an unwillingness to recognise the value of a financial outlay on music appears to be widespread. This study reveals examples of music creators providing music for free, and even stories of record labels paying for sync opportunities in the US.

9.8 FILM

No data was identified on the extent to which the domestic film industry uses Irish music in syncs, or the value this represents to Irish music creators. There is no organisation or body that tracks this data and similarly, there is no representative body promoting music usages to industry or to the public.

Licencing of tracks is often regarded as prohibitively expensive for small budget films and ruled out at the beginning of production on that basis however many films will find they require placed tracks to complement score by the time they get to edit. This can mean there is little or no budget left and time is limited to source and licence tracks.

This study finds that when selecting music for sync, the preference can be towards established companies and well-known tracks.

Average figures for an Irish film sync with an overall production budget of €1,000,000 or less would range between zero fee to €500 per side for an unsigned artist, and for a represented artist with publisher and/ or a record label between €1,500 - €3,000 per side. If the artist is represented by a UK based publisher the fee will be quoted in sterling. Back-end royalty income is based on the level of distribution of the final film, across all media. Online or video on demand film and TV distributors such as Netflix are a relatively new distribution path following theatrical release, with royalty payments per view very small compared to traditional media such as TV broadcast. There are relatively low-income expectations from a sync in a low budget Irish film with limited distribution expectation.

BEING VISIBLE

For a track to be considered it must be heard or known about by the director or, have the capacity to come in contact with them. In the cases where there is a music supervisor they will bring music suggestions to the director based on creative needs and the music choice of director and they can help disseminate the usage requirement and offer a much wider choice.

In the absence of a music supervisor music can arrive from various sources, it will be suggested, by the producer, editor, or a composer, if there is one on board, will often have input into additional music.



9.9 PROFILE: 'A DATE FOR MAD MARY'

The film was released in September 2016 and was a hit both critically and commercially. Directed by Darren Thornton, it won the best feature award (jointly with 'The Young Offenders') at the Galway Film festival and won best feature film at the IFTAS 2017. It is produced by Juliette Bonass and Ed Guiney (Element Pictures) and received funding from IFB and BAI, with TV3 as broadcaster.

The soundtrack featured predominantly Irish music. The music supervisor, Juliet Martin, of Bray based Silverstream Music, was brought on at the script stage in pre-production when funding had been secured. The director had a clear vision of the type of music he wanted and as this was a contemporary story, with a lot of scenes in nightclubs and parties, it was felt placed music was going to be a key production element. In addition, the director wanted to capture the character of Mary through the soundtrack. International acts were initially considered because of the Director's vision, but as a local music supervisor was engaged, ultimately mainly independent Irish artists were used delivering great effect.

9.10 TV USAGES & BROADCASTER BLANKET LICENCE

Music usage within TV content has a slightly different landscape owing mainly to broadcaster influence and availability of blanket licences.

TV blanket licences from IMRO (performing rights), MCPSI (synchronisation rights) and PPI (sound recording rights) allow broadcasters to use commercial music within any production, commissioned or funded by them, for broadcast on their TV channels, under a one off annual licence. This gives the content creator access to a vast international catalogue of music which can be placed within a programme without having to separately licence via the music copyright owners.

Broadcasters can extend the licence to Independent Production Companies for content created for their channel. Which productions the blanket licence is extended to is at the discretion of the broadcaster. In general, only content which is 50% or more funded by the broadcaster, or directly commissioned by the broadcaster, can avail of a blanket licence. In the past, when the majority of the content for a domestic broadcaster was commissioned directly or produced in-house and the broadcaster retained the copyright of the production with a smaller market for international distribution, blanket licence usage was more straightforward.

In recent years, however, with more independent producers creating content and retaining ownership of copyright, BAI funding and multiple opportunities for further distribution, the TV blanket licence landscape has become more varied. In response to this trend, MCPSI now offers blanket synchronisation licences directly to Independent Productions Companies.

Given the territorial mandate of PRO's, blanket licences have traditionally covered broadcasters for music use on its linear channels within its home territory. In general, the performing rights will be covered for exploitation abroad via the network of reciprocal agreements between performing rights societies, however this may not automatically be the case in respect of synchronisation and sound recording rights. This can mean that any further distribution of the content, geographically or via any other media, may require additional licensing.

The internationally successful TV drama production 'LOVE/HATE' used many well-known tracks in all five series broadcast on RTÉ in Ireland using the broadcasters blanket licence. For international distribution, a new version was created which replaced all the profile tracks with production licence music purchased from a UK library. Only Irish music that was easy and affordable to licence for both the synchronisation and sound recording rights remained in the exported version.

All music creators who sign up to IMRO and MCPS assign the right to include their music within these licences, along with most of the world's catalogue of music through the internationally affiliated PRO's. The blanket licence allows for the easy inclusion of music for broadcasters and their content producing partners and undoubtedly means a much greater level of commercial music usage than would exist in its absence, which in turn delivers royalty revenue to the music creators.

The blanket licence should be recognised as a positive and necessary resource serving both music users and creators. The licence supports music usage by removing the barriers associated with licencing usages on an individual basis.

9.11 CONTENT CREATORS

Producers cite a number of obstacles to using commercial Irish music within TV productions. The main one being that the budget does not allow for it, aside from the actual expense there is evidence of an industry perception that licencing music rights will be prohibitively expensive, married with a desire for 'free' music, anything that is not free can be viewed as not cost effective.

In addition to the cost of the licence, the process of clearing tracks separately is seen to be time consuming and labour intensive, particularly when you are dealing with multiple rights owners or the rights owner is not easily identifiable. While independent or unsigned music might be more attractive in terms of cost, it can often be difficult to identify the owner of the music copyright, find their contact information and negotiate a deal. This was cited in an interview with a broadcaster representative around the commissioning of an Irish TV drama a number of years ago. A creative decision was made to use multiple independent Irish tracks from up and coming artists and the process of researching and contacting the correct rights owner was found to be prohibitive for the producers, the broadcaster was able in this instance to access information through radio programmers but it certainly doesn't increase the likelihood of usages if the content creator finds it or perceives it prohibitively difficult to navigate the logistics of the process.

There are opportunities for the music industry to assist in this process. The ownership of tracks can be easily identified within PROs and could be made available on publicly or industry accessible search engines, or with an advertised help line or email contact.

In addition, clear pricing for both customers and suppliers is required to support budgeting and fee negotiation. Currently to clear an independent track for buyout will be priced in the region of €1,000 – €2,000 depending on the usage, opening and closing title usages will command more when purchased through publisher or music supervisor.

The current lack of guidance on pricing makes it challenging for inexperienced negotiators.



‘STRIKING OUT’, TV DRAMA COMMISSION FOR RTÉ 1 AIRED EARLY 2017

‘Striking Out’ was a new 3-part TV drama series commissioned by RTÉ 1 and produced by Blinder Films. The production was funded by RTÉ, BAI, Section 481, DCD Sales/Acorn Media Enterprises.

The story is about a female lawyer based in Dublin city, a contemporary urban story with a female lead.

The music for the series featured a lot of Irish tracks with 24 out of 25 of the usages from Irish talent. The composer for the series was a UK composer who has a similar level experience in drama for TV in the UK and was the preference of the Swedish director of the series. The producers and broadcaster were happy to support the director’s choice in composer and were happy with the results.

RTÉ as the commissioning broadcaster were very involved in the music selection for the series from a creative point of view, seeking to give the series a Dublin soundtrack to help locate it, and to include as many female voices as possible.

Part of the pitch to the BAI for the series was that they would feature a lot of up and coming Irish talent.

Music blogger and reviewer Nialler9 and was brought on as music supervisor through the agency he works with, Avant Music Port along with Willem Bloc. They were given the task of sourcing tracks that suited the directors creative vision and taste and worked to the brief of being up and coming Irish and featuring female voice. As the director is from Sweden she was not familiar with independent Irish music so Nialler9 bridged this gap by learning about the music she liked and finding similar offerings from Irish talent. Each of the episodes ended with a featured usage, Lyra and Róisín O songs were particularly noteworthy with social media and Shazam reactions to their usage.

All the music was licenced for a fee and rights were fully bought out so that the music will travel with the production to international markets and other media formats.

The producers were in the position to avail of the broadcaster's blanket licence for Irish broadcast but as there was already an international distribution deal in place it was more advantageous to use music that could be licenced for buy out.

Both the producer and the broadcaster were very happy with the music side of the production, both the with creative impact and the audience reaction. They reported the experience of working with the music supervisors as very positive and cost effective. The music creators were happy with the results and being able to capitalise on the use of their songs in a production broadcast on primetime TV.

There is a second series in the planning and the same music department line up will be used.

With more and more Irish produced content attracting international distribution, the impact on the Irish landscape is dramatic. A major hit will cost anywhere up to €20,000 to clear for full buy out rights. In this context, the choice to clear outright an up and coming domestic artist becomes much more attractive.

9.12 FUNDERS

Public funders for Irish produced content demonstrate low levels of awareness of the potential positive impacts on Irish music creators and industry of sync opportunities within audiovisual content.

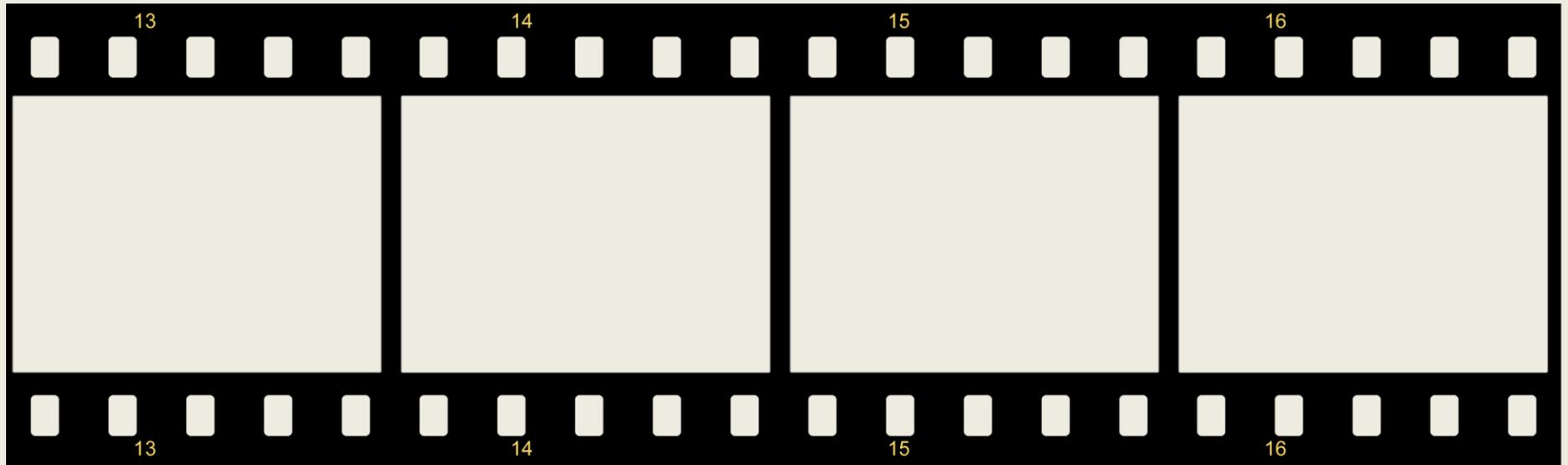
There is a need to promote the value of sync opportunities for existing commercial Irish tracks to both industry and funders, and to promote good practice in licencing of music.

Irish music of all genres carries within it Irish culture and experience. Music has the capacity to tell contemporary and historical stories of society and culture within its lyrics and its tunes.

In addition, by providing funding for, and assistance in, licencing of independent music at the start of a production or creating pathways to easy licencing beyond the blanket licence usage, the music could carry through to export level and travel with the content beyond Ireland. This in turn enables relationships between domestic content creators, music professionals and music creators, which will lead to further collaboration.

The study finds that broadcaster funders and commissioners will offer creative and practical input into the music direction, starting from whether they allow the producer use of their blanket licence. Music choices will and can be vetoed by commissioning editors within broadcasters, and assistance in the form of administrative and financial will also be provided for licencing tracks.

Irish music is seen as creating an Irish soundscape ideal for Irish based documentary and drama. Similar to advertising however, respondents in this study point to the need for the Irish music industry to better promote to ensure it can compete against international music, not only for Irish based productions by also for use in productions which are not distinctly Irish either in setting or characterisation. The Irish music industry is more than capable of meeting the needs of both.



10. THE ROLE OF THE INDUSTRY

Visibility and accessibility of music to audiovisual customers is crucial to drive usage.

The music industry at large must continue to seek to improve audiences and media access for commercial Irish music in order to further the music for screen sector. The greater the reach of a song, the more likely it is to be considered by the audiovisual industry.

In addition, the Irish music industry must take an active role in promoting Ireland's talent and infrastructure in the area of audiovisual music.

All of the producers and directors interviewed for this report expressed interest in receiving more information and links to music and demonstrated low awareness of existing platforms which promote Irish music to industry. International libraries, publishers and labels are more aggressive in proactively reaching out to them. The Irish music industry therefore must endeavour to increase engagement with the audiovisual sector, recognise and react to their needs and proactively encourage and facilitate the use of Irish music.

10.1 TAKING TIPS FROM THE MAJORS:

Promotional strategies which should be considered include:

- Distributing curated playlists of new or thematically linked music such as compilations for St. Patrick's Day, summer themed songs, Christmas playlists etc;
- Highlighting successful usages such as that of The Sultans of Ping in 'Young Offenders';
- Targeting directors, production companies, post production supervisors and editors, broadcasters and funders.

The study finds that there is a keen appetite among the music industry to improve their share of the sync market and to ensure that creators receive a fair return. The lack of an industry wide organisation to represent musicians in this area however is seen as problematic.

Many professionals in the sector are struggling to sustain themselves at and may be also working in other areas of music.

In addition, without funding and support the domestic industry is losing ground to larger international service providers, publishers, libraries and music supervision services that are operating in multiple territories.

Mechanisms should be established to leverage international approaches to music for screen promotion, fair usage, and provision of resources for audiovisual and music stakeholders alike.

First Music Contact and IASCA's existing platforms of breakingtunes.ie and Yangaroo could be expanded, and with assistance from Music from Ireland, these bodies could promote audiovisual specific offerings.

There is a unique language and skillset associated with music usage in audiovisual productions. It is recommended that further research of the potential client base and consultation be undertaken to maximise opportunities in this area.

10.2 MUSIC LIBRARIES AND THE ONLINE REVOLUTION

Producers and directors may turn to music libraries to search for tracks. Online music libraries hold large catalogues of pre-cleared music which are easily searchable. These were traditionally more focused on offering production music, generally instrumental music which could be used in place of score, but more recently there has been an increase in online non-exclusive music agents or platforms which offer music submitted by independent artists at pre-negotiated rates. This allows users to licence a track at a set rate

and in line with the size and type of production, and download a high-quality version of the track, all within minutes. Artists receive between 35-75% of the upfront fee for the usage and any associated back-end royalties derived from the usage.

Producers interviewed for this research source music from libraries and online sync services and said that they tend to re-use the same library if it was a successful experience in the past. Libraries mentioned were US, UK and Scandinavian based, with only a small number of respondents mentioning Irish based libraries. Streamlined service with personalised assistance, size and breadth of catalogue, as well as offerings that enable users to download stems (different versions of the same track), were all cited as elements that made libraries attractive. Producers in both film/TV and advertising production reported frequent sales visits from bigger libraries, mainly based outside of Ireland but with a number having representatives based in Ireland fulltime. This demonstrates the value of the Irish market to libraries.

10.3 PUBLISHERS AND RECORD LABELS

The study found that international publishers and record labels are very proactive in driving growth opportunities. The market is highly competitive and in response, international players will also engage directly with film and TV production companies in the form of sales visits and regular promotional mail outs, promoting new music to film, creating curated playlists based on themes, framing the music in audiovisual specific language and suggesting placements for individual tracks/compilations.

Once a production licences a track, the publisher or label may seek to expand the contract and offer deals to fulfil more of the productions music needs. This appears to be a growing trend where sync revenue has become more important in the decline of traditional music selling, with a number of producers interviewed saying they had worked with record labels in this way - fulfilling all or most their music needs for a production from the one record label's catalogue.

This creates tough competition for smaller local music providers and publishers who may have stretched resources for funding promotional activity.

10.4 ADVERTISING AND VIDEO GAMES

It is often said that music is 50% of the impact of an ad, when a brand finds its musical tone it can really hit home with its customers.

Advertising placements offer some of the most lucrative opportunities for bands and musicians composing for screen. Well known commercial tracks are stated as generally top of the wish list for a brand with the bigger the profile of the song the more impact the ad will have on their audience. Profile tracks can attract significant clearance fees and anything from €20,000 – €60,000 are the norm depending on the size of the media campaign, territories of use, what is available the licence and the available budget.

What music gets used in an advertisement will depend on budget, creative needs, client wishes with trends and fashions within advertising creative also having an impact. “*Brands follow trends and you will hear similar types of music being used in ads over a given time.*” The main decision makers will be production manager and director, with client also having an impact.

Agencies contacted in the writing of this report said that primary factors in using music from Irish bands would be budget, creative requirement and client direction and what music is available. Some clients may ask specifically for music from an Irish band or Irish sounding music, AIB, SuperValu supermarket and Fáilte Ireland are cited as examples of companies who have sought to include up and coming Irish acts within their TV campaigns. Using Irish music particularly in promoting an Irish brand or Ireland as a brand reinforces the “Irishness” of the brand.

Music will be sourced by call outs to music sourcing or supervision services, record labels or if there is a specific piece of music looked for, by going straight to the band or musician.

There is a growing number of agencies or individuals that offer music supervision services operating in Ireland, but it still remains a very underdeveloped area and is over shadowed by bigger more established media agencies in the UK. Similar to hiring a composer, ease of relationship and previous work seems to factor highly on what music sourcing services an agency will go to with more established, bigger UK companies having an advantage over the relatively new services in Ireland.

Supervision services will pitch songs most suited to the creative requirements which can be quite broad to start with. They may start with bands on their own roster, if they carry a roster, but are not limited to that. Once a track is considered negotiations will start around licencing and fees.

Difficulty exists in ascertaining how competitive Irish bands are on the international market or domestically for non-specific Irish music ads made here. A number of publishers contacted in relation to this study felt that Irish music is not considered enough for ads made here where there is not a specified Irish music requirement. This publisher was frustrated with the lack of invitations to pitch for bigger international brands ads and feels that Irish artists should be getting more opportunities. The perception is that Irish music is not as high a value and follows similar frustrations cited in the performance music sector that Irish commercial music in pop and rock genres are not competing well with international acts who have bigger profiles in - music programming for radio. Unless a song has profile then difficulties exist for it to attract attention in the advertising world, unless a song or band has visibility to music sourcing services that advertising agencies use. Similarly they will have difficulty attracting this work. Consequently, the role of the music supervision service is important in creating visibility for Irish music.

WHO'S WHO: MUSIC FOR SCREEN

Music creator is the original author of music, either a single composer or a collective of musicians who have written the music and lyrics, if it is a song, they may or may not also perform the music. The music may previously exist and be used or synchronised ("sync") within some kind of visual media output or be created specifically as original score.

Performers of music are any musicians who perform for soundtrack or commercial track. These will range from a session musician playing an instrument to an orchestra hired to perform an orchestral score.

Composer for screen is a music composer who creates music primarily for use within content created for screen. A composer will create the music and may fulfil any number of other functions including performing it, hiring performers, recording it, orchestrating score, licensing additional music and creating music mix. They are primarily engaged with working in this area, or seek to make a fulltime living from this area.

PRO's – Performing Right Organisations– There are a number of royalties payable on the public performance of copyrighted music, these organisations serve to collect and distribute these royalties at the point of performance, broadcast or mechanical licensing, on behalf of their writer, publisher members and affiliates. The Irish collection bodies are IMRO, MCPS Ireland, PPI and RAAP.

Music publishers look after the exploitation and administration of music rights, on behalf of the music composer, the sound recording (master) owner and anyone else who has a claim on the music rights, including an audiovisual producer.

Music publishers range from major label publishers – BMG, Sony, EMI, Universal through to independent publishers who may work alone or within a larger international group of sub publishers or self-publishing authors and master owners themselves. Publishers work in this area to negotiate and licence terms under which audiovisual producers may use music. They administer royalties on behalf of the rights holders including themselves from the performance and distribution of the music within audiovisual productions.

A publisher may work with a music creator looking for opportunities for them or simply in an administrative capacity. The publisher is assigned the rights for music and collects royalties on these rights.

Music Supervisors are professionals who are employed by an audiovisual production to help create and manage the music element. They will seek to source music which creatively fits, can be licenced within the budget and to the distribution requirements of the production. They will work closely with the director to help fulfil their creative vision for the music and with the producer to ensure that

all the necessary rights are in place. They may be involved in finding and contracting a composer for delivering original score and work with the composer in delivering this and to fill any gaps in the musical needs the score cannot. Music supervisors either work independently or within agencies. They may also be publishers or music agents in addition to music supervisors. They work with producers, advertising agencies and any audiovisual content producers.

Audiovisual content creators are production companies, producers who are involved in developing, funding and producing content for screen.

Creatives are directors, editors, post production supervisors, music editors and sound designers, editors and mixers will all interact with music within an audiovisual production.

PUBLIC FUNDING

The audiovisual industry in Ireland particularly, film and TV content has a number of public funders who will all have some degree of say in the production of content.

Government Departments involved in audiovisual are:

- **Department of Culture, Heritage and the Gaeltacht;** The Arts Council and Irish Film Board are funded by this Department, they also manage the cultural test for Section 481 funding.
- **Department of Communications, Climate Action and the Environment** – funding and regulating public service broadcast.
- **Department of Finance** – administers Section 481 tax incentive for audiovisual production.
- **Irish Film Board** and their training arm, **Screen Training Ireland** are involved in the funding, development and promotion of Irish film and production activities, including investing in talent, creativity and enterprise.

The role of Bord Scannán na hÉireann/the Irish Film Board (IFB) is the national development agency for Irish filmmaking and the Irish film, television and animation industry, investing in talent, creativity and enterprise. The agency supports writers, directors and production companies across these sectors by providing investment loans for the development, production and distribution of film, television and animation projects.

- **BAI Broadcasting Authority of Ireland** – Regulator of broadcasting in Ireland involved in licensing, making codes and rules, and regulating public broadcasters. BAI functions most relevant in relation to this study are; providing and awarding funding for programming relating to Irish culture, heritage and experience under the broadcasting funding scheme and supporting the development of the broadcasting sector through research and training.
- **Arts Council of Ireland** involved in distributing funding for both music and audiovisual content creation.

PROFESSIONAL AND TRAINING BODIES

There are a number of funding, professional and resource organisations operating to service the music industry including:

Music Network

IMRO - Irish Music Rights Organisation

IASCA - Irish Association of Songwriters, Composers and Authors

AIC - Association of Irish Composers

MPAI - Music Publishers Association of Ireland

IRMA - Irish Recorded Music Association

FMC - First Music Contact

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