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Feasibility Study on a Shared Media Production Facility

2024

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1 Introduction

1.1 Context

The Dún Laoghaire Institute of Art, Design & Technology has been part of the N-TUTORR project; a NextGenerationEU funded project supported by the Higher Education Authority (HEA) and coordinated by the Technological Higher Education Association (THEA) in collaboration with 7 Higher Education Institutions across Ireland:

- Atlantic Technological University (ATU);
- Dundalk Institute of Technology (DkIT);
- Dún Laoghaire Institute of Art, Design and Technology (IADT);
- South East Technological University (SETU);
- Munster Technological University (MTU);
- Technological University Dublin (TU Dublin);
- and Technological University of the Shannon: Midlands Midwest (TUS).

The N-TUTORR programme is designed to transform learning, teaching and assessment by focusing on transforming the student experience and developing the capabilities of all staff to address a sustainable pedagogical and learning environment with particular and critical focus on the UN Sustainable Development Goals and equality, diversity and inclusion. The N-TUTORR programme of work is organised around 4 connecting streams, designed to enable the technological sector to achieve the goal of developing and implementing a major programme of work that sets out to transform learning, teaching and assessment by achieving clear sectoral gains and digital transformation through collaborative engagement.
The 4 main work streams are framed as:

- Transform the Student Experience through learner empowerment;
- Transform Learning, Teaching and Assessment by Developing Staff Capabilities;
- Enable Digital Ecosystems to transform Learning, Teaching and Assessment;
- Securing Progress and Sustaining Impact.

Crowe was appointed by IADT to conduct a feasibility study to advise on the initial concept of how best a shared Media Production facility (or facilities) based in Ireland, could support collaboration across the Technological Higher Education sector (with a focus on the N-TUTORR partners) and beyond. We explore whether the facility, as suggested in the brief, “could make a significant and visible impact and the potential technologies used within the facility could have application across multiple disciplines and industries such as animation, live action, health sciences, prototyping, VFX, games, science, XR, architecture and more” and how this could positively impact teaching and learning as well as supporting the development of industry.

1.2 Terms of Reference

Responding to the needs specified within RFT, this report:

- summarises existing feasibility studies re: value and impact of Media Production in Ireland;
- provides advice on the cooperation/joint management arrangements for the facility that could be appropriate for a project of this nature as either:
  - a National facility, or;
  - an educational multi-institutional facility;

- highlights and assesses national and international key comparators;
- identifies a realistic potential impact on education, skills, jobs, investment, etc;
- identifies potential funding sources or partnerships to complement/supplement, or extend any funding that may be provided via N-TUTORR;
- highlights the multiple disciplines and industries that the facility might seek to engage;
- identifies recommended model(s) for provision and the optimal geographical location(s) to achieve optimal impact;
- identifies issues for further consideration by N-TUTORR partner institutions, including, but not limited to, appropriate management of any such facilities.

Context & Methodology

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2 Context and Methodology

2.1 Understanding of Requirements

The central aim of the project was to explore the concept of a shared Media Production facility in the Republic of Ireland. This report used desk research to conduct an initial examination of the feasibility of the concept and to provide advice on how the prospective facility could be managed and governed to develop a model of supportive collaboration across the Technological Higher Education sector. At this early conceptual stage, this initial analysis of the concept of the Media Production facility will enable N-TUTORR partners to understand the range of issues, needs, opportunities, and management arrangements that a multi-institutional or national facility could entail.

We understand that N-TUTORR is part of the work of the National Recovery and Resilience Plan. N-TUTORR is an innovative partnership made up of 7 higher education partners, including IADT, aiming to "transform the learner experience in the technological university sector through technology and staff/student collaboration, in alignment with sustainable development goals". This shared Media Production facility concept is being investigated to ascertain how N-TUTORR partners could positively impact teaching and learning as well as industry and jobs at a local, national and international level through innovation, research, and development.

2.2 Proposed Methodology

Our methodology consisted of 4 phases:

- Phase 1: Project Initiation Meeting and Project Management;
- Phase 2: Contextual and Background Desk Research;
- Phase 3: Analysis and Evaluation;
- Phase 4: Draft and Final Report.

2.2.1 Phase 1: Project Initiation, Project Planning and Partner Consultation and Communication.

Phase 1 commenced with a project initiation meeting and continued through all stages of the project with regular communication and updates provided from Crowe to the project Steering Committee. The project initiation meeting laid out the 'context-setting' of this assignment and established how the project would commence and the reporting requirements for the duration of this assignment.

2.2.2 Phase 2: Contextual and Background Desk Research

The research phase was designed to facilitate an understanding of the concept of a shared Media Production facility, and the potential opportunities, challenges and benefits, and issues that may arise. In the course of completing this phase, desk research identified lessons from other comparable facilities, and trends from across industry publications, academic papers, and government policy related to the concept of Media Production facilities and the Media Production sector. The desktop research was comprised of:

- Collection and review existing data and documents;
- Identification of appropriate national and international comparators;
- Identification of management, governance, and funding arrangements;

- Identification of existing supports including funding sources and opportunities;
- Identification of stakeholders likely to engage with the facility/facilities.

We held a consultation session with project stakeholders to capture their preliminary thoughts on the concept of a shared Media Production facility, the potential pitfalls to be avoided, and the core principles that the facility should apply in the context of supporting collaboration across the sector.

2.2.3 Phase 3: Analysis and Review

The desk research and consultation from Phase 2 were collated and analysed to identify emerging key themes. Findings were thematically analysed to generate insights into the concept. We presented emerging findings to N-TUTORR Programme Steering Board, in advance of drafting the feasibility study report.

2.2.4 Phase 4: Draft and Final Report

The final phase of the project brings all aspects of the project together including the desktop research, consultation, as well as the analysis and outputs from phases 2 and 3.

Key Comparator Insights

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3 Key Comparator Insights

In considering the role and concept for the shared Media Production facility there are important lessons to be drawn from international comparators. By reviewing the lessons, journeys, and future plans of these comparators, insights can be drawn to inform the potential path ahead for the facility. Two comparators were agreed upon for examination due to their significance, proximity to Ireland, reputation, their varied history (the first is a new development designed to fill a need for specialist Virtual Production infrastructure and the other is an expansion of one of the oldest studios in the world), and their focus on meeting both industry and academic needs as part of their offerings. Each is examined in turn before summarised insights are presented.

3.1 Studio Ulster

Introduction

Studio Ulster, currently under construction, is an Ulster University project to develop a world-class studio complex and a Tier 1 facility of excellence in R&D and innovation in Virtual Production and associated facilities for traditional film, animation, game design, and broadcasting. Originally conceived as a Screen Media Innovation Lab (SMIL), Studio Ulster has evolved into a wider project designed to be a key driver for growth in key sub-sectors of the Media Production sector, including film, animation, immersive media, and gaming.

Studio Ulster is expected to act as a catalyst for the sector by providing access to facilities (particularly with respect to Virtual Production) to high-end commercial operators, while also supporting the development of skills within Ulster University and the wider creative ecosystem. The 57,000 sq. ft building will include 2 large-scale virtual production stages along with an in-camera visual effects stage, a motion capture stage, a 3D scanning stage for full body, facial and object scanning and an R&D smart stage with virtual production technologies to support research. Currently under construction and scheduled to open in late 2024, once completed Studio Ulster will host:

- a large-scale in-camera visual effects stage for virtual production;
- a hybrid blue/green screen studio;
- a motion capture stage with 15m high ceilings;
- a 3-D scanning stage;
- a SMART stage;
- a broadcast studio;
- film studios;
- and a Research and Development facility.

Cost and Funding Sources
Studio Ulster is due to cost approximately £70 million with £25.2 million contributed by the Belfast Region City Deal programme – a UK government economic development programme. The remainder (£44.8 million) has been funded by Belfast Harbour, Ulster University, and the UK Government's Levelling Up Funds. Additional funding was received from UKRI's CoSTAR programme to support Studio Ulster becoming part of the UK's virtual production research and development network (which is currently the largest research network for Virtual Production in Europe) with other facilities across the United Kingdom.

History of Growth
As part of Ulster University, Studio Ulster has a lineage as a public research university stretching over 150 years to 1865. The University has a budget of £282.5 million, and over 27,000 students in academic year 2021/2022. Studio Ulster has grown out of the Future Screens NI project, a previous intervention to address skills deficits in the Media Production sector, into a project dedicated to "drive collaboration in R&D on an unprecedented scale with researchers in Virtual Production from film, broadcast, animation, games and immersive co-locating with screen production and technology professionals" (Belfast Region City Deal, 2023). The project has secured partnerships with Epic Games, and Ulster Screen Academy, and is currently seeking a new production partner to take up residence in the Virtual Production Space (Studio Ulster, 2024).

User Base
The proposed industry clientele for Studio Ulster includes high-end film and television productions, AAA game productions, and smaller Media Productions using aspects of the facility on an ad-hoc basis. Additionally, students from Ulster University will benefit from training and skills development in leading-edge technology including Virtual Production as part of their qualifications and training on state-of-the-art tools equipping them with experience and training.

Impact
The entire Studio Ulster development and the associated work surrounding the facility has led to direct investment of almost £72 million in the Northern Irish economy with the project estimated to create over 460 direct and indirect jobs in Media Production (Gouveia, 2024). Northern Ireland Screen estimate the impact of film and television productions in the region at over £330 million since 2018 including direct spending, indirect spending, and induced demand and spillover effects including tourism (Belfast City, 2022).

Governance and Executive
The governance of Studio Ulster is overseen and approved by the 9-person Resources Committee of the University of Ulster. The Committee"s membership includes 4 ex-officio members including the Pro-Chancellor and Chair of the Ulster University Council, the Honorary Treasurer of Ulster University, the Vice-Chancellor and President, and the Student's Union President; 3 appointed members; 1 staff member; and 1 co-opted member. There is a range of experiences and perspectives represented on the Resources Committee including civil servants, former and practising accountants, university administration, information technology professionals, construction and engineering professionals, practicing academics and students.

Studio Ulster has a CEO; Prof. Declan Keeney – Chair of Screen Technologies & Innovation at University of Ulster and a member of the Board of the British Film Institute. In addition, there is a Studio Ulster Ltd company, which operates the facility on behalf of Ulster University. Studio Ulster Ltd currently has 7 directors with a range of experience from academia, industry and government including accountancy, university teaching staff and administrative support staff

3.2 Pinewood Studios U.K.

Introduction

Pinewood Studios is the U.K.'s largest film studio complex. In 2023, Pinewood received planning permission to develop a 1.4m sq. ft expansion. This will involve 21 new sound stages built, backlot filming spaces and a purpose-built education and training space, "Centre Stage" (operated by The National Film and Television School in the UK) constructed on-site to provide access to modern facilities and trained staff to utilise them.

The expansion will add to the existing facilities of Pinewood including 30 stages ranging from 160m^2 to the 007 Stage which covers 5,500m^2, 2 specialist TV studios, the only permanent underwater stage in the world, Sony's Digital Media Production Centre including leading-edge virtual production spaces as well as ancillary post-production facilities and over 200 independent businesses involved in supporting Media Productions across film, television, gaming, and news media all spread across 92 acres.

Focusing on the training hub ("Centre Stage"), once completed the Hub will comprise an education and training hub / a business growth hub / and a community use space all in one. As part of the hub's offering; Pinewood will:

- operate a film and television training school, with the ability to train over 800 students per year, in areas including:
  - Craft Skills – Full-Time Training;
  - Production – Full-Time Training;
  - BFI Film Academy Training – Short Courses;
  - CPD Short Courses;
  - Virtual Production Training;
  - Adult Education and Training for career changers.
- The Business Hub will provide supports including:
  - accommodation and services for working/co-working;
  - monitoring and expert advice and guidance;
  - pre-startup support: testing a business proposition;
  - startup: developing/growing a business proposition;
  - on-site and virtual/on-line entrepreneurial training and accommodation with specialist expertise/facilities (studio and production);

- cohort selection and provider of seed investment funding;
- commercial letting of business space to qualifying users.

- The Community Space will provide outreach and engagement with local schools and community groups;
- This will be situated in what will be the largest studio complex in the world with 51 specialist sound stages, specialist facilities including digital production, underwater filming, and post-production facilities.

Funding

Pinewood appears to be fully financing its expansion, with Pinewood having over £1 billion in Senior Secured Debt (secured against company assets) on its books to be deployed in support of strategic objectives (Pinewood Finco PLC, 2023). Similarly to Studio Ulster, funding was received from UKRI's CoSTAR programme to support Pinewood becoming part of the UK's virtual production research and development network (UKRI, 2023). Four other facilities across the UK are part of the project which is currently the largest research network for Virtual Production in Europe which includes Pinewood Studios.

History of Growth

Pinewood has grown from its original 1930s configuration to a sprawling complex in 2024 of some 600,000m2. It currently comprises 30 stages, 2 specialist TV studios, leading-edge virtual production spaces including CoSTAR lab, and post-production facilities (Pinewood Studios, 2024). The organisation is privately held, with most of the studios leased to Walt Disney Studios on a 10-year lease due to expire in 2030. The FY23 Accounts place the total assets of the studio at over £1 billion with over £4 million in retained earnings (Pinewood Finco PLC, 2023).

Customer Base

The clientele for Pinewood includes high-end productions for film and television, AAA game productions, and smaller budget productions using aspects of the facility on an ad hoc basis, along with 200 businesses based on location catering to all scales of productions. Pinewood has long-term lease agreements with Disney, Netflix and Prime Video along with steady production business on other sites with productions including: *The Little Mermaid, Indiana Jones and the Dial of Destiny, The Marvels, Slumberland, Roald Dahl's Matilda the Musical, Loki Season 2, NYAD, Saltburn, and All of Us Strangers.*

Impact

The planned Pinewood development is expected to cost £850 million, creating over 8,000 jobs and injecting £640 million into the UK economy annually. The training hub is expected to produce up to 1,000 skilled workers a year suitable for roles in industry. The most recent economic impact assessment for Pinewood was completed in 2013 ahead of their previous expansion which estimated that Pinewood could contribute £392 million per annum in 2012 prices to the UK economy once the expansion was completed. Of the £392 million, £149m was additional impact created by the new expansion (Amion Consulting, 2013).

Governance

Governance of Pinewood is overseen by an Executive Board including a Chairman, CEO, CFO, Special Project Director, and Corporate Affairs Director. Members are drawn from a number of private sector industries including finance, media, accountancy/consultancy, and Media Production. A senior management team supports the CEO, CFO, Special Project Director, and Corporate Affairs Director in operating the business day to day including a General Manager, Director of HR, General Council, Post-Production Director, Facility Services and HSSC Director, and Real Estate Director.

3.3 Key Insights from Comparators

- Both comparators benefit from having a large-scale site in a prime location in close proximity to existing facilities or industry partners while having room to expand and develop into the future. Pinewood and Studio Ulster are both currently benefiting from having the space to grow to meet the demand of a strongly performing local Media Production economy.
- Development work of this scale takes many years to complete with costly processes for planning and delivering building work at the scale of modern Media Production facilities.
    - In the case of Pinewood Studios, a planning application was lodged in July of 2022 after a substantial period of pre-planning work. Planning permission was granted in February of 2023 with works expected to complete in 2025.
    - In the case of Studio Ulster, an application for planning permission was submitted in February 2020, granted in August of 2020, with construction starting in September 2022 and still ongoing in 2024.
- Technological evolution is a long-established trend within the Media Production sector. It is prudent for any facility brought from concept to fruition by N-TUTORR partners to have the capacity for further expansion in the future to accommodate increased demand or changing industry standards. This echoes a comment made within consultation that “it is easy to grow old… [in this sector]” (Crowe Ireland, 2024).
- Modern facilities are expensive even before fit-out is considered. A development of this scale requires external funding by either European or national government, adequately capitalised private backers and/or facility owners/operators willing to take on a share of the full burden themselves.
    - An example of this is The National Film and Television School in London, who have Key Partner Sponsors and Key Partner Funders. Their key partners include: BBC, Sky, itv, and Amazon Prime Video while their key funding includes: the Department for Digital, Culture, Media & Sport, the Office for Students and the UK National Lottery. In addition, they are due to occupy part of the Pinewood development once completed.
- Phased construction backed by clearly evidenced demand and a strong set of complementary facilities in close proximity have driven success for comparators including Pinewood, Ulster University, and UCLA’s School of Theatre, Film, and Television.
    - The University of California, Los Angeles (UCLA) faculty comprises “industry leaders” who are awards-winning writers, directors, actors, producers, animators, set designers, lighting designers, cinematographers, editors, sound designers, costume designers, scholars and more. As part of their offering, they provide accredited summer classes providing access to key personnel in the industry along with practical hands-on training and education in traditional and digital filmmaking.
- All projects in this space are triple and quadruple-helix partnerships, with the needs of industry, academia, government, and the community all being considered in the course of these developments.
- Both comparators showcase engagement with education through their provision of training courses and facilities at the core of modern Tier 1 Media Production facilities.

Research & Consultation Insights

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4 Research and Consultation Insights

4.1 Overview

Over the course of the project, we examined publications from both academic and professional sources and arranged consultation with N-TUTORR partner organisations. Our research and consultation questions focused on:

- existing feasibility studies and research;
- management arrangements that could be appropriate for a project of this nature;
- highlighting and assessing national and international key comparators;
- the potential impact on education, skills, jobs, and investment;
- the potential funding sources or partnerships;
- identifying the sectors that the facility might seek to engage with;
- identifying recommended model(s) for provision;
- the optimal location characteristics;
- and the appropriate management structures for such facilities.

4.2 Value and Impact of Media Production in Ireland

Media Production as an industry produces both tangible economic benefit as well as intangible cultural benefits. Understanding the scale of the sector is essential to appreciating the impact that the facility may have. The sector employs millions of people and inspires countless more while generating billions of euros in revenue each year. The facility has the potential to support an important segment of both the Irish and European economies.

The Media Production Sector provides billions of euros of value each year globally. Focusing on the context of Europe and Ireland, an EU Commission analysis placed the size of the sector in 2021 at €134.7 billion (€91.4 billion for the audiovisual sector, €23.5 billion for the video games sector and €19.8 billion for news media) (EU Commission, 2023). Total EU level GDP was €14.6 trillion in 2021, meaning that the Media Production Sector accounted for approximately 1% of total EU economic activity in 2021 (EU Commission, 2023).

In the Irish context, the most comprehensive analysis of the audiovisual sector in Ireland to date is a 2017 study from Olsberg•SPI and Nordicity, which estimated the GVA of the Irish audiovisual sector at €1.05 billion in 2016 (Olsberg•SPI & Nordicity, 2017). The audio-visual sector contributed 1.4% of Irish GVA in 2016 with CSO data estimating total Irish GVA at €73.47 billion in 2016 (CSO, 2024).

	Value of Media Production	GDP/GVA	Percentage of Total Economic Activity
Ireland (as at 2017)	€1.05 billion	€73.47 billion (GVA)	~1.4%
European Union (as at 2023)	€134.7 billion	€14.6 trillion (GDP)	~1.0%

Source: EU Commission, Olsberg•SPI & Nordicity, and Crowe Calculations.

Employment in the EU media sector was estimated at 1.2 million in 2019 (EU Commission, 2023), broken down as follows: 490,000 in the audiovisual sector, 100,000 in the gaming sector, and 623,000 employed in the news media sub-sector (EU Commission, 2023).

Contextualising the EU Commission report, at year end 2021, there were 199.9 million persons employed within the European Union (Eurostat, 2024). Media Production therefore comprised 0.6% of all EU employment in 2021.

The Olsberg report placed employment in the Irish audiovisual sector in 2016 at 16,930 full-time equivalents, of which 10,560 were directly employed (Olsberg•SPI & Nordicity, 2017). This was broken down as follows:

- 11,960 FTEs in Film, TV, and animation;
- 2,560 FTEs in Radio;
- 2,040 FTEs in the Video Games sub-sector;
- 370 FTEs in Commercial Advertising.

Based on CSO figures, the sectors included in the Olsberg•SPI & Nordicity report contributed 0.7% of all employment in Ireland with total employment at 2.17m at year-end 2016, or 0.6% when considering only those directly employed in Media Producers of relevance to the conceptual facility (excluding Commercial Advertising) (CSO, 2024).

Aside from the purely economic benefits of the sector, producers based in Ireland have had commercial and critical success; adding to Ireland's reputation as an attractive Media Production base, with local talent:

- Irish film productions have won Academy Awards (Once, Six Shooter, Room, and Brooklyn), Canne Palme d'Or (The Wind that Shakes the Barley) Canne Jury Prize (The Lobster), and numerous Golden Globes (Poor Things, My Left Foot, and Belfast).
- Irish animation studios have received critical acclaim including multiple Oscar nominations for studios including Brown Bag Films (Give Up Yer Aul Sins / Granny O'Grimm's Sleeping Beauty) and Cartoon Saloon (The Secret of Kells / Song of the Sea / The Breadwinner).
- Award-winning TV productions filmed in Ireland include Normal People, Love/Hate, Game of Thrones, Kin, and Adam Saves Christmas.
- Critically acclaimed game studios operating in Ireland include Larian Studios, Riot Games, ActivisionBlizzard, Black Shamrock, Digit Game Studios, and a host of digital toolmakers including Havok.

The sector makes a sizable contribution to the economy of both Ireland and Europe across GDP/GVA, employment, and other measures of economic performance. The facility could therefore form part of a wider ecosystem of potential users and partners who could work with the facility.

4.3 Definitions of Sector/Sub-Sectors

While reviewing the surrounding literature, it became clear that definitions of "Media Producers" are many and varied and can include film, TV, advertising, gaming, radio, and social media. In this section, we present some of the definitions used in various reports and define this report's working definition of the term "Media Producers". The facility may also attract interest from a number of other industries and disciplines, and this section outlines the other sectors that could be engaged with:

- A 2022 report by TechIreland uses the term "Screen Industries" to refer to film, animation, gaming, augmented and virtual reality technologies as a collective (TechIreland, 2021); this language is replicated by the Studio Ulster project discussed above (Studio Ulster, 2024).

- The EU Commission uses the term “Media Sector” to describe a collection of stakeholders including audiovisual media, (traditional linear TV, streaming, film, and animation), video games, and news media (EU Commission, 2023).
- The Irish Department of Tourism, Culture, Arts, Gaeltacht, Sport, and Media uses the term Audiovisual Sector as a term to encompass traditional linear TV, streaming, film, animation and video gaming but not news media (Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, 2021) (Government of Ireland, 2018).

Consultees noted a range of sub-sectors either one but not both may be interested in using the facility including film, TV, digital media, game production and noted the convergence in the technology used by them as driving collaboration and competition between them. Given the wide applicability of media in other industries, it was noted that there are both direct and indirect stakeholders who may have interest in the facility. Contributors were concerned that given the wide range of stakeholders that may seek to engage with the facility and recommended that the scope of the facility would need to be focused to avoid it becoming overstretched.

To aid in comprehending this analysis and to provide a compromise definition of who the facility could seek to engage, the report uses the term “Media Production” or “Media Producers” to refer to those companies engaged in visual Media Production:

- Traditional Linear TV production (including TV-based News Media);
- Streaming TV Content production;
- Live Action Filmmaking;
- Animation;
- Video Game production.

Aside from media producers and their own activities, media has applications in a range of other industries or disciplines that the facility might seek to engage. Over the course of the consultation and desk research, a number of potential sectors were identified:

- **Health Sciences:** Health Science organisations and institutions work with media producers to create videos, models and develop promotional materials for their products and services.
- **Education:** Educational institutions and e-learning platforms utilise media producers to create videos, animations, and other multimedia content for educational purposes.
- **Architecture and Design:** Architects, interior designers, and design firms frequently collaborate with media producers to showcase their design concepts and projects. 3D renderings and virtual tours help clients visualise spaces and understand the design intent before construction or renovation begins.
- **Automotive:** Car manufacturers, dealerships, and automotive brands rely on media producers to create promotional videos, commercials, and virtual showroom experiences. Media producers may use modelling software to create 3D visualisations of vehicles, prototype designs, showcase features, and simulate driving experiences.
- **Engineering and Product Designers:** Engineers and Product Designers may partner with Media Production companies to create videos, animations, or interactive presentations showcasing projects such as bridges, buildings, infrastructure, and industrial facilities or smaller products. Presentations could include 3D renderings, animations, and simulations to help clients better understand the proposed designs and engineering solutions.

- **Arts, Culture, Heritage and Tourism:** Visitor attractions and cultural productions (events, festivals, theatre, concerts) are increasingly conscious of the need to provide ever more immersive experiences and innovative ways of animating audience interaction with their artform or site. The application of media and multimedia tools and techniques is at the forefront of experience development in the arts, culture, heritage and tourism sectors.
- **Technology and Software:** Apart from the Media Production sector itself, there are a diverse set of technology companies, software developers, and IT firms that rely on media producers to create product demonstrations, tutorials, and promotional videos to showcase their latest product through interactive demos, visualisations, and simulations that explain complex concepts or demonstrate product functionality as part of their advertising.

As such, there is a diverse range of potential stakeholders who have reason to engage with the proposed facility. Defining the scope of the facility is a critical consideration in order to keep the facility focused.

4.4 Policy

In this section, we present a set of relevant policies (the relevant Government Department Strategy which would influence the proposed facility, the relevant Strategy from Screen Ireland, and the IADT Statement of Strategy (as an example of N-TUTORR partner strategy). These policies include industry and government policy and provide an indicative sense of how the proposed shared Media Production facility fits within the growth ambitions for the sector from government and industry as outlined in these documents.

4.4.1 Europe's Media in the Digital Decade: An Action Plan to Support Recovery and Transformation

The EU Commission's Media and Audiovisual Action Plan (MAAP) has been in operation since 2020 and covers 3 action areas i) Recover, ii) Transform, and iii) Enable and Empower with a total of 10 actions. A number of these actions are of relevance to the facility concept and work has been commenced on bringing these actions to fruition. The action areas of the action plan are as follows:

Action Area 1: Recover

- Easier access to EU support;
- MEDIA INVEST aimed at boosting investment in the audiovisual industry;
- 'NEWS': an initiative to bundle actions and support for the news media sector;

Action Area 2: Transform

- Unleashing innovation through a European media data space and encouraging new business models;
- Fostering a European Virtual and Augmented Reality (VR/AR) industrial coalition;
- Towards a climate-neutral audiovisual sector;

Action Area 3: Enable and Empower

- Towards a broader availability of audiovisual content across the EU;
- Fostering European media talents;
- Empowering citizens;
- Ensuring the functioning of the European media market.

4.4.2 *Statement of Strategy – Department of Tourism, Culture, Arts, Gaeltacht, Sport, and Media*

The Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media's Statement of Strategy for 2023 to 2025 address the role of Media within Goal B of the plan: 'To support and develop engagement with and in, the arts, culture and creativity by individuals and communities, enriching lives through cultural and creative activity; and to promote Ireland's arts, culture, and creativity globally; and to drive a more vibrant and diverse Night-Time Economy.' Under this Goal B, there are a number of High-Level Strategies with relevance to the stakeholders of a shared Media Production facility:

- Expanding the opportunities for Ireland's audiovisual and gaming sectors;
- Securing and upgrading a viable and sustainable network of arts and cultural infrastructure.

4.4.3 *Audiovisual Action Plan*

The Audiovisual Action Plan is the government strategy for the development of the Audiovisual sector in Ireland. The plan is designed to achieve the ambitions originally articulated under Pillar 4 of the Creative Ireland Strategy in 2017 'Ireland as a Centre of Excellence in Media Production' (Creative Ireland, 2017). The Audiovisual Action Plan instead seeks to position Ireland as a 'Global hub for the production of Film, TV Drama, and Animation' (Government of Ireland, 2018). The plan is comprised of a number of action areas of relevance to the facility:

- Ensure Skills to Match Production Growth;
- Greater Alignment of the Third Level and Sector;
- Networking Opportunities and Training;
- Affordable Business Premises.

The most recent progress report published in 2021 notes that 'the alignment of the education sector to the needs of the industry remains a standing item on the agenda of the Steering Group and will be of particular importance in the coming years with the anticipated growth of studio space and employment opportunities across the sector.' (Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, 2021)

4.4.4 *Building for a Creative Future – Screen Ireland*

The Screen Ireland strategy *Building for a Creative Future* outlines how Screen Ireland will support the film industry over between 2024 – 2027. Of relevance to the potential shared Media Production facility, the strategy has relevant objectives and sub-actions including:

- Invest in the talent and skills required for the future success of the industry through supporting capacity development with diversity, equity and inclusion at its core;
- Build stronger links between industry and education to establish more structured and certified work-based learning programmes, at new entrant and senior career progression levels;
- Champion industry development that is national and sustainable, supporting Irish companies, a competitive fiscal offering and an expanded workforce;
- Support the building of strong production companies to achieve scale and compete on a global basis through company development and slate funding;
- Champion a national approach to industry development, including dedicated support for regional production and promotion.

4.4.5 Strategic Plan 2019 – 2023: Better Futures Created Together – IADT

We have included the 2019 – 2023 Strategic Plan for IADT as an illustrative example of strategic themes within the N-TUTORR cohort that fit with the ambition of creating a shared Media Production facility. There are 3 themes in the strategy Excellence, Growth, Community. Under each of these themes there are subheadings where a shared Media Production facility may contribute to realising the ambition of the strategy.

Theme 1 – Excellence

- **Educating Students:** We will provide high quality and inquiry-led teaching and learning that encourages and embeds curiosity, innovation, creativity and entrepreneurship across all our disciplines.
- **Researching and Developing Knowledge:** We will strengthen our research, development, enterprise and innovation capacity and capabilities, and focus our activities on specific disciplines.

Theme 2 – Growth

- **Attracting Students:** We will continue to grow our student numbers across our disciplines. We will strategically target growth in line with our aspirations for regional, national and international excellence.
- **Developing an International Institution:** We will continue to enhance our brand, profile and reputation internationally. We will be recognised internationally as an Institute of choice for students, staff and partners in specific programmes.
- **Collaborating and Developing Partnerships:** We will strengthen our current relationships with our partners. We will seek new opportunities to collaborate and work together to advance IADT.
- **Strengthening Our Skills and Relationships with Industry:** We will strengthen our links with industry and engage with industry experts, to ensure that our graduates are equipped with the skills necessary to excel in their future careers.

Theme 3 – Community

- **Engaging and Supporting Our IADT Community:** We will develop our physical environment and invest in technology to enhance the overall student and staff experience.
- **Engaging and Supporting Staff:** Our staff are critical to the success of IADT. We will continue to recognise their ongoing contribution and commitment to students and to the overall success of our Institute. We will further invest in their development to enable them to meet their career goals.

There is clearly a multitude of policies and strategies focusing on education, capacity building, and industrial development. The policies and strategies focus on the need to maintain and improve the competitive edge of the Media Production sector. It will be crucial that the proposed facility align with the ambitions, goals, and actions of these policies to maximise the impact of the facility and benefit from complementarities with other policy action.

4.5 Potential impact on Education, Skills, Jobs, and Investment.

Any education provider will impact education and skills directly thorough the production of talented and skilled graduates, and in doing so support the development of the Media Production industry as shown several relevant policies and strategies have objectives related to this point. The shared Media Production facility could have the potential to play a significant role in the development of the sector into the future by acting as a catalyst for development and the adoption of new technologies that future-proof skills and enhance industry capacity and capability.

Discussion of the Media Production sector across national and international education and industrial development policy has noted that the adoption of new Media Production technology in Ireland and Europe is lagging behind peers and that in order to spur academic and industry alignment to support the sector, intervention by a well-funded third party (such as a university or an alliance of universities) might be needed. The facility could serve the role of aligning training to industry needs by providing access to training on, and the experience of using, modern cutting-edge methods used within the sector such as Virtual Production.

OECD

OECD research on Ireland's skills landscape identifies that across the economy there is a shortage of skilled workers, especially within rapidly growing and FDI-led sectors (OECD, 2023); such as the science, engineering, and technology sector where almost 40% of vacancies are considered difficult to fill (SOLAS, 2022). OECD guidance in relation to developing skills in Ireland noted the importance of developing a high-quality skills system that is more responsive to industry trends and needs (OECD, 2023). This is to be achieved through a number of priorities including:

- Priority 1: Securing a balance in skills through a responsive and diversified supply of skills.
- Priority 2: Fostering greater participation in lifelong learning in and outside the workplace.
- Priority 3: Leveraging skills to drive innovation and strengthen firm performance.
- Priority 4: Strengthening skills governance to build a joined-up skills ecosystem.

The concept of the facility is potentially well suited to contribute to these priorities by:

- providing access to and training on new technologies,
- strengthening the connection between academia and industry to ensure skills are applicable to industry needs,
- developing both formal education and professional development courses that train individuals to industry standard and allow them to stay relevant over time.

European Union

EU research within the area of Media Production notes that costs are increasing within the sector especially for crew with sufficient skills to contribute to modern productions due to increased demand brought by larger productions (EU Commission, 2023). Positions across the sector are vacant for extended periods and this is leading to poaching of talent limiting the ability of production companies to develop a talented team for the long term.

EU research characterises the Media Production sector as being unlikely to become more productive without the intervention of a third party that could provide access to training, facilities, and the financial resources needed to facilitate upskilling and technological evolution. A third party (such as a University or Publicly Funded Entity) may be able to drive the sector

onward by bringing together talented people, funding, and the right relationships with partners in the Media Production sector (EU Commission, 2023). The shared Media Production facility could be well placed to contribute to this mission by catalysing technological upgrading within the sector and increasing talent development and knowledge transfer.

Irish Government

Under the Audiovisual Action Plan (Government of Ireland, 2018), the Irish Government noted 5 key recommendations for skills development within the sector which the facility may cater towards either directly or through collaboration:

- Specific Business Management skills were noted as a need within the sector;
- Increased scale of skills development to match with growth in the size of productions;
- Greater alignment between third level and business on skills development;
- Ensure Irish companies can effectively use their IP;
- Networking opportunities and training support.

The facility could provide courses, training, and retraining that support these identified recommendations and benefit from other initiatives to develop the skills base available to the sector by aligning with these recommendations.

Consultation

In consultation, respondents noted that a modern facility with state-of-the-art infrastructure and resources was needed to help the Media Production sector to remain competitive (Crowe Ireland, 2024). This was considered an acute issue especially within the virtual production (VP) space, with consultees noting a perceived lack of suitable facilities to cater to the evolving needs of Media Production in the VP space. Aside from VP, respondents noted that skills development in the sector needed support, with new technologies coming to the forefront of the sector and changing industry needs meaning that education approaches needed to evolve accordingly with a shared facility offering the opportunity to train staff across all partners consistently.

Aside from the benefit to skills development and competitiveness, the facility was seen as having the potential to positively influence the European and International profile of the Irish Media Production Sector via a halo effect i.e. the tendency for the positive perception of one aspect of a person, place, or organisation to positive influence the perception of other aspects of the same entity. The sector was seen as lagging behind key competitors including the UK when it came to reputation, the level and standard of technology being used, and the profile of the sector. In this case, consultees saw the facility as being able to positively affect the reputation of the entire Irish Media Production sector by indicating the commitment of the sector to modern methods and practices and the evolution of the Media Production sector.

4.6 Concept Definition

As outlined in the brief for the feasibility study and as outlined above, the concept will need to be focused on meeting the needs of the Media Production sector and aligning with Government, THE sector, and industry policies and priorities. This is achieved through consideration of a scope and scale for the facility that is in line with resource requirements, potential market interest from media producers and others, and the evolution of industry demands and expectations.

This challenge is further complicated by having to implement decisions as part of a shared facility with partnerships, shared responsibilities, and a need to balance between academic and industry access to the facility. During our consultation with N-TUTORR partners, there was an insightful discussion on how to define the facility and what role the facility could fulfil. The discussion focused on ideas surrounding how the facility could operate, the activities which could be provided, the activities the facility could host, and how the facility could work to support the Media Production sector (Crowe Ireland, 2024). A summary of this discussion is provided below:

Activities and Amenities:

- access to **shared resources** including on-site, rentable equipment and facilities including co-working space;
- access to a **state-of-the-art facility with industry standard fit-out** for education, training, and production uses;
- providing additional **high-quality Media Production facilities** on the island of Ireland to meet the need among private sector partners;
- When considering the feasibility of a complex concept such as a shared Media Production facility, consultees suggested that the facility could specialise with a **dedicated role as a modern virtual production facility** being preferable given the absence of such a facility within the N-TUTORR membership;
- active facilitation of knowledge transfer through workshops, masterclasses, and other events/programmes;
- **modern teaching space** (designed for educational and industry use) to add to the capacity for skills development within the sector;
- **promoting the sector** for students or those seeking to switch careers and developing ongoing training for the sector.

Working with the Media Production Sector:

- providing a point of contact for more **hands-on learning opportunities** including internships, secondments, and opportunities in work;
- acting as a **talent development partner** for the Media Production sector with up-to-date training on industry leading technology;
- provide a **key networking space** for students, industry, and academia to meet and discuss the past, present and future of the industry;
- highlighting employment and commercial opportunities within the sector.

4.7 Site

A number of key factors were identified as being essential to the successful development and operation of the facility with location being a critical success factor. In choosing, developing, and refining the concept careful consideration needs to be given to choosing a site that meets the needs of all parties initially and as they evolve over time. A number of themes emerged from reviewing relevant documentation and engaging in consultation including:

- Availability of a site with a suitable size, scale, and a reasonable cost of acquisition or development;
- Proximity to existing transportation hubs/strong position on exiting transportation networks;
- A site with adequate planning for future development and expansion;
- Close proximity to green/brownfield sites to allow for expansion/colocation;
- Access to accommodation, on-site or in close proximity;
- Connections to utilities including high-speed broadband with sufficient bandwidth for enterprise;
- Access to a local talent pool to draw from and to further develop to operate/use the facility;
- A strong reputation within the Media Production sector or national prominence;
- A supportive local community and local politicians;
- Alignment with and the ability to benefit from future Development and Infrastructure Plans, as well as policy and strategy.

The facility's site will need to supply the appropriate foundation for the success of the site including the optimal scale, linkages, access to talent, a supportive local community of people and enterprises as well as internal infrastructure that meets modern production requirements. To be truly compelling, the facility needs to provide both the location and the amenities that will draw interest from stakeholders as part of a cohesive offering built on modern standard infrastructure. The decision on site(s) also needs to be informed by accessibility to all partners, optimal access for industry, the availability of sites (on and off campus), and related costs.

4.8 Infrastructure

The range of technology used in Media Production gives rise to a related need for investment in robust infrastructure at the proposed shared facility. As has been demonstrated in the comparators, the cost of providing modern state-of-the-art facilities is not insignificant. Relevant technology which should be considered for inclusion in the facility includes:

- Studio Space including Sound Stages, Insert Stages, Flash Cam, Green Screen/Chroma Key Areas and Virtual Production;
- Offices and Meeting Rooms including Post-Production Facilities;
- Control Rooms for Audio and Video;
- Storage Areas for Production Equipment;
- Post-Production Equipment;
- Editing Suites including Computers with editing software (e.g., Adobe Premiere, Final Cut Pro), Colour Grading Workstations and Audio Editing Suites;
- Networking and Data Storage;
- Creative Infrastructure including Set Design, Construction, and Workshops;
- Support Infrastructure including Uninterruptible Power Supply (UPS), Generators, Climate Control, and HVAC Systems;
- Education space including Lecture Theatres, and/or Seminar Rooms;
- Security including Access Control and Surveillance Cameras;
- Ancillary Facilities including Break Rooms, Cafeteria, Restrooms, Changing Rooms Dressing Rooms, Maintenance Space, Rehearsal Hall/Lounge, Green Room, Hair, Make-Up, Wardrobe, Staging, Storage and Audience Holding if required.

4.9 Cost

To build a state-of-the-art Media Production facility, on the type of site with the required infrastructure as outlined above, a substantial investment of time and money is necessary to realise a project at the scale and level that is compelling and competitive. Costs cannot be estimated at the concept development stage as they are contingent on factors that have not yet been decided, most importantly the scale and scope of the envisaged development. A number of elements will need to be scoped including site acquisition costs, site unlocking costs, site development costs, infrastructure costs, construction costs, and operational costs as part of a full feasibility. What the concept feasibility can do is to present and discuss the line items that need to be considered and will need to be examined in detail in a full feasibility once the concept is clarified. What can be assumed, with a level of certainty, is that this would not be a small-scale project and could involve costs in the millions and most likely tens of millions.

Site Costs

Analysis from real estate firm Savills noted that land in Ireland that is suitable for residential use has attracted substantial premiums given the high demand for residential property (Savills Research, 2024). This complicates locating the facility in areas with residential planning permission or close to existing residential development as it will likely result in inflated site costs which will have to be borne by project funders.

Commercially attractive property is expected to see strong demand for prime developments in prime locations but the high level of vacancy in the office sector is expected to limit the upward momentum in prices for this segment (Savills Research, 2024). The recently announced Dublin Fields development is located on 56 acres of cheaper commercially zoned land at Grange Castle Business Park with space for future development in the short term and the ability to acquire land in the future at more affordable rates than in prime development locations (RTE, 2024).

Across the purchases reviewed by Savills, there was a wide range of valuations for prime development land. Excluding a €36.2 million per acre sale recorded for the Jury's Inn site in Dublin 4 due to it being an exceptional sale to the US State Department for their new embassy; prices ranged from €1.4m per acre at the highest for land in Clongriffin, Co. Dublin to €205,000 per acre at the lowest for land at Ballincollig, Co. Cork (Savills Research, 2024). This gives a range of prices which could be paid to acquire land suitable for the construction of the proposed facility.

Construction Costs

Research from Savills specific to Ireland notes that the Wholesale Price Index for Construction Materials has increased by 60% between late 2019 and early 2023 but that this has begun to moderate gradually over the last year. Prices are still elevated over previous years but that is beginning to decline (Savills Research, 2024). This directly impacts the cost that will be paid to build the proposed facility.

HLW, an international architecture, design, planning, and strategy consultancy conducts an analysis estimating the cost of building a Media Production facility in the US, the most recent being launched in early 2023. While we cannot comment on the comparability of construction costs with those in Ireland, the report provides an illustrative example of what might be involved and the variety of costs that could be incurred.

The report outlines construction costs for different workspaces and broadcast facilities and provides an estimate of cost per square foot for different types of spaces required as part of a Media Production facility (prices are quoted in USD/sq. ft). To aid in comprehension we have converted the prices to EUR/sq. ft by taking the market close exchange rate on the day of the HLW report's publication (18/01/2023) to provide an estimate of the costs of construction.

Space	Description	Price/sq. ft. USD	Price/sq. Ft. EUR
Workspace	Offices, Workstations, Open Office, Meeting Rooms, Facilities, Administration Spaces, and Reception Space.	$303.50	**€281.28**
Production Studio	Studio Space, Insert Stage, and Flash Cam	$450.00	**€417.06**
Studio Support	Dressing Room, Maintenance Space, Rehearsal Hall/Lounge, Green Room, Hair, Make-Up, Wardrobe, Staging, Storage and Audience Holding	$400.00	**€370.72**
Technical Operations and Support	Control Rooms, Processing Suites, Edit Rooms, Media Rooms, Transmission, LAN, Rack and Server Rooms	$502.50	**€465.72**
Broadcast, Technical, and MEP Areas	Telephone, Electrical, Mechanical, Plant, and Networking Space	$1,400.50	**€1,297.98**
Infrastructure	Upgrades to Building Infrastructure	$125.00	**€115.85**

Source: HLW Media Production Facility Cost Report 2023 / Crowe Calculations

The report also estimated costs for different site buildings and facilities. These are quoted in a USD range. As above we have converted these costs to Euro (rounded to the nearest whole euro) by taking the market close exchange rate on the day of the report's publication (18/01/2023):

Building	USD Price per gross sq. ft.	EUR Price per gross sq. Ft.
Stages	$475-$575	€440-€533
Production Support Buildings	$430-$565	€399-€524
Production Office Buildings	$275-$350	€255-€324
Production Office Interiors	$125-$175	€116-€162
Onsite Parking	$14-$23	€14-€23
Mill Building	$125-$200	€116-€185

Source: HLW Media Production Facility Cost Report 2023 / Crowe Calculations

Note: A number of costs were not included in the HLW estimates due to variation across locations including the constructor's profit margin, contingency, fit out of office, cabling, security systems, computers, technical equipment, lighting systems, AV equipment, movable testing equipment, communication equipment, set construction, antennas and satellite, signage, artwork, and expanded commissioning. In many cases identified, the building was completed to a shell specification and then fitted out by those leasing the property.

Operational Costs

Clearly, operational costs will also need to be defined and considered in a full feasibility study. It can safely be expected that operating costs will reflect those of a state-of-the-art facility and that there will be a regular need to refurbish the infrastructure and update the skills base so that the facility has the infrastructure and capability to evolve in line with emerging technologies and industry/market and employer demands. Regular reinvestment will be required to both keep pace with technology developments and market demands, as well as potentially expanding the facility and the provided supports if demand outgrows the original space (as was the case in both Ulster University and Pinewood). Operational Costs for the facility will include:

- Rent (if required);
- Utilities including Water, Electricity, and Rubbish Disposal;
- Property Insurance and Liability Insurance (at a minimum);
- Salaries and Wages for staff as well as benefits;
- Building Maintenance and Reinvestment including regular upkeep of the facility and renewing of technology;
- Equipment Maintenance: Servicing, repair, and replacement of equipment;
- Professional Services including Legal and Accountancy Services;
- Software Licenses: Ongoing subscriptions for editing, VFX, and other production software;
- IT Support: Costs for maintaining and supporting the facility's IT infrastructure;
- Training and Development including ongoing staff professional development.

4.10 Potential Funding Sources

Partner Contributions

In considering this project, it is prudent to consider all funding opportunities to ensure that the facility is given the greatest opportunity to attract the level of funding that will be required for development and subsequent redevelopment/expansion. Aside from the opportunities identified below, partners themselves will need to be a source of funding for the facility. This is particularly important given that third-party funding will be timebound, and many funds will require match funding. Setting aside that, evidenced commitment of resources from the partners will inspire confidence in the long-term future of the facility by answering the question: what will happen after third-party funding ends?

Capital Funding

There would be a substantial cost involved in the development of a shared Media Production facility at the scale and standard required to meet current and evolving expectations and market developments. Each stage of the process from site identification, site acquisition, site unlocking, and site development is a significant outlay before consideration is given to funding the fit-out to modern standards with leading-edge technology. Given the significant outlay that could be expected to develop the facility, funding streams with the capacity to fund from €10m upwards in costs were examined.

Irish Government
In reviewing funding from the Irish government, it became clear that the established funding stream for investment in Media Production and audiovisual industry under the Investing in our Culture, Language, and Heritage 2018 – 2027 strategy (€200m over 10 years) is inadequate to fund a project of this scale. The funding is already committed to multiple projects through Screen Ireland and other agencies.

European Union
Using the European Union's CulturEU funding guide, and filtering the guide to select funding that is relevant to the facility, there were 5 funding streams identified which may be applicable to the funding of the concept under Horizon Europe:

- Horizon Europe Startup-Europe Grants;
- Horizon Europe STARTS programme Grants;
- Horizon Europe European Innovation Ecosystems Grants;
- Horizon Europe EU Mission in Horizon Europe Grants;
- Horizon Europe Culture, Creativity, and Inclusive Society Grants.

Given the scale of funding available under these pools, with a total Horizon Europe budget of €95.5 billion, and Horizon Europe operating as a call-based system consideration needs to be given to applying following a number of steps:

- a suitable consortium is brought together to apply for funding;
- a fully detailed concept is defined, and scoped;
- a full feasibility study is completed comprising a full scoping and design of the facility;
- a suitable call for funding is launched.

Corporate Sponsorship and Private Philanthropy
A funding agreement with a commercial business or a philanthropic partner offers another potential source of funding for the potential facility. In the case of private philanthropy, some funds operate on open calls while others are closed operating at the discretion of a trust or a key person. Funding could come from an international or national source and in both cases would require deliberate and continued engagement to develop these relationships and connections.

Relationships are key to the process of securing funding and take years to build and come to fruition. There are notable success stories in Ireland and abroad including funding provided by Eric Kinsella, former chair of Jones Engineering (Trinity College Dublin, 2021), and the Naughton Family Foundation (Trinity College Dublin, 2019) of €30m and €25m respectively to Trinity College Dublin; Dr Tony Ryan and family gave €7m to the DCU Ryan Academy (Dublin City University, 2022); and the National Film and Television School in the UK has sponsors including the BBC, SKY, Channel 4, Amazon Prime, ITV, UK Cinema Association, and the Film Distributor's Association (National Film and Television School, 2024).

Operational Funding

Income generation would need to be part of the funding model, particularly for operating costs, as the large majority of EU funds are unlikely to cover operational costs. Rental income is an obvious option for parts of the facility or to provide access to the facilities to commercial partners in exchange for a contribution to the facility including technology, funding, or resources. The more specialised the services offered by the facility the greater likelihood of the facility being able to successfully rent these to industry partners. In addition to short-term rent, there is also the possibility for a long-term lease of parts of the facility especially to defray parts of the costs by leaving fit out of the space to the leaseholder by providing the space to a shell specification.

4.11 Governance, Strategy, Management and Operations

In operating any facility, consideration needs to be given to how the facility will be governed, managed, and operated. Given the nature of a "shared" facility, it is critical that governance is robust and representative. Governance, management and operational processes and structures will need to inspire confidence and trust from stakeholders and ensure that this environment is created. Comparators in the sector operate with triple and quad helix approaches with structures, practices, and actions which actively seek to engage multiple forms of stakeholders across government, industry, and academia (and communities) in order to maximise the benefits to all stakeholders.

Governance

- Desk research of comparators shows that a board and senior management structure is standard within similar facilities and hubs.
- Across comparator case studies, board members include representatives with diverse skills in academia, industry, finance, creative fields, government, and others. This diversity in skillsets and experience allows for the facility to benefit from a range of skills and experience. Consultees agreed that representation from both academia and industry would benefit the facility by blending diverse perspectives and experiences.
- A Joint Management Arrangements Committee could be established as part of the governance structure with a dedicated remit to monitor and ensure that the shared ethos of the facility is being adhered to.

Strategy

- In developing the facility, a future-focused strategy is needed in order to ensure that all parties are aligned with the mission, aims, and values. This will be overseen by the board and reviewed to ensure that it is fit for purpose. This document will direct the actions of facility personnel in a manner that reinforces the shared ethos of the facility and ensures that all of the activities of staff are guided in a consistent and constructive manner.
- The document should include:
    - Vision and Mission related to the facility to define the facility's long-term objectives and core purpose;
    - Strategic Pillars outlining how the facility will operate, (given the shared context of the facility it will be crucial to embed principles of fairness, equity, and transparency in the pillars);
    - A reporting/organisational structure with clearly defined roles and responsibilities as well as reporting protocols;

- A communication protocol that defines when, how, and how frequently facility stakeholders will be notified about developments and how these will be monitored;
- A risk assessment and mitigation action plan to avoid foreseeable pitfalls and prepare a resolution in advance to prevent the development of hostility.

- Separately, and in advance of developing the facility, a shared fundraising strategy should be developed to identify and pursue funding opportunities for the facility.

Management and Operations

- Discussion on how the facility was to be managed noted that a management team with a mixture of industry and academic experience and skills is required. In addition, a key addition to the management team would be a person with previous experience in managing a shared hub/facility.
- It was emphasised that facility management would need to work collaboratively with industry and academic parties to support the facility's ongoing development and to ensure that it is meeting the needs and expectations of industry and academic users of the facility.
  - Management in comparator cases operated with a collaborative ethos, by actively seeking to engage with government, industry, academia and the community to increase the impact of their operators, share the benefits, and develop positive relationships between all stakeholders.
- In addition to governance structures being robust and transparent, those consulted equally emphasised the need to ensure that the “shared” facility is operated in a way that ensures that there is no sense that the “owned” or “captured” by any individual partner(s). Building trust in the operating processes and decision-making was highlighted as being crucial to the long-term success of the shared facility and the participation of all partners.
- In establishing the facility, participants noted that independence and transparency in operation was essential for the long-term success of the facility. A specific concern raised by participants was the facility losing its shared ethos and becoming “owned” by one partner. It was noted that while partners were collaboratively minded, they were competitors and if the facility was seen to be led primarily by or for the benefit of one partner or this could undermine the willingness of others to collaborate on the share facility concept.

It is important that the facility’s governance, management, and operations support the participation of all partners, protect the shared ethos of the facility and establish a sense of trust in the governance and operation of the facility. Going beyond their own internal operations, successful comparators have been able to engage the public, government, and industry in order to strengthen the position of their facilities.

4.12 Key Insights

Key Insights summarise the lessons, insights, and findings of the desk research and consultation in order to provide critical points on which the recommendations are based. These are developed by comparing policy, research, comparators, and the contributions of consultees and identifying common themes. These are then used to inform the recommendations presented further within the document.

4.12.1 Development of the Media Production Sector

- The sector is defined by a high level of technological development and there is an ongoing need to remain adaptable and responsive to new technology and innovation.
- The sector has been identified in a number of key policy documents at both national and international level as a priority area with substantial growth potential in both capacity and capability.
- Ireland has a marginally greater proportion of employment in the Media Production sector than the EU and the Irish Media Production sector contributes a greater proportion of Irish economic activity than the EU Media Production sector contributes to EU economic activity on a percentage basis.
- Existing facilities appear to attract a wide range of users (film, TV, and gaming) with rapidly converging needs and requirements.
- The role of a third-party institution/partnership capable of providing access to cutting-edge technology has been identified as being particularly important for European producers given their comparative deficit of funding relative to their American counterparts.

4.12.2 Skills

- There have been long-standing challenges in the sector when it comes to developing the range of skills required to meet the contemporary and future needs of productions. This has created a need for more relevant and up-to-date training specific to the current needs of the industry and identified skills gaps/needs.
- Training provided in the facility would need to keep pace with the evolving skills needs within the industry and continually review the priority areas of skills development, upskilling, CPD and training/retraining in partnership with industry.
- As evidenced in several policy documents and strategies, there are long-standing issues with finding suitably skilled staff to fill vacancies in Media Production sub-sectors including film, TV, and gaming with vacancies left open for extended periods. This is related to the point about the need to better align the higher education curriculum with employer needs.

4.12.3 Governance

- Comparator boards and executives have diverse industry and academic expertise, which benefits the organisation through the inclusion of a wide range of stakeholder perspectives and insights.
- Trust is critical to the engagement and buy-in of N-TUTORR partners and industry to the concept. Robust governance structures would be central to developing and maintaining that trust.
- The Board should include representatives from industry so that specialist skills and knowledge are included in the Board's advice and oversight.

4.12.4 *Organisational Structure and Staff*

- For leadership and management credibility, the management and executive teams would need to have sector-specific experience and experience of running a shared facility/hub.
- Management teams should approach the work of the facility in a spirit of collaboration to encourage a culture of cooperation between academia/industry and other partners.
- The facility will need to include managers and directors who are able to manage the facility as well as those capable of leading research, innovation, and development.

4.12.5 *Policy*

- The facility would operate in a multi-faceted policy environment and could link back to a number of areas of local, national, and European policy including education, enterprise, innovation, sector development and local/regional economic development policies.
- Media Production is currently recognised as a priority area for Ireland and Europe in a number of key documents, including:
    - The EU's Media and Audiovisual Action Plan;
    - Irish Government's Audiovisual Action Plan;
    - Irish National Development Plan 2021 – 2030.

4.12.6 *Cost*

- Costs for building a modern Media Production facility reflect the high-spec building and infrastructure requirements of the sector with costs in the millions or tens of millions.
- There are also likely to be significant costs incurred if a site needs to be acquired due to the scale of space required, the existing demand for land for residential and commercial development, the need to consider future expansion opportunities, and the ongoing need for infrastructure updates to keep pace with technology and sector developments.
- The cost of infrastructure will be substantial both at completion and with respect to ongoing maintenance and renewal costs in order to ensure the facility remains aligned with the current state of the art.
- As development policy trends in the direction of establishing industry clusters at both a national and regional level, facility staff will be in demand given their experience in running a shared facility/hub and would command a salary commensurate with the demand for their skills. A similar dynamic is foreseeable with respect to technical staff leading on research, development, and innovation.

4.12.7 Site

- The facility needs a site that is in an attractive location, with space in which to expand in future. Given the evolution of technology in the sector, space requirements are likely to grow over time and consequently may outgrow the initial site.
- Depending on the final scale of the facility, the size requirements of the site will vary depending on whether it is spread over multiple sites or located on a single site. Key comparators have found success in developing compact and comprehensive single sites with multiple co-located and synergistic facets of Media Production in close proximity to each other. When other sites have been developed, each is able to operate as a singular entity (e.g. Pinewood Toronto/UK).
- Infrastructure and services provided by the facilities must reflect the needs of the target markets being served, with leading-edge technology needed to attract leading-edge productions.
- Site options include building on existing partner land, a greenfield site not currently owned by any partner, or collocation with an industry operator such as Dublin Fields.

4.12.8 Funding

- There are no suitable national funding streams and limited European funding streams suitable for funding a capital project of this type/scale.
- There is suitable funding for the facility available from Europe under the Horizon programme which could cover capital expenditure and operational expenditure related to the project for key personnel.
- Horizon Funding is time-limited, and consequently, consideration would have to be given to the long-term funding of the facility by partners given the inevitable end of funding along with any requirements to match funding over the course of the Horizon funding.
- Alternatives including commercial partnerships and private philanthropy should be considered in collaboration with other funding sources to strengthen the position of the facility.
- A robust fundraising strategy incorporating capital and operational costs; national and international funders; and suitable strategies and tactics will be critical to secure the necessary funding as it is likely multiple sources will be needed.
- Once operational, the facility could look at renting access to services or products within the facility or leasing space within the building to industry partners to generate revenue alongside traditional tuition charges.

4.12.9 Strategy and Partnerships

- Triple- and quad-helix approaches incorporating alliances across government, academia, industry (and community) are evident in the comparator cases (and expected by funders). Combining industry, academia, and government supports under a single facility it allows for all parties to benefit from increased synergy and cooperation.
- Given interest in the facility to both positively impact teaching and learning as well as supporting the development of industry; the right balance will need to be struck between stakeholders in balancing the facilities dual remit to address the needs of education and industry.

- Consideration should also be given to a quad-helix or triple-helix structure that could include a focus on community benefits as is evident within the Pinewood example in order to build strong relationships with the community and to spark interest in the profession.

4.12.10 Key Opportunities

- There are opportunities to develop a cohort of academic staff in partner institutions who have state of the art training and applicable experience on cutting edge technology and processes.
- Staff and students will have the opportunity to collaborate across institutions more effectively through the shared facility with opportunities for collaborative learning, project work, and knowledge transfer.
- Working collaboratively allows for partners to share the cost of implementing leading edge technology and allows for economies of scale.
- The facility has the potential to uplift the Irish Media Production sector and strength the sector's case as an attractive destination for modern productions across TV, Film, Gaming, etc and would contribute to enhancing Ireland's reputation internationally.

4.12.11 Key Challenges: Cost, Complexity, Capacity, Concept

- At this early stage a key challenge that has become apparent are "4 C's" with relevance to the development of the facility:
    - Cost – *Who will pay for it and how much will it cost?*
    - Complexity – *How will the facility stay relevant in an evolving and complex sector?*
    - Capacity – *What scale is needed in order to maximise benefits?*
    - Concept – *What defines the concept of the shared Media Production facility*?
- Delivering facilities of this scale is a protracted and complex process, requiring commitment from a number of people for a number of years to see it through and given evolving needs it becomes necessary to expand and grow in response to new demands.

Management & Governance Options

5

5 Management and Governance Options

5.1 Considerations / Recommendations

This facility is envisaged as a shared facility with project partners sharing responsibility for securing funding in the first instance, overseeing construction, and then governing, managing, and operating the facility. The shared ethos will raise important questions on who is involved at what point in the process, how the decisions are made, and how a culture of cooperation, appropriate responsibility, and equitable engagement can be developed. It will add complexity to governance and this needs to be represented in the oversight, management, and operations structures. The dual remit of education and industry will also add a layer of complexity to the oversight, management, and operations structures. This section considers how the facility can be structured to support cooperation and joint management arrangements.

Governance

- Good governance will be key and therefore the governance structures will need to be robust, transparent, and accountable in order to create the trust required to motivate engagement by both industry and academic partners and to ensure the facility stays current to the needs of the industry.
- The Board should be comprised of industry and academic partners with a range of experience to inspire confidence and benefit from their diverse backgrounds.
- The independence of the Board is a key success consideration and the effective delegation of authority within a well-defined operating model to a competent senior management team will be needed.
- A sub-committee of the board could be established to ensure alignment and agreement on cooperation and joint management arrangements for the facility as well as monitoring and reviewing the arrangements over time.
- A future-focused strategy should be developed which would direct operations and priorities and ensure that the services and supports remain responsive to the sector at all times, enabling the sector to avail of opportunities and manage challenges.

Management

- The management of the facility should reflect established best practice. This would include a senior management team with specialised training in operating a facility of this nature, and a wide range of experience.
- A wide range of skills are required in the modern Media Production. There is increasing complementary of skills between different specialisms; increasing demand for scarce talent; and there is a need for a greater number of personnel on modern media projects. Senior management should include individuals with knowledge of the skills needs within the Media Production sector to ensure that they are met through the course material on offer.
- Staffing will need to include special project roles (focused on working with industry users and partners), management team (management of the facility, research, liaison with partners and partner institutions, financial management, strategy development and implementation, marketing and communications) and administration staff (focused on the day-to-day operation of the facility).

- In the case of a multi-site model, there would be increased complexity as management structures are duplicated across multiple sites and there would need to align each site to ensure that the teams in all sites avoid being siloed and can collaborate effectively.
- Consideration should be given to a “group” structure in the case of a multi-site model, with individual management structures for each facility, overseen by group management.

Strategic Options

6

6 Strategic Options

6.1 Strategic Options

In order to decide on the model to be implemented, consideration needs to be given to the synergies which may be achieved by either locating all aspects of the facility on a single site or by spreading the facility across multiple sites. A number of options for how to operate the facility have been considered in the course of this project and discussed by project partners in consultation. In selecting which option to pursue there are a number of key factors that N-TUTORR partners will need to address:

- What sites or buildings do partners have, if any, that could be suitable for the facility?
- What role can a partner play in supporting the facility? How could they support it in future?
- What tools/capabilities do they have that can help the facility achieve its potential? What capabilities will partners have in future?

We summarise the options below as well as the pros, cons, and risks of a national and multi-institutional model at a high level.

6.1.1 Option 1: A National Facility

Under this approach, N-TUTORR partners would agree to collaborate on and share a single property/location which would house a national facility for Media Production. This would require the building of a single unified facility (whether in the form of a single building or smaller clustered buildings to be determined), in a single site (on the campus of a partner or on a greenfield site) while being shared by the participating project partners. This site would act as a central location for engaging with the services offered by the facility for both academic and industry users.

6.1.2 Option 2: An Educational Multi-Institutional Centre

In this scenario, aspects of the facility are dispersed across a number of sites, which may be partner sites or another site with agreed partner(s) hosting an aspect/aspects of the wider facility. This may involve providing an end-to-end service across multiple sites cooperating together. This would entail the building of a number of smaller buildings across the campuses of partners or on greenfield sites to house aspects of the facility at multiple locations to the preference of partners. It would therefore be necessary for the different aspects to collaborate to provide access to students or commercial partners or to replicate aspects across multiple sites. Sites could specialise in a particular area of Media Production e.g. film, gaming, etc. or an individual site might specialise with respect industry application e.g. medicine, engineering, product development, etc.

Options	Pros	Cons	Risks
A National Facility	■ A single unified centre acting as a point of focus for Media Production in Ireland reducing logistical complexity in accessing all aspects of the facility. ■ A simplified planning process requiring engagement with a single council, a site analysis on a single location, and engagement with 1 set of relevant local stakeholders. ■ Greater ease in selling the prospect of co-location to industry and other partners. ■ A more substantial project which may garner increased national political attention and support than a smaller more locally based set of alternatives. ■ A single governance structure. ■ Cost efficiencies due to economies of scale.	■ The need to develop and access a much larger site for a single point of focus centre. ■ A more substantial construction project which may run into challenges regarding planning or zoning depending on site selection. ■ Concentration in a single area would create issues of accessibility particularly to institutions located far from the site. ■ Increased expectations and pressure to provide cutting-edge technology and facilities to potential partners. ■ Cost precludes smaller funding streams being used to fund the project.	■ Identifying a suitable site with space to expand and with other desirable characteristics including access to transport networks in close proximity to industry and students ■ Substantial costs, and expectations from the positioning of the centre as the national facility for industry and academia.

Options	Pros	Cons	Risks
An Educational Multi-Institutional Centre	■ Dispersed model allows for greater accessibility by locating aspects on or close to several partner campuses. ■ Greater participation on a day-to-day basis by local management teams at each partner. ■ Assists in avoiding issues of perceived ownership of a singular national centre. ■ Reduced need for building space than in one-stop-shop model.	■ Increased complexity in the operation of the facility given multiple constituent parts housed in multiple locations. ■ Potential for siloing occurring between teams working in the centres given their geographical dispersion. ■ Diluted economies of scale. ■ Reduced attractiveness for industry collocating given dispersed nature of facilities. ■ Increased complexity in securing planning in multiple jurisdictions with multiple local stakeholder groups. ■ A complex management structure that might require group and individual management structures.	■ Greater levels of political risk due to failure to secure planning permission in a single location threatening the viability of other aspects of the centre. ■ Difficulty in upgrading or redeveloping the facility to maintain industry standards given complexity of operations across multiple campuses. ■ Multiplier effect could lead to inefficiencies and inconsistency

6.2 Operating Model

6.2.1 Overview

Given the time needed to bring either strategic option to fruition, there is value in considering the models which may be used in realising the potential of the centre and delivering the greatest impact for potential members. This includes a purely Physical Space, a Digital Space, and then a Hybrid Space including both a Physical and Digital element.

6.2.2 Physical Space

This model is based on providing a physical space with no digital element i.e. a **building first approach**. This building would include space for use by staff, students, and industry. It would require partners either retrofitting or upscaling an existing space or building a new space to house the facility. In the context of providing physical space; a number of points would need to be clarified surrounding the operating model for the building would be:

- Partners as owner and operator;
- Partners as landlord with the facility fully operated by an external entity;
- Partners in a shared operation, managing and operating the facility with other entities.

For a physical space model, it would be necessary to:

- Scope out the range of services to be offered by the facility, and in the case of a multiple location model, where they should be offered;
- Identify those who could use the physical space (on a drop-in, short-term and permanent basis);
- Source and confirm the capex funding required;
- Develop a business model aligned to industry while preserving educational access to the facility;
    - Covering capex, operational expenditure, tenancy and income generating activities;
- Create and implement a development strategy for the facility.

6.2.3 *Digital Space*

This model is based on providing a digital space with initially no physical space i.e. a **digital first approach**. In the context of providing a digital space, partners would launch an online interactive platform for information, collaboration, and knowledge sharing providing a shared learning and collaboration space between industry students and industry stakeholders online. This would be accessible to students, staff, and industry through an online portal.

For a digital space model; it would be necessary to:

- Define what can be provided digitally including knowledge transfer, tools, education, etc;
- Ensure technical capacity is available to manage the physical infrastructure needed to run the platform;
- Appoint concept and content managers to manage the digital space;
- Source content creators to create content for the site;
- Develop a knowledge transfer and engagement strategy.

6.2.4 *Hybrid Space*

A hybrid model comprises both a physical and digital element in a cohesive blended approach. This would include a digital element allowing for information, collaboration, and knowledge exchange with accompanying physical premises which could be used by industry/students. To deliver a hybrid model, partners would need to:

- Provide for all the needs in the digital model as laid out above;
- Provide for all of the needs of the physical model as laid out above;
- Achieve buy-in from partners on content, strategy, and direction across both elements;
- Develop and implement a strategy that covers both aspects of the model.

Recommendations & Conclusions

7

7 Recommendations and Conclusions

7.1 Overview

This report into the initial concept of what a shared Media Production facility could become, and defining the factors which will be key to the success of the concept has uncovered a number of useful lessons and observations that need to be investigated and understood fully in a full feasibility study. Below we have laid out a number of recommendations and conclusions which should be considered in the course of developing this concept further.

As noted, and agreed at the project initiation meeting, as this is an early concept feasibility, the outcome will sometimes be identifying the questions that still need to be answered through a full feasibility rather than there being a definitive answer at this point in time.

Further research and engagement along with a thorough feasibility analysis will help to identify common pitfalls when developing a project of this scale and complexity. This is a rapidly developing and evolving section of the economy and careful consideration is needed to ensure that the facility is responsive to current and evolving market and sector demands. A key part of the facility's USP will be providing access to skilled talent and leading-edge facilities that are at all times up to industry standards.

It is understood that further work will be required to decide on and plan the facility which cannot be defined in any detail at this point in the project lifecycle before partners have considered and decided on the strategic direction of the proposed facility. It is intended that the key insights and content of this report should guide the decisions to be made at this stage of initial concept analysis.

As the concept is refined further in light of further research and consultation it will become necessary to settle on a definitive concept for the facility, and to revise the expectations and approach of the facility to best cater to the needs of stakeholders. A clear rationale for the facility will need to be established. At this early stage, this paper offers the following recommendations and conclusions to guide this process.

7.2 Rationale for the Facility

- There is a gap in training provision that includes training on new industry techniques which have to the fore in recent years such as Virtual Production.
- The facility could occupy a specialised role to meet industry demand for modern leading-edge technology and amenities.
- There is alignment between the facility and education and industrial development policy especially with the need for a third party to spur on technological development and uptake in the Media Production sector. The facility could be a vehicle through which EU and national strategy and policy commitments are realised.
- The facility could play a key role in supporting the Media Production sector in Ireland to reach its full potential creatively and economically and to create opportunities that support the employment of graduates.
- The facility could act as a conduit/incubator/hub for the industry as well as a developer/nurturer of talent and academic potential to provide benefits to both academia and industry.

- The idea that the facility would have "application across multiple disciplines/industries such as animation, live action, health sciences, prototyping, VFX/XR, games, science, architecture" should be fully tested in order to prioritise and provide focus based on the areas that would optimise mutually beneficial outcomes. A user design workshop would be a useful tool in this regard.
- The facility could act as a collaborative solution to education and sectoral challenges by providing an environment that is conducive to cooperation, ideas exchange, knowledge exchange and co-design.

7.3 Model and Approach

- Ensuring that the facility aligns with national, European, and industry priorities for the Media Production sector is vital to attracting investment and collaboration with partners.
- The specification of the potential facility's infrastructure/services/site must reflect the potential user's needs and must be designed to evolve with those needs over time.
- A physical location with up-to-date technology could be developed in order to address identified gaps in the availability of training and access to technology.
- In order to ensure focus, project partners should finalise a definition of "Media Production" for the purpose of the project.
- Consideration should be given to selecting a site/sites which allows for future expansion and the development of a cluster surrounding the facility to maximise its impact as a catalyst for the wider sector.
- Forward planning should be undertaken to identify opportunities for additional funding, and to plan for the potential expansion of the facility through the development of a fundraising strategy aligned with the overall strategy.
- This shared media facility would be a highly complex organisational design which would need to be tested and risk mitigation and risk management plans will need to be developed to manage this complexity and that of it being a shared facility.
- Governance structures would need to include a joint management committee with representation from all partners to oversee the operation of the facility on a shared ethos; consideration could be given to incorporating these principles within Codes of Conduct and Terms of Reference where appropriate.
- A cooperative approach focused on a shared ethos is essential to ensuring the facility translates its intention of being "shared" and is developed in the interest of all participating partners, with appropriate transparency and accountability.
- The facility should have a board with representation from both academic and industry partners including a diverse set of experience to ensure that the facility benefits from a range of viewpoints and that there is a balance between industry and academic priorities.
- Consideration should be given to establishing the facility as an independent legal entity with ownership divided among the partners of the facility.
- In lieu of developing the facility, consideration should be given to securing a collaboration with Studio Ulster or another entity in the Republic of Ireland in order to access their facilities (with a specific focus on Virtual Production facilities) without the delay and expense of developing them or as a transition consideration.
- Regardless of the approach taken, the different phases of development should be considered and outlined ahead of development commencing.

7.4 Roles and Focus

- It will be important to settle on the scope, scale and priorities of the facility in order to manage expectations and ensure that the facility is aligned with the needs of both academia and industry.
- It is suggested that the centre focuses on areas where the N-TUTORR partners have established areas of practice across institutions or where there are clear plans to develop capacity in this area in the near to short term.
- The facility should seek to form strategic partnerships with industry organisations to secure support for the development of the facility.
- Any consideration of location-based targeting in relation to sectors where Media Production can be applied (as outlined in section 4.3); should be informed by the prevalence of relevant clusters in that geographic location e.g. pharma/med-tech in Cork/Galway. Such case-by-case targeting should also complement the existing specialism of the proximate institution(s).
- The facility should adopt a quad-helix approach to align with expectations from funders, and other stakeholders to ensure that multiple perspectives are considered, and the benefits of the facility are shared.

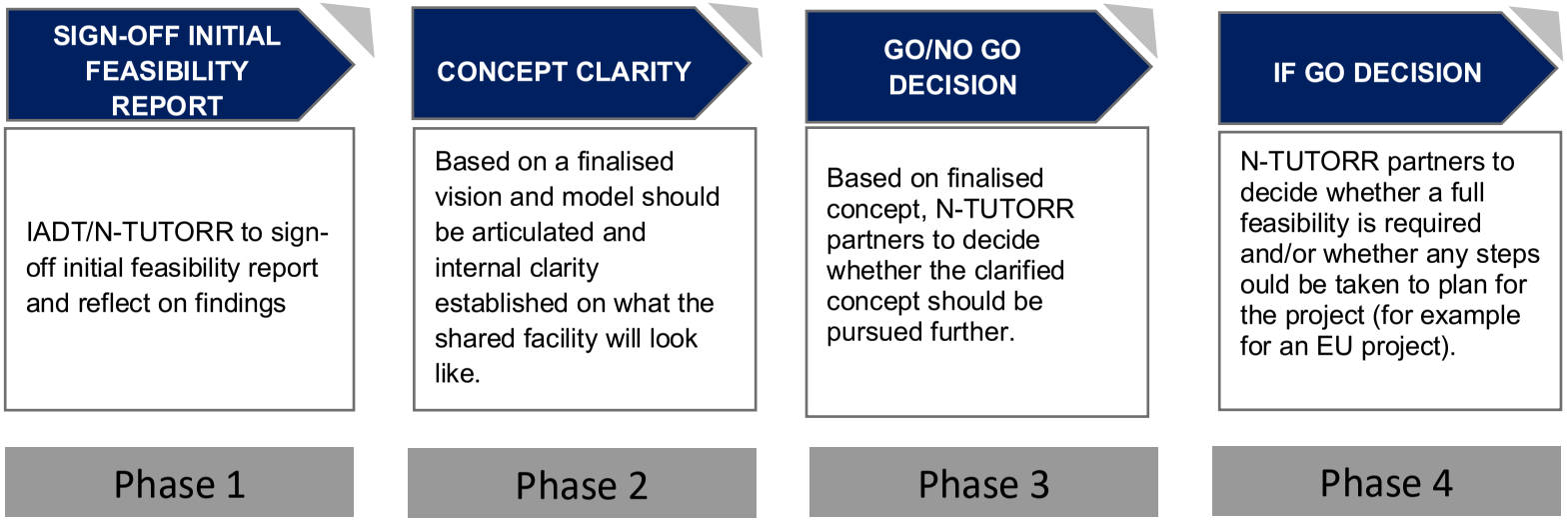
7.5 Further Issues for Consideration

- The concept for the facility needs to be finalised in detail in order to ensure alignment across all project partners, key stakeholders, potential project sponsors, and potential collaborations. The finalised concept should be focused on the needs of academia and industry and clarity on the influence and application of Media Production in industry.
- Once a final concept is agreed, and costs are estimated in greater detail consideration should be given to the resource contribution (time, financial, human resource) required of partners and how that would be structured.
- As a state-of-the-art facility with leading-edge technology, substantial funding will need to be sourced in order to deliver the project. In preparation for this, a watching brief should be maintained ahead of identifying and applying for a suitable call under EU funding streams.
- Ensuring that the facility remains committed to a shared ethos will be crucial to the long-term success of the facility by avoiding partners withdrawing from the facility due to perceptions of the facility being overly dominated by 1 or more partners.
- Consideration should be given to conducting in-depth learning journeys and a gap analysis of skills and experience across the sector to identify lessons to be learned and incorporated as part of the development. Ideally, this would be to both a single facility and a multilocational facility.
- Long-term strategic thinking is required to ensure that feasibility is considered both for the initial concept and potential future iterations especially as funding structures evolve and technology changes as it is likely that this could be undertaken as a phased development.

- Building on this initial concept feasibility study, a full feasibility study could be undertaken encompassing:
  - An analysis of the economic impact of the proposed facility;
  - Deeper consultation with industry participants, external stakeholders, and international comparators to acquire additional insights and identify their preferences when engaging with a Media Production facility;
  - Identification of specific funding sources which might be used including calls for applications for EU funding, Private Philanthropy guided by the National Philanthropy Policy, direct state funding, and other sources as appropriate;
  - A development plan for the facility including:
  - Infrastructure Requirements;
  - Scale/Reach/Scope;
  - USP Development;
  - Operational Staffing and Budget;
  - Governance and Management Requirements;
  - Supports for Industry;
  - Student and Peer Learning Opportunities/Facilitation;
  - The potential to develop an Industry Cluster;
  - Alternative Revenue Streams;
  - Marketing and Promotional Activities;
  - Sustainability Planning;
  - A thorough PESTEL and SWOT analysis of the facility and the Media Production Sector;
  - A multi-criteria analysis of identified locations and models for the facility;
  - Identification of potential partners outside of the academic partners from N-TUTORR.

7.6 Next Steps

After signing off this report, N-TUTORR partners should reflect on this report as well as their own perspectives and experiences within the Media Production sector to identify a path forward. A clear vision for the concept as well as an operational model should be articulated, and internal clarity established on how the facility will look once brought to fruition. Once this concept is finalised, N-TUTORR partners should decide on how the concept should be pursued and then what additional work is entailed in order to deliver on this, and how to phase out and plan the project.



Appendix: Works Cited

8

8 Appendix: Works Cited

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