



# Statement of Strategy 2023-2027

Presented to the Department of Tourism,  
Culture, Arts, Gaeltacht, Sport & Media and  
Coimisiún na Meán

*Final Version*



# Contents

|   | Page |
|---|------|
| 1. Preface.....                                       | 2    |
| 2. Executive Summary.....                             | 3    |
| 3. Overview of TG4 .....                              | 8    |
| 4. The Operating Environment & Key Challenges .....   | 14   |
| 5. TG4 Strategy 2023-2027.....                        | 19   |
| 6. Additional Funding and Financials 2023 - 2027..... | 42   |
| 7. Benefit / Impact of TG4’s Strategy .....           | 47   |
| 8. Conclusions.....                                   | 53   |

## 1. Preface

The Programme for Government, Our Shared Future, in recognition of the importance of a sustainable Irish media sector, and in recognition of the significant changes being experienced by the media sector in Ireland and globally, mandated the establishment of the Future of Media Commission. It was tasked with addressing how media should serve Irish society, assessing how well the current system meets these goals and considering what changes need to be made to support our media sector. *The Commission has made 50 recommendations which provide a strategic platform for the transformation of Ireland's media sector.* The Future of Media Commission Report described the current provision of Irish language broadcasting services in Ireland and made recommendations to improve this provision.

- Recommendation 7-1: Editorial Control for TG4 over its news services: TG4 should have independent editorial control over its news services. This will allow for greater plurality in news coverage and allow TG4 to provide an enhanced service to its audiences.
- Recommendation 7-2: Comprehensive review of the provision of Irish language services: Coimisiún na Meán should undertake a comprehensive review of the provision of Irish language services and content across the media system, with a focus on institutional structures and opportunities for innovation and collaboration. This review, to be concluded within 18 months, should include recommendations for improving the provision of Irish language services, with a focus on institutional structures, including:
  - The roles of TG4 and RTÉ.
  - A particular focus on Raidió na Gaeltachta, its role within the Gaeltacht regions and its access to commercial income.
  - The role of PSCPs.
  - Opportunities for collaboration and partnerships between PSM and PSCP, particularly in regard to digital innovation and syndication.
  - Strategies for youth engagement including education, youth programming and making better use of digital mediums such as podcasting and social media.
  - Strategies for Irish language education, including for people who are learning the language or who are trying improve their proficiency in the language.

Coimisiún na Meán has been tasked with undertaking the following:

- Conduct a comprehensive review of the provision of Irish language services;
- Focus on roles of RTÉ, TG4, Raidió na Gaeltachta and PSCPs;
- Investigate opportunities for collaboration, youth engagement and digital mediums;
- Develop strategies for Irish language education, including adult learners;
- Engage with stakeholders to consult on any proposal for further engagement through the media sector, and in developing Irish language provision; and
- Examine opportunities for enhancing the current support to promotion of the Irish language on an all-island basis.

The timing of this review is due to commence in mid-2023 and conclude at the end of 2024. As such, the outcome of the Coimisiún na Meán review and its recommendations for improving the provision of Irish language services, will certainly impact TG4's action plans for 2026 and 2027 as part of our five-year Statement of Strategy. It is therefore deemed appropriate to prepare a detailed action plan for 2026 and 2027 following the completion of the Coimisiún na Meán review, in order to reflect and deliver on the review's outcomes.

As part of the TG4 2023-2027 strategy, TG4 presents a detailed three-year action plan for 2023-2025. TG4's strategy will be reviewed by the TG4 Board during 2025 and a detailed action plan for the last two years of the strategy (2026 and 2027) will be produced in line with the Coimisiún na Meán's review and recommendations for improvement.

## 2. Executive Summary

### Introduction to TG4's Strategy 2023-2027

As Ireland's national Irish language Public Service Media (PSM) organisation, TG4 is required by the Broadcasting Act 2009, as amended by the Online Safety and Media Regulation Act 2022, to prepare a Statement of Strategy every five years. TG4's Statement of Strategy 2018-2022 concluded at the end of 2022 and as such, there is a requirement to put a new strategy in place. This document presents TG4's Strategy for 2023-2027, along with a detailed action plan and associated benefits, for the first three years of the Strategy (2023-2025).

### The Strategic Context - the Importance of Irish Language Media

The impact TG4 has on society is a crucial part of our role in the context of the PSM and cultural ecosystem in which we operate. As the Future of Media Commission concluded, Public service content is a "merit good" which represents "critical public infrastructure". TG4 is not just a broadcast initiative but also part of a broader Government policy to support the Irish language, culture and arts. We also support regional and rural development and social inclusion of minority language communities by supporting the Irish language and Irish-speaking communities and Gaeltacht.

Despite its constitutional standing, the Irish language behaves as a minority language and like all minoritised languages, it is in danger of 'language shift', the process whereby a speaker community shifts to a different language. In the context of language shift, UNESCO now classifies the Irish language as 'definitely endangered'. Every Irish generation has the privilege and responsibility of maintaining Irish linguistic diversity as part of the worldwide language ecosystem and global linguistic diversity.

TG4's Strategy for 2023-2027 is fundamentally about building a public sphere for the Irish-speaking community, creating national status for the language and mainstreaming the language within the national sphere. It is based around moving to a more balanced, less monolithic PSM ecosystem in Ireland and on developing the quality and status of TG4's brand to a European level benchmark which has been proven to impact on language shift within minority language communities.

Language science shows us that language shift can be countered. All of the accredited sociolinguistic research confirms that transmission of Irish as a living language within the family domain and between generations is critically important. A supportive framework and opportunities in which Irish can be passed on in a natural way within households and communities are vital. Meaningful and energetic Language Planning strategies must be deployed in three areas to support this. These areas are Language Corpus Planning, Language Acquisition Planning and Language Status Planning.

In the increasingly global and digital world, TG4 has an important role in all three of these areas. Irish language media is a core element in the combat against language shift and the maintenance of linguistic diversity (with language-based arts, Irish language education and Irish medium education being other very important areas). While TG4 can demonstrate many successes in bestowal of status on the Irish language and in helping to mainstream the concept of bilingualism with majority language speakers since TG4 was established almost three decades ago, we must do more. Other minority languages in other countries have made greater progress because their minority language strategies, including those for media, have been pursued with far greater vitality and investment. TG4 believes that strengthening Irish language public service media is critical to ensuring a strong Irish culture. Public service media plays an essential role in society, representing a nation's cultures, promoting its languages, shaping and supporting its creative industries.

### The Global Context - Digital & Audience Shift

The global media landscape continues to change, with digital technology, social media and connected devices transforming audience viewership and content consumption. PSM faces some of the most significant challenges ever, and for TG4, these challenges are magnified by virtue of being an Irish language content provider in a global, predominantly English language media market. The growth of highly-resourced global streaming and media services in Ireland has resulted in a growth of highly-resourced English-language content.

Audiences are also fragmenting with the continued rise of the streaming industry, online video, gaming and social media. While broadcast television is an important platform for older audiences, social media is seen by younger generations as a one-stop-shop for social connection, news, music, games, user-generated content and personalised information. It competes more than ever, for attention with broadcast and streaming content. TG4 must address the challenges associated with the

evolution of digital technology and media platforms, and continue to innovate to grow our services and connections with audiences, particularly the next generation.

## Environmental, Social & Governance

Global economic, political and social developments continue to have a major impact on all businesses and societies. These include: climate change; the legacy impact of the pandemic; geopolitical shifts and conflict including the continued conflict in Ukraine; energy shortages; disruption to supply chains; and, inflation. These major global challenges continue to cause disruption to economies, businesses and individuals alike. Further extreme weather, social unrest, and supply chain shortages could have much wider and more severe impacts on global economies. We must continue to address our environment and push for sustainability in everything we do. We must also manage the financial impact of inflationary pressures and our budgets well. An important aspect of TG4's strategy therefore relates to "ESG" or Environmental, Social and Governance.

## TG4's Strategic Priorities

These important areas of context underpin TG4's strategic priorities for 2023 - 2027 which are to:

1. Properly serve and inspire, and increase our engagement with, younger audiences including children's audiences.
  - Younger people are growing up in a global media environment and we must increase our resonance and relevance with this important audience. While the majority of TG4's funding is spent on Irish language content, insufficient funding has made it challenging to deliver new drama and entertainment content every year, which in turn makes it challenging to engage consistently with younger audiences. We must also create compelling and engaging short-form content for online platforms which have a deep reach into this audience demographic.
2. Serve Irish language audiences and the Irish-speaking communities & Gaeltacht even better.
  - This includes: beginning to implement the Future of Media Commission's Recommendation 7-1 "TG4 should have independent control over its news services", i.e., strengthening news and

current affairs under the TG4 brand which sees TG4 emerge as an omni platform provider of distinctive news coverage and investigative current affairs programming; provision of significant audio-visual supports for Irish within the education system; ensuring Irish culture, heritage and the arts are supported; and creating status for the Irish language by stimulating cultural works of national significance, including high-quality Irish language film and drama.

3. Support regional creative companies and the regional creative economy.
  - As a Publisher-Broadcaster, TG4's success relies heavily on the Irish independent production sector's original programming and content. Additional funding will be invested in commissioning new content from the sector and in talent development schemes. We will create new work and protect and grow jobs. We will be a significant platform for the generation of independent Irish intellectual property and a springboard for internationalisation of, and job creation in, the screen production sector in the regions.
4. Ensure TG4 is a sustainable and inclusive organisation for the long-term.
  - TG4 must continue to play a meaningful role in the sustainability of the Irish language and Irish language media. We must also continue to prioritise other key aspects of sustainability including: environmental sustainability (pursuing our targets for sustainable production and operations); sustainability of our people (employee health and wellbeing), Diversity, Equity & Inclusion (DEI); and, governance (high quality stewardship and being a "trusted" organisation).

TG4's [Vision](#) and [8 goals for 2023 - 2027](#) are summarised overleaf. Further detail is provided later in the Strategy.

### TG4's Vision

Through first-class funding scale and an enhanced focus on young people and on Irish independent creativity, TG4 will continue to engage audiences of all ages and lay the foundations for sustaining Irish-speaking communities and for successfully internationalising our industry in the regions. Through "TG4 Gach Áit / TG4 Everywhere" and a brand synonymous with strong, creative Irish media, we will ensure Irish language public service content remains important and prominent in a modern Ireland.



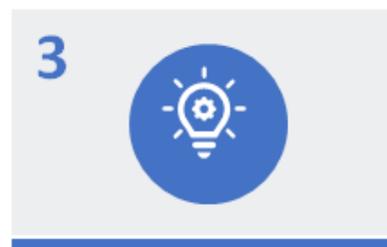
#### 1. Children's Services

Enrich our services for children, strengthening their engagement with TG4 and the Irish language.



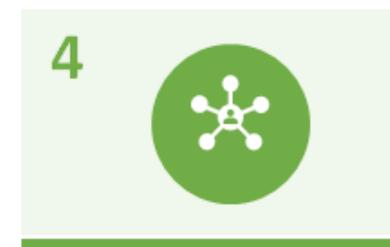
#### 2. Younger Audiences

Provide bolder, more exciting content for 15 to 34 year olds and put younger audiences centre-stage on TG4's social and online platforms.



#### 3. Educational Resources

Build an ambitious portfolio of educational resources which open up a new era of learning Irish and learning through Irish, supporting growth of the Irish language.



#### 4. Nuacht & Current Affairs

Reimagine news and current affairs under the TG4 brand, seeing TG4 emerge as a multi-platform provider of distinctive news coverage and investigative current affairs programming.



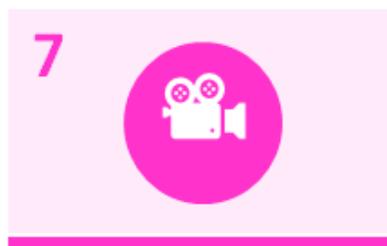
#### 5. Irish Arts, Culture & Heritage and Sport

Expand TG4 as a platform to champion Irish arts, culture & heritage and sport.



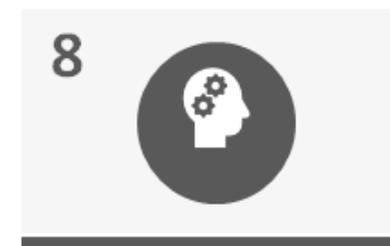
#### 6. Irish Language Film & Drama

Build the scale of Irish language film and TV drama production in Ireland's regions.



#### 7. Invest in Production Sector

Champion the success of Irish production sector talent and enterprise.



#### 8. Sustainable & Inclusive TG4

Build a sustainable and inclusive TG4.

## Funding

TG4 acknowledges and thanks the work of the government in strengthening TG4 over the last three budgets. However, TG4 still lags far behind other European minority language broadcasters in terms of funding and scale, such as S4C in Wales or EITB in the Basque Country. S4C is the closest equivalent to TG4 but its overall budget is twice that of TG4. In the short term, TG4 needs to be functioning at least at the level of S4C in Wales in terms of resources and funding.

European Broadcasting Union (EBU) research<sup>1</sup> shows Ireland is one of three countries in larger western European markets in which PSM is underfunded relative to their respective economies. Ireland ranks in the bottom third of all EBU markets. In 2019, Ireland's PSM funding amounted to 0.11% of our Gross Domestic Product (GDP) compared to an average of 0.16% across the EBU. In 2021, Ireland's PSM funding has fallen to just 0.09% of GDP. The EBU notes that Ireland "*appears underfunded in proportion to its respective economy*".

To deliver TG4's Strategy, we are seeking a public funding increase of €10.6m in 2024, €10.7m in 2025 and €10m in both 2026 and 2027. This reflects the increase requested in TG4's Post-Covid Vision which was submitted in 2021. This will bring TG4's public funding to €93.66m by 2027. This is equivalent to only 48% of RTÉ's [2021](#) licence fee income. While small relative to what RTÉ receives every year, it will help to address PSM funding balance, reflect greater equity in PSM funding and help reform the monolithic PSM ecosystem in Ireland.

As the principal funder of the independent production sector in Ireland's regions outside of Dublin/Wicklow, more funding for TG4 will result in a step-change in the scale of the Irish regional screen sector. TG4's Publisher-Broadcaster model guarantees that by 2025, based on our detailed action plan for the first three years of our strategy, 78% of the additional funding will be invested in the independent production sector. Our plan will result in an estimated 300-400 new jobs in the sector by the end of 2025. By expanding the skilled technical and creative employment in Gaeltacht and regional areas, the investment will help retain talent and young Irish speakers in these areas. It will help to strengthen and grow companies and stimulate further investment in production sector capital formation and local supply services. It will provide a catalyst for internationalisation of the production sector in the regions.

Using multiplier analysis, it is calculated that in 2025, TG4's expenditures in the economy (again based on our three-year action plan for 2023-2025), will have a jobs impact in the national economy of an estimated 1,650 full-time equivalent jobs (direct, indirect & induced) of which an estimated 1,450 would be in the regional economy.

Over a quarter of a century has seen the emergence of TG4 as a genuine force for Irish language audio-visual innovation. We will continue in our efforts to reimagine the role of TG4 and status of the Irish language and the Gaeltacht in Irish society. We believe that media and the arts play a central role in this reimagined vision and that despite the significant number of major global media services and intense competition, TG4 is needed more than ever. Our unique purpose sets us apart and we are a vital part of a modern Ireland.

Transforming our scale and services as the media market evolves, is fundamental for TG4 to maintain this purpose and we have ambitious plans for the years ahead. These plans will ensure that we: provide TG4 audiences with even more value; support the continued development of Ireland's regional creative sector; and, support the growth and preservation of the Irish language, building connection with young people who are growing up in a global media world.

TG4's long-term vision is to attain a status closer to that of a broadcaster in societies where bilingualism is stable and where language shift is no longer an existential threat. Public broadcaster role models include Canada, Switzerland, Belgium and Spain. As a first step, TG4 needs to achieve an increase in funding scale to ensure the service can create significant societal and economic value and overcome the challenges facing Irish language media in the digital age.

TG4's plan is fully aligned with national policy and strategy including: the Future of Media Commission recommendations; the Government's 20-Year Strategy for the Irish language; Creative Ireland's Audio-visual Action Plan; Programme for Government: Our Shared Future; the National Development Plan 2021-2030; and, Global Ireland - Ireland's Global Footprint to 2025, among others.

A summary of the key benefits of TG4's strategy is presented overleaf. It should be noted that these benefits relate to the detailed three-year action plan and do not reflect the full benefits of the five-year strategy. The full five-year benefits will be identified when the detailed action plans for 2026 and 2027 have been developed.

<sup>1</sup> Funding of Public Service Media (Media Intelligence Service, EBU, April 2023).

## Summary of the Benefits of the Strategy

(Based on the three-year Action Plan 2023-2025 only)



### 3. Overview of TG4

#### TG4 holds a Unique Place in Ireland's Media Landscape

As Ireland's national Irish language PSM organisation, TG4 provides trusted, creative content services. The breadth of our output includes: news and current affairs; educational programming; arts & drama; *Cúla4* and other children's content; national events of cultural significance including commemorations; live national sporting occasions free-to-air; documentaries of historical and cultural importance, and so much more. Our output is provided across linear and non-linear platforms ensuring we can deepen our audience connection on all devices of choice.

At a time of increasing globalisation in the media market, extensive competition and changing audience behaviour, TG4 holds a unique place in the Irish media landscape. National market research<sup>2</sup> shows that 92% of the public strongly agree there is a clear need and role for TG4 in broadcasting in Ireland with 81% agreeing that TG4 provides high quality content and services.

TG4's Mission is:

**We deliver entertaining, educational, informative and innovative media services that celebrate Irish language creativity and connect with audiences of all ages at home and worldwide.**

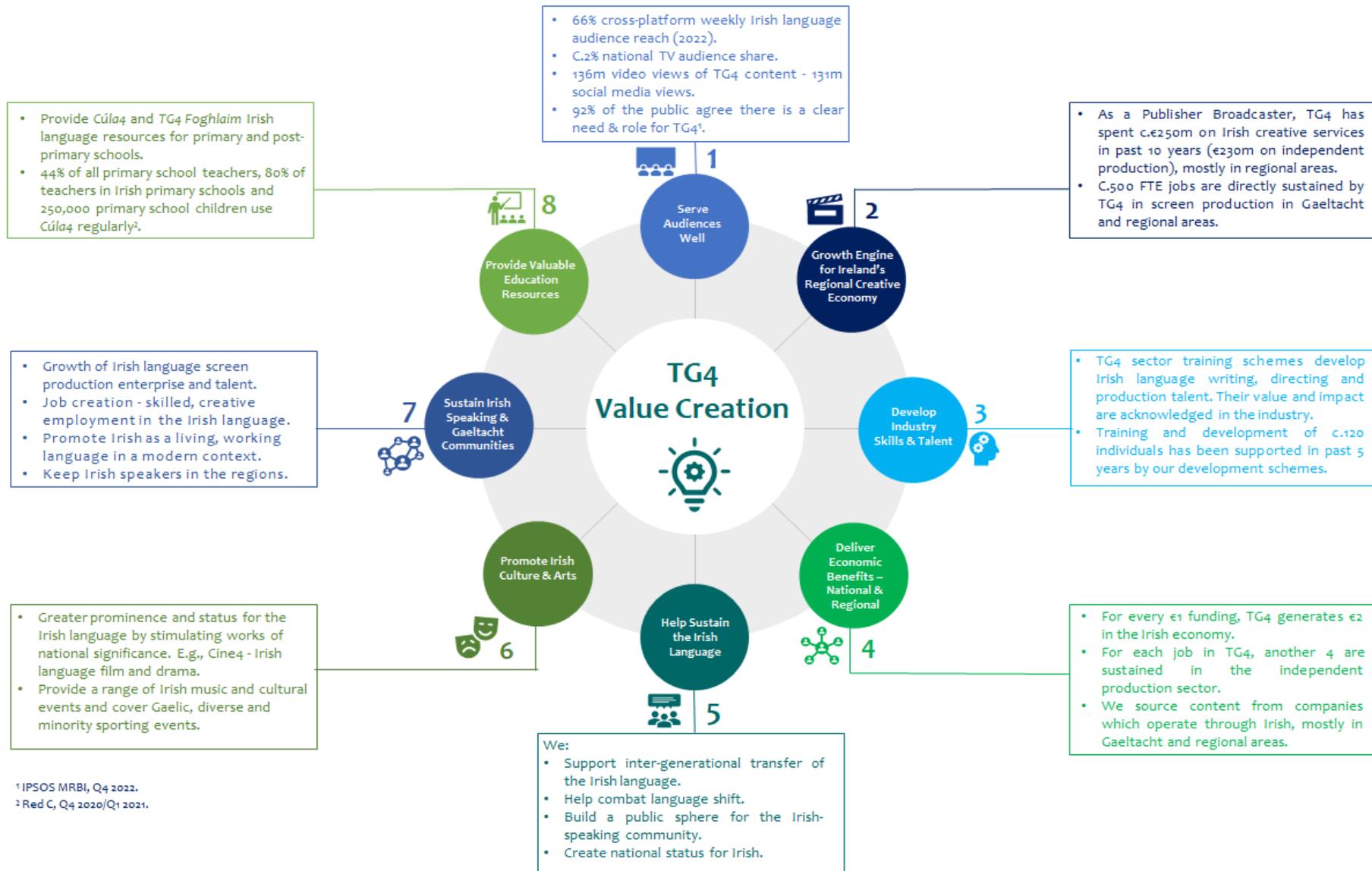
**We support Irish-speaking communities and help normalise the Irish language in the daily lives of Irish people.**

**Through partnership with the Irish language screen sector, we enable the creation of world-class content and support economic growth in Ireland.**

<sup>2</sup> IPSOS MRBI (1,000 Irish adults - aged 15+ years), October 2022

## TG4 Creates Value

TG4 delivers value in so many ways as summarised below and described thereafter.



## Serves Audiences Well

In addition to the main linear channel, TG4 provides a broad range of content brands across all platforms, as shown below. We continue to develop new services to meet audience needs. For example, TG4 HD was launched on Saorview in December 2022. We are also preparing for the launch of *Cúla4* as a dedicated children’s channel on the Player, Saorview and Virgin Cable in 2023 (it will also be made available to Sky Ireland) as well as for the launch of a TG4+1 channel.



We continue to grow TG4’s audience reach and engagement through our services. In 2022, 3.654m people or 82% of the population watched TG4 at some stage during the year. Continued growth of TG4’s national television audience share has been delivered over the last three years and in 2022, it increased from 1.89% in 2021 to 1.96%, an almost 4% increase in average all day viewing share. This is the highest share the channel has had since 2011. There was also a 5% increase in primetime audience share (from 2.05% in 2021 to 2.15% in 2022).

The strong growth of TG4’s non-linear digital media viewing and audiences also continued in 2022. The number of cross-platform video views of TG4 content grew 120% from 61.8m in 2021 to 135.8m in 2022 (on top of the 65% growth in 2021).

TG4’s cross-media reach with Irish language audiences is also strong. In 2022, TG4 reached 66% of all Irish language audiences weekly, across *all* linear and digital platforms including TV, smart devices, mobile, online etc. TG4 content is recognised for its quality. A small selection of TG4 audience feedback is presented opposite.

## Audiences & Stakeholders Value Our Content & Services

*"Watching some previews of programmes coming up on TG4 this week and I can honestly say that I'd happily up the licence fee if it all went to TG4"*  
 Elis O'Hanlon, Sunday Independent Jan. 2022

*"TG4 is quality viewing in anyone's language"*  
 Pat Stacey, Herald Nov. 2021

*"This film's (An Cailín Ciúin) remarkable success should serve as a proof-of-concept, if one was needed, for the Cine4 scheme and strengthen arguments in favour of increased funding for Irish screen production more widely"*  
 Laura Slattery, Irish Times June 2022

*"TG4 do a superb job with limited resources"*  
 WicklowPeople, April 2022.

*"TG4's Súil Eile approach has grown female sport".*  
*"TG4 have continuously reaped the rewards for excellent ladies football coverage".*  
 Sinead Kissane, Virgin Media News & Irish Independent. Joanne O'Riordan, Irish Times Oct. 2021

### Growth Engine for Ireland's Regional Creative Economy

As a Publisher-Broadcaster, TG4 enables creation of world-class content and supports creative industries' growth in Ireland. TG4 is a significant investor in the screen sector in Ireland's regions in particular. TG4 sources content from companies which operate through the medium of the Irish language, most of which are located in Gaeltacht areas. TG4 is currently working with 66 production companies and of these, very actively with 33 independent Irish language producers, most of which are based in Gaeltacht regions. In the past **5 years** alone:

**€141m<sup>3</sup>** TG4 has spent over €141m on creative services in Ireland, particularly in regional areas.

**€116m<sup>4</sup>** TG4 has invested over €116m with the Irish independent production sector, the majority of it with regional production companies. Every year, we spend over 90% of our programme budget on independent production.

**80%** TG4's investment in Ireland's creative services represents on average, almost 80% of TG4's current funding every year.

**460** A minimum of 460 fulltime equivalent jobs are directly sustained by TG4 in screen production in Gaeltacht and regional areas<sup>5</sup>. This generates important economic, social and cultural benefits for these communities (*excluding wider economic impact*<sup>6</sup>).

TG4's role in the development of the Irish independent production sector is widely acknowledged by industry stakeholders, as shown opposite.

### TG4's Role in Developing the Irish Production Sector is Acknowledged\*



\* TG4 industry research & consultations, 2019 & 2022.

<sup>3</sup> Excluding sports and music rights.

<sup>4</sup> Excluding sports and music rights.

<sup>5</sup> Based on TG4 and Údarás na Gaeltachta estimates. Excludes freelance FTEs not captured in data returns.

<sup>6</sup> In 2022, TG4's expenditures made a contribution to national output of circa €76m and supported approximately 1,146 full-time equivalent jobs (direct, indirect and induced).

## Develops Industry Skills & Talent

TG4 is an important investor in production sector training and development to build creative talent and skills. Over the years, in conjunction with Coimisiún na Meán, Údarás na Gaeltachta, Greasán na Meán Skillnet and other partners, TG4 has run various schemes, including a number of short film development schemes (Síol, Údar, Scéal 1 and Scéal 2) which provided training and support for emerging Irish language writing, directing and other production talent, benefitting the sector enormously. Other schemes which have supported development of industry talent include:

- *Cine4* - in collaboration with Coimisiún na Meán and Screen Ireland, to support development and production of Irish language feature films and talent.
- *Scéim Forbartha Oiliúna* - in conjunction with the independent production sector and Údarás na Gaeltachta with accredited training delivered by the Atlantic Technological University (ATU). This provides industry trainees with one-year placements with independent production companies.
- *Glúin Nua* - to support emerging Directors and Writers Irish language projects.
- Our commissioning rounds have clear upskilling and talent development objectives, to continue to build Irish language writing, directing and production skills in the independent production sector.
- We have also invested in new film, drama and documentary shorts schemes in conjunction with Screen Ireland and Údarás na Gaeltachta, to grow Irish language talent and support internationalisation of Irish content.
- Since 2019, TG4 has also been providing one-year work placements or shorter internships in TG4 for new industry trainees and apprentices. E.g., in content creation, social media and web development etc.

Our schemes have been vital for growing and further developing Irish language writing, directing, production and other sector talent, and their value and impact have been acknowledged throughout the industry.

## Delivers Economic Benefits - National & Regional

Through TG4's expenditure with the Irish independent production sector and through all of the other services we buy from Ireland's creative companies, we support the development of industry and production talent, regional jobs and incomes, helping to sustain and build Ireland's regional creative economy.

TG4's economic impact can be measured using multiplier analysis and the most commonly applied form of multipliers are output (contribution to national output)

and employment (impact on full-time equivalent jobs). The impacts are measured at three levels:

1. Direct impact - employment and output generated directly by TG4.
2. Indirect impact - employment and output supported in TG4's supply chain (e.g., independent production companies, other suppliers).
3. Induced impact - employment and output supported by those directly or indirectly employed in TG4 and its suppliers, spending their income on goods and services in the wider Irish economy.

It is estimated that in 2022, TG4's expenditures in Ireland made a contribution to national output of approximately €76.3m and supported approximately 1,146 full-time equivalent jobs<sup>7</sup> (direct, indirect and induced). Of this, TG4's expenditures in the regions made a contribution to regional output of approximately €63m and supported 972 full-time equivalent jobs<sup>8</sup> (direct, indirect and induced)<sup>9</sup>.

## Helps Sustain the Irish Language

TG4 has an important role in Language Corpus Planning, Language Acquisition Planning and Language Status Planning for the Irish language. Irish language media is a core element in the combat against language shift and the maintenance of linguistic diversity. In 2023, TG4 looks forward to engaging with the *Future of Media Commission on the* review of the provision of Irish language services and content across the media system. We anticipate that it will be framed in the context of Language Planning Strategies aimed at combatting Irish language shift and preserving our ecosystem of linguistic diversity in Ireland for this generation and for future generations. It is heartening to see preliminary findings from Census 2022 which shows an increase of 6% (since Census 2016) in the number of people who indicated they could speak Irish. Even with non-Irish residents in Ireland now accounting for 12% of the population, the number of Irish speakers represents 40.4% of the population, up from 39.8% in 2016<sup>10</sup>. Of this total number, 10% indicated that they speak Irish very well with a further 32% stating that they speak it well. A welcome finding is young people. 63% of young people between the age of 15 and 19 who spoke Irish reported that they spoke it either well or very well.

<sup>7</sup> Based on analysis of TG4's 2022 operating & capital spend & funding in Ireland.

<sup>8</sup> Excludes additional catalytic impacts (spill-overs) such as skills development, tourism etc.

<sup>9</sup> The "static" nature of multiplier analysis should be highlighted. Multipliers are based on a snapshot of an economy for a given year. Changes in the multipliers from year to year, along with changes in the expenditure, do not support year-on-year comparative analysis.

<sup>10</sup> Population aged 3 years and over. Preliminary Census 2022 results. CSO May 2023.

## Promotes Irish Culture & Arts

Through our cultural and arts programming and through Cine4, TG4 provides greater prominence and status for the Irish language by stimulating works of national significance. We support Irish music and cultural events including a wide range of initiatives from independent film festivals to cultural gatherings and exhibitions etc. TG4's output of traditional music has increased steadily over the years and we continue to provide a platform for this cultural form. In 2022 alone, TG4 broadcast 2,036 hours of Irish language arts, culture and sport content and invested circa €22m in commissioning original Irish content from the independent production sector, across these programming genres. Our focus on Irish-language film through the Cine4 scheme, which brings original Irish language films to cinema, film festivals and television, has also been very successful. Since 2017, Cine4 has supported two Irish-language film projects a year, in partnership with Screen Ireland and Coimisiún na Meán. Cine4's completed films to date are *Finky*, *Arracht*, *Róise & Frank*, *Foscadh*, *An Cailín Ciúin* and *Tarrac*. Cine4 films have been critically acclaimed both nationally and internationally, at film festivals and award ceremonies around the world. *An Cailín Ciúin* is the most successful Irish-language film at the box-office recorded to date. It was nominated for the 95th Academy Awards 2023, in the Best International Feature Film category of the Oscars, making history as the first Irish-language feature film to be nominated in this category.

## Sustains Irish-Speaking & Gaeltacht Communities

A key pillar of TG4's strategy is *Cothrom na Féinne* or Solidarity. This relates to providing support and stability in areas of imbalance. For TG4 as an Irish language PSM, this means "serving habitual Irish speaking audiences well, supporting the communities who speak Irish". Irish language media supports the visibility of the Irish language and its daily use in the community, including increasing young people's engagement with the Irish language. Through our investment in Ireland's regional creative industries, TG4 is providing more opportunities for skilled, creative and technical employment, working in the Irish language and is promoting Irish as a living, working language in a modern context. This helps to keep young Irish speakers in the Irish-speaking and Gaeltacht communities throughout the regions.

In 2022, TG4 commissioned an IPSOS MRBI national survey of 1,000 Irish adults to establish a baseline measure of public perception relating to TG4's role in promoting

the Irish language and giving it prominence. This survey showed that 83% believe TG4 is the most positive measure to promote the Irish language and give it prominence.

## Provides Valuable Education Resources

TG4 views education as a core element of our PSM remit and we recognise the importance of our role in providing educational and learning content. We value our role in providing support for teachers, parents and all those of all ages, who wish to learn Irish or learn through Irish, at home and abroad. We also recognise the vital role TG4 has in promoting the learning of Irish in all schools, both in the Gaeltacht and across the island as a whole.

TG4 offers a range of educational content services for young children including *Cúla4*, our daily broadcast service, a *Cúla4* Player, Apps and a *Cúla4* YouTube channel. We responded to the Covid-19 pandemic with a new educational series for schools, *Cúla 4 ar Scoil*, a five day per week home-school programme. *Cúla4* content is used extensively in primary schools as a learning resource. This is a significant population of 568,184 5-12-year-olds<sup>11</sup>. A national survey in late 2020, of all primary schools (English and Irish-speaking)<sup>12</sup>, on the awareness and use of the TG4 and *Cúla4* Players and content showed a strong performance. An exceptionally high 44% of all primary school teachers, 80% of teachers in Irish-speaking primary schools and 250,000 primary school children throughout Ireland, regularly use the TG4 Player or *Cúla4* Player in the classroom.

TG4 also provides content for post-primary schools. Developed in partnership with Comhairle Um Oideachais Gaeltachta agus Gaelscolaíochta (COGG), with guidance from the Department of Education, our portal *TG4 Foghlaim* is a learning resource which provides audio-visual content for the Leaving Cert and Junior Cert curricula. We have been increasing the visibility of *TG4 Foghlaim* through promotion on social media platforms and through outreach to schools, universities and teachers' associations, among other organisations. *TG4 Foghlaim* performed well with users and in 2022, engagement was well over 100k page views.

Every year, TG4 also delivers a number of educational events for schools. For example, *Iriseoirí an Lae Amáraigh* (in conjunction with *NUIG* and *Nuacht RTÉ*), a week-long programme on Irish language journalism for Transition Year Students. Over 400 pupils registered for the event in 2022.

<sup>11</sup> Census 2022, Central Statistics Office (CSO) June 2023.

<sup>12</sup> Red C TG4 National Schools Research (Q4, 2020).

## 4. The Operating Environment & Key Challenges

Public Service Media is facing some of the most significant challenges in its history. For TG4, these challenges are magnified as an Irish language content provider operating in a highly global and predominantly English language media market. The most significant challenges TG4 faces in the years ahead are summarised below and described thereafter.



### Globalisation & Competition

The media landscape is highly dynamic. Digital technology, social media and connected devices have transformed consumption to the extent that the lines between traditional broadcasters and global content intermediaries have converged. Global Internet and technology conglomerates such as Amazon, Apple and Microsoft, and global media giants such as Netflix, Amazon Prime, Disney+, Apple TV and Sky Now have made significant inroads into the European audio-visual sector, disrupting the competitive environment for public service and commercial broadcasters alike, and posing a real threat to the public service media ecosystem. Audience behaviour, particularly young people's, is evolving as content options expand to include subscription and ad-funded video services, digital and social content etc. The emergence of these large global conglomerates has impacted in three key ways.

Firstly, public service media is facing increased pressure from ever-bigger competitors. Research undertaken by the EBU shows that in 2019, the top-10 Internet & technology giants earned €960 billion which was 26 times the funding of all 66 EBU PSMs<sup>13</sup>. Competition for audiences is intensifying as these conglomerates spend billions on new content to attract and retain audiences. Secondly, these global giants act as gatekeepers where they are vertically integrated<sup>14</sup>, with a clear incentive to draw audiences to content that suits their commercial interests. Thirdly, there is increased competition for viewer attention across all platforms. Audience migration to streaming and online content is a good example and the streaming wars are projected to intensify, with bundled offerings and advertising-supported tiers expanding. Streamers continue to invest in big series and library content alike<sup>15</sup>. Irish household subscriptions to subscription video-on-demand (SVOD) services continue to rise. For example, the percentage of households with access to Netflix is now 60% (up from 51% in 2020), Apple TV Plus is 5%, Amazon Prime is 17%, Disney+ is 18% and Now is 5%<sup>16</sup>. The percentage of households with Smart TVs is also increasing (67% - up from 53% in 2020, with Smart TVs with connections to the Internet standing at 62% - up from 47% in 2020)<sup>17</sup> which has a notable impact on the audience for live television viewing. This will present significant challenges for broadcasters, particularly small broadcasters such as TG4. As competition in the media market intensifies, the cost of content genres such as

<sup>13</sup> Market Insights: Public Service Media's Competitive Environment (EBU February 2021).

<sup>14</sup> Where platform operators are also content owners and / or providers.

<sup>15</sup> Hot Media Trends for 2023, EBU Media Intelligence Service, 2023.

<sup>16</sup> Nielsen Establishment Survey 2023 P1.

<sup>17</sup> Nielsen Establishment Survey, 2023 P1. All TV Households in Ireland.

drama, comedy, and premium factual content continues to rise. The longer-term impact of this shift will be to accelerate the transition from broadcast TV to online viewing. However, there is still a huge value in broadcast TV and the majority of households continue to watch live broadcast television. On average, Irish adults watch 2.6 hours of broadcast television every day<sup>18</sup>. Television continues to be one of the most important unifying cultural forms. It influences how we think about, and connect, with each other, with our communities and with the world around us. However, the growth in global Internet, technology and content conglomerates means that Irish language media, already marginal, risks irrelevance if it is not resourced properly. TG4 must have viable scale to maintain competitiveness and relevance and to create connections and impact with audiences.

### Findability & Prominence

The past decade has witnessed the emergence of platforms for curating content and services. Many of these do not confer prominence to PSM with global players incentivised to support their own content or provide access to the highest bidder, often disadvantaging PSM. Prominence of PSM content is critical - it has a direct impact on audience's ability to access the well-regulated, trustworthy, high-quality programming which traditionally defines public service content.

There are additional linguistic reasons which make findability and prominence even more vital for TG4's content. Although a national language, Irish functions as a minority language. Its habitual-speaking community continually face the danger of language shift and diminution. Irish language media has very little market power and, unlike Ireland's English language media, exerts very little influence on commercial content platforms.

Unless Irish media is supported and given due prominence, it will lose relevance, particularly for younger Irish audiences who are growing up in a global media environment. TG4 must continue to invest in platform development and data analytics, marketing and curation in order to support discoverability of TG4's content and customer acquisition. From a policy perspective, there is also a requirement for public service content prominence to be safeguarded. With the transposition of the Audio-visual Media Services (AVMS) Directive into Irish legislation, the importance of having appropriate regulatory protection to ensure TG4's content remains easy to find, cannot be overstated. TG4 and RTÉ engaged

with the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media throughout 2021 and 2022 to secure inclusion of legislative prominence entitlements for Public Service Broadcasters in the Online Safety and Media Regulation Act 2022 and this was successful. TG4 and RTÉ are now jointly engaging with Coimisiún na Meán to ensure that this is delivered as envisaged.

### Intergenerational Irish Language Transmission

While the Irish language has constitutional standing, it behaves like a minority language in Ireland and is under considerable pressure at the level of intergenerational transmission in the Gaeltacht and throughout Ireland. Within Irish-speaking communities, Irish speakers are very aware that society and media structures bestow a far greater level of status to English than to Irish. This lower status of Irish is a consistent factor in decisions made by individuals regarding the intergenerational transmission of the language within their communities.

Government policy is to increase the use and knowledge of Irish as a community language. Specifically, the aim is to ensure that as many citizens as possible are bilingual in both Irish and English. Policy focus for the Gaeltacht is on maintaining the linguistic identity of the Gaeltacht community as a distinctive language region. The government has adopted language planning or "language management" as one of its core active Irish language strategies. The pillars of this strategy are: language corpus management; language acquisition management; and, language status management. Transmission of Irish as a living language within the family and between generations is critically important. The overall approach is to create a supportive framework and the opportunities in which Irish can be passed on in a natural way within households and communities. This is of special importance in the context of the Gaeltacht. Irish language media and arts, digital corpus-building, Irish language education and Irish medium education have core roles across the three pillars of government's language management policy and are important areas for combatting 'language shift'.

TG4 was established almost three decades ago, within the context of a population that understood the role of the Irish language. Almost 30 years later, Ireland is a global, multi-cultural society and there is a significant proportion of the population today, who don't understand the role and significance of the Irish language. Now more than ever, TG4 must grow the relevance of Irish language content, drive brand awareness, grow audience and "mainstream" TG4.

<sup>18</sup> Consolidated viewing. TAM Ireland / Nielsen (2022).

As described in the next section, PSM is underfunded. Irish language media is however, majorly underfunded relative to English-language services. It is also underfunded relative to other broadcasting services in countries where there are two or more languages which co-exist sustainably (e.g., S4C, Swiss Broadcasting Corporation, Canadian Broadcasting Corporation and the Spanish regional broadcasters).

TG4 - and other Irish language media and arts organisations - play an important role in promoting the self-identity and enrichment of Irish communities and in supporting intergenerational transmission of the Irish language. However, it is clear to the Irish language community that the Irish language media and arts are still, as Breandán Ó hEithir described over forty years ago, at a “second-class or third-class” level compared to their national counterparts in the majority language, the intergenerational transmission of Irish will weaken. Unless Irish language media is supported with adequate funding levels and given due prominence, it is at risk of losing relevance, particularly for younger Irish audiences who are growing up in a global media environment.

TG4’s long-term vision is to attain a status closer to that of a broadcaster in societies where bilingualism is stable and where language shift is no longer an existential threat. Public broadcaster role models include those in Canada, Switzerland, Belgium and Spain. However, in the short-term and as a first step, TG4 needs to overcome its unsustainable lack of scale within Ireland’s monolithic public media ecosystem and grow quickly to a similar scale as that of the Welsh language broadcaster, S4C.

## Funding Scale & Balance

The latest research from the EBU<sup>19</sup> shows that PSM funding across the EBU (64 organisations in 47 markets) is falling, reflecting a structural contraction. While PSM funding increased by 6.7% between 2020 and 2021, this “post-Covid rebound” has to be considered within the wider context of over a decade of austerity and repeated reductions in funding. Overall, PSM funding has only increased by 7.1% over the decade between 2012 and 2021. This represents a minimal annual average growth rate of just 0.7%. When inflation is taken into account, PSM funding actually declined by 4.4% in real terms. The gap between PSM limited nominal growth and the decline in PSM financial capacity is also expected to have widened in 2022.

Three years of public funding increases have been allocated to TG4 (€3.5m for 2021, €4.2m for 2022 and €7.3m for 2023) and we acknowledge and thank the work of the government in strengthening TG4 over the last three budgets. We are truly grateful for these funding increases. We believe they recognise the importance of Irish language PSM and the confidence Government has in TG4.

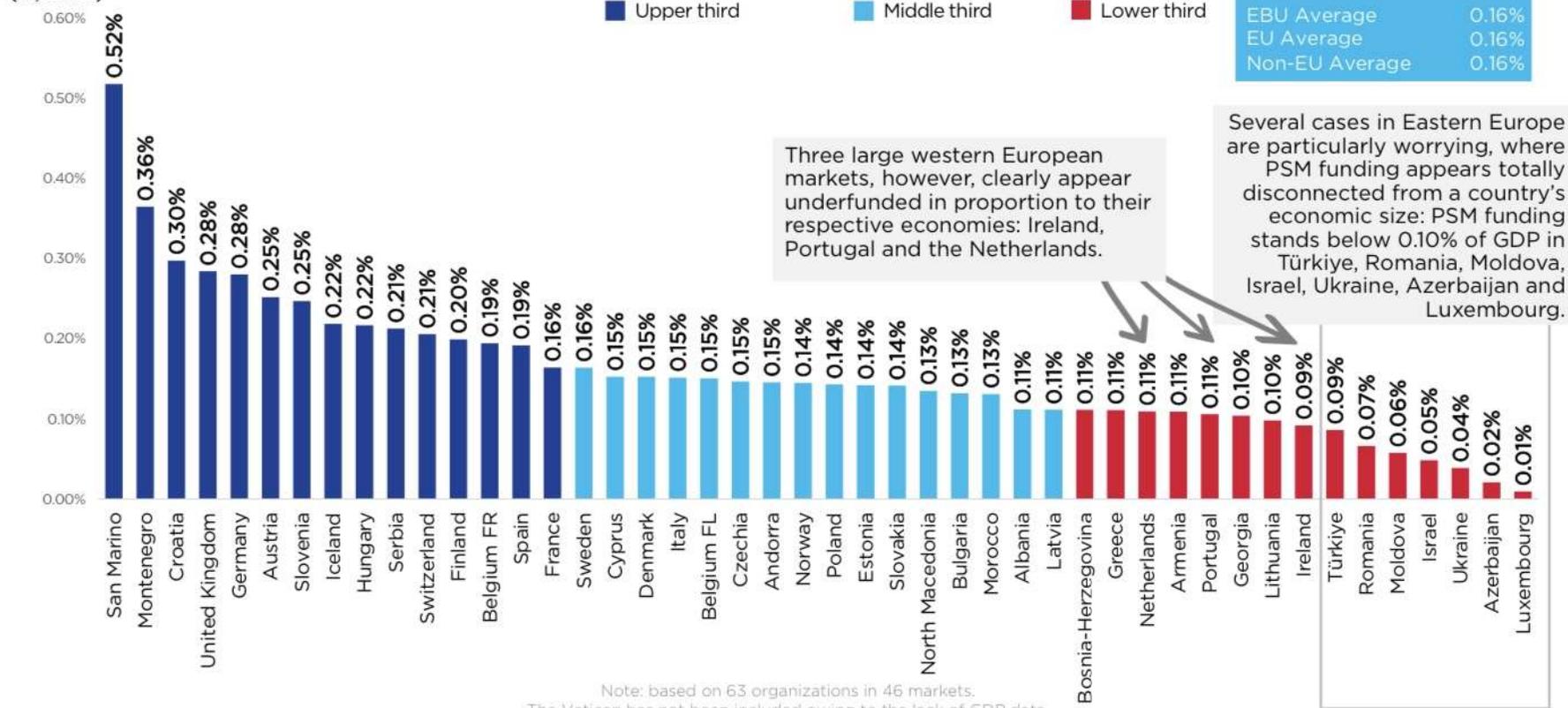
Despite these significant increases, Ireland’s PSM remains underfunded. PSM funding as a percentage of Gross Domestic Product (GDP) indicates funding growth relative to economic growth. This provides a clear picture of Ireland’s lack of funding scale. In 2012, on average, PSM funding across the EBU represented 0.19% of EBU countries’ GDP. This has declined over the decade and now stands at an average 0.16% in 2021.

As shown overleaf, Ireland is one of three countries in larger western European markets in which PSM is underfunded relative to their respective economies. Ireland ranks in the bottom third of all EBU markets. In 2019, Ireland’s PSM funding amounted to 0.11% of our GDP (compared to an average of 0.16% across the EBU). In 2021, Ireland’s PSM funding has fallen to just 0.09% of GDP. The EBU notes that Ireland (along with Portugal and the Netherlands) “*appear underfunded in proportion to their respective economies*”.

<sup>19</sup> Funding of Public Service Media (Media Intelligence Service, EBU, April 2023).

### European Broadcasting Union - PSM Funding

**PSM OPERATING REVENUES AS A % OF GDP**  
(%, 2021)



Note: based on 63 organizations in 46 markets.  
 The Vatican has not been included owing to the lack of GDP data.  
 Source: EBU based on Members' data and IMF.



In addition to a lack of funding scale, there is a major imbalance in Ireland's public service media funding. TG4 has broadly the same remit (i.e., objects and powers) in the Broadcasting Act 2009 as RTÉ (Section 114 v Section 118). Despite this, TG4's total public funding for 2023 is only 27% of RTÉ's 2021 licence fee income and 15% of its total revenues. Thus TG4's fundamental question regarding the PSM ecosystem is: "What is the basis of the state's calculation that makes TG4 less deserving of adequate public funding?"

We look across the water to our nearest indigenous language broadcaster and the level of funding which is received by the Welsh-language public service broadcaster S4C. S4C was reviewed in 2022 by the British Government and awarded an increase of £7.5m in its annual public funding to bring the funding it gets from the UK licence fee to £88.5m. It also receives 515 hours of programming per annum from the BBC, with an estimated value of £22m. This is a total annual public funding of £110.5m. It should be highlighted that Welsh does not have the same constitutional status as Irish. Wales has a population of 3.19m, of which it is estimated that 29.5% are able to speak Welsh and just under 15% speak it frequently<sup>20</sup>. It is clear that a much more significant scale of resources is directed towards public media services for speakers of Welsh than for speakers of the Irish language in Ireland. In the Basque Country, EITB, the equivalent of RTÉ, divides its budget equally between the majority language (Spanish) and the minority language (Basque). EITB spends around €90m per annum on Basque language content, serving a regional population of c.2.2m of which approximately 750,000 speak the Basque language.

TG4 is seeking a better balance in the public funding of the sector. Over the five years of the strategy, we are seeking to increase our public funding to €93.66m by 2027. The effect of this would be to promote diversity and plurality in Ireland's PSM sector, better balance in Ireland's audio-visual ecosystem and in its regional layout, as well as reflecting the importance of the Irish language. As the principal funder of the audio-visual sector in Ireland's regions outside of Dublin/Wicklow, it would also mean a significant increase in the scale of the regional audio-visual sector.

---

<sup>20</sup> Annual population survey (December 2022) [www.gov.wales](http://www.gov.wales)

## 5. TG4 Strategy 2023-2027

TG4's Vision is:

Through first-class funding scale and an enhanced focus on young people and on Irish independent creativity, TG4 will continue to engage audiences of all ages and lay the foundations for sustaining Irish-speaking communities and for successfully internationalising our industry in the regions.

Through “TG4 Gach Áit / TG4 Everywhere” and a brand synonymous with strong, creative Irish media, we will ensure Irish language public service content remains important and prominent in a modern Ireland.

This vision is underpinned by three pillars which are the foundation of TG4's strategy.



|                                       |   |
|---------------------------------------|---|
| <b>Fás / Growth</b>                   | <p>Focuses on growing audience reach.</p> <p>Concerns stimulating use of Irish and increasing the number of people who speak Irish, helping to stabilise and grow Irish language communities throughout Ireland and beyond.</p> <p>It is about growth in the Irish screen sector and in turn in the Irish economy.</p>  |
| <b>Cothrom na Féinne / Solidarity</b> | <p>Concerns providing support and stability in areas of imbalance.</p> <p>For TG4 as an Irish language PSM, this means supporting habitual Irish language speakers, supporting new talent and diversity and supporting regional screen sector development and the potential of regional companies.</p>  |
| <b>Comhpháirtíocht / Partnership</b>  | <p>Recognises that TG4 must collaborate to grow audiences and deliver audience-focused solutions.</p> <p>Partnerships will support efficiency and strengthen quality and creativity.</p> <p>Collaboration must be with the independent production sector, other PSMs, Coimisiún na Meán, Screen Ireland and other key screen sector, Irish language, culture &amp; heritage and sporting organisations in Ireland and beyond.</p> |

To achieve its vision, TG4 will deliver **8 goals** or strategic objectives which are summarised overleaf. The key proposals / actions underpinning these, as part of a detailed three-year action plan for 2023-2025, are described thereafter. As noted in the Preface, the action plan for years 2026 and 2027 will be developed in 2025 following the completion of the Coimisiún na Meán review of the provision of Irish language media services.



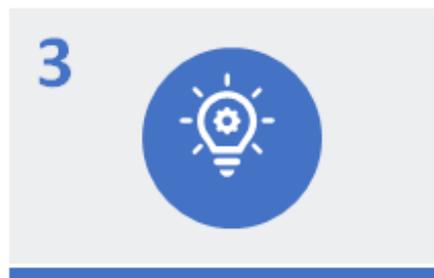
### 1. Children's Services

Enrich our services for children, strengthening their engagement with TG4 and the Irish language.



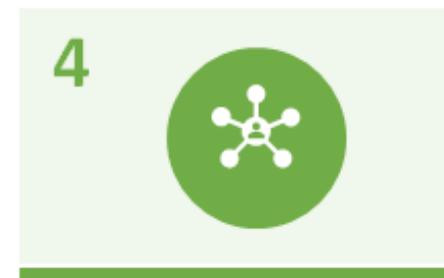
### 2. Younger Audiences

Provide bolder, more exciting content for 15 to 34 year olds and put younger audiences centre-stage on TG4's social and online platforms.



### 3. Educational Resources

Build an ambitious portfolio of educational resources which open up a new era of learning Irish and learning through Irish, supporting growth of the Irish language.



### 4. Nuacht & Current Affairs

Reimagine news and current affairs under the TG4 brand, seeing TG4 emerge as a multi-platform provider of distinctive news coverage and investigative current affairs programming.



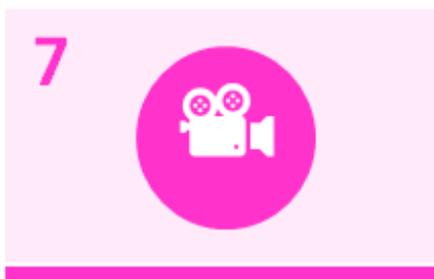
### 5. Irish Arts, Culture & Heritage and Sport

Expand TG4 as a platform to champion Irish arts, culture & heritage and sport.



### 6. Irish Language Film & Drama

Build the scale of Irish language film and TV drama production in Ireland's regions.



### 7. Invest in Production Sector

Champion the success of Irish production sector talent and enterprise.

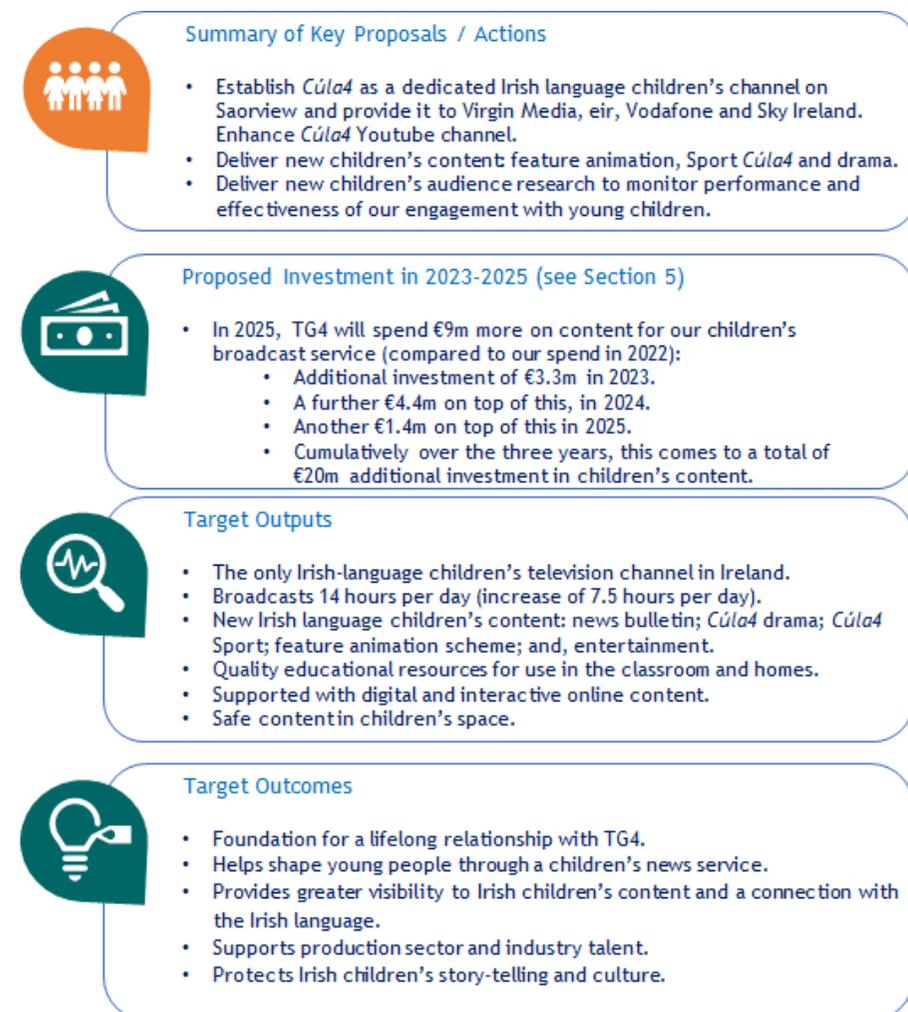


### 8. Sustainable & Inclusive TG4

Build a sustainable and inclusive TG4.

## Key Proposals: 3-Year Action Plan (2023-2025)

### Goal 1: Enrich our services for children, strengthening their engagement with TG4 and the Irish language.



It is a fact that media experiences are fundamental to the development of children's understanding, attitudes and engagement with society. We must engage children and young people in trusted, safe spaces with trusted content. Public service broadcasters have a special role to play in relation to this.

For TG4 there is an additional concern. Irish language media faces the added challenge of competing for audience in a global and predominantly English language media market. If Irish language media is not supported and does not have platform prominence, it is at risk of losing relevance, particularly for younger Irish audiences who are growing up in a global media environment. Now more than ever, TG4 must grow the relevance of Irish language content and properly serve and inspire the younger audiences who will determine the future of Irish as a community language. We must enrich TG4's services for children, strengthen children's engagement with TG4 and ultimately, their engagement with the Irish language.

In Ireland, there are approximately 21 dedicated children's linear television channels (excluding the +1 and HD versions). Apart from RTÉ Jr, the vast majority are either UK or US channels. With the rise of global media groups offering their content to global audiences, insufficient diverse and representative content is provided by these media conglomerates, particularly for children, and their editorial approach is mostly global. They do not provide the resonance which targeted, culturally meaningful and representative content offers. Public service broadcasters, on the other hand, have a long tradition of providing local perspective and portrayal.

In addition, certain types of children's programming (mainly indigenous live action drama, information and educational programmes etc.), are not sufficiently attractive for commercial organisations to produce. There are therefore gaps in overall provision, particularly in Irish language children's content. TG4 aims to provide more creative and inspiring children's content for all platforms. The key proposals are as follows:

#### 1. Launch *Cúla4* as a dedicated Irish language children's channel

*Cúla4* is TG4's daily broadcast service for children. It is currently simulcast as a dedicated children's channel on the Virgin Media platform (channel 602). In September 2023, TG4 will launch *Cúla4* as a dedicated Irish language children's channel on Saorview, the Digital Terrestrial Television (DTT) platform, and will also provide the full channel to Virgin Media, eir, Vodafone and make it available to Sky Ireland. *Cúla4* will be the only Irish-language children's television channel in Ireland.

It will broadcast in the Irish language only and will be on air from 06.00 to 20.00. Content will include a children's news bulletin, educational content, drama & entertainment, and will reflect the diverse backgrounds of children living in all parts of Ireland, but particularly in Gaeltacht and Irish speaking communities. Content for the *Cúla4* channel will be: newly commissioned content from the Irish Independent Production Sector; re-licenced content from the Irish Independent Production Sector; and, content from international distributors which is revoiced into Irish by the Irish Independent Production Sector. There will be no advertising or sponsorship on the channel, minimising any exposure to commercial communications for children. TG4 will also enhance the *Cúla4* YouTube channels for pre-school and primary school children, to support this.

TG4 will address two children's audiences with creative and engaging Irish language content: (i) pre-school & younger primary school children (to 6 years); and (ii) older children (7-14 years):

- Up to 6 years: by 2025, we aim to be investing an additional €3.74m to enrich our children's programming including a greater emphasis on drama and original animation. We will develop *Cúla4's* personality to include regular channel faces (developing new young Irish presenter talent) along with road-shows to bring the channel brand and content to local Irish-speaking and Gaeltacht communities. We want to provide children's audiences with a safe space in a world where content can present risks for children with potentially harmful material. We also want children to see their lives reflected in our programmes.
- Between 7-14 years: as an age-group currently under-served by strong, entertaining Irish language content, this is a priority audience target for TG4. We aim to focus our investment on high impact commissions with an emphasis on drama, comedy, entertainment, sport and a young people's news service, in addition to our YouTube channel, to build loyalty and connection with TG4. By 2025, we aim to be investing an additional €4m on content for this age group.

## 2. Commission new research on children's engagement with TG4

We will commission new research on TG4's engagement with children's audiences. We will measure Irish language children's audience average weekly reach using the Irish language Fios Fise measurement panel. We will also deliver new regular research to capture TG4's engagement with children, their views on TG4 content and services and to assess usage behaviours and demand. We will also commission independent research on all primary and post-primary schools (English and Irish-speaking) in the Republic of Ireland on alternate years, in order to identify TG4's

reach and engagement with primary and post-primary schools, teachers and school children. We will focus on identifying the level of awareness and use of TG4's content / resources in the classroom, by both teachers and students. We will use this research to continue to build our resources and to enhance young learners' connections with TG4 and the Irish language. Every third year, we aim to measure TG4's engagement with schools in the six counties of Northern Ireland to capture an All-Island perspective of the use of TG4's educational resources (refer to Goal 3).

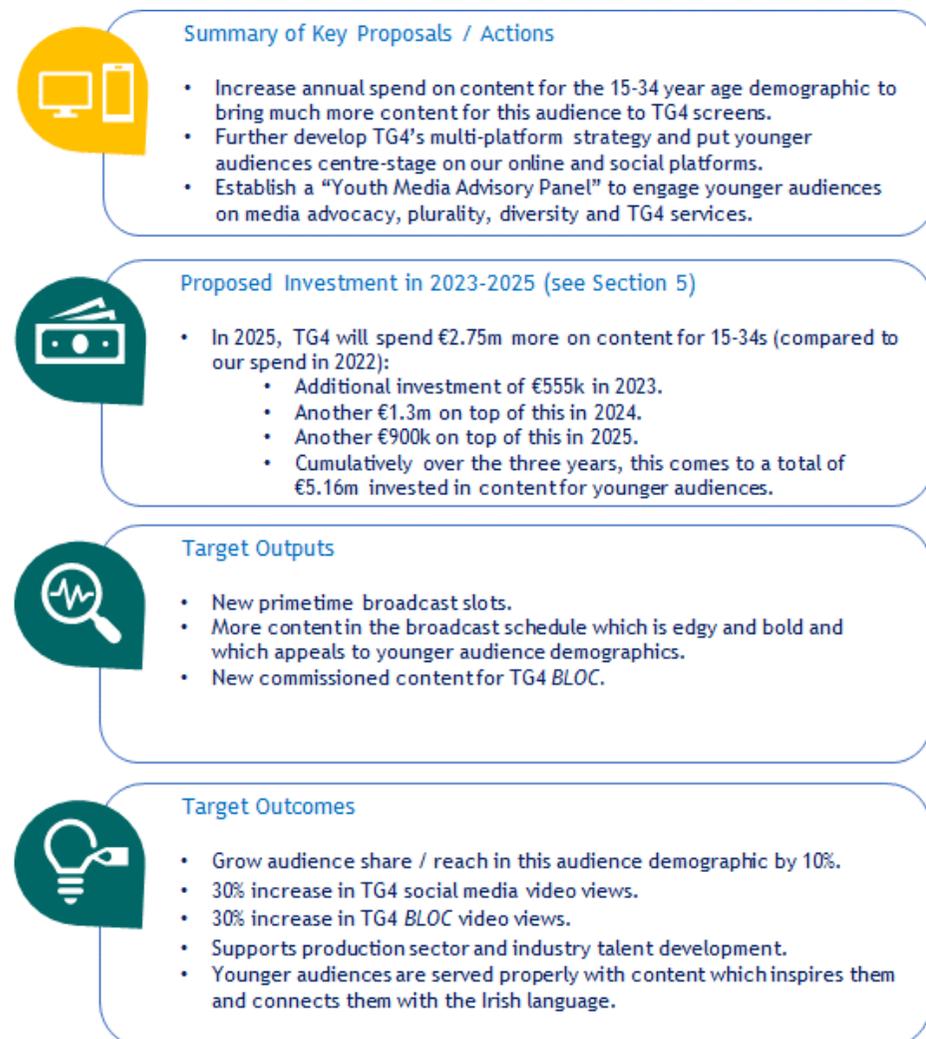
## 3. Expand *Cúla4* content

TG4 aims to expand our investment in content for children's audiences and the *Cúla4* channel. In year two of our strategy, we aim to establish an Irish language animation scheme as described in Goal 6. Building on the success of Cine4 in conjunction with Coimisiún na Meán and Screen Ireland, we will develop the scheme to encourage development of short animated films for cinema and *Cúla4*. TG4 also aims to commission more underage sport content particularly targeting 7-14-year-olds. TG4 aims to establish a new sports output deal to provide c.36 hours of content. In 2024 and 2025, TG4 also aims to invest in children's drama development, in conjunction with partners, to provide a longer-running series for children's audiences. Drama is expensive and requires an extensive development lead-time. However, investment in high quality drama has a strong repeat value.

Key deliverables by year:

| Year | Key Deliverables   |
|------|--|
| 2023 | <ul style="list-style-type: none"> <li>• <i>Cúla4</i> established as a dedicated Irish language children's channel on Saorview, provided to Virgin Media, eir, Vodafone and made available to Sky Ireland.</li> <li>• Call out for new sports and drama children's content.</li> <li>• Children's research including primary school survey.</li> </ul> |
| 2024 | <ul style="list-style-type: none"> <li>• Development of feature animation scheme in conjunction with stakeholders. Callout for development round.</li> <li>• New children's sport and drama content in production.</li> <li>• Post-primary school survey.</li> </ul>   |
| 2025 | <ul style="list-style-type: none"> <li>• Feature animation scheme - shortlist and development round complete with one company selected to go to production (which commences in 2026).</li> <li>• Northern Ireland school survey.</li> </ul>  |

**Goal 2: Provide bolder, more exciting Irish language content for 15- to 34-year-olds and put younger audiences centre-stage on TG4's social and digital platforms.**



Younger people are growing up in a global media environment where English predominates and we must increase TG4's resonance and relevance with younger audience demographics. They will determine TG4's future and the future of Irish as a living, spoken language. In the past, insufficient funding has made it challenging to engage consistently with younger audiences. With limited funding, TG4 has been unable to deliver new drama and entertainment content every year and because of this, to deepen our reach and engagement with younger audiences.

TG4's additional funding over the past two years, in addition to the funding increase received for 2023, has begun the process of helping to rebalance the demography of Irish language media in favour of younger people. We are investing in new bolder and more exciting content for our broadcast schedule and for the first time ever, TG4 has an Ollsoláthar (four-year output contract) for the 15-34 demographic, with the first year of the agreement in 2022. We are also creating compelling and engaging short-form content for online platforms which have a deep reach into younger audience demographics. For example, *Bloc*, TG4's social media channel for 18-34-year-olds, is available across various platforms including Instagram, Facebook, YouTube and Tik Tok. It has performed strongly with younger audiences.

Younger audiences will determine the future of Irish as a community language and TG4 must increase our resonance and relevance with this important audience - including our portrayal of race, ethnic diversity, sexual orientation and disability.

### 1. Invest in content for younger audiences

By 2025, we aim to have increased TG4's annual spend on content for the various segments in the 15-34-year-old age demographic by €2.75m<sup>21</sup> (compared to our spend in 2022), to bring much more content specifically aimed at this audience to TG4 screens. We will open up new slots in the primetime broadcast schedule and invest in high-quality drama and entertainment which appeals to younger audiences, including reality and "bold" TV along with sharp, unconventional "edgy" documentary programming. These are priority audience targets for TG4 to ensure continued resonance and relevance with younger Irish audiences who are growing up in a global media environment. The absence of new drama and entertainment content every year makes it challenging to engage consistently with younger audiences otherwise.

<sup>21</sup> Some of the investment in Goal 5, Arts, Culture, Heritage & Sport will also target this audience demographic (additional new investment of €1m).

To support the increase in commissioned content, TG4 must support the capacity building of the independent production sector. We aim to target new companies to work in the sector and to encourage existing companies to grow their capabilities. This is described further in Goal 7.

## 2. Develop TG4’s multi-platform strategy for younger audiences

In keeping with the increased use of on-demand and online services by younger audiences, we will further develop TG4’s multi-platform strategy and put younger audiences “centre-stage” on our online and social platforms. We will increase our investment by €400k (in 2024), in the creation of engaging short-form content for *BLOC*, TG4’s social media channel for 18 to 34-year-olds, in addition to other online platforms which have a deep reach into this audience demographic. We will also invest in improving functionality and content discovery across all platforms.

## 3. Establish a “Youth Media Advisory Panel”

TG4 will establish a “Youth Media Advisory Panel” for the purpose of engaging younger audiences on media advocacy, plurality and diversity (in front of, as well as behind, the camera) and to provide feedback on TG4 services.

Summary of key deliverables by year:

| Year | Key Deliverables  |
|------|---|
| 2023 | <ul style="list-style-type: none"> <li>Support capacity building in the independent production sector.</li> <li>Additional investment in content for younger audiences and in BLOC.</li> <li>New commissioned content call outs.</li> </ul> |
| 2024 | <ul style="list-style-type: none"> <li>New commissioned content call outs, go to contract and production.</li> <li>Additional investment in BLOC.</li> <li>Youth Media Advisory Panel established.</li> </ul>                               |
| 2025 | <ul style="list-style-type: none"> <li>Transmission of new commissioned content.</li> </ul>   |

### Goal 3: Build an ambitious portfolio of educational resources which open up a new era of learning Irish and learning through Irish, supporting growth of the Irish language.



**Summary of Key Proposals / Actions**  
Significant investment in “Fís Scoile”, an initiative to support teachers & learners with learning Irish and learning through Irish:

- New broadcast series to support learning Irish in primary and post-primary T2 schools (i.e. where there is no Irish language foundation in the schools).
- Development of TG4’s Education Hub with curriculum-based content.
- Language Learner broadcast series for adult learners.
- Educational events for post-primary schools.
- Annual survey of primary / post-primary schools on TG4 education supports.



**Proposed Investment in 2023-2025 (see Section 5)**

- In 2025, TG4 will spend €3.97m more on education (compared to our spend in 2022):
  - Additional investment of €180k in 2023.
  - Another €1.4m on top of this in 2024.
  - Another €2.4m on top of this in 2025.
- Cumulatively over the three years, this comes to a total of €5.7m additional investment in education content.



**Target Outputs**

- Fís Scoile:
  - Education Hub which consolidates TG4’s educational resources and delivers 24 new short-form content hours for primary and post-primary schools over the 3 years (cumulative).
  - 21 new hours of an Irish language learning series for post-primary & primary schools (12 and 9 hours respectively in 2024 and 2025). This is a cumulative total of 30 hours over the 3 years of the strategy.
  - Educational events aimed at TY students, to foster media literacy, creative thinking skills and STEAM skills.
  - Surveys measuring use of TG4 educational resources in schools.
- Edutainment: 7 new hours of a new series for primary schools (14 cumulative hours over the 3 years of the strategy).
- Adult Learning: 7 hours broadcast series for adult Irish language learners in 2025.



**Target Outcomes**

- Education Hub: 100% increase in TG4 Foghlaim engagement.
- 60% of primary schools regularly use TG4 content in the classroom, through either the TG4 or Cúla4 Player.
- 60% of post-primary schools use TG4 content for learning.
- Significant audio-visual supports for Irish language and the curricula within the education system and for learners outside formal education.
- Significant contribution to growing use of the Irish language.

As part of our strategy, TG4 has developed a plan for a new major schools educational initiative and we have appointed an Education Coordinator to drive the strategy for TG4 educational projects to support Irish language learning and grow users of these important resources. Over the three years of our strategy, we will build an ambitious portfolio of educational resources which support Irish language learning and learning through Irish, supporting growth of Irish language usage. We aim to grow the engagement and trust built with young learners, teachers and parents, and provide resources to bring the best of TG4’s educational content to the classroom and to learners at home.

**Fís Scoile** is TG4’s proposed initiative to support teachers and learners in the acquisition and use of Irish as a spoken language, and in learning through Irish. It has been developed in conjunction with educational bodies and stakeholders and aims to provide educational programming which has the European Framework for Language Learning at its core. TG4 aims to develop our educational provision responding to the demand from teachers and parents. We will provide practical resources which respond to the curriculum changes in primary and secondary school settings.

TG4 Foghlaim will deliver more content to support Irish language pupils who are learning Irish as well as supporting the wider school community. It will also connect with adult learners by providing short-form learning materials which support the learning and speaking of Irish.

TG4 Foghlaim will develop guidelines for Educational Providers in conjunction with the National University of Ireland, Maynooth to ensure best practice in the delivery of educational content across all TG4 platforms. We aim to build on the reputation of TG4 Foghlaim among learners and teachers and create entertaining, engaging and inspiring content, with the vision of creating a new generation of confident, progressive and active speakers of the language across the island of Ireland. The key proposals are as follows:

#### 1. Fís Scoile

- **Fís Scoile 1:** development and broadcast of a series to support the learning of Irish in T2 secondary schools (i.e., schools which there is no Irish language foundation). Using the European Framework for Language Learning, the aim of this series is to enable pupils to develop their spoken Irish so that they can communicate confidently through the medium of Irish on a daily basis.

- **Fis Scoile 2:** development and broadcast of a series to support the learning of Irish in T2 primary schools. This series will support Irish language acquisition in pupils from primary schools with no previous Irish language background.
- **Fis Scoile 3:** development of the TG4 Foghlaim Education Hub to provide short-form content that supports assessment in the Junior and Senior cycles across a range of subjects. This short form content will support teachers who teach subjects such as history, science, geography etc. through the medium of Irish.
- **Fis Scoile 4:** TG4 Foghlaim will develop educational projects aimed at transition year students which foster media literacy, creative thinking skills and STEAM skills. Working in conjunction with media and educational partners, projects identified include journalism skills, film making skills, gaming/immersive technology skills.
- **Annual series:** development and broadcast of a bespoke edutainment series. Taking inspiration from the world around us, this series will complement learning across cross-curricular themes in the primary school setting.

## 2. Adult Learning

To enhance provision for the Irish Language learning community and the Irish diaspora, TG4 will deliver a multi-platform course for adult learners which reflects the cultural connection and richness of the language and the different dialects of the Irish Language. This course will allow learners to develop at their own pace through a graded course which aims to create proficient speakers of the language. This series will also act as a support and learning tool for those parents and guardians who have children attending Gaelscoileanna and who want to support their children through their education. This is an area which has not been prioritised by broadcasters since the 1990s. While a small number of online Irish language learning resources exist today, TG4 aims to deliver an original audio-visual, multi-platform course (with new content and content created from our rich programming archive).

## 3. Survey of TG4 Usage in Primary & Post-Primary Schools:

TG4 will survey primary and post-primary schools (English and Irish-speaking schools) to identify TG4’s reach and engagement with primary and post-primary schools. We will focus on identifying the level of awareness and use of TG4’s content and educational resources in the classroom, by both teachers and students. We will use this research to continue to build our resources and to enhance young learners’ connections with TG4 and the Irish language, from an early stage, and to support learning of other subjects through the Irish language. We will use the research to measure TG4’s performance in increasing our engagement with school children, teachers and schools.

## 4. Marketing & Publicity

We aim to develop a strong education brand and to target teachers and schools with this valuable resource. We will undertake promotion of the resources through stakeholder engagement, reaching out to schools and colleges, social media engagement etc. to promote the resources with school teachers and students.

## 5. Resources

We will resource our education services appropriately and efficiently, sharing resources with other TG4 content production areas wherever possible. We have appointed our Education Coordinator and will appoint a Commissioning Editor to drive delivery of TG4’s Fis Scoile and other educational resource plans. We will commission most of the new content using TG4’s Publisher Broadcaster model.

Key deliverables by year:

| Year | Key Deliverables  |
|------|---|
| 2023 | <ul style="list-style-type: none"> <li>• Education Coordinator in place.</li> <li>• Education Plan developed.</li> <li>• Engagement with education stakeholders.</li> <li>• 4 new hours of short-form content for primary/post-primary.</li> <li>• Survey of primary schools.</li> </ul>  |
| 2024 | <ul style="list-style-type: none"> <li>• Education Hub in place.</li> <li>• 6 new short-form content hours for primary/post-primary.</li> <li>• Irish learning series for T2 secondary schools (9 hours).</li> <li>• Educational events to foster media literacy, creative thinking skills and STEAM skills amongst TY / Leaving Cert students.</li> <li>• Survey of post-primary schools.</li> <li>• Edutainment: 7 hours new series for primary schools.</li> </ul> |
| 2025 | <ul style="list-style-type: none"> <li>• Irish learning series for T2 primary schools (9 hrs).</li> <li>• Irish learning series for T2 secondary schools (3 more hours).</li> <li>• Educational events to foster media literacy, creative thinking skills and STEAM skills amongst TY / Leaving Cert students.</li> <li>• Survey of post-primary schools.</li> <li>• Adult Learning: 7 hours series for adult Irish language learners.</li> </ul>                     |

## Goal 4: Re-imagine news and current affairs under the TG4 brand, seeing TG4 emerge as a multi-platform provider of distinctive news coverage and investigative current affairs programming.

### Summary of Key Proposals / Actions

- Achieve transfer of complete editorial control of Nuacht TG4.
- Launch new brand including new studio look.
- Deliver a comprehensive portfolio of news and current affairs services.
- Develop TG4 news and current affairs capabilities and collaborations.
- Investment in investigative current affairs programming.

### Proposed Investment in 2023-2025 (see Section 5)

- In 2025, TG4 will spend €2.6m more on news & current affairs (compared to our spend in 2022):
  - Additional investment of €960k in 2023.
  - Another €500k on top of this in 2024.
  - Another €1.1m on top of this in 2025.
- Cumulatively over the three years, this comes to a total of €4.98m additional investment in news & current affairs.

### Target Outputs

- Editorial autonomy of news services.
- Omnimedia portfolio of news and current affairs services including a rebranded multimedia Nuacht TG4 service, investigative current affairs, children's news services, audience-first podcasts and omnipresence on social media. TG4 "súil eile" coverage of elections.
- New studio look.
- TG4 news and current affairs capabilities developed.
- Delivery of a journalist training scheme for Irish language journalists.
- Additional c.20 hours of current affairs content over the three years.

### Target Outcomes

- Editorial autonomy and a distinctive TG4 Nuacht vision & strategy.
- "Story-centric" and audience-first approach in place to serve audiences whose news habits are increasingly fragmented.
- Irish language speakers and Gaeltacht community better served in terms of plurality and diversity of news.
- Nuacht TG4 becomes the first / primary source of news for habitual Irish speakers.
- Development of new Irish language journalistic talent.

Providing trusted news and information is a key role for PSM with a news service at the core of every public service broadcaster, demonstrating the values of the broadcaster within the public sphere. Independent research<sup>22</sup> shows that Irish language audiences want TG4 to provide: more comprehensive news services with a "súil eile" perspective, including an online news service; a more distinct editorial perspective on national and international news; build on the current strengths of Nuacht TG4 local and regional news coverage; and, investment in more investigative journalism and creating a news agenda.

At present, TG4's news service is part of RTÉ's statutory one hour-a-day provision to TG4. TG4 needs editorial autonomy of news that aligns with TG4's strategy and core values. We must have the freedom to develop an alternative news agenda which will provide plurality of news services, diversity, and new perspectives.

It is also vital for TG4 to establish an 'audience-first' approach to news. An audience-first approach means serving the audience on whatever platform they use. As audiences' news consumption habits are increasingly fragmented, it is important that TG4's news service can adapt and move with audience behaviours.

Currently the service provided by RTÉ is a daily linear bulletin. There is no digital service, and the capabilities do not exist within the current structure to provide it. In a 24/7 news cycle it is crucial that news services are transformed to remain relevant. Instead of waiting until 7pm to broadcast the news, the newsroom will need to think digital and audience first, publish news as it happens on Nuacht TG4's website, share the news to social media, and develop the story suitably across multiple platforms from social media to linear.

TG4's plan is to reimagine how we deliver our news and current affairs services. TG4's strategy is to establish innovative independent Nuacht capabilities and services including: a branded multi-platform news service; a Nuacht TG4 website; digital news services and prominence on social media; children's news services; and, investigative current affairs. We aim to have full editorial, structural and funding independence over our news and current affairs under the *Nuacht TG4* brand and to develop and nurture Irish language journalism and collaborate with other media bodies and schemes to achieve this aim. TG4 as a public service media brand, must have a distinctive, independent

<sup>22</sup> National University of Ireland Galway (NUIG), 2021.

Nuacht vision and strategy and be able to deliver a range of news services. Ireland would be better served in diversity and plurality of news, if an independent Nuacht TG4 vision can emerge again.

The Future of Media Commission Implementation Strategy & Action Plan<sup>23</sup> recommends that TG4 should have independent editorial control over its news services to allow for greater plurality in news coverage and allow TG4 to provide an enhanced service to audiences. This recommendation aligns fully with TG4's vision for our news and current affairs services.

*Recommendation 7-1: Editorial control for TG4 over its news services*  
*TG4 should have independent editorial control over its news services. This will allow for greater plurality in news coverage and allow TG4 to provide an enhanced service to its audiences.*

A review of the financial and operational implications is to be completed by Coimisiún na Meán in 2023 and this review will direct the implementation of TG4's proposed news and current affairs strategy.

A new strategy for TG4's news and current affairs services will establish editorial independence of Nuacht TG4 that aligns with TG4's aim to become the first / primary source of news for habitual Irish speakers.

### 1. Transfer editorial control

We aim to work with Coimisiún na Meán and RTÉ to achieve transfer of complete editorial control of Nuacht TG4 to provide greater plurality in news coverage for Irish language audiences. This transfer of editorial control and editorial autonomy, along with the development of TG4's own news brand, is vital for our identity, and displays confidence in our position as a national PSM organisation.

### 2. Develop the news and current affairs services portfolio

TG4 will develop and strengthen Irish Language journalism to deliver a comprehensive omni media portfolio of news and current affairs services delivered with a 'story-centric' and audience-first approach to serve audiences whose news habits are increasingly fragmented. A news and current affairs service will include a

rebranded multimedia Nuacht TG4 service, investigative current affairs, children's news services, digital-first podcasts, and omnipresence on social media. Investment in comprehensive news services will enable TG4 to provide enhanced personalised content, local and international news as well as niche news and current affairs interests.

### 3. Develop TG4's news and current affairs capabilities:

We will:

- Appoint *Nuacht TG4* editorial staff who will be responsible for developing and delivering TG4's news and current affairs strategy, brand and services.
- Collaborate with and develop a network of new journalism opportunities such as Local Democracy News Schemes, Court Reporting Schemes and other Irish language media and bodies.
- Delivery of a journalist training scheme for Irish language journalists, as part of the development of TG4's news and current affairs capabilities and services.

### 4. Innovation

We will integrate innovation into news and current affairs where beneficial and appropriate. For example, Artificial Intelligence (AI) and technologies to enhance journalistic collaboration and news production etc. We will ensure they are implemented in such a way that they support our provision of trustworthy, high-quality news services.

### 5. Strengthen TG4 current affairs

Continued investment in investigative current affairs programming to strengthen our current affairs provision. We will deliver an additional c.20 hour of current affairs content over the three years.

<sup>23</sup> Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media, 2022.

Key deliverables by year:

| Year | Key Deliverables  |
|------|---|
| 2023 | <ul style="list-style-type: none"> <li>• TG4 Ceannaire Nuachta &amp; Cúrsaí Reatha in place.</li> <li>• TG4 news and current affairs vision &amp; strategy delivered.</li> <li>• Engaged with Coimisiún na Meán and RTÉ to achieve transfer.</li> <li>• Re-branding of TG4 Nuacht (ongoing).</li> <li>• Online presence in place.</li> <li>• Children’s news service launched.</li> <li>• Delivery of an award-winning current affairs series, <i>Iníúchadh TG4</i>.</li> </ul> |
| 2024 | <ul style="list-style-type: none"> <li>• TG4 “súil eile” coverage of Elections - Údarás / Local / European May 2024 and General Election Autumn 2024 and Spring 2025.</li> <li>• Digital-first podcasts.</li> </ul>   |
| 2025 | <ul style="list-style-type: none"> <li>• Editorial control transferred.</li> <li>• TG4 news and current affairs resources in place.</li> <li>• Network of new journalism opportunities in place.</li> <li>• New brand launched including new studio look.</li> <li>• Journalist training scheme established.</li> <li>• Story-centric approach in place.</li> <li>• Innovation integrated into TG4 news and current affairs where beneficial and appropriate.</li> </ul>        |

## Goal 5: Expand TG4 as a platform to champion Irish arts, culture & heritage and sport.



### Summary of Key Proposals / Actions

- New live multi-cultural events under a new “TG4 BEO” brand.
- Champion under-represented sports and sporting talent.
- Invest in the further development of *Sport TG4*, our Irish language sport portal.
- Delivery of TG4’s Digital Archive strategy to preserve, curate and provide access to, Irish language content.



### Proposed Investment in 2023-2025 (see Section 5)

- In 2025, TG4 will spend €4.33m more on arts, culture, heritage & sport content (compared to our spend in 2022):
  - Additional investment of €1.9m in 2024.
  - Another €2.4m on top of this in 2025.
  - Cumulatively over the three years, this comes to a total of €6.25m additional investment in arts, culture, heritage & sport content.



### Target Outputs

- New multi-cultural live events under *TG4 BEO* brand in conjunction with arts and creative communities in the regions.
- Investment in diverse sports and in *Sport TG4*, our Irish language sport portal.
- 102 new hours of arts, culture & heritage and sport content and events (in total over the 3 years of the strategy).
- Digital archive strategy, resourcing and projects delivered.



### Target Outcomes

- New multi-cultural live events under *TG4 BEO* brand in conjunction with arts and creative communities in the regions.
- The best of Irish culture is brought to audiences worldwide.
- Government Global Ireland Strategy supported.
- Under-represented sports and sporting talent are championed.
- Safeguarding of Irish language content which includes Irish history, information, music, sport etc., with access to the Archive ensured and the content preserved and curated.

An important objective for TG4 is that unique, creative Irish content holds its own place on the international stage, bringing Irish culture and creativity to the world. This aligns with the Government strategy *Global Ireland - Ireland's Global Footprint to 2025* which aims to strengthen and deepen Ireland's international presence, reputation and influence (including the promotion of Irish arts, heritage and culture to new generations and to audiences across the world).

Nationally, TG4 has built a reputation for outstanding live regional and community events and through these, we provide a window on music and cultural events in Ireland's regions for audiences nationally and worldwide.

TG4 has also built a reputation for broadcasting a diverse range of sports which has had a positive impact in Ireland, particularly in the regions. Every year, TG4 provides extensive coverage of Gaelic games such as football, hurling and Ladies Gaelic Football Association (LGFA) fixtures including the TG4 All-Ireland finals etc.

Over the three years of the strategy, we aim to expand TG4 as a platform to champion Irish arts, culture and sport. We aim to deepen TG4's reach with national audiences and to have a strategic focus on the Diaspora, through Irish music, arts, culture and sport, particularly live events. We aim to: bring creative communities together; connect Irish-speaking and Gaeltacht communities; help extend Ireland's global cultural footprint by celebrating the Irish language and culture in an entertaining way with the Irish Diaspora; and, bring Irish content to the world, ensuring it holds a strong position on the international stage. By 2025, we aim to have increased TG4's spend on Irish culture & heritage, arts and sport by €4.33m (versus 2022).

### 1. New Series of Live Events - “TG4 BEO”.

TG4 will deliver a series of new live, exciting, multi-cultural events under a new “TG4 BEO” brand. We will work with promoters of current events and festivals as well as developing our own events. We will bring the arts and creative communities together to establish this series of new live music, entertainment and cultural events around the country, to connect Irish-speaking and Gaeltacht communities. We will also broadcast to national and international audiences through the TG4 Player service, to bring the very best of Irish culture to audiences worldwide. We will build on the scale of our traditional music events for live audiences and our TRAD TG4 YouTube channel.

## 2. Champion under-represented Irish sport

TG4 will champion under-represented sports and sporting talent. We will work with existing and new sports partners to further develop the diverse range of sports for Irish audiences on TG4 screens. We will celebrate excellence by showcasing sports and talent which typically do not have a high profile or which are alternative or minority sports. E.g., TG4 showcases younger and more regional Gaelic games across age groups and communities. We have also pioneered the broadcast of women's sport. *Rugbaí Beo* features an all-female analysis and commentary team - a first for Irish broadcasting - and we broadcast matches from the Women's Australian Football League (AFLW). We will evaluate and identify the preferred option for the development of *Sport TG4*, our Irish language sport portal, to make it the "go to" portal to champion the diversity of under-represented sports and sporting talent. As described in Goal 1, with *Sport Cúla4*, TG4 also aims to commission more underage sport content. Targeting 7-14-year-olds, TG4 aims to establish an output deal to provide c.36 hours of kids' sport content.

## 3. Digital Archive development.

As a custodian of Ireland's broadcasting heritage, TG4 is safeguarding that legacy through the development of an Irish Language Digital Archive. The Archive is an important record of Irish history, information, music, sport and entertainment. Access to the Archive must be ensured, with the material preserved and curated. In 2022, TG4 appointed an Archive Manager to develop a new archive strategy to advance the use and benefits of TG4's Digital Archive including finding new ways to use the archive as a historical and creative resource. TG4 is also establishing a "Closed Access" archive platform for educational research, i.e., an archive to which only educational institutions/members are given access for educational and research purposes.

TG4's Digital Archive has been constructed predominantly through Coimisiún na Meán Archive funded projects. TG4's aim is to create a "living" Digital Archive. Archiving work would be continuous and not based solely on one-off projects. Content would be archived as soon as it has been broadcast and all new broadcast hours would be "archive ready", i.e. catalogued and indexed and ready for re-use/repurposing etc. The corporate archive and short-form/ online content will also be addressed. A robust archive structure and resources are required to continue to preserve,

promote, manage the demand and create accessibility. Over 2023 to 2025, we will further develop TG4's Irish Language Digital Archive as follows:

- Completion of TG4's Digital Archive Strategy;
- Continuation of the digitisation of the remaining hours in TG4's Irish Language Tape Library (approximately 7,500 hours to be digitised - digitisation and preservation of all video-based content need to occur before obsolescence of tapes and tape machines); cataloguing of all content which has been digitised, for example, Nuacht TG4 2012 to date.
- Funding will be sought from the Coimisiún na Meán Archive Fund.
- Delivery of the Closed Access Archive Platform/Portal;
- Development of new workflows to enable processing of newly produced content at the point of broadcast;
- Development of partnership with other Archives / Cultural Heritage Institutions;
- Exploration of the use of Artificial Intelligence innovation and technology in an Archive context;
- Implementation of a custom image / photo asset management site;
- Appropriate resourcing of the Archive function in TG4 (there is only one TG4 resource at present, with digitisation and cataloguing etc., outsourced as part of Coimisiún na Meán); and,
- Copyright - clearance - acquisition of rights which are out of licence.

Summary of key deliverables by year:

| Year | Key Deliverables  |
|------|---|
| 2023 | <ul style="list-style-type: none"> <li>• TG4 BEO events identified.</li> <li>• Call out for new sports content.</li> <li>• Digital Archive Strategy &amp; Resource plan complete.</li> <li>• Feasibility Study on Closed Access Archive Platform.</li> </ul>  |
| 2024 | <ul style="list-style-type: none"> <li>• Production and broadcast of new TG4 BEO events.</li> <li>• Production and broadcast of new sport content.</li> <li>• Identify preferred approach for the development of Sport TG4.</li> <li>• Digital Archive resources in place.</li> <li>• Develop new workflows to enable archiving of short and long-form content.</li> <li>• Continuation of digitisation of the tape archive.</li> <li>• Tender for Closed Access Archive Platform.</li> </ul> |
| 2025 | <ul style="list-style-type: none"> <li>• Continued production of new sports and cultural content.</li> <li>• Continued implementation of Digital Archive Strategy.</li> <li>• Closed Access Archive Platform delivered.</li> </ul>  |

## Goal 6: Build the scale of Irish language film and TV drama production in Ireland's regions.



### Summary of Key Proposals / Actions

- New investment in Irish language drama.
- Expand the scale and impact of *Cine4*.
- Deliver 2 short-film and 3 new documentary schemes to develop talent, in conjunction with other stakeholders.
- Deliver feature animation scheme.



### Proposed Investment in 2023-2025 (see Section 5)

- In 2025, TG4 will spend €1.4m more on film & drama (compared to our spend in 2022):
  - Additional investment of €100k in 2023.
  - Another €100k on top of this in 2024.
  - Another €1.2m on top of this in 2025.
  - Cumulatively over the three years, this comes to a total of €1.7m additional investment in film & drama.



### Target Outputs

- 6 new *Cine4* Irish language films delivered.
- 2 short-film and 3 new documentary schemes established which develop talent, in conjunction with other stakeholders.
- Delivery of: 6 Tús Irish language short films; 6 Céim Eile short dramas; 4 feature documentaries; 6 half-hour docs; and, 6 mini-docs.
- New feature animation scheme established.



### Target Outcomes

- *Cine4* scale and impact expanded with international co-productions.
- Greater prominence and status for Irish language film and drama.
- Protection of Irish language culture and story-telling.
- Increased scale of drama and film production in the regions.
- 155-175 new talents supported and developed (all schemes).
- Irish language documentary production companies supported with further development of capabilities and internationalisation of their business.
- Talent supported and jobs created in Irish animation sector.

Over the three years of the strategy, TG4 aims to build the scale of Irish language film and TV drama on TG4's screens and in doing so, to build the scale of Irish language film and TV drama production in Ireland, particularly in the regions. This will represent a major investment programme for TG4 but will deliver a number of significant benefits. These include: more value for Irish language audiences; providing a framework to help protect Irish language culture, story-telling and Irish linguistic identity; and, the building of skills, infrastructure and capacity in the regions for drama and film production.

By 2025, we aim to have increased TG4's annual spend on Irish language drama by €1.7m compared to our spend in 2022. We will provide drama on TG4 for all age groups including pre-school and older primary school children as well as high-end, prestige drama for younger adult audiences. We will build the TG4 drama brand and face of TG4 in this important genre and invest in sustainable lower-cost production models which will allow us to build scale and impact, efficiently. Key proposals are:

### 1. Increase investment in *Cine4* to expand its scale and impact.

Currently, *Cine4* live-action feature-length drama film projects have budgets of up to €1.2m. We aim to increase TG4's investment in *Cine4* by €200,000 in 2023, increasing the contribution TG4 makes to individual production budgets by €100,000. This will bring TG4's contribution up to €300,000 per production (the same as Screen Ireland's). This additional investment will deliver even higher-quality productions and greater impact from the scheme's funding.

Between 2023 and 2025, TG4 will support delivery (production, distribution, theatrical / festival release and broadcast) six new Irish language films (two per year).

### 2. Deliver talent development schemes in conjunction with key stakeholders.

TG4 will continue to support production companies to find new talent and to open the door for entrants to the industry. We aim to deliver a number of drama and documentary talent development schemes with stakeholders:

- Tús, an Irish language short film scheme, in conjunction with Screen Ireland and the Irish Language Broadcast Fund (ILBF). Over 2023 to 2025, TG4 will develop and produce six short dramas for TG4's broadcast and online platforms.

- Céim Eile, an Irish language short drama (20-30 minutes in length) scheme will be delivered in conjunction with Screen Ireland and the ILBF. Over 2023 to 2025, we aim to develop and deliver six short films.

We will also invest in three new documentary production schemes:

- Mini-Docs: a new Irish language short documentary scheme. over 2023 to 2025, TG4 aims to produce six short documentaries (three each in 2024 and 2025).
- Half-hour documentary scheme: over 2023 to 2025, TG4 aims to produce six half-hour documentaries for TG4’s broadcast and online platforms (three each in 2024 and 2025).
- A feature documentary scheme: over 2023 to 2025, TG4 aims to produce four feature length projects (two each in 2024 and 2025).

All productions will continue to promote female talent in the production sector as well as encouraging producers to implement, sustainable production practices to help create a more environmentally sustainable screen industry in Ireland. TG4’s objective is to develop 155-175 new talents in the sector from these and our other schemes (industry talent, not just film & drama talent) and to produce new Irish language short film and documentary content for theatrical release where appropriate and for TG4’s broadcast and online platforms. The feature documentary scheme is particularly important for further developing the capabilities of, and to provide a springboard for the internationalisation of, documentary production companies. TG4 will also deliver other industry talent development schemes, as well as the above schemes for drama and documentary talent development. These are described in Goal 7 under broader screen industry development.

### 3. Development of the screen production sector in the North-West region.

TG4 is partnering with Screen Ireland and Údarás na Gaeltachta on the development of the audio-visual production sector in the North-West region. We are investing in a co-production, utilising existing studio space, to produce six hours of “film noir”. There is a skills and talent development scheme as part of the co-production. The purpose of the scheme is to develop new talent and encourage new entrants to the industry. In particular, its aim is to support development of new Irish language writing and directing talent in the region. This will have other benefits for the area in terms of stimulation of investment in studio, production and post-production facilities etc., increased spend with local supply services such as production services,

accommodation, transport, catering etc. and helping to keep young Irish language production talent in the region.

### 4. Support development of Irish Language Animation

TG4 will establish an Irish Language Animation scheme to develop world-class Irish intellectual property (IP) in animation with Irish cultural storylines, and to develop Irish-language talent and jobs within Ireland’s animation production sector. Building on the success of Cine4 in conjunction with Coimisiún na Meán and Screen Ireland, we will develop the animation scheme to encourage the industry to develop short animated films for cinema and the *Cúla4* channel. TG4 aims to develop the scheme in conjunction with key stakeholders in 2024 in addition to delivering a callout for a development round. In 2025, we aim to complete the shortlist and development round with one company selected to go to production (to happen in 2026).

Key deliverables by year:

| Year | Key Deliverables   |
|------|--|
| 2023 | <ul style="list-style-type: none"> <li>• Development of screen production sector in North West.</li> <li>• Development of new short film and short drama schemes.</li> </ul>   |
| 2024 | <ul style="list-style-type: none"> <li>• Deliver 3 short films and 3 short dramas.</li> <li>• Deliver 3 Mini-docs, 3 half-hour and 2 feature documentaries.</li> <li>• Development of feature animation scheme in conjunction with stakeholders. Callout for development round.</li> </ul>                                     |
| 2025 | <ul style="list-style-type: none"> <li>• Deliver 3 short films and 3 short dramas.</li> <li>• Deliver 3 Mini-docs, 3 half-hour and 2 feature documentaries.</li> <li>• Feature animation scheme - shortlist and development round complete with one company selected to go to production (which commences in 2026).</li> </ul> |

## Goal 7: Champion the success of Irish production sector talent and enterprise.

### Summary of Key Proposals / Actions



- Grow content commissions from the independent production sector.
- Establish Irish Language Screen Unit (with Screen Ireland).
- Refocus *Scéim Forbartha Oiliúna* as Production Apprenticeship scheme.
- Establish a Screen Sector New Entrants Scheme.
- Section 481 Gaeltacht Uplift.
- Irish Language Screen Sector Skills Development Portal.
- Deliver Media “Bootcamps” & Other Training Initiatives.
- Support Delivery of Accelerator Programmes for High-potential Sole Traders (with CREW).

### Proposed Investment in 2023-2025 (see Section 5)



- In 2025, TG4 will spend €22.25m more with the independent production sector (compared to our spend in 2022).
- This is the additional money we will invest in the sector arising from our spend in Goals 1 to 6 inclusive.
- This will represent an additional cumulative investment of €40m in the sector over the three years of the strategy.

### Target Outputs



- More investment in content and services from the Irish independent production sector.
- Irish Language Screen Unit in place.
- Screen Sector Production Apprenticeship and New Entrants Schemes.
- Section 481 Gaeltacht Uplift implemented.
- Irish Language Screen Sector Skills Development Portal established.
- Accelerator Programmes for High-potential screen production sole traders.
- New animation scheme to foster the Irish language animation sector.

### Target Outcomes



- A unit dedicated to supporting the development of the Irish language screen production sector which is integrated with existing national structures for the sector.
- Additional spend with the sector has an impact of c.300-400 new jobs in the independent production sector in the regions - more opportunities for skilled creative & technical employment.
- 155-175 new industry talents developed through the commissioning, apprenticeship and new entrant schemes.
- Irish language media is a catalyst for growth in regional creative sectors.
- Irish language is being promoted as a living working language.

As an engine of growth for Ireland’s regional creative economy, TG4 will deliver new measures to strengthen the independent production sector. We aim to support production companies by creating new work and by protecting and growing jobs. Through this, we will be a significant platform for the generation of independent Irish intellectual property and a springboard for internationalisation of our industry in the regions.

Through delivering new commissioned content for our broadcast and online platforms (with strong public service themes at heart) and through our investment in sector talent development, we will significantly grow TG4’s investment in the sector. Through delivery of our strategic goals (more investment in children’s content, in young people’s content, in education content, in news & current affairs, in Arts, Culture, Heritage & Sports content, and in Film & Drama) we will invest more in the independent production sector. By 2025, we aim to have increased TG4’s spend with the independent production sector in Ireland, by €22.25m (compared to our spend in 2022). In terms of the cumulative spend with the sector, this represents an additional €40m being invested in the sector, over the three years.

The increased investment in the independent production sector will support an estimated 300-400 new jobs in the sector, particularly in the regions. TG4’s investment will not only strengthen and grow companies as well as long-term employment in the sector, it will also stimulate further investment in production sector capital formation (such as studios, production and post-production facilities etc.) and drive increased spend with local supply services.

TG4’s investment will help to expand skilled technical and creative employment in Gaeltacht and regional areas and help keep talent and young Irish speakers in these areas. The creative audio-visual industry can also help to energise tourism, arts and culture, as well as enhancing the creative industries through clustering and co-location.

Key actions / proposals:

### 1. Increase investment in content from the Irish Independent Production Sector.

TG4 is a significant investor in the screen production and other audio-visual creative sectors in Ireland’s regional and Gaeltacht areas. We source content from companies

which operate through the medium of the Irish language, most of which are located in the regions and the Gaeltacht. Every year, we spend over 80% of TG4's independent production spend in the regions, primarily in Connacht and Munster and over 70% in Gaeltacht areas - approximately €18m-€19m annually.

In 2025, we aim to spend €46.6m with the sector. This represents an increase of 82% on our spend of €25.6m with the sector in 2022. This additional investment will support continued development of the industry and production talent, regional jobs and incomes, and help to sustain and build Ireland's creative economy, particularly in the regions.

## 2. Establish Irish Language Screen Unit (with Screen Ireland).

TG4 and Údarás na Gaeltachta actively collaborate to support growth and development of the Irish language Audio-visual sector in the Gaeltacht. In 2022, TG4 and Údarás na Gaeltachta jointly developed a three-year strategy for the Irish language / Gaeltacht-based Screen Production sector. The strategy focuses on common areas and aligns with the organisations' remits and responsibilities. It aims to create new opportunities and supports to nurture strong and sustainable Irish language production companies and grow employment, talent and economic activity in the Gaeltacht. The strategy's goals were developed through consultation with industry including independent production companies and sector organisations such as Screen Ireland, Screen Skills Ireland, Northern Ireland Screen, the Irish Language Broadcast Fund (ILBF), Atlantic Technological University (ATU), Crew and Ardán etc.

A key proposal from the joint strategy is to establish an "Irish Language Screen Unit" (ILSU) to support and co-fund the Irish-language screen production sector. This would be a unit dedicated to supporting the development of the Irish language screen production sector which is integrated with existing national structures for the sector.

The ILSU would be a standalone unit co-funded by TG4, Údarás na Gaeltachta and Screen Ireland to support the Irish-speaking screen production sector. It is essentially equivalent to a branch or fund of Screen Ireland which focuses on the Irish language sector (in the manner of the ILBF being part of Northern Ireland Screen). We believe it should be located in the Gaeltacht and staffed by Irish language speakers experienced in the screen sector. It would work directly with and through Screen Ireland on co-funding and development and markets programmes. It would lead on skills development for the Irish language sector in conjunction with Screen Skills Ireland. Proposed resources for the ILSU comprise an Irish language Development

Officer and a HR industry development role to oversee and lead on skills development of new entrants, apprentices and industry talent.

## 3. Refocus Scéim Forbartha Oiliúna as Production Apprenticeship scheme.

Research from the joint TG4 and Údarás na Gaeltachta strategy clearly shows that there are specific skills and resource gaps in the short to medium-term in the Irish language screen production sector (particularly Producers, Assistant Producers, Directors, Assistant Directors, Editors, Camera and Sound Operators etc.). There are also longer-term challenges in developing the next generation of talent and in attracting new sector talent (due to opportunities, pay and conditions). Industry feedback also shows that there are limited pathways for new talent, particularly in the Gaeltacht: *"no structured framework in the Gaeltacht where young people can see at a young age, that they want to be a producer or can work in the industry"*<sup>24</sup>.

Since 2019, TG4 and Údarás na Gaeltachta have been delivering Scéim Forbartha Oiliúna with the independent production sector. This valuable training scheme for individuals with some experience in the industry, has already delivered 50 trainees between 2019 and 2022. TG4 estimates that at least 120 people have received training and development through various TG4 and Údarás na Gaeltachta schemes since 2008. The importance of these schemes, for developing talent in the sector, has been acknowledged by industry stakeholders and production companies alike - *"providing a critical backbone of talent in the sector"*. While Scéim Forbartha Oiliúna is of real value to the sector, industry feedback shows there is potential to enhance it further. TG4 proposes to refocus the scheme from being a 12-month training initiative to being an 18-24-month apprenticeship programme. Funding dependent, TG4 will seek to provide 12-14 places per programme.

The apprentice will require company support (and part funding) to avail of the programme and the independent production company will recruit and employ the apprentice. There is flexibility re. the company's needs in terms of the role (e.g., Assistant Producer, Editor etc.). It is proposed that the ILSU HR development resource would be a liaison for the apprentices in terms of assisting them with skills and personal development etc. Development will be tracked by the ILSU HR role to evaluate the impact on sector talent. In conjunction with the academic modules

<sup>24</sup> Strategy for the Gaeltacht and Irish Language Audio-visual Production Sector 2023 - 2025 November 2022, TG4 and Údarás na Gaeltachta.

and accreditation, additional training programmes will be pitched appropriately to the apprentice's needs.

#### 4. Establish a Screen Sector New Entrants Scheme.

In conjunction with other stakeholders, TG4 also proposes to establish a Screen Sector New Entrants Scheme (perhaps building from Atlantic Academy's 2022 *Dianchúrsa Oiliúna*). This would be an intensive 9-12-month course with 3-months training and development followed by 6-9-month industry placement. The candidate does not require industry experience. Funding dependent, TG4 proposes to deliver 10-12 places per annum.

The implementation of the scheme will be agreed with industry but potentially, it would be delivered by National Talent Academies/Gréasán na Meán under auspices of, and steered by, the ILSU. The trainee could be employed by the ILSU and paid a stipend / real living wage. The ILSU HR role would oversee selection of trainees, industry placements and rotations and track development (for evaluation of impact on sector talent).

#### 5. Section 481 Gaeltacht Uplift

The film tax credit provided by Section 481 Taxes Consolidation Act 1997 (as amended) is known as "Section 481" (S481). S481 offers an additional uplift for production activity taking place in the regions outside of Dublin, Wicklow and Cork, in areas defined as "assisted regions" under the Regional Aid Guidelines. This designated uplift commenced at an additional 5% tax credit in 2019 and will remain in place until 31st December 2023. Being time limited, the uplift is being reduced on a phased basis and was reduced to 2% in 2023.

The Audio-visual Action Plan (Creative Ireland Programme Pillar 4)<sup>25</sup> highlights the importance of further developing strategic capacity in the audio-visual production sector in the regions, counter-balancing the metro-centric critical mass of production in the Dublin / Wicklow area. Analysis<sup>26</sup> shows that the S481 Regional Uplift has been successful in supporting the regionalisation of production since its introduction in April 2019. There is now evidence however, indicating that the

reduction in the S481 Regional Uplift has significantly reduced the level of production in the regions and the associated employment<sup>27</sup>.

In 2022, Ardán presented a submission on behalf of the Western AV Forum seeking to "re-establish the S481 Regional Uplift at the level of 5%. The Government extended S481 to 2028 in the 2023 Budget but did not indicate any intention to extend or reinstate the S481 Regional Uplift. Ardán and other stakeholders continue to lobby the Government on this critical issue.

TG4, in conjunction with Údarás na Gaeltachta, presents an alternative proposal in the event that the Regional Uplift is not extended or reinstated. Our proposal is to establish a *S481 Gaeltacht Uplift*. We believe there is a unique linguistic case, in addition to an economic and cultural argument for supporting the proposal. The Gaeltacht regions are recognised in Government legislation and within stated public policy prescriptions. Such statutory and planning instruments recognise that particular legislation, structures and funding are required to ensure the viability of the Gaeltacht communities as distinct language communities with a unique sociocultural and linguistic heritage.

Research clearly shows that while economic policy prioritising employment-led development is vital, particularly in Ireland's Gaeltacht areas, it is not sufficient to address the challenges for the Irish language as a threatened minority-language. A development model based on the concept of a "Linguistic Return on Investment" (LROI) recognises the impact of one set of public policy interventions (economic) on the capacity to sustain and develop a separate but related set of public objectives (linguistic)<sup>28</sup>. Gaeltacht development policy must support integrated development of Gaeltacht communities. It must focus on sectors which can best contribute to the economic and linguistic development of the Gaeltacht. These include the language sector, cultural, educational or creative tourism, the knowledge economy, the CREATech sector, and natural resource development etc. The Irish language screen sector has the capacity to create and sustain enterprise and employment opportunities, and as it is language-based, it directly supports the strengthening of Irish as a working, community language. It provides employment in Gaeltacht communities for Irish speakers, retaining talent and young people in these areas. A S481 Gaeltacht Uplift aligns with the need for particular policy supports to ensure continued viability of Gaeltacht communities.

<sup>25</sup> 2017-2022.

<sup>26</sup> Budget 2023 Submission on behalf of the Western AV Forum. Ardán, August 2022.

<sup>27</sup> Budget 2023 Submission on behalf of the Western AV Forum. Ardán, August 2022.

<sup>28</sup> Regional development in minority language territories: state policies, structures and interventions in the Irish Gaeltacht (Ó Neachtain, Éamonn, 2016).

## 6. Irish Language Screen Sector Skills Development Portal.

A key issue for the screen sector is that there is lack of clarity regarding industry skills development supports in terms of the providers, courses and supports available, how they work together and who provides what. In conjunction with sector stakeholders, TG4 proposes to establish and maintain a single website (portal) where all Irish language creative media talent can find information on, and links to, all skills and talent development courses and supports etc. This would be a clear source of information on, and links to, all skills and talent development courses and supports which are available to Irish language screen talent. Ideally, this would present the courses and supports by “career level” (e.g., new entrant, expert etc.), information on the supports and courses and links to the relevant provider. This portal could be developed as part of, and maintained by, the ILSU and the TG4 website would also provide an entry point to the portal.

## 7. Creative Media Campaign for Gaelscoileanna, Media “Bootcamps” and other Training Initiatives.

In conjunction with other stakeholders, TG4 proposes to develop a promotional programme for Gaelscoileanna post-primary schools focusing on Transition Year and Leaving Cert students to promote careers in creative media including the screen production sector. This could be based on the Iriseoirí an Lae Amáraigh TY programme, Techspace programme or BBC Alba’s FilmG model etc. to encourage young people to get involved and consider a career in the creative media sector. TG4 also proposes to run a series of “Media Bootcamps” in different Gaeltacht areas each year, with a focus on introducing “careers in media”. These could be potentially tied into local media events. E.g.: Celtic Media Festival, Dingle Film Festival etc. TG4 will also provide new internship and apprenticeship opportunities for entrants to the industry. TG4’s focus will lie, not just on development and retention of talent behind the camera (writing, directing, producing etc.) but also on Irish language acting talent.

## 8. Support Delivery of Accelerator Programmes for High-potential Sole Traders

TG4 proposes to identify a number of high-potential screen production sole traders / micro-enterprises which have vision and ambition, opportunity for growth, a scalable business model, unique output etc. but which may need a platform for growth. The aim is to proactively foster their growth through a structured accelerator programme. This would comprise: business opportunities in conjunction

with TG4; participation on the CREW accelerator programme; funding and other business development supports with Údarás na Gaeltachta; and, internationalisation and business development skills with Screen Skills Ireland/Creative Europe etc. The objective is to support the growth of sustainable screen production enterprises and talent and to grow employment in the sector.

Summary of key deliverables by year:

| Year | Key Deliverables   |
|------|--|
| 2023 | <ul style="list-style-type: none"> <li>• Deliver Scéim Forbartha Oiliúna.</li> <li>• Identify sole traders for Accelerator programme.</li> </ul>   |
| 2024 | <ul style="list-style-type: none"> <li>• Establish Irish Language Screen Unit (ILSU).</li> <li>• Refocus Scéim Forbartha Oiliúna as apprentice scheme.</li> <li>• Establish New Entrants scheme.</li> <li>• Establish Irish Language Screen Sector Skills Development Portal.</li> <li>• Deliver Section 481 Gaeltacht Uplift</li> </ul> |
| 2025 | <ul style="list-style-type: none"> <li>• Deliver a Creative Media campaign and media bootcamps.</li> </ul>   |

## Goal 8: Build a sustainable and inclusive TG4.



### Summary of Key Proposals / Actions

- Sustainability Strategy & Action Plan (covering Irish language, environment, production, operations, people, governance etc.).
- Discovery and consumption of TG4 content by investment in analytics and technology, broadcast and content distribution systems.
- Establish TG4+1 on Saorview.
- Continued implementation of best-practice cyber security and DR.
- Investment in People including creative resources.



### Proposed Investment in 2023-2025 (see Section 5)

- In 2025, TG4 will spend €2.87m more on ensuring TG4 is a sustainable organisation (compared to our spend in 2022):
  - Additional investment of €2.08m in 2023.
  - Another €483k on top of this in 2024.
  - Another €311k on top of this in 2025.
- Cumulatively over the three years, this comes to a total of €7.5m additional investment.



### Target Outputs

- 5-Year Sustainability Strategy & Action Plan developed.
- TG4+1 established on Saorview and TG4 Player further developed.
- Best-practice management of cyber security and DR.
- Upgrade of Studio 2 facilities and systems.
- Investment in Content Distribution platforms and systems.
- Carbon Reduction Implementation Plan in place.
- Required creative capabilities delivered.



### Target Outcomes

- TG4 capabilities are aligned with the future of the industry.
- Enhanced discoverability, prominence and availability of TG4 content, growing audience reach and engagement.
- Reduced carbon emissions, energy savings and reduced waste.
- Increased employee satisfaction.
- Irish language and community protection, greater plurality & inclusivity.
- Corporate governance is aligned with ESG; TG4 is perceived as even more trustworthy.

A critical goal is to ensure the long-term sustainability of TG4 for the future and to ensure that TG4 is a diverse and inclusive organisation. There are a number of aspects to this which underpin our proposed actions over the timeframe of our 2023-2025 strategy. These include actions under the themes of sustainability of the Irish language, and environmental & social sustainability and governance (“ESG”):

- Irish language: TG4 is not just a broadcast initiative but also plays a substantial role in relation to the sustainability of the Irish language, including language promotion, development and attaining a national and international status befitting the first official language of the state.
- Environmental: sustainable production and operations:
  - Sustainable production: a more environmentally sustainable screen industry in Ireland.
  - Sustainability of our people: employee health & wellbeing and Diversity, Equity & Inclusion (DEI).
  - Sustainability of our operations: best-in-class operational systems, cybersecurity and disaster recovery (DR) etc.
- Social: TG4 also has a significant impact on Irish culture and arts, regional and rural development, and social inclusion of minority language communities by supporting the Irish language and Irish-speaking communities and Gaeltacht.
- Governance: high-quality stewardship and being a trusted organisation.

### 1. TG4 Sustainability Strategy

Building on the traditional “ESG” model, TG4 proposes to develop a “GESG” strategy and action plan. The G reflects the inclusion of Gaeilge/Irish language, as language sustainability is fundamental to everything TG4 does. The key pillars of the GESG summarised are presented overleaf.

TG4’s objective is to develop a GESG strategy and Action plan which is compliant with EU requirements and to gain B Corp certification showing TG4 as being best-in-class for sustainability, within the next five years. TG4 will continue to work with Government, European and industry stakeholders to align our strategy with the UN Sustainable Development Goals and all relevant regulatory requirements.

TG4 proposes to bring managers and staff members together in four working groups to lead out on our specific GESG action plans. They will in turn engage with all staff and our suppliers to deliver change. A sustainability expert/consultant will be engaged to support TG4 with the development of TG4’s GESG Strategy and Action Plan to ensure we address all key areas and deliver international best practice.

| Pillars           | Gaeilge   | Environment   | Social   | Governance   |
|-------------------|---|---|--|--|
|                   | Sustain the language  | Broadcast sustainably   | Include all  | Act responsibly  |
| Key Targets       | <ul style="list-style-type: none"> <li>Sector skills development strategy.</li> <li>Create jobs to keep Irish speakers in regions</li> <li>Strategy to support intergenerational language transmission</li> <li>Build national status for language</li> <li>Strategy to promote our living language</li> <li>Create a digital ecosystem for Irish language</li> </ul> | <ul style="list-style-type: none"> <li>100% Sustainable production</li> <li>100% Sustainable content</li> <li>Carbon neutrality by 2030</li> <li>Implement Digital strategy – reduce waste</li> <li>Implement more efficient workflows</li> <li>Decapitalise broadcast &amp; production facilities</li> </ul> | <ul style="list-style-type: none"> <li>Achieve greater DEI on &amp; off screen</li> <li>Support DEI initiatives in communities of interest</li> <li>Diversify the sector</li> <li>Organise outreach and community activities</li> <li>Support inclusive music, arts &amp; culture</li> </ul> | <ul style="list-style-type: none"> <li>Sustainability Strategy</li> <li>Sustainability Action plan</li> <li>Net Zero by 2030</li> <li>B Corp certification</li> <li>Keep Well Mark</li> <li>GRI/CSRD reporting</li> </ul>  |
| Completed to Date | <ul style="list-style-type: none"> <li>Multiannual contracts</li> <li>Traineeships &amp; placements</li> <li>Grásán na Meán</li> <li>Cine 4</li> <li>TY programme</li> <li>Content Archive</li> </ul>   | <ul style="list-style-type: none"> <li>Albert certification</li> <li>Screen Greening strategy</li> <li>Solar panels</li> <li>Energy saving measures implemented</li> <li>Digitisation underway</li> <li>Biodiversity actions implemented</li> </ul>   | <ul style="list-style-type: none"> <li>Champions Forum</li> <li>Creative Ireland initiative</li> <li>LGFA partnership</li> <li>Flexible working policy</li> <li>Dignity in the workplace</li> <li>Neurodiversity training</li> <li>Wellbeing programme</li> </ul>                            | <ul style="list-style-type: none"> <li>Baseline data</li> <li>SEAI reporting</li> <li>Annual Statement of Performance</li> <li>Commitments</li> <li>Sustainability Roadmap</li> <li>Annual Reporting</li> <li>Fios Fise report</li> <li>Risk Register</li> </ul> |
| Plan to do        | <ul style="list-style-type: none"> <li>Cúla4 channel</li> <li>Nuacht TG4 service</li> <li>TG4 Foghlaim</li> <li>Regional training hub</li> </ul>  | <ul style="list-style-type: none"> <li>Carbon neutrality</li> <li>Solar farm</li> <li>Biodiversity plan</li> <li>Commission content on sustainability</li> <li>Circular economy initiative</li> </ul>   | <ul style="list-style-type: none"> <li>DEI Strategy</li> <li>DEI training</li> <li>Outreach programme</li> <li>Partnerships with Creative Ireland</li> <li>Accessibility audit</li> </ul>  | <ul style="list-style-type: none"> <li>Stakeholder engagement</li> <li>Prioritise issues</li> <li>Develop strategy</li> <li>Board approval</li> <li>Action Plan</li> <li>Communications plan</li> </ul>  |

## 2. Environmental Sustainability Actions

As part of our GESG strategy, TG4 will continue to invest into operations and environmental sustainability. TG4 has adopted the Climate Action Framework and is part of the Sustainable Energy Authority of Ireland (SEAI) reporting system. We are investing to make our energy usage more efficient and to reduce / eliminate waste. Key targets are:

- Energy efficiency: TG4’s 2030 target is 50% energy efficiency (50% reduction from a 2009 baseline); and,
- CO2 reduction: TG4’s 2030 target is 50% CO2 reduction (50% reduction from a baseline average of 2016, 2017 and 2018).

Over 2023 to 2025, TG4 will deliver the following:

- Production of 5% of TG4’s energy usage from renewable energy sources. This will be 300,000Kwh and equates to 104,000Kg of CO2.
- Installation of a 100kw ground-based solar panel collector.
- LED lighting upgrades.
- Delivery of a feasibility study on how TG4 will achieve 2030 carbon reduction targets. This will include for example, identification of required investment in building upgrades to improve thermal mass along with measures to move from oil burners etc.

## 3. Sustainable Production Actions

As part of our GESG strategy, TG4 is supporting Irish producers to create a sustainable screen industry in Ireland. As part of this, TG4 is working with albert<sup>29</sup> and ScreenGreening<sup>30</sup> to achieve higher standards of environmental sustainability within the industry. The albert toolkit comprises a carbon calculator and Carbon Action Plan to achieve Certification. All productions commissioned by TG4 from 2021 onwards were required to use the albert carbon calculator to monitor carbon footprint. Over 2023 to 2025, we will continue our work with Irish independent production companies to support their completion of Carbon Action Plans and to achieve albert Certification.

## 4. Investment in People

TG4 is investing in wellness and mental health of staff. Training and development also play a major role in enabling TG4 to build on the performance of our people, to continually improve performance and to grow and innovate. Our focus is on supporting staff development to ensure our people have capabilities which are aligned with TG4’s strategy and structure as they evolve. We also focus on succession and knowledge management. In 2023, we will measure Employee Satisfaction through a TG4-wide survey. The findings from this survey will feed into our detailed plans for 2024 and 2025.

## 5. Diversity, Equity & Inclusion Actions

Over the past two years, TG4 has been embedding Diversity, Equity & Inclusion (DEI) into everything TG4 does, both on and off-screen. We adopted a new DEI strategy,

<sup>29</sup> Screen industry project on environmental sustainability hosted by BAFTA.

<sup>30</sup> Members are TG4, RTÉ, Virgin Media Television, Screen Ireland, Screen Producers Ireland and Coimisiún na Meán.

and delivered initiatives to address DEI in Ireland’s screen sector. We are a member of the Media Literacy Ireland Steering Group & Chair of the Irish Language Sub-Group. We engage with disability stakeholder groups as part of our commitment to ensure we deliver on our accessibility targets and ensure inclusivity in our content and services. Over the timeframe of the strategy, we will roll-out further DEI training and complete an accessibility audit among other actions.

### 6. Governance & Trust Actions

Strong governance is fundamental to success and TG4 will continue to ensure that the organisation has high quality stewardship, including robust ESG governance structures as appropriate. These will be established as part of the development of the GESG strategy, policy and processes. We will also measure public perception of TG4 as a trusted organisation.

### 7. Investment in Platforms & Systems

TG4 will continue to invest in content distribution and platforms. We will strengthen our position on existing and new content distribution platforms as they continue to evolve. We are also extending out linear broadcast services including establishing a TG4+1 service on Saorview. Being prominent and findable are critical for TG4. We will ensure discovery and consumption of our content through investment in audience analytics and appropriate technologies, through content curation and marketing and through content distribution partnerships.

We will also ensure our operational broadcast systems are future-proof and efficient. During the timeframe of the strategy, we will review our studio and broadcast system requirements and invest in system upgrades as necessary. We aim to upgrade our studio facilities over the timeframe of the strategy. Our aim is to redevelop and modernise the studio and gallery facilities to cater for different strands of internal production (for example, news, weather and sports).

TG4 will continue to invest in content distribution and platforms. We will also continue to invest in cybersecurity and Disaster Recovery (DR) including technologies, policies and practices and staff security awareness training.

### 8. Investment in Creative Resources

Over the timeframe of the strategy, TG4 aims to invest in key creative resources to support delivery of our expanded platform strategy. With a number of new content channels (Cúla4 and TG4+1), growth in our non-linear and distribution platforms and partnerships, and growth in our brands (Nuacht TG4, Fís Scoile, Sport TG4, feature animation scheme etc.), TG4 must ensure we have robust brand coordination and content creation capabilities. We aim to appoint a brand coordinator to lead the implementation of all new brands and to maintain brand integrity across our multi-platform services. We will also appoint two new content creators with the skills to specialise in digital content creation for our social and digital platforms and for the new Education Hub and all educational content provision. Our objective is to ensure TG4’s short-form and educational content increase views and engagement and that TG4 content is championed across platforms to inform, educate and inspire younger audiences. We will also seek to enrich our visual brand on our various digital platforms such as Sky Glass, Vodafone and Virgin Media etc. Overall, our aim is to achieve excellent brand awareness for TG4 with all audiences.

Summary of key deliverables by year:

| Year | Key Deliverables   |
|------|--|
| 2023 | <ul style="list-style-type: none"> <li>TG4+1 established on Saorview.</li> <li>Sustainability Strategy &amp; Action Plan and support resources have been delivered.</li> <li>Continued implementation of best-practice cyber security &amp; DR.</li> <li>Invest in content distribution platforms and systems.</li> </ul>  |
| 2024 | <ul style="list-style-type: none"> <li>Feasibility study complete on achievement of 2030 carbon reduction targets. Development of implementation plan.</li> <li>Upgrade of Studio 2 and gallery facilities.</li> <li>Continued implementation of best-practice cyber security &amp; DR.</li> <li>Implementation of Sustainability Action Plan targets for 2024.</li> <li>Invest in content distribution platforms and systems.</li> <li>New Brand Coordinator and one new content creator in place.</li> </ul> |
| 2025 | <ul style="list-style-type: none"> <li>Delivery of Carbon reduction implementation plan - actions for 2025.</li> <li>Implementation of Sustainability Action Plan targets for 2025.</li> <li>Invest in content distribution platforms and systems.</li> <li>New content creator in place.</li> </ul>   |

## Summary of Key Proposals / Actions by Year 2023-2025

|      |                         |                            |                                  |   |   |    |    |    |
|------|--|---|---|---|--|---|---|---|
|      | Children's Services  | Younger Audiences   | Educational Resources   | News & Current Affairs  | Irish Arts, Culture & Heritage and Sport   | Irish Language Film & Drama   | Champion the Irish Production Sector  | Sustainable & Inclusive TG4   |
| 2023 | <p>Establish Cúla4 as a dedicated Irish children's language channel.</p> <p>New children's research.</p> | <p>Increase our investment in Irish language content for under-35s audiences.</p>                           | <p>Expand TG4's Portfolio of Curriculum-based Educational Resources.</p>  | <p>TG4 Ceannaire Nuachta &amp; Cúrsaí Reatha in place.</p> <p>Nuacht vision &amp; strategy.</p> <p>Engage with Coimisiún na Meán and RTÉ.</p> <p>Re-branding of TG4 Nuacht (ongoing).</p> <p>Online presence.</p> <p>Children's news service.</p> | <p>Digital Archive Strategy.</p> <p>TG4 BEO established.</p>   | <p>Expand Cine4 scale and impact.</p> <p>New short film and short drama schemes.</p>  | <p>Deliver Scéim Forbartha Oiliúna (SFO).</p>   | <p>Establish a TG4+1 channel on Saorview.</p> <p>Deliver TG4 GESG Strategy.</p> <p>Best-practice security and DR.</p> <p>Content Dx platforms &amp; systems.</p>  |
| 2024 | <p>Establish children's feature animation scheme &amp; invest in Sport Cúla4 and Sobal Dráma.</p>        | <p>Establish Youth Media Advisory Panel</p> <p>Continued investment in content for under-35s audiences.</p> | <p>Education: Hub.</p> <p>Education series for primary.</p> <p>Edutainment series.</p> <p>Short form content.</p> | <p>TG4 "súil eile" coverage of Elections.</p> <p>Digital-first podcasts.</p>  | <p>Explore and identify the preferred option for the development of TG4 Sport</p> <p>Develop new archive workflows.</p> <p>Continuation of digitisation of tape archive.</p> | <p>Establish children's feature animation scheme .</p> <p>Deliver new documentary schemes.</p> <p>Cine4 and short-film/drama schemes delivered.</p> | <p>Establish ILSU.</p> <p>Refocus SFO as apprentice scheme.</p> <p>Establish New Entrants scheme.</p> <p>Establish Irish Language Screen Sector Skills Development Portal.</p> <p>Deliver Section 481 Gaeltacht Uplift.</p> | <p>Feasibility study on 2030 carbon reduction targets.</p> <p>Upgrade of Studio 2 and gallery facilities.</p> <p>Best-practice security and DR.</p> <p>Sustainability Strategy Actions.</p> <p>Content Dx platforms &amp; systems.</p> <p>Creative branding &amp; content resources</p> |
| 2025 | <p>Continued investment in children's feature animation scheme, Sport Cúla4 and Sobal Dráma</p>          | <p>Continued investment in content for under-35s audiences.</p>   | <p>As above plus: Education series for secondary schools.</p> <p>Education series for adults.</p>                 | <p>Editorial control transferred.</p> <p>Resources in place.</p> <p>New brand launched including new studio look.</p> <p>Journalist training scheme established.</p> <p>Story-centric approach in place.</p>                                      | <p>More investment in Irish arts, culture and sport.</p> <p>Deliver archive legacy photo / image project.</p>  | <p>Continued investment in children's feature animation scheme, documentary schemes, Cine4 and short-film/drama schemes.</p>                        | <p>Creative Media Campaign &amp; Bootcamps.</p>   | <p>Carbon reduction actions.</p> <p>Systems investment.</p> <p>Creative content resource</p>  |

## 6. Additional Funding & Financials 2023-2027

### TG4 Funding

TG4’s Grant-in-Aid for 2022 (excluding capital funding) was €43.385m comprising: current funding (€40.733m); capital grant for programming (€2.2m); Coimisiún na Meán Archive funding (€236k); NDNA funding (€100k); and, HD Supplemental (€116k). Capital funding was an additional €2m bringing total 2022 funding to €45.4m. TG4’s 2022 funding and expenditure is summarised below.



[1] Excluding €2.235m production staff costs; [2] Including €2.235m production staff costs; [3] Including €0.587m BA fee; and [4] excluding sports and music rights and spend outside Ireland].

2023 public funding is €52.33m. To deliver TG4’s Strategy, we are seeking a public funding increase of €10.6m in 2024, €10.7m in 2025 and €10m each in 2026 and 2027. This would bring TG4’s public funding to €93.66m by 2027. As shown in the table below, the funding requirement for 2024 and 2025 are higher than that requested in TG4’s Post-Covid Vision for those two years because TG4 received only €4.2m of the €10.1m sought for 2022 and €7.2m of the €9.2m sought for 2023.

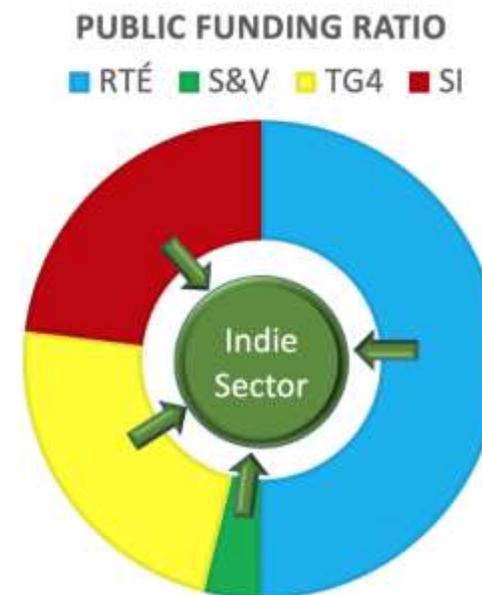
| Funding €m                     | 2021  | 2022                   | 2023   | 2024   | 2025   | 2026   | 2027   |
|--------------------------------|-------|------------------------|--------|--------|--------|--------|--------|
| <b>Post-Covid Vision</b>       |       |                        |        |        |        |        |        |
| Public Funding Increase        | -     | €10.1                  | €9.2   | €9.2   | €9.3   | N/a    | N/a    |
| Total Public Funding           | €40.8 | €50.9                  | €60.1  | €69.3  | €78.6  | N/a    | N/a    |
| <b>TG4 Strategy 2023-2027:</b> |       |                        |        |        |        |        |        |
| Public Funding Increase        | -     | €4.2                   | €7.3   | €10.61 | €10.72 | €10.0  | €10.0  |
| Total Public Funding           | €40.8 | €45.03 m <sup>31</sup> | €52.33 | €62.94 | €73.66 | €83.66 | €93.66 |

<sup>31</sup> Excluding Coimisiún na Meán funding of €236k and HD Supplemental funding of €116k.

### Funding Ireland’s PSM Ecosystem

This level of funding will deliver sufficient scale for TG4 and better funding balance in Ireland’s PSM ecosystem. TG4 believes that an equivalent amount of the public funding allocated to RTÉ should be shared between Screen Ireland, TG4 and Coimisiún na Meán Sound & Vision Fund, as funders of public service content, i.e., an equivalent amount of RTE’s public funding should be allocated in a 40:40:20 split to TG4, Screen Ireland and the Coimisiún na Meán Sound & Vision respectively, as summarised in the figure below.

Public funding of €93.66m by 2027 will be equivalent to 48% of RTÉ’s 2021 licence fee income. While small relative to what RTÉ receives every year, it will help to address PSM funding balance, reflect greater equity in PSM funding and help to reform the monolithic PSM ecosystem in Ireland. This funding level is also more aligned with S4C’s public funding scale.



## TG4’s Proposed Funding Allocation 2023-2025

As the principal funder of the screen production sector in Ireland’s regions outside of Dublin/Wicklow, this funding increase will impact the scale of the regional sector. Based on our three-year action plan for 2023-2025, TG4’s Publisher-Broadcaster model guarantees that 78% of the additional funding will be invested in the independent production sector in Ireland, particularly regional companies (in keeping with TG4’s current investment levels with the sector). This expenditure comprises commissioning spend and investment in training and market development supports for the sector. A key focus of TG4’s strategy is investment in Ireland’s regions and the majority of the additional funding will be invested in the regional creative sector outside Dublin / Wicklow over the four years.

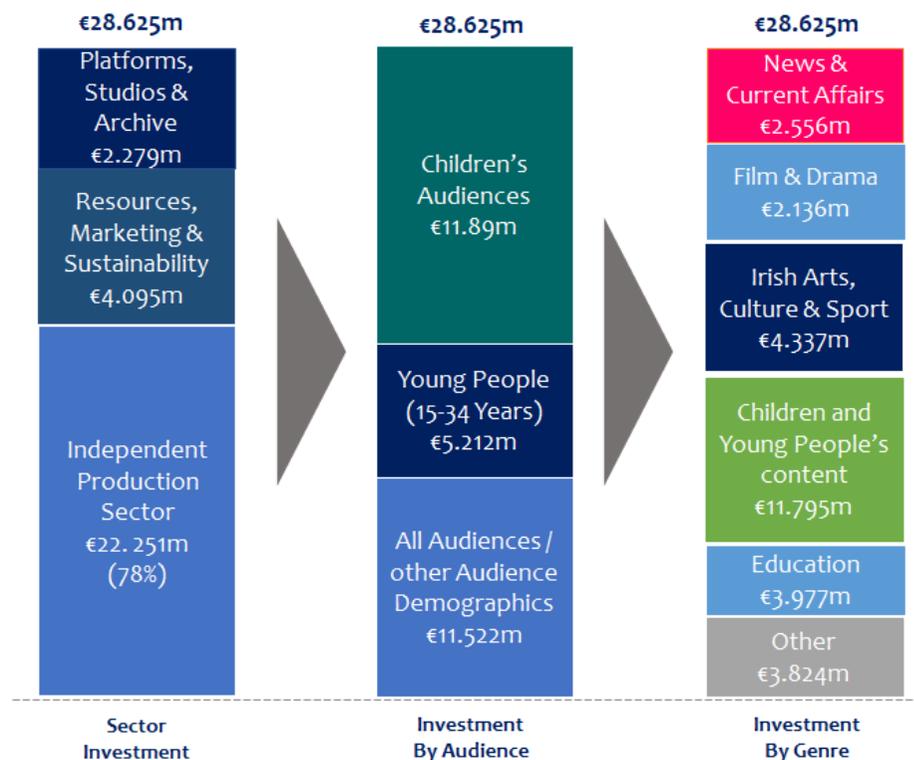
The second key focus of TG4’s strategy is to help to rebalance the demography of Irish language media in favour of younger people, as this will determine the future of Irish as a community language.

Reflecting our detailed three-year action plan, by 2025, TG4 aims to invest the additional €28.625m (for the three years 2023-2025) as shown in the chart opposite. The precise allocation of the last two years funding increase which is being sought, will be allocated in 2025. Allocation will reflect the outcome of the Coimisiún na Meán review in addition to TG4’s continued focus on independent production sector services, content and services for children and young adults, educational services, Irish language film and drama and news & current affairs etc.

It should be noted that the figures in the chart do not reflect the cumulative total spend on each genre or audience etc. over the three (3) years. Rather, they reflect the additional investment in each area in 2025 versus 2022, i.e., at the end of the strategy. Cumulative spend is set-out in TG4’s detailed three-year action plan for each of the eight (8) goals, which is presented in Section 5.

In addition to serving TG4 audiences better, there will be clear economic, industry and societal benefits from this additional investment, as set-out in section 7.

### Allocation of Additional Funding - Increased Spend in 2025 vs. 2022 (based on the detailed three-year action plan for 2023-2025)



**Proposed Use of Additional Funding - TG4 Strategy 2023-2025  
(Based on the three-year detailed action plan)**

| €'000  | 2023         | 2024          | 2025          |
|--|--------------|---------------|---------------|
| <b>Current Funding:</b>                                      |              |               |               |
| Children's content   | 3,300        | 4,345         | 1,375         |
| Young people   | 555          | 1,300         | 900           |
| Education portal   | 180          | 1,397         | 2,400         |
| News & Current Affairs                                       | 960          | 500           | 581           |
| Arts, Culture & Sport  |              | 1,810         | 2,427         |
| Film & TV Drama Production                                   | 100          | 100           | 1,200         |
| Production Sector Development <sup>32</sup>                  | 125          | 550           | 1,010         |
| Sustainable & Inclusive TG4                                  | 2,080        | 443           | 121           |
| <b>Total Annual Current Funding</b>                          | <b>7,300</b> | <b>10,445</b> | <b>10,014</b> |
| Cumulative Additional Current Funding                        | 7,300        | 17,745        | 27,759        |
|  |              |               |               |
| <b>Capital Funding:</b>                                      |              |               |               |
| Kid's Portal & Online Content                                |              | 20            |               |
| TG4 Archive & Culture Portal                                 |              | 100           |               |
| Cybersecurity & DR   |              | 40            | 40            |
| Carbon Reduction Implementation Plan                         |              |               | 50            |
| News & Current Affairs (to include studio & gallery upgrade) |              |               | 615           |
| Baseline capital expenditure                                 | 4,200        | 4,200         | 4,360         |
| <b>Total Annual Capital Funding</b>                          | <b>4,200</b> | <b>4,360</b>  | <b>5,065</b>  |

<sup>32</sup> This excludes the spend with the independent production sector which is captured within the spend on children's and young people's content, the education portal, news & current affairs, Arts, Culture & Sport content and Film & TV Drama above.

## Financial Projections 2023 - 2027

TG4's Summary Income Statement for the five-years of the Statement of Strategy (2023 - 2027) is presented below. A summary of the capital and current funding increases is presented thereafter.

### TG4 Summary Income Statement 2022-2027

|   | 2022              | 2023              | 2024              | 2025              | 2026              | 2027              |
|---|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Net Sales   | 4,054,672         | 4,400,041         | 4,800,000         | 5,230,000         | 5,630,000         | 6,030,000         |
| <b>Expenditure</b>  |                   |                   |                   |                   |                   |                   |
| Staff Costs   | 7,053,551         | 8,592,247         | 9,689,018         | 10,338,112        | 11,344,874        | 12,571,772        |
| <b>Content</b>  |                   |                   |                   |                   |                   |                   |
| Commissioned and Versioned  | 28,521,496        | 31,105,677        | 38,850,677        | 46,610,677        | 54,325,884        | 62,004,491        |
| Subtitle Costs  | 302,259           | 520,000           | 670,000           | 745,000           | 834,400           | 934,528           |
| Sector Training & Development                                     | 629,883           | 975,000           | 1,630,000         | 2,710,000         | 3,102,000         | 3,472,400         |
| Other Programme Fees (including music & performance royalties)    | 1,217,027         | 1,144,326         | 1,497,326         | 1,862,326         | 2,162,326         | 2,462,326         |
| Licensed Content  | 3,606,170         | 4,159,866         | 4,459,866         | 4,609,866         | 4,909,866         | 5,209,866         |
|   | 34,276,835        | 37,904,869        | 47,107,869        | 56,537,869        | 65,334,476        | 74,083,611        |
| Transmission Costs  | 1,395,188         | 2,320,833         | 2,320,833         | 2,320,833         | 2,500,000         | 2,500,000         |
| Marketing & Social Media  | 2,254,517         | 2,965,604         | 3,161,786         | 3,256,021         | 3,466,503         | 3,639,828         |
| Operating and Administration Expenditure                          | 2,435,562         | 2,962,175         | 3,298,265         | 3,569,813         | 3,776,794         | 4,027,438         |
| <b>Net Operating Expenditure</b>                                  | <b>43,360,981</b> | <b>50,345,687</b> | <b>60,777,771</b> | <b>70,792,648</b> | <b>80,792,648</b> | <b>90,792,648</b> |
| State Funding (Incl capital provided for programming)             | 43,033,000        | 50,333,000        | 60,777,771        | 70,792,648        | 80,792,648        | 90,792,648        |
| Other Funding (BAI, HD Supplemental, etc)                         | 352,411           | 12,687            | -                 | -                 |                   |                   |
| <b>Total Funding</b>  | <b>43,385,411</b> | <b>50,345,687</b> | <b>60,777,771</b> | <b>70,792,648</b> | <b>80,792,648</b> | <b>90,792,648</b> |
| Surplus / Deficit on Ordinary Activities                          | 24,430            | 0                 | 0                 | 0                 | 0                 | 0                 |
| State Capital Funding (not incl capital provided for programming) | 2,000,000         | 2,000,000         | 2,160,000         | 2,865,000         | 2,865,000         | 2,865,000         |
| <b>Total State Funding</b>  | <b>45,033,000</b> | <b>52,333,000</b> | <b>62,937,771</b> | <b>73,657,648</b> | <b>83,657,648</b> | <b>93,657,648</b> |

## Summary of Capital &amp; Current Funding Increases 2023 – 2027

|                 | 2022   | 2023   | 2024   | 2025   | 2026   | 2027   |
|-----------------|--------|--------|--------|--------|--------|--------|
| Current Funding | 40,833 | 48,133 | 58,578 | 68,593 | 78,593 | 88,593 |
| % Increase      | -      | 18%    | 22%    | 17%    | 15%    | 13%    |
| Capital Funding | 4,200  | 4,200  | 4,360  | 5,065  | 5,065  | 5,065  |
| % Increase      | -      | 0%     | 4%     | 16%    | 0%     | 0%     |
|                 |        |        |        |        |        |        |
| Total Funding   | 45,033 | 52,333 | 62,938 | 73,658 | 83,658 | 93,658 |
| %Increase       |        | 16%    | 20%    | 17%    | 14%    | 12%    |

## 7. Benefits / Impact of TG4’s Strategy

We acknowledge the importance of being able to demonstrate the contribution TG4 makes to Irish society and the economy. It is likewise important to demonstrate the value TG4 will deliver from our strategy and from the additional funding we are seeking over the timeframe of the strategy.

In addition to the benefits for TG4 audiences, additional funding and investment will make a positive contribution to our economy, to employment and regional development, particularly Ireland’s regional creative sector. This will be achieved through TG4’s investment in commissioned content and services, Intellectual Property (IP) creation and in sector training and development etc., all of which also helps to generate production and creative company clusters and support growth of the regional creative economy overall.

In addition, there will be many qualitative social and cultural benefits such as: our impact on learning through provision of educational resources for schools and learners at home; the societal / public value of having a trusted source of news and access to content that might not otherwise be available; our support for regional Irish language communities; and, our unique role in inter-generational transmission of the Irish language, among many others.

The eight key benefits of additional investment in TG4 are summarised opposite and described in this section of our strategy. It builds on Section 2, which described the value created by TG4. It should be noted that the detailed benefits for audiences (such as new programming and content hours etc.) are based on the three-year action plan. The action plan for 2026 and 2027 will determine the quantifiable benefits such as hours of content and investment in production sector training and development etc.

TG4 has applied multiplier analysis (contribution to national output and impact on full-time equivalent jobs) to measure the economic impact of TG4’s strategy. This economic analysis is likewise focused on the detailed three-year action plan for 2023-2025 only. Multiplier analysis identifies the positive economic impact of particular expenditures and investments in the economy. The investment and expenditure associated with 2026 and 2027, the last two years of TG4’s five-year Strategy for 2023-2027, will not be defined until 2025 following the completion of the Coimisiún na Meán review.

It should be noted that the scope of the benefits analysis is not a full cost benefit analysis (CBA) of TG4 as the outputs and value created are challenging to quantify and measure accurately and in their entirety.

Summary of TG4’s Strategy Benefits



## Benefits for Audiences

From the three-year action plan alone, TG4 will deliver 1,148 new original content hours cumulatively over the three years in Irish language film, high-quality drama, younger audience's entertainment, children's and educational content for delivery across multiple platforms including our broadcast service, online and social platforms. A core aim of TG4's strategy is to help to rebalance the demography of Irish language media in favour of younger people. Because of the planned additional investment in content for children and younger audiences, our strategy will help deliver this.

Over the three-year action plan, we aim to build a significant portfolio of educational resources to support Irish language learning, grow engagement with young learners, teachers and parents and provide resources to bring the best of TG4's educational content to the classroom and to learners at home.

Summary of outputs for audiences (based on the three-year action plan 2023-25):

- **Dedicated children's channel** & safe content space for children with an **additional 7.5 hours** of broadcasting per day.
- **75 hours of new** educational programming and content to support Irish language learning and learning through Irish. This includes **24 new short-form content hours** for schools over the 3 years of the strategy. These are valuable education supports for primary & secondary schools and adults.
- **Enhanced news & current affairs** services for Irish speakers & the Gaeltacht - 71 new hours over the 3 years of the strategy.
- 102 new hours of Irish Arts, Culture & Sport programming over the 3 years.
- 11 new hours of original Irish language film and drama.
- Over the 3 years, 889 new hours of other programming (entertainment, animation and children's).
- **TG4 Beo** - new multi-cultural live events.

Through more investment in new content, TG4 aims to connect with sections of the audience where we have clear gaps in the provision of content for these audiences, due to insufficient funding. As a result, we will deliver growth in TG4's audience reach. By 2025, we are targeting 154.3m cross-platform video views of TG4 content, an average of 3 million each week in Ireland and internationally. We also aim to increase TG4's average weekly cross-platform reach with Irish language audiences. 2022 saw TG4 reach 66% of Irish language audiences across all linear and digital

platforms (TV, smart devices, mobile, online) weekly. By 2025, TG4 aims to increase this to 75%, an increase of c.14%. Use of TG4's educational resources in the classroom and by students, will also have increased significantly.

## Production Sector Growth

EBU research<sup>33</sup> shows that public service media has long played a central role in the European creative sector, using its funding for content creation and to support creative industries. European PSM organisations are catalysts for content creation spending on average, €19.5 billion per year across the EBU area. With 84% of this spend allocated to original content, they are leading investors in European original content. In 2019, PSM organisations originated 40.2% of total EU original audio-visual content compared to 1.7% from SVOD<sup>34</sup> companies. This demonstrates the commitment of PSM to original content production and how PSM has been a major creative catalyst in European culture.

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

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

## New Industry Talent

Over 2023 to 2025, in addition to investment in new commissioned content which supports talent development throughout the sector, TG4 will continue to invest in talent development schemes. We estimate that the further development of 155-175 individuals can be supported through TG4's commissioning development schemes in addition to training schemes such as *Scéim Forbartha Oiliúna* and TG4 internships

<sup>33</sup> Funding of Public Service Media 2020 (EBU, December 2020)

<sup>34</sup> Subscription Video-on-Demand.

etc., all of which are funded in conjunction with other stakeholders. This will have a positive impact on the emergence and development of local creative and technical talent in the audio-visual and creative sectors, particularly in the regions. TG4's proposals will also have an impact on the development of regional journalistic talent through our investment in a new children's Irish language news service and enhanced TG4 news and current affairs services.

## Grow Regional Jobs & Economic Impact

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

| Economic Impact   |                                     | 2022   | 2025    |
|-------------------|-------------------------------------|--------|---------|
| National          | Independent Production Sector Spend | €25.6m | €47.85m |
|                   | Contribution to National Output     | €76.3m | €114m   |
|                   | Jobs Impact (FTEs)                  | 1,146  | 1,650   |
| Of which Regional | Independent Production Sector Spend | €23.1m | €41.5m  |
|                   | Contribution to Regional Output     | €63m   | €100m   |
|                   | Jobs Impact (FTEs)                  | 972    | 1,450   |

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

Between 90% and 100% of production budgets are spent directly in the local areas and many production companies in the regions have policies of hiring and purchasing from their local areas first and from other locations in proximity to their base,

second<sup>35</sup>. Services and suppliers include set-building and painting supplies, catering and accommodation, taxis and other transport services, clothing supplies for costumes, cleaning services for the studios etc. electrical supplies and electricians, vehicles, repairs and servicing, among many others, all of which are purchased in local areas wherever possible. In addition, production staff not living locally stay in rented and other accommodation which is a benefit to the local property and hospitality sector, particularly during the off-season in the tourism sector.

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

These potential benefits are important in the context of Ireland's regional competitiveness. EU research<sup>36</sup> shows that Ireland is the 9<sup>th</sup> most competitive economy in the EU27 with a competitiveness score of 112.6 versus an EU average of 100. The three regional areas of the Northern and Western Region, Eastern and Midland Region and Southern Region were assessed individually. Eastern and Midland Region ranks 24<sup>th</sup> of 234 regions, Southern Region ranks 90<sup>th</sup> and the Northern and Western Region ranks 113<sup>th</sup>. The Northern and Western Region has a competitiveness score of 98.2 versus the EU average of 100. It scored only 34.1 on infrastructure and 91.1 on innovation compared to the EU average score of 100. However, it scored 134.4 on technological readiness, well exceeding the EU average score of 100. TG4's strategy can deliver significant benefits for the region in supporting further development of its competitiveness.

In summary, it will:

- Expand skilled technical and creative employment in Gaeltacht and regional areas and help retain talent in these areas.

<sup>35</sup> Based on TG4's analysis of additional investment in the Irish Independent Production Sector (2019).

<sup>36</sup> EU Regional Competitiveness Index 2.0 2022 edition.

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

### Supports Government Cultural & Irish Language Strategies

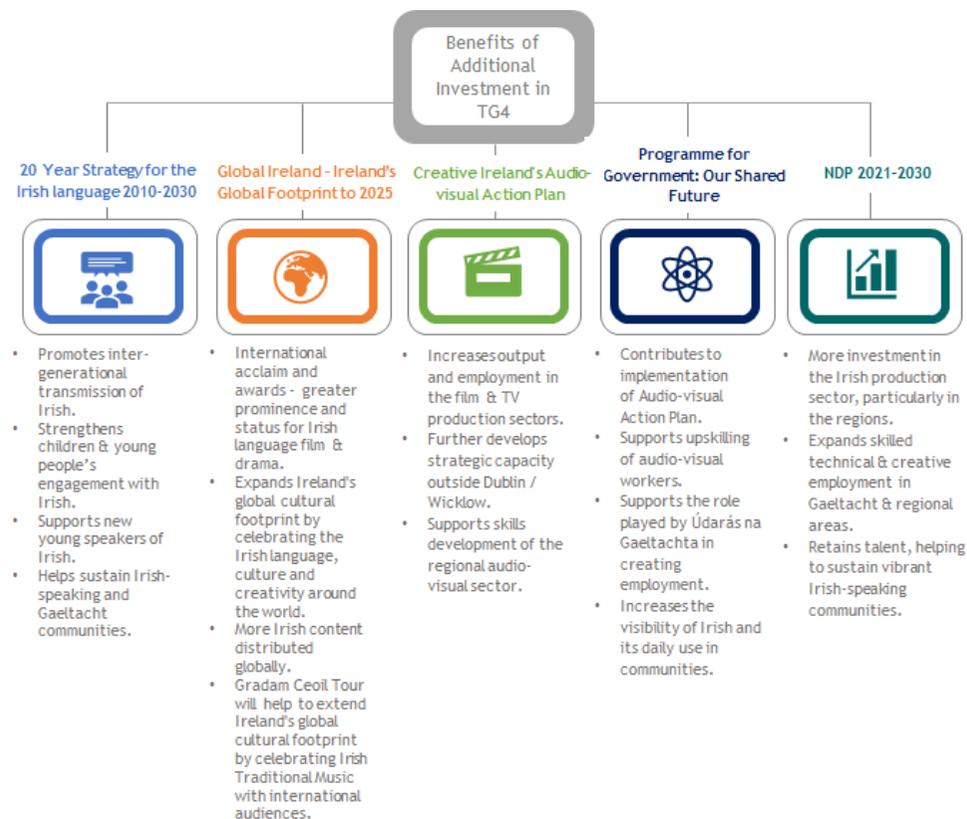
TG4's investment proposals also support delivery of other Government national economic, audio-visual and Irish language policies / strategies, namely:

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

TG4's strategy alignment with these policies / strategies is described overleaf.

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

### Summary of Benefits for Delivery of Other Government Policies / Strategies



### **Government's 20 Year Strategy for the Irish Language (2010-2030)**

The 20-Year Strategy for the Irish Language (2010-2030) aims to increase the number of daily Irish language speakers to 250,000 by 2030. The Government is committed to increasing the use of Irish nationally and is striving to achieve functional bilingualism. Its approach is to create a framework and opportunities for the Irish language to be passed on in a natural way throughout households and communities. The importance of media and technology is recognised in this regard with “*high quality broadcast services through the medium of Irish (to) be ensured*”. TG4's strategy is aligned with the Irish language strategy and seeks to lay the foundations for sustaining Irish-speaking communities and for ensuring Irish language public service content remains important in a modern Ireland.

### **Global Ireland - Ireland's Global Footprint to 2025**

The strategy aims to deepen Ireland's international presence, reputation and influence. A key element is to promote Irish arts, heritage and culture to new generations and to audiences across the world. It also seeks to promote Ireland as a tourism destination. Through TG4's additional investment in Irish language drama and film, and through our investment in Irish culture, arts and sport, TG4 will help to grow Ireland's global cultural footprint by celebrating the Irish language, culture and creativity around the world.

### **Audio-visual Action Plan (Creative Ireland Programme Pillar 4)**

The Creative Ireland Programme 2017-2022 is a five-year Government initiative which places creativity at the heart of public policy. It seeks to double employment in the film, television and animation sectors to over 24,000 full-time equivalents (FTEs) and to achieve a gross value added of almost €1.4bn. It identifies further development of strategic capacity outside Dublin/Wicklow as being critical to achieving the projected employment and output growth targets. It also acknowledges the importance of skills development in the industry. TG4's strategy will contribute directly to growing output and employment in the film and television production sectors in addition to supporting skills development of the sector.

### **Programme for Government: Our Shared Future**

The ambition of the Programme for Government includes repairing the damage that has been inflicted by the Covid-19 pandemic and delivering actions to create new jobs, prepare for the jobs of the future, drive our economic recovery and improve the quality of life for all our people. TG4's strategy is aligned with the Programme for Government. This includes: implementing the Audio-visual Action Plan; supporting the upskilling of audio-visual workers; supporting the role played by

Údarás na Gaeltachta in creating employment; and, increasing the visibility of the Irish language and its daily use in the community (which will be achieved through a range of initiatives including “..develop(ing) platforms to increase young people's engagement with the Irish language, e.g., TG4...” (ref. page 89 of Programme)).

### **National Development Plan (NDP) 2021-2030**

The Government launched the renewed NDP 2021-2030 in Q4 2021. It includes a focus on solutions for jobs growth in every region and economic renewal for the decade ahead. It supports development of “the creative industries and a vibrant media production and audio-visual sector” and also aims to “sustain Gaeltacht communities through investment in Údarás na Gaeltachta and promote the Irish language through Gaeltacht and Irish language support schemes”. TG4 will contribute directly to delivery of National Strategic Objective (NSO) 3 [*Strengthened Rural Economies & Communities*]. NSO3 investment priorities include tourism, culture, arts, Gaeltacht, sport and media. Additional investment in TG4 will be invested directly in Ireland's regional creative sectors. Our investment in Irish language original commissioned content and services will expand skilled technical and creative employment in Gaeltacht and regional areas and retain talent in these areas, helping to sustain vibrant Irish-speaking communities.

## Supports Irish Communities, the Gaeltacht & the Irish Language

Through additional investment in TG4, TG4 will in turn support continued inter-generational transmission of the Irish language and support Irish-speaking and Gaeltacht communities:

- Irish language media supports the visibility of the Irish language and its daily use in the community, including increasing young people’s engagement with the Irish language.
- A *Cúla4* channel will provide more support for families raising their children through Irish, who wish to promote Irish as the first language of the household. It will help to encourage the socialisation of Irish and provide an immersive language experience for children. By broadcasting Irish language television programmes, children can see that Irish is a living language and that it has a place in social networks in the home and in other settings outside of school.
- TG4 will deliver significant audio-visual supports for Irish within the education system, in particular for Irish-speaking primary and secondary schools and school children, but also for any learner of Irish outside the formal education system.
- TG4 will invest further in original Irish language film and drama and give greater prominence to, and help create status for, the Irish language by stimulating cultural works of national significance.
- Through our investment in Ireland’s regional creative industries, TG4 will provide more opportunities for skilled, creative and technical employment, working in the Irish language and will promote Irish as a living, working language in a modern context.
- Irish-speaking and Gaeltacht communities will be better served in terms of greater diversity and plurality of news and current affairs.

## More Education Resources

TG4’s investment in educational and children’s content will positively impact education and learning in our society. Through a dedicated *Cúla4* channel, TG4 will be able to bring more educational content to not just learners at home, but also to the classroom. With additional funding, TG4 will deliver an Education Hub which consolidates TG4’s educational resources and delivers new content for primary and post-primary schools every year including Irish language learning broadcast content, educational events aimed at post-primary students to foster media literacy, creative thinking skills and STEAM skills. TG4 will also deliver new broadcast content for adult Irish language learners. Through these resources, TG4 will provide significant audio-visual supports for the Irish language within the education system but also for any

learner outside the formal education system. We will continue to support Irish language learning and contribute to long-term flourishing of the Irish language.

## Positive Social & Cultural Impact

In addition to the value for audiences and to the value we deliver for the national and regional economy through additional employment, the development of skills and talent in the audio-visual production sector etc. additional investment in TG4 will deliver many qualitative benefits for Irish society including:

- Support Gaeltacht & regional Irish language communities.
- Support learning (with our educational resources);
- Support inter-generational transmission of Irish as a living working language;
- Provide greater visibility to Irish children’s content and a connection with the Irish language from a young age;
- Help to shape our young people (with a children’s news service); and,
- Keep Irish-speaking communities well informed.

## 8. Conclusions

Public service media plays an essential role in society, representing a nation's cultures, promoting its languages and both shaping and supporting its creative industries. It provides a means to inform citizens, to foster open dialogue and to provide trusted information, contributing to a healthy democratic society.

TG4 believes that strengthening Irish public service media is critical to ensuring a strong Irish culture. Our strategy seeks to ensure that Irish language public service media provision is adequately funded.

Transforming TG4's scale and services as the media market evolves, is fundamental and we have ambitious plans for the four years ahead. We are seeking a public funding increase of an average of circa €10m per year to 2027.

### Based on TG4's detailed three-year action plan alone:

TG4's efficient Publisher-Broadcaster model guarantees that 78% of the additional funding in 2025 will be spent with the independent production sector in Ireland particularly in regional companies. As the principal funder of the audio-visual sector in Ireland's regions outside of Dublin/Wicklow, this funding increase will have a significant positive impact on the scale of the regional audio-visual sector. It will deliver an estimated 300-400 new jobs in the sector by the end of 2025, particularly in the regions, and help develop the sector's skills and talent.

By expanding the skilled technical and creative employment in Gaeltacht and regional areas, the investment will help retain talent and young Irish speakers in these areas. It will help to strengthen and grow companies and stimulate further investment in production sector capital formation and local supply services. It will provide a catalyst for generation of independent Irish intellectual property, job creation and internationalisation of the production sector in the regions, including foreign direct investment in the form of co-production funding and other revenues.

The additional funding will also increase TG4's contribution to national output and employment. TG4's expenditures in the economy in 2025 are estimated have a national jobs impact of an estimated 1,650 full-time equivalent jobs (direct, indirect & induced) of which an estimated 1,450 will be regional.

Through additional investment in new content, TG4 aims to connect with sections of the audience where we have clear gaps in the provision of content, due to insufficient funding. As a result, we will deliver audience growth. By 2025, we are targeting 154.3m cross-platform video views of TG4 content, an average of three million each week, and to have increased cross-platform reach with Irish language audiences to 75%, from 66% today (2022). We are also increasing our engagement with schools.

Our plan will also help to rebalance the demography of Irish language media in favour of younger people, who will determine the future of Irish as a community language. A significant share of the additional funding will be directed towards content and services for younger audience demographics. This will help the revival and preservation of the Irish language, building resonance and connection with young people who are growing up in a global media environment.

### The key outcomes of the additional funding for 2023 to 2025:

- Underpin growth in the creative economy and deliver an estimated 300-400 new independent production sector jobs.
- A national jobs impact of an estimated 1,650 fulltime equivalents by 2025.
- Increase young people's engagement with the Irish language.
- Deliver audience growth and address gaps in content provision - provide 1,148 cumulative hours of new content, in total over the three years.

TG4's long-term vision is to attain a status closer to that of a broadcaster in societies where bilingualism is stable and where language shift is no longer an existential threat. Public broadcaster role models include those in Canada, Switzerland, Belgium and Spain. In the short-term and as a first step, TG4 must achieve growth in funding scale and continue to innovate and collaborate, to ensure the service can create significant audience, societal and economic value and overcome the challenges facing Irish language media in the digital age. We will continue in our efforts to reimagine the role of TG4 and status of the Irish language and the Gaeltacht in Irish society. We believe that media and the arts play a central role in this reimagined vision and that despite the significant number of major global media services and intense competition, TG4 is needed more than ever. Our unique purpose sets us apart and we are a vital part of a modern Ireland.