

VFX IRELAND REPORT 2024

Charting Ireland's VFX Future

The need for a dynamic and
progressive hub for Irish VFX specialists



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EXECUTIVE SUMMARY

This report highlights skills gaps and suggest ways that VFX studios, colleges and training providers can establish a strong skills and talent pipeline

CHAPTER

01

Executive Summary

A path to greater visibility, promotion and awareness of the Irish VFX sector



Executive Summary

This report is a detailed analysis of the VFX industry in Ireland, with practical recommendations for supporting growth within the sector. The report's primary objective is to provide valuable insights to inform policy and decision-making.

The Irish visual effects (VFX) sector is a high-tech industry that currently employs over 300 staff, with 326% revenue growth in the last five years, and 100% growth between 2021 and 2022 alone. However, this rapid growth has resulted in a VFX skills gap in Ireland. This report highlights these gaps, and suggests practical ways that VFX studios, along with colleges and training providers, can establish a strong skills and a talent pipeline, driving visibility, promotion and awareness of the sector. This will encourage local talent and foster career paths for current creative staff.

The report, commissioned by VFX Ireland, with support from Screen Ireland, drew valuable insights from colleges, training providers, college graduates and other stakeholders. These key sources of information were crucial in shaping the report and its findings.

The Irish VFX sector is a high-tech industry that currently employs over 300 staff, with 326% revenue growth in the last five years

VFX Ireland - the voice of the Irish VFX industry

VFX Ireland is a trade association that represents Ireland's top VFX studios – EGG VFX, Element VFX, Piranha Bar, Outer Limits, SSVFX and Windmill Lane. These member studios have an established track record of delivering award-winning digital visual

effects work across various genres, in episodic drama series and feature films, contributing to Ireland's excellent international reputation in the field. High quality Irish VFX work has been nominated by Emmy, BAFTA, IFTA and VES, with work on titles such as A Discovery of Witches, Bad Sisters, Black Panther, Good Omens, Joe Pickett, Marlowe, Stranger Things, The Mandalorian, The Favourite, The Woman King, and Wendell & Wilde.



Fostering growth and talent

VFX Ireland promotes Ireland as a hub of VFX excellence, showcasing the country's talent and scalability. With an eye to the next generation, VFX Ireland has formed strong relationships with Screen Ireland, Creative Media Academy Ireland (CMAI), Cultural & Creative Industries Skillnet, third-level institutions and Enterprise Ireland. This ensures a continuous pipeline of industry-ready talent, which strengthens the sector's global reputation.

VFX Ireland also ensures that Ireland remains an attractive destination for VFX production by leveraging the Irish Government's Section 481 tax rebate of up to 32% of eligible expenditure on a TV or film production created in Ireland. It consolidates the strengths of individual member studios while highlighting Ireland's substantial talent pool, scalability, and incentives for producing exceptional VFX.

VFX within the Irish film Industry

The film, television, documentary and animation industry in Ireland has grown consistently in recent years, and expenditure on production within the Irish economy reached an all-time high in 2021.

This remarkable achievement can be attributed to heightened activity following temporary Covid-19 shutdowns. In 2022, production generated a spend of over €36 million, fuelled by both domestic and international productions – a significant increase compared with 2019.

In 2022, Screen Ireland's S481 team worked with over 49 productions who developed 3,500 structured learning programmes and skill development opportunities across various sectors, with Skills Officers in a role of supporting a learning culture on productions. These initiatives also encompassed specialised courses, S481 Masterclasses, and other programmes designed to enhance skills and knowledge. These initiatives have played a critical role in enhancing talent and expertise within the screen industry, through opportunities in mentorships, shadow directing, and a range of other valuable learning experiences.

€36m

generated from production spend in 2022

Screen Ireland's S481 team developed

3,500

learning and skills opportunities in 2022



68%

of Section 481 productions involved the participation of Irish creatives

The impact of Section 481

The 2023 report "The Cultural Dividend Generated by Ireland's Section 481 Film and Television Incentive" highlights the significant impact of the Government tax incentive on the screen industry. The report underscores the positive effects on Irish society, both domestic and international audiences, and professionals involved in the creative screen industry in Ireland.

The demand for VFX has expanded globally across multiple sectors, and Ireland has carved a significant space in the field

44



Irish productions in the works in 2023

Notably, the report revealed that a substantial 89% of incoming production expenditure is attributed to the Section 481 tax rebate. Additionally, it emphasised that a considerable majority of projects benefiting from Section 481 relied on the contributions of Irish creative professionals. Specifically, between 2017 and 2021, 68% of productions involved the participation of Irish creatives.

The global VFX revolution

The VFX sector has experienced significant growth due to several factors, including the integration of VFX into nearly every film and television series, the rise of streaming platforms and the booming industry during the Covid-19 pandemic, and the increasing popularity of video games and immersive formats.

The 2023 production slate of Irish film, TV, documentary and animation contained 44 projects, including live action and animated feature films, documentaries, TV animation for young audiences, and live action TV dramas. These projects produced in Ireland, as well as by global clients, form the basis of the VFX industry in Ireland. The fast expanding industry both nationally and globally has put high demand on the VFX sector.

Additionally, practical solutions such as LED stages and virtual production have revolutionised filmmaking and post-production. The demand for VFX has expanded globally across multiple sectors, and Ireland has carved a significant space in the field.

Continued demand for Irish VFX services

The six leading Irish VFX studios have experienced annual growth and increasing demand for their services. However, the VFX sector in Ireland did not emerge from the recent demand in the global industry, but has been steadily growing for over 40 years out of long-established post-production houses.

Irish VFX studios are well-positioned globally, as English-speaking companies that produce high-quality content, while being geographically accessible to continental Europe and the USA. Supporting the sector is Ireland's very attractive Section 481 Tax Incentive for Film and Television. The VFX sector in Ireland needs to harness these advantages, while addressing the challenges highlighted in this report.

Looking to the future

The report highlights the need for the VFX sector in Ireland to adapt to the demands and challenges of future growth and investment. It outlines Ireland's current VFX capacity and capabilities and provides recommendations to support sector growth, and a foundation for a stronger industry in Ireland.



OUR ANALYSIS

Currently the largest barrier to growth facing Irish VFX studios is access to skilled and trained creative staff in Ireland

CHAPTER

02

Our Analysis

Examining challenges and potential
for growth in Ireland's VFX landscape



Our Analysis

An examination of the current state and potential growth trajectories of Ireland's VFX industry, focusing on talent development, educational alignment, and strategic initiatives to enhance robustness and global competitiveness.

Currently the largest barrier to growth facing Irish VFX studios is access to skilled and trained creative staff in Ireland. To meet their needs, studios have had to recruit talent from overseas to fill mid-level and senior-level positions. While this is common in the Irish creative industries, the VFX industry faces unique challenges that set it apart from closely related sectors, for example animation and design, which have experienced substantial growth and have benefited from educational institutions that support their development.

VFX workforce

The VFX Ireland member studios currently employ 205 creative staff and 53 production staff in total across the six member studios.

While numbers can fluctuate depending on the needs of production, demand for new creative staff is growing and there is a continued effort by the studios to upskill and train from within their own organisations. The studios are committed to hiring graduates where possible, with the understanding that they are investing in the next generation of mid and senior creatives to build towards a stronger VFX sector for the future. Figure 02 shows the percentage of graduates employed

Figure 01 Total VFX Staff

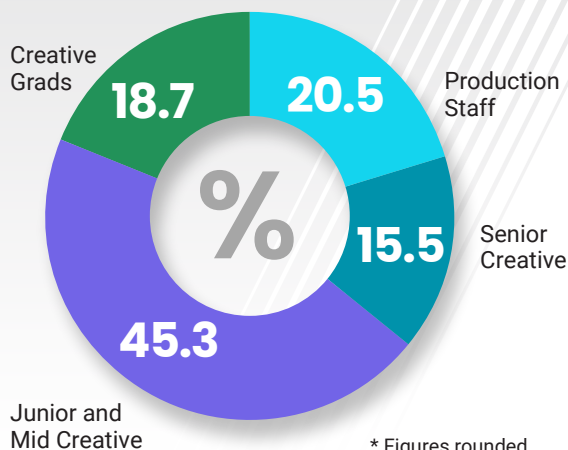
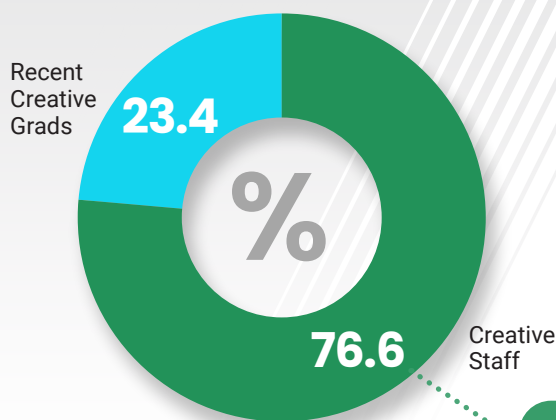


Figure 02 Creative VFX Staff



48 of the total workforce are recent graduates

across the six VFX Ireland member studios within creative departments.

Almost one quarter of the creative staff in the Irish VFX sector are recent graduates. These new hires are brought in at entry or junior level with the understanding that they will be trained on the job through tailored training workshops.

This training is sometimes delivered by the studio with the support of the Creative Media Academy Ireland (CMAI) and Screen Ireland.

Of the total number of creative staff in the Irish VFX sector, 48 are recent graduates.

Recruitment

VFX member studios have identified skills and software training that are not being taught to the required standard in Irish colleges, and offer internships to teach these necessary skills to graduates of film, animation, art and creative media third-level programmes. There is no dedicated VFX programme offered in Ireland but there are short workshops and modules that deliver some VFX-specific requirements.

The top four Irish colleges with graduates who gain employment in the Irish VFX sector are listed in figure 03. However, after these graduates are selected by the Irish VFX studios, they are placed into further training courses within the company. Studios currently recruit 55.6% from within Ireland, with additional employment coming from the UK, France and Brazil. While 83% of these graduates are Irish and the studios are committed to hiring Irish graduates where possible, there is an identified difference between the skill set of Irish graduates and those from overseas.

66.7% of the VFX studios believe Irish graduate skill sets are lesser than those of their UK and France counterparts.

33.3% of the VFX studios expanded on this data, adding that the UK and French graduates are instantly employable, i.e. they do not require additional training for junior roles.

83.3% of the VFX studios specified that Irish third-level educational providers need to meet the employability benchmark of the UK and France by providing dedicated VFX degree courses that deliver the specific VFX skill set and software required by the VFX sector. The studios would also like to see accredited professional development courses for current staff.

Figure 03 Hiring from Irish Colleges

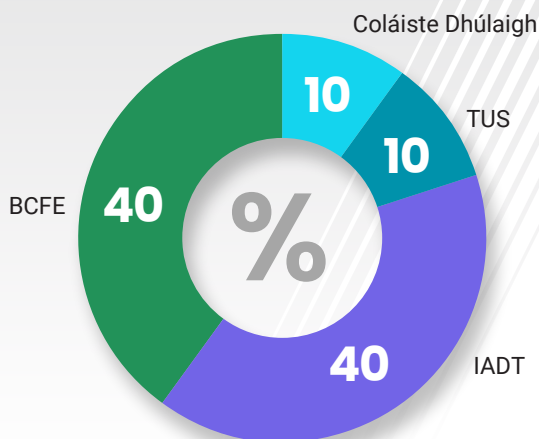
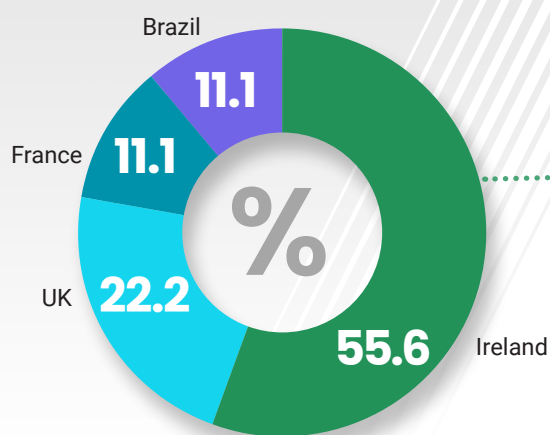


Figure 04 Hiring Pool



Just over half of graduates are recruited from within Ireland

100% of studios agree that dedicated degree programmes offered in Ireland and on-the-job training would help meet the current and future requirements of the studios' hiring needs. 66.7% agreed that a skills academy specifically for VFX graduates would be beneficial.

83.3% of the studios agreed that special purpose courses for graduates would benefit the sector.

66.7% agreed that industry mentoring is helpful, but that there is a cost in providing this.

The studios are open to bolstering this by supporting special purpose courses and providing industry mentoring. They are aware that currently the support by CMAI and their own in-house training will not sustain the growing VFX sector.

Fundamental skills gaps

100% of the VFX member studios noted there was a lack of software skills from recent Irish graduates.

The top four software packages identified by the studios as most lacking are: Nuke, ShotGrid, Maya and Houdini.

Figure 05 shows the software packages most used by the Irish VFX sector to produce content for the global market.

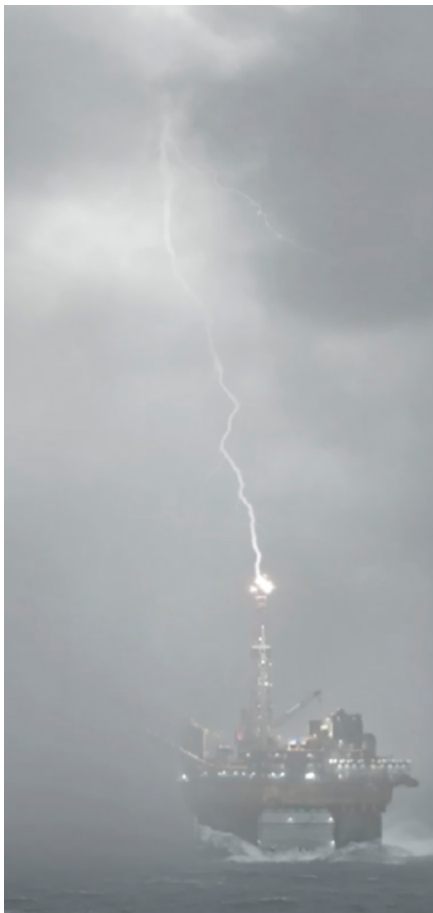
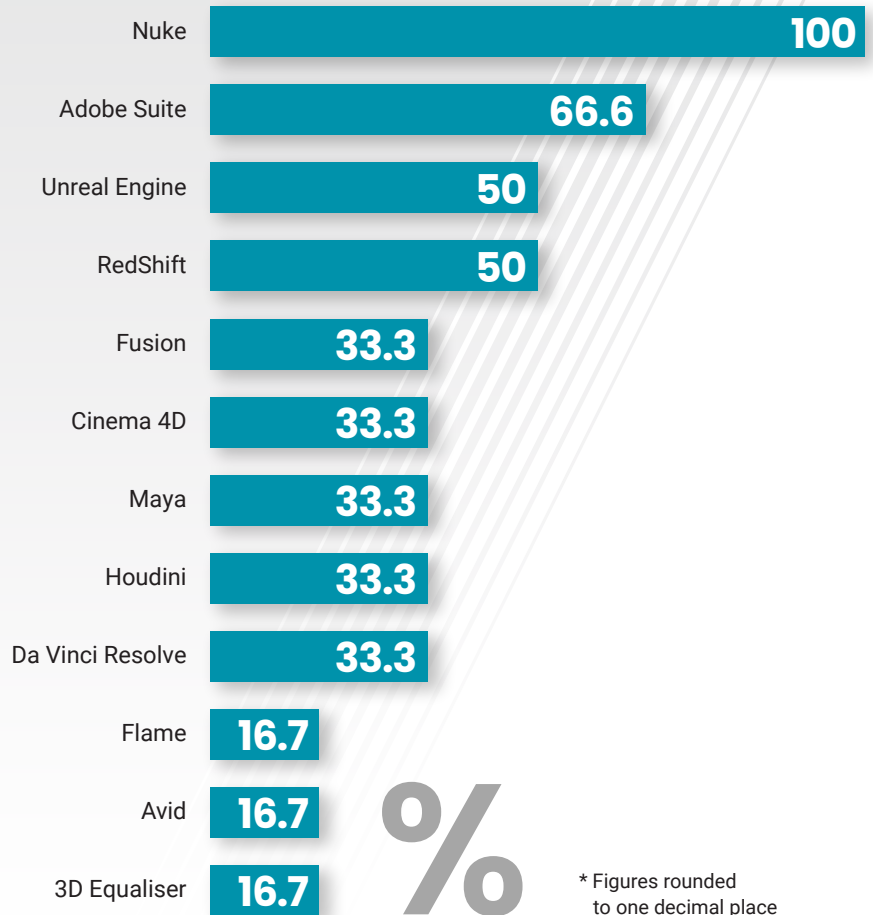


Figure 05 Software packages most used by the Irish VFX industry



100%

of VFX Ireland member studios cited a gap in software skills in recent Irish graduates

Comparatively, the Irish colleges that offer VFX programmes, modules or workshops deliver training in the following software suites:

Figure 06
Training offered by Irish colleges in VFX software

		Software training																		
		Nuke	Adobe Suite	Shot Grid	Unreal Engine	Red Shift	Fusion	Cinema 4D	Maya	Houdini	Flame	Avid	DaVinci Resolve	3D Equaliser	Blender	Substance Painter	3D Max	Unity	Z-Brush	
College/Training Provider	BCFE	✓	✓	✓					✓			✓	✓		✓				✓	
	Cork FETEC		✓												✓	✓	✓			
	Dundalk IT								✓						✓					
	TUS Clonmel	✓	✓						✓	✓						✓		✓	✓	
	NCAD		✓		✓										✓					
	SETU																		✓	
	Cultural & Creative Industries Skillnet	✓																		
	Creative Media Academy Ireland	✓		✓									✓							
	IADT		✓	✓	✓	✓			✓					✓		✓			✓	
	DCU	✓																		
	Griffith College/Pulse	✓	✓		✓				✓							✓			✓	✓

Figure 07
Industry software requirement gaps

Required by VFX studios / not taught in Irish colleges	Taught by colleges / not currently used by VFX studios
3D Equaliser	3D Max
Cinema 4D	Blender
Flame	Mudbox
Fusion	Unity
	Z-Brush

Four software packages listed as required by the VFX sector are not taught by Irish colleges. Five packages listed on college programmes as taught modules are not currently used by the Irish VFX sector. Cost can sometimes affect software accessibility, but it must also be noted that no Irish college is currently offering a dedicated VFX programme, so meeting relevant software training needs is a challenge. These software packages are displayed in Figure 07.

To counter the issue of software training, Irish VFX studios provide training in-house for new creative staff, and for established staff in their creative departments. The studios all provide:


- On-board training for new staff;
- Salary reviews and pay scales;
- Short courses that can be taken outside of work hours, and

- Time off to attend courses during work hours.

The senior teams are aware that much of their role includes delivering training and sharing expertise. This is an extra cost and can lead to additional working hours for senior staff. More support is needed to support this initiative by the studios.

The VFX studios continue to work with CMAI on relevant training courses with a view to hiring the learners who complete the programme. They are committed to working closely with CMAI and Cultural & Creative Industries Skillnet to arrange training beneficial to employees as required by their projects.

The studios utilise online training where applicable, and provide subscriptions to FXPHD, GreyscaleGorilla, Pluralsight and Cave Academy.



2/3rds

of the Irish VFX studios often advertise their positions outside Ireland



50%

use word-of-mouth advertising


Advertising vacancies in the Irish VFX sector

The VFX industry is experiencing growth through an increasing number of clients working with Irish studios. However, there needs to be more visibility in the sector so the vacancies in creative roles are accessible and visible to potential new hires.


66.7% of the Irish VFX studios often advertise their positions outside Ireland. The same 66.7% of these studios use recruiters to do so, while 83.3% of the studios use social media to advertise vacancies.

50% use word-of-mouth advertising, while 33.3% use their company careers web page or third-party careers portals. 16.7% of Irish VFX studios have advertised in Irish national newspapers.

None of the Irish VFX studios have engaged with minority communities to attract potential creative staff, and 66.7% of the studios engage with third-level colleges to promote the sector and attract new graduates to the VFX sector in Ireland. This is detailed in the next section.



Creative roles need to be more visible to attract the right talent



College engagement

Of the 66.7% of Irish VFX studios that regularly engage with third-level colleges to provide workshops and guest talks:

100% of these four studios are in contact with Ballyfermot College of Further Education (BCFE).

75% of these studios are in contact with the Dun Laoghaire Institute of Art, Design and Technology (IADT).

25% engage with Griffith College, the Technological University of the Shannon Midwest (LSAD/TUS) and Colaiste Dhulaigh.

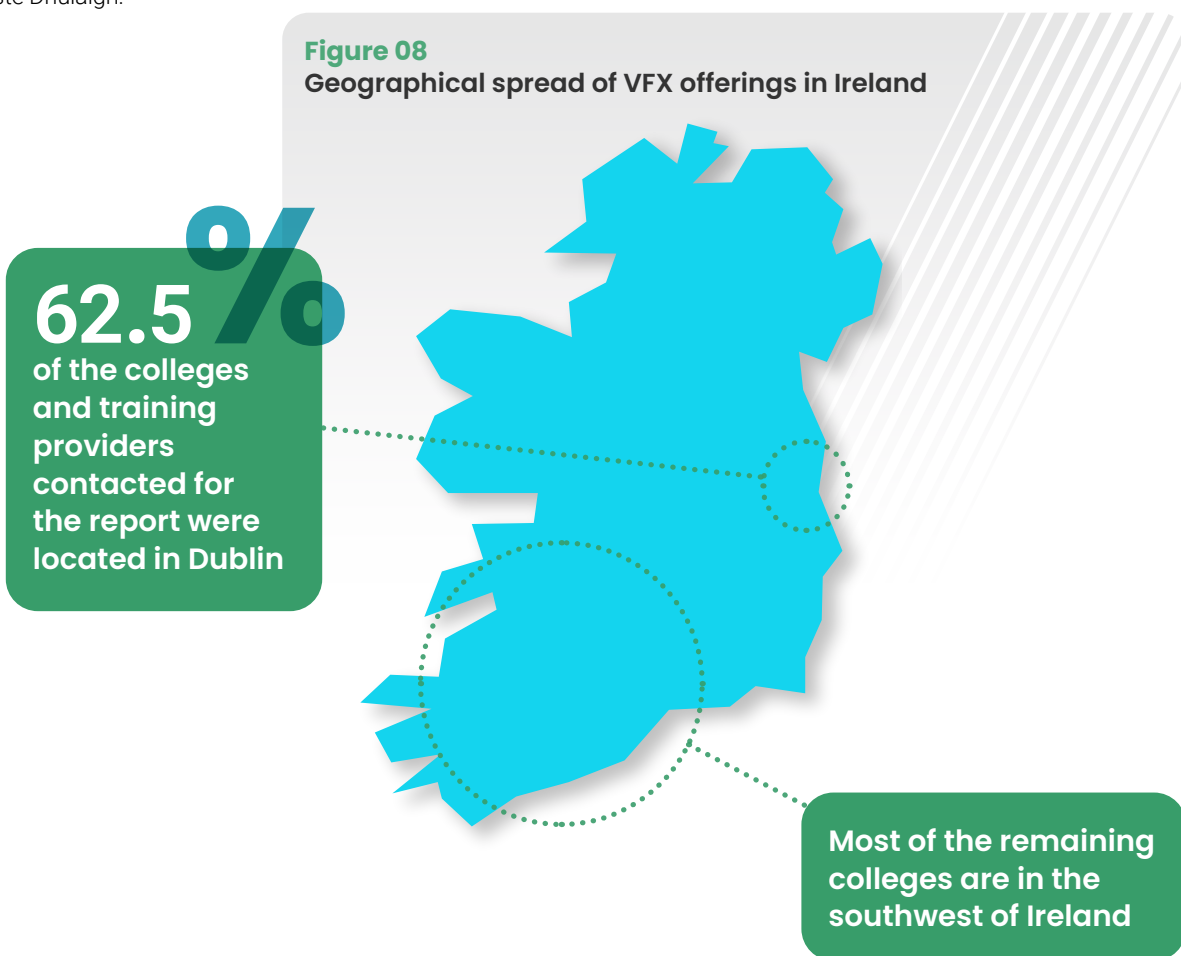
Geographically, five of the Irish VFX studios are within walking distance of each other within Dublin city centre in Dublin 2. One studio, EGG VFX, also has a premises in Dun Laoghaire in south county Dublin, a short walk from Outer Limits, which is located on the same street.

The Irish VFX studios are solely located in Dublin, with no regional spread. This accounts for the low percentage of engagement with colleges and universities outside Dublin.

16 colleges and training providers were contacted and asked to contribute to this report. 62.5% of these are in Dublin. The regional spread of the remaining colleges that offer VFX modules, courses or training are located mostly in the southwest of the country.

Figure 08 shows the geographical spread of VFX offerings in Ireland.

Figure 08
Geographical spread of VFX offerings in Ireland



However, the colleges that deliver elements of VFX software and training are not dedicated to the VFX sector. The courses that offer VFX training are generally in the area of animation, film and creative media. Other courses that touch on VFX are fine art, multimedia and computing.

The total number of graduates from these programmes per year is approximately 315. Figure 09 illustrates the breakdown of these numbers.

From this total of 315, approximately 45 have already graduated with a college degree or certificate programme, and have then registered with Cultural & Creative Industries Skillnet or Creative Media Academy Ireland (CMAI) to undertake a 6-12 week training programme. These training programmes are supported by the VFX sector and the courses are written and delivered specifically for the sector.

Of the 315 college graduates each year, approximately 36% chose the programme because of the programme's VFX offerings. Approximately 94 students per year graduating from Irish colleges have had some VFX training and are interested in pursuing a career in the VFX sector. Just less than half of these (45 students per year) gain a place on the dedicated training courses provided by CMAI, and those who complete the training will be closer to securing employment within the VFX sector if positions are vacant for them at that time.

There is scope here for an Irish college to offer a dedicated VFX programme that can potentially appeal to 94+ applicants per year, who would like specific training in VFX to gain direct employment in the VFX sector in Ireland.



Figure 09
Number of graduates per year

College/training provider	Title of course	QQI level	No. of years	Yearly intake
BCFE	• Certificate in Visual Effects and 3D Technology; Certificate in Creative Media for Production (Visual Effects/Animation)	5	1	7-15
Cork FETEC	• BTEC HND in Creative Media Production	5	1	20
Dundulk IT	• Certificate in 2D & 3D Digital Animation Production	7	1	40
TUS Clonmel	• BSc (Hons) in Creative Media and User Experience Design; • BSc (Hons) in Game Art & Design; • BSc (Hons) in Digital Animation Production	8	4	30
NCAD	• BA (Hons) in Fine Art Media pathway	8	4	60
SETU	• BSc (Hons) Creative Computing	8	4	30
Cultural & Creative Industries Skillnet	• Various - Nuke and Avid - training	n/a	6-12 weeks	15
Creative Media Academy Ireland	• Various - Nuke and Avid - training	n/a	6-12 weeks	30
IADT	• BA (Hons) in Design for Film; • BA (Hons) in Animation; • BA (Hons) in 3D Animation (first intake Sept 2023)	8	4	20
DCU	• BsC (Hons) Multimedia; BA (Hons) Film & Creative Media	8	4	70
Total per year				315

Graduate numbers are small considering the growing VFX sector in Ireland. The current number of graduates who are specifically studying VFX to pursue a career in the sector will not be enough to sustain it.

To analyse the current graduate intake and experience of the VFX sector, 15 recent graduates of a CMAI training course were contacted to contribute to the report. Figure 10 shows the colleges where these students had completed their undergraduate studies before undertaking the CMAI training.

After graduating and completing the CMAI VFX training course, the 15 graduates had a varied experience in gaining employment. Figure 11 shows that three students were immediately employed in the Irish VFX sector and seven were employed within a year of completing their courses. Seven students are currently not working in the VFX sector.

The majority of the graduated cohort listed Nuke, Houdini and ShotGrid as software missing from their training programmes. They received some training in other relevant software suites, but for the most part the graduates felt untrained for the VFX sector after graduating.

Graduates have highlighted that Irish colleges are not effectively promoting the VFX sector as a viable career option. This is due to a lack of engagement with the industry and limited access to guest speakers and tailored workshops in regional colleges.

VFX Ireland has the opportunity to address this issue by offering guest speakers and enhancing the visibility of roles, opportunities, and growth within the sector.

Figure 10 Graduates

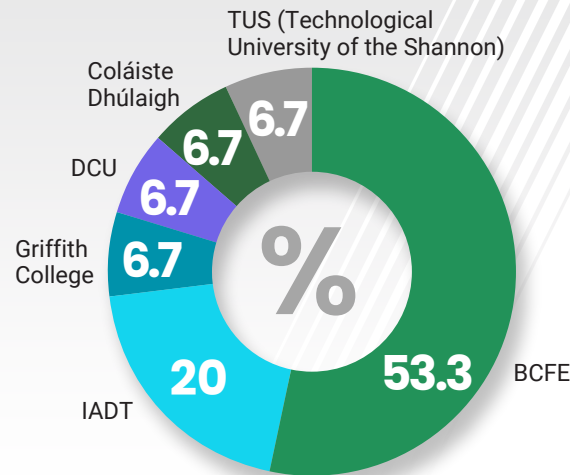
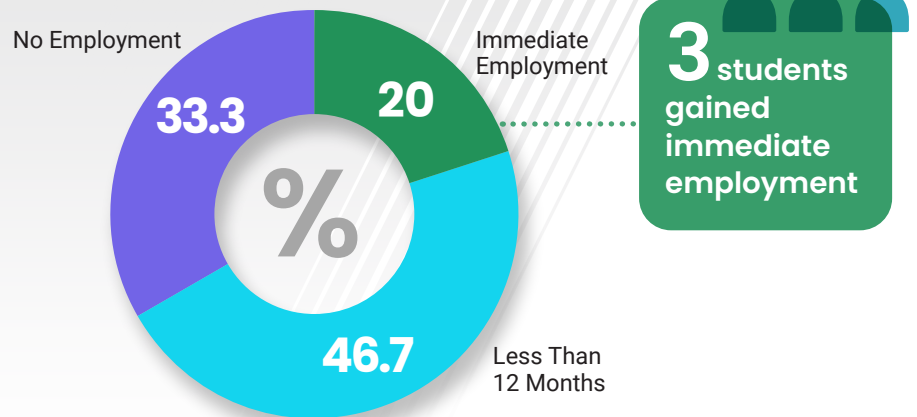


Figure 11 Employment rate



Most graduates listed Nuke, Houdini and ShotGrid as software missing from their training

Wider community engagement

VFX Ireland recognises the need to promote the VFX sector and identify untapped creative talent within the broader community. Currently, there is minimal engagement with minority groups and the wider community in Ireland. The Irish VFX studios have expressed a desire to connect with these groups, provided they receive the necessary support and funding.

Creating a clear table of roles suitable for both school leavers and degree graduates is crucial as VFX Ireland seeks to engage with the broader community. Defining these roles and outlining the VFX sector is essential to attract new talent.

The positions listed below reflect the feedback from VFX Ireland member studios regarding the various roles within the sector. It is important to determine if there are roles in the VFX sector that can be offered to school leavers, distinct from those offered to graduates with higher levels of education and training. This assessment is vital to gauge the potential for engaging with minority groups.

Studios have identified composers and Matchmove artists as roles that could be offered to school leavers with in-house training or with additional mentoring or training through a tailored CMAI course, making them accessible to young creatives interested in VFX. However, the studios have highlighted that there are more opportunities for graduates with dedicated degrees and additional on-boarding/role-specific training by CMAI.

Studios have identified composers and Matchmove artists as roles that could be offered to school leavers with additional in-house training and mentoring through a tailored CMAI course



The Irish VFX sector is growing fast and there is a high demand for mid-level and senior-level staff in all departments. Currently, this demand from domestic and international clients is being met by creative professionals from overseas. There is a demand for a sustainable homegrown industry that enables staff to be promoted internally into mid and senior positions.

Junior roles such as texture artists, lighting artists, 3D modellers, VFX editors and animators need to be filled by graduates from a dedicated VFX degree programme, and who may have completed a short CMAI VFX course.

Mid and senior roles encompass the above junior roles but also include rigging artists, FX artists and CG generalists.

To begin to approach the wider community with offers of potential employment, VFX Ireland is engaging in clearly defining roles within the sector so that these possible new hires can clearly see a pathway for themselves where they might not have thought to gain employment before.

Equality, diversity and inclusivity (EDI) and studio culture

In parallel with the expanding VFX sector, there is a growing demand for a diverse and inclusive workforce.

VFX Ireland member studios acknowledge they are in the early stages of cultivating an environment focused on equality, diversity and inclusion (EDI). Their commitment to EDI goes beyond merely checking boxes; it is a continuous endeavour to transform the VFX industry through meaningful change.

The studios recognise that the journey is ongoing and there is still much work to do. However, they are determined to take the necessary steps towards effecting real change in their workplaces and the wider industry.

A pivotal aspect of their approach is creating a safe and inclusive workplace. The studios understand that in some cases investment in infrastructure is needed to provide continuous improvement. The studios actively identify areas for EDI enhancement and employ progressive strategies to bring about substantial transformation.

VFX Ireland embraces EDI as an integral part of their organisational culture. Their commitment is constantly evolving, as they recognise the significance of creating an inclusive workplace. The studios aim to lead the way in making the VFX industry more diverse, equitable, and inclusive, fostering an environment where everyone can thrive and contribute to the industry's collective success.

Despite their openness to diversity, the current staffing figures do not reflect this commitment. This is evident in the industry's recognition of the limited number of female creatives and those from diverse ethnic backgrounds.

To assess the current situation in the Irish VFX sector, member studios were asked to provide a gender breakdown of their staff.

A further breakdown shows that 34.8% of senior creative and production staff in the sector identify as female or non-binary, while 38.5% of junior creative and production staff in the sector identify as female or non-binary.

Comparatively, the survey results from current students and graduates, with 35 responses in total, reveal the following gender breakdown: 31.4% identify as female, 62.9% identify as male, 2.9% identify as non-binary, and 2.9% prefer not to disclose their gender. These figures closely mirror the gender distribution within the studios, highlighting an uneven representation of graduates entering the workforce, making it challenging to achieve equal representation for all.

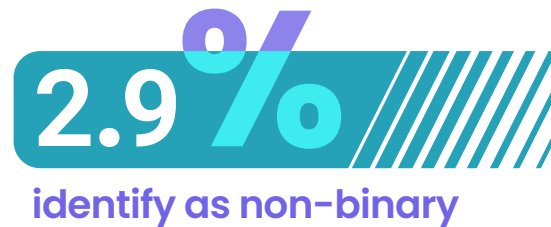
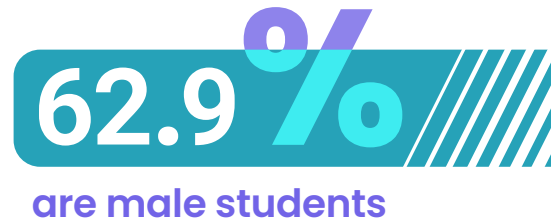
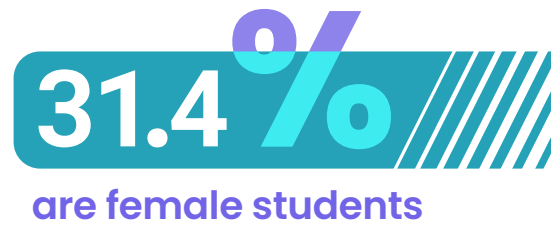
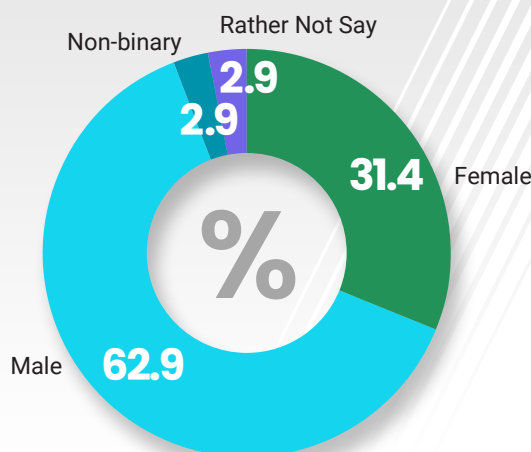


Figure 12 Current student identity



The ethnic backgrounds of current creative staff was also recorded, to better understand the ethnic diversity of the VFX sector. Almost three quarters of creative staff in the Irish VFX studios are white Irish. Again, amending this disparity would be challenging, given the lack of ethnic diversity in college graduate cohorts.

Where there is a high percentage of white Irish creative and production staff within the sector, this is also reflective in the educational system.

Overall only 10% of students who responded to the survey were from a Black or mixed ethnic background. 90% of students in Irish colleges, or those who recently graduated, are from white Irish or another white ethnic background.

Regarding the college and training providers' participation in this report, their VFX training courses have a student cohort composed of 55.5% male, 43.6% female, and 0.8% non-binary people. In the context of education in Ireland, 61% of these students are Irish, with the remaining 39% originating from various EU, EEA, and non-EU countries, such as Brazil, Moldova, Lithuania, Portugal, Ukraine and Colombia.

The current lack of diversity in the current Irish talent pool means VFX studios in Ireland find it difficult to hire graduates from diverse backgrounds. To address this issue, broader engagement and collaborative efforts by the Government, industry, and the education sector are needed to promote the VFX sector to diverse communities and support this initiative.

Figure 13 Ethnic backgrounds

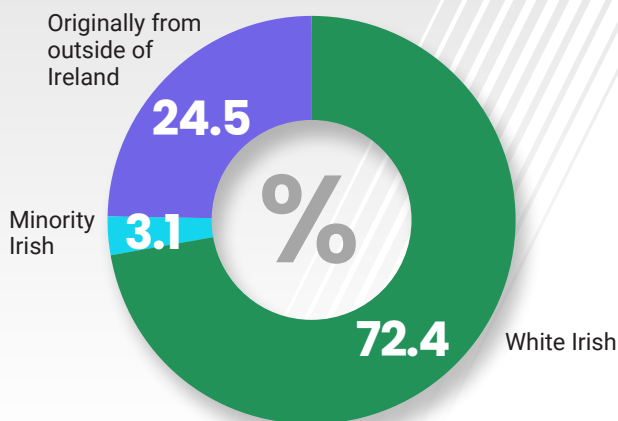
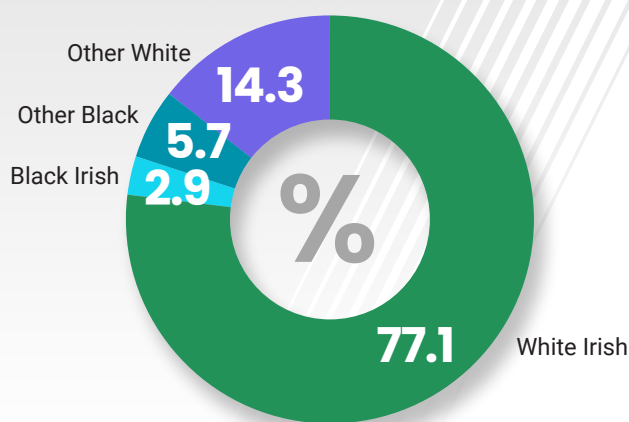


Figure 14 Ethnic backgrounds in colleges



Broader engagement and collaborative efforts are needed to expand the diversity of the current talent pool

Disabilities

Regarding physical disabilities and the adaptability of VFX studios to accommodate staff who may need specialised workstations and studio infrastructure, the current building structures of studios do not allow for such accommodations.

The studios are aware of this limitation and are open to exploring ways to improve accessibility.

33.3% of VFX Ireland member studios can make some accommodations.

66.7% can only offer candidates with a physical disability the option of the position to be made remote.

The studios have also outlined that new and junior staff are largely required to work in-house as they will benefit from mentorship, localised support, training and real-time feedback. None of the studios have had to turn away a potential candidate with a physical disability, and while the current infrastructure may not support accommodations for staff with disabilities, all member studios are confident that they could facilitate requirements if they needed to. Studios currently say they will react to requirements rather than proactively plan for them. This is an area that requires investment and implementing necessary supports.



Investment and infrastructure

The Irish VFX sector has been experiencing rapid growth, thanks in part to the 32% tax rebate and the high calibre projects for global streaming services such as Netflix, Amazon, Apple TV and Sony.

However, for the Irish VFX sector to become truly sustainable, it needs to expand further. Currently, the industry is still in its fledgling stage and requires a larger pool of trained Irish artists who can seamlessly transition into projects upon graduation from VFX courses. It also needs to attract clients from overseas by establishing itself as a viable and sustainable VFX location. Additionally, the sector must increase the amount of work it secures to reach a critical mass, so it can compete effectively on the international stage. A notable example to consider is New Zealand, which has achieved remarkable success despite its similar size and population to Ireland.

To compete with major studios globally, the Irish VFX sector must focus on cultivating and developing its talent pool and infrastructure. While the 32% Section 481 tax rebate is beneficial, it is not as favourable as the tax incentives offered in France, Belgium, New Zealand and Canada. It is important to note the 40% credit available in other jurisdictions. France, for instance, offers an additional 10% for VFX, which merits a thorough comparison with Ireland's incentives before engaging in lobbying efforts.

In the 2023 proposal to Ibec through the AF Council, VFX Ireland suggests implementing an 8% bonus for international projects when the Irish VFX spending exceeds €1 million and the project involves collaboration with Irish VFX vendors. This would match the current 40% VFX rebate offered in France.

Currently, most productions that come to shoot in Ireland under Section 481 only engage in 'shoot and run' practices, outsourcing their VFX work to other countries. Local VFX companies are not reaping the benefits of these projects, despite their efforts to win and attract them to Ireland. By conducting VFX work domestically, the potential impact on the overall production shooting spend would be significant.

Implementing these changes could lead to a tenfold growth of the VFX industry over the next 5-10 years, generating substantial employment opportunities for creative and technical talent. Moreover, it would leverage existing infrastructures and accomplishments to emulate the success of similar-sized jurisdictions

VFX Ireland suggests implementing an 8% bonus for international projects when the Irish VFX spending exceeds €1 million

such as New Zealand, where a thriving world-class VFX industry employs thousands of people.

The 2023 increase to the Section 481 tax incentive cap of €70m to €125m was a positive step towards encouraging larger productions to Irish shores. To build on this momentum, the Government should raise the existing 32% rebate to remain competitive in the global market. France's 40% rebate, which includes an 8% uplift specifically for post-production and VFX, is an example of a more competitive offering for larger studios and streamers.



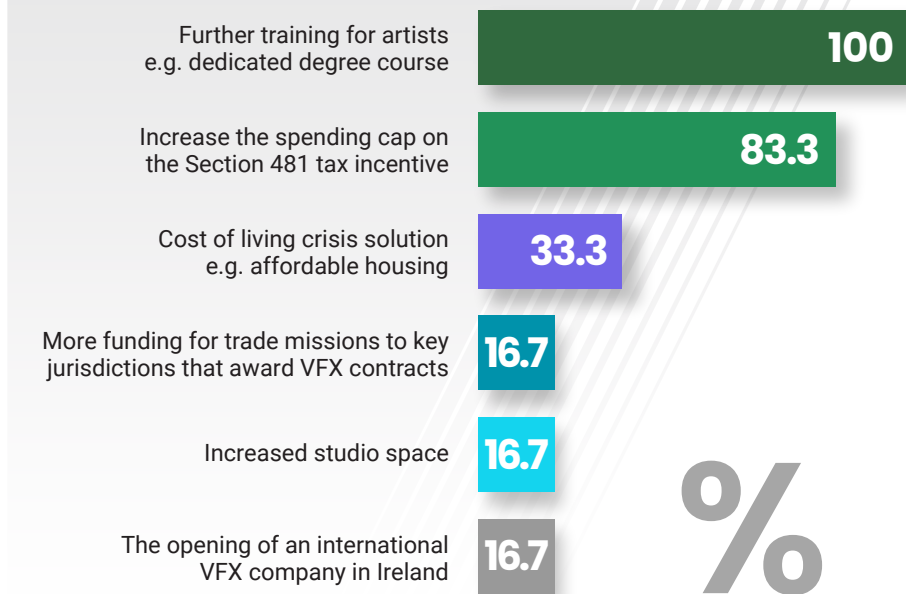
100% of the VFX Ireland member studios have indicated the need for dedicated VFX college programmes to boost the Irish VFX sector. 83% agree that increasing the Section 481 tax incentive is the priority for the sector's growth.

To further boost the sector, addressing the cost of living and housing crisis is essential for staff mobility. Additionally, more funding should be made available for trade missions, and studio space should be increased. Furthermore, a major international VFX company setting up operations in Ireland could enhance visibility and foster new partnerships. This could be fulfilled by the recent expansion of the UK VFX company, Milk VFX, into Ireland in early 2023.

The VFX studios operate in a highly demanding industry that requires constant investment to meet the technical requirements and infrastructure necessary for delivering international standard VFX content. Achieving a functioning VFX studio requires a certain critical mass, including a solid project pipeline, a strong team of IT specialists and engineers, a core creative team, and access to a large pool of contracting talent.

To fulfil the demands of major projects, Irish studios must make substantial investments in infrastructure and training. The studios will need to heavily invest in equipment, staff and training. Some 2D studios have already incorporated recent graduates with expertise in 3D modelling, animation, and lighting into their VFX departments. The diverse skills and knowledge these graduates bring are valuable, particularly as studios aim to

Figure 15 What would boost the sector



expand their 3D departments. To sustain this growth, dedicated VFX college programmes and specialised software training will also be crucial.

Virtual production and volume technologies are gaining popularity, but they need substantial financial investments and specialised expertise. These skills and knowledge are not yet widespread, with even early adopters like Disney showing some caution about their value. In the Irish context, virtual production is becoming important, but it is unlikely that a viable volume stage will be established here for at least the next three years.

While some Irish studios are currently exploring virtual production and preparing for evolving technologies, establishing a volume stage in Ireland may not currently attract substantial investment. However, the growing importance of Unreal Engine in the VFX industry should be noted and monitored closely.

VFX studios need continuous investment to meet technical demands and develop a robust infrastructure. The primary focus remains on delivering high-quality VFX content, while keeping an eye on industry advancements and emerging trends.

CONCLUSION AND RECOMMENDATIONS

The Irish VFX sector needs an investment plan in education, training and infrastructure, to produce quality graduates from dedicated programmes

CHAPTER

03

Conclusion and Recommendations

Strategic steps towards future global competitiveness in Irish VFX



Conclusion

The Irish VFX sector needs a 6-10 year investment plan in education, training and infrastructure, to produce high-quality graduates from dedicated VFX degree programmes.

The VFX studios will continue to promote internally and provide upskilling and training within their culture to fill mid-level and senior-level positions. In the meantime, the studios will continue to hire externally and from overseas until Ireland has a strong database of homegrown creative staff.

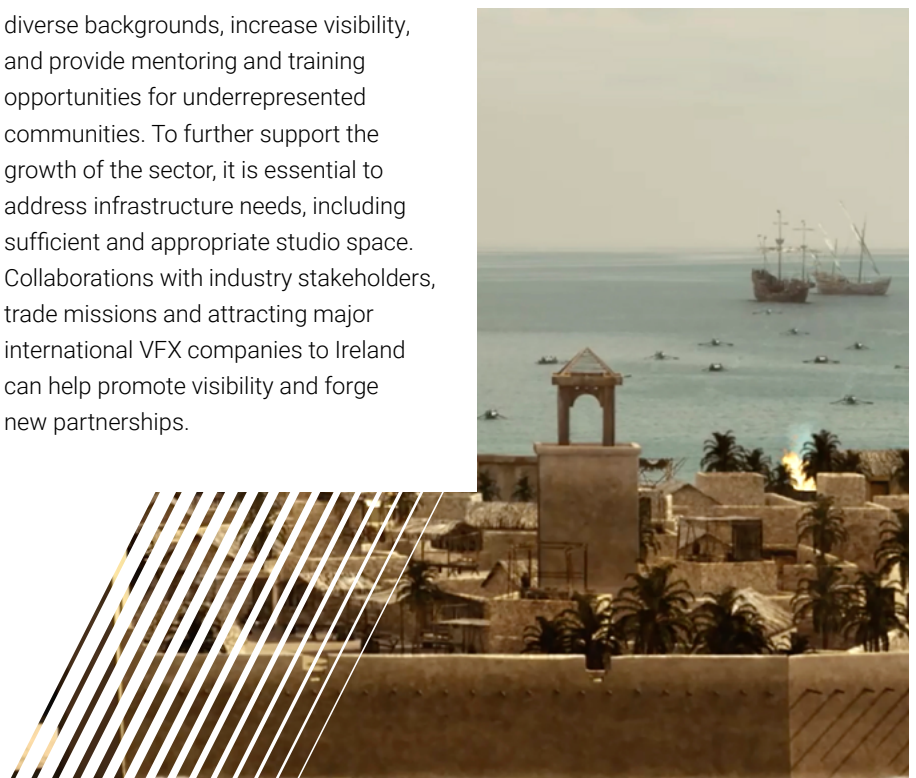
Now that the VFX sector has been integrated into the National Talent Academy, this should be a vital platform for nurturing and developing VFX talent, through specialised training and mentorship programmes. The industry can now focus on long-term talent development, to ensure a sustainable pipeline of skilled professionals.

The sector is actively investing in training and upskilling initiatives, both in-house and through partnerships with organisations like Creative Media Academy Ireland (CMAI) and Screen Ireland. The studios are committed to hiring and nurturing graduates, recognising their potential to contribute to the growth of the Irish VFX industry. However, there is a recognised disparity between the skill sets of Irish graduates and those from the UK and France, which must be addressed through comprehensive VFX training programmes and software education within Irish colleges.

Software skills are crucially important to the VFX industry, and Irish colleges need to align their curricula with the specific software requirements of the sector. The studios are taking proactive measures by providing in-house training, online resources, and subscriptions to training platforms so their creative staff stay up-to-date with the latest technologies and software advancements.

The Irish VFX studios have identified the importance of expanding their talent pool, engaging with colleges and universities, and fostering diversity and inclusivity within the sector. Efforts should be made to attract talent from diverse backgrounds, increase visibility, and provide mentoring and training opportunities for underrepresented communities. To further support the growth of the sector, it is essential to address infrastructure needs, including sufficient and appropriate studio space. Collaborations with industry stakeholders, trade missions and attracting major international VFX companies to Ireland can help promote visibility and forge new partnerships.

In conclusion, the Irish VFX sector has significant potential for growth, but challenges must be overcome. By investing in talent development, addressing software training gaps, fostering diversity and improving infrastructure, the sector can establish itself as a sustainable and competitive hub for VFX production in Ireland. Continued collaboration between studios, educational institutions and industry organisations will be crucial in shaping the future of the Irish VFX industry and ensuring its long-term success.



Recommendations

The recommendations below aim to address the challenges and further develop the Irish VFX sector, focusing on talent development, education, visibility, and promotion. There is an opportunity to build on its established reputation and to expand on the seat count within the current Irish studios.

The inclusion of the VFX sector in the National Talent Academy should provide a platform to nurture and develop talent specific to the VFX industry, offering specialised training and mentorship programmes. To succeed and benefit the industry, this integration needs to foster a dedicated focus on talent development, ensuring a sustainable pipeline of skilled professionals.

Education plays a vital role in bridging the skills gap in the VFX sector. To enhance the training landscape, it is essential to actively engage with current VFX training programmes within third-level institutions. This involvement can involve delivering workshops, providing industry insights through guest speakers, and collaborating on curriculum development. Additionally, there is a need for dedicated VFX Level 8 degree programmes that comprehensively cover the technical and creative aspects of VFX production. Accredited Level 9 apprenticeships could also be introduced to offer practical, hands-on training opportunities.

Visibility, awareness and promotion are key to attracting new talent to the VFX sector. To achieve this, the VFX Ireland website should include a definitive list of roles and departments within the industry, providing a comprehensive overview for aspiring professionals. A strong social media presence for VFX Ireland can help raise awareness, share success stories, and showcase the opportunities available in the sector. Hiring a marketing/content

creator can ensure consistent and engaging communication across various platforms.

Active participation in festivals and markets relevant to the VFX industry is crucial for networking, showcasing talent and attracting new projects. Attendance at colleges and universities for workshops and guest speaker sessions could provide valuable insights and practical knowledge to students interested in pursuing a career in VFX. Creating a video presentation specifically tailored for schools and colleges could effectively communicate the benefits and opportunities within the VFX sector. Furthermore, sponsorships and support for student film societies and awards could encourage students to explore VFX and showcase their talent.

Promoting VFX within disadvantaged and diverse communities is essential for fostering inclusivity and tapping into a broader talent pool. Collaborating with community arts centres, community outreach centres, regional county offices and the Arts Council could help facilitate access to training programmes and provide opportunities for engagement. Participating in events like The Ploughing Championships, with tens of thousands of attendees, could offer a platform to showcase the VFX industry and its potential. Collaboration with RTE, such as featuring the VFX sector on programmes like Nationwide, could create positive exposure and generate interest among a wider audience.

Finally, it is essential to present positive and enticing information to attract new talent to the VFX sector. The current content on the www.careersinscreen.ie website should be revised and expanded to provide a more accurate and attractive portrayal of VFX careers. Avoid using negative language that emphasises high pressure and tight deadlines, which may discourage young creatives. Instead, highlight the creative opportunities, technical skills development, and the exciting projects that await those pursuing a career in VFX.

In conclusion, implementing these recommendations will contribute to the growth and sustainability of the Irish VFX sector. By investing in talent development, engaging with educational institutions, promoting visibility, and presenting a positive image, the sector can attract a diverse range of skilled professionals. The collaboration between industry stakeholders, educational institutions, and industry organisations will be vital in driving the Irish VFX industry forward and positioning it as a competitive global player.

Summary of recommendations

01 Investment and infrastructure

- Advocate for a minimum additional 8% VFX bonus for international projects in Ireland, matching the 40% rebate offered in France, to encourage involvement in productions.
- Seek funding for trade missions and invest in studio space to accommodate the growing demands of the VFX sector.

02 Talent development and education

- Collaborate with educational institutions to develop dedicated VFX degree programmes that align with industry requirements.
- Provide tailored training workshops and courses for recent graduates to enhance their software skills and bridge the gap between college programmes and industry demands.
- Establish partnerships with colleges and universities to offer internships and on-the-job training opportunities to students, equipping them with the necessary skills for the VFX sector.

03 Software training

- Identify the specific software skills lacking in recent Irish graduates and collaborate with educational institutions to incorporate them into existing courses or develop new modules.
- Offer in-house training and mentoring programmes to new and established staff to bridge the software skills gap.
- Support online training platforms and provide subscriptions to relevant training resources to ensure continuous professional development.

04 Advertising and recruitment

- Engage with minority communities and diverse talent pools to attract potential creative staff and promote inclusivity within the industry.
- Collaborate with colleges and universities to promote the VFX sector and attract new graduates to the industry in Ireland.

05 Equality, diversity, and inclusion

- Promote diversity and inclusivity within the VFX sector by actively engaging with minority communities and underrepresented groups.
- Provide guest speakers and industry mentoring to colleges and universities to raise awareness and visibility of the VFX sector as a viable career option.
- Develop initiatives and programmes to encourage a diverse workforce, ensuring equal opportunities for all individuals. For example, formalise a mentorship programme within each studio.
- Consider investing in building accessibility and alternative workstations for potential staff that may require accommodations because of physical disabilities.



06 Studio culture and workforce development

- Foster a culture of continuous learning and skill development within VFX studios through in-house training, mentoring and upskilling programmes.
- Encourage internal promotion and career growth opportunities to retain talent within the industry.
- Invest in infrastructure and resources to meet the technical demands of the VFX industry and establish a solid project pipeline.

07 National Talent Academy

- Actively support the National Talent Academy for VFX in Ireland, taking a leading role in crafting training courses, identifying skills gaps and advising on future technologies – ensuring Irish VFX crews remain at the forefront of innovation, renowned globally as best in class.
- Establish a VFX Pathways fund, in line with the Animation Pathways fund.

08 Visibility, awareness and promotion

- Prepare a definitive list of roles and departments included on the VFX Ireland website and establish a social media presence for VFX Ireland. Consider hiring marketing and content creators.
- Attendance and funding for national and international festivals/markets, e.g. VFX Summit.
- Attendance at schools and colleges – workshops and guest speakers, virtual events, online seminars.
- Create video presentations and other promotion documents for schools and colleges. Consider sponsorships and support for students e.g. college film societies, student award prizes.
- Promotion within disadvantaged and diverse communities. Reach out to:
 - Community arts centres
 - Community outreach centres
 - Regional county offices/arts councils
 - Stalls/exhibitors e.g. The Ploughing Championships
 - RTE coverage, e.g. Nationwide

09 Industry perception

- Consider revising and enhancing the VFX sections on careersinscreen.ie with more engaging content. Present the industry as challenging yet rewarding, avoiding phrases that may deter prospective talent. Rather than focusing on high pressure and tight deadlines, highlight the creativity, opportunities, and career growth potential to appeal to recent graduates, school leavers, and their families.



CASE STUDIES

Studios in France, the UK and New Zealand have been at the forefront of adopting cutting-edge techniques in visual storytelling

CHAPTER

04

Case Studies

Insights from three global leaders in VFX innovation



Case Studies

France, the UK and New Zealand have established themselves as top players in the VFX industry for film – each contributing unique strengths and capabilities to the global cinematic landscape.

In France, the VFX industry has flourished due to its rich history in art, animation, and film production. The country's renowned artistic tradition has nurtured a pool of skilled artists and technicians, making it a hub for high-quality VFX production. French studios have contributed to numerous award-winning productions. Paris, in particular, has emerged as a VFX centre, attracting both local and international talent.

The UK has also risen to prominence in the VFX industry, fuelled by a combination of creativity, technical expertise and robust infrastructure. London boasts an array of world-class VFX studios that have been involved in some of the most visually groundbreaking films of recent times. The UK's VFX sector benefits from strong government support, tax incentives and collaborations with major film studios, making it an attractive destination for filmmakers seeking cutting-edge visual effects.

New Zealand's VFX industry has achieved global recognition through its association with acclaimed film franchises like *The Lord of the Rings* and *The Hobbit*. The country's landscapes and diverse natural environments have made it a prime location for both film production and VFX production. Wellington, in particular, has become a thriving VFX hub, hosting some of the industry's leading studios and nurturing a community of talented artists and technicians.

These three countries' success in the VFX industry is also attributed to their commitment to innovation and technology. Advancements in CGI, virtual reality, and motion-capture have significantly enhanced the possibilities of visual storytelling, and studios in France, the UK and New Zealand have been at the forefront of adopting these cutting-edge techniques.

As technology continues to evolve, these countries will play a pivotal role in shaping the future of VFX and holding on to their client base while also gaining new clients and forging new partnerships.

France

- France offers the Tax Rebate for International Production (TRIP) of up to 30% of eligible production spend, capped at \$33 million (€30 million).
- TRIP requires projects to be in the fiction genre, pass a cultural test, and shoot for at least five days in France for live action production.
- A minimum of \$276,000 (€250,000) or 50% of the production budget (whichever is lowest) must be spent on French-qualifying expenditures.
- The rebate increases to 40% on eligible expenses when at least \$2.2 million (€2 million) is spent on VFX in France.
- Regional aid is also available through France's network of local film commissions.

As technology continues to evolve, these countries will play a pivotal role in shaping the future of VFX

- France offers over 20,000 shooting locations, heritage sites and qualified crews.
- Studio facilities, digital labs and VFX houses are available.
- A \$2.2 billion (€2 billion) national investment plan through 2030 funds the construction of soundstages, production facilities, VFX, animation and industry education.
- Film France By CNC and local film production service companies handle location scouting, crew hiring, work permits and studio facilities.

France's VFX sector has emerged as a formidable force in the global entertainment industry, boasting 24+ cutting-edge studios and 7,790 staff members that are at the forefront of visual effects innovation. One of the key factors contributing to the sector's growth is the attractive tax rebate offered for VFX projects, which can reach 40%. This financial incentive has drawn numerous international productions and advertising campaigns to collaborate with French VFX studios. This incentive was offered after France identified that while international productions were shooting in the country, the VFX stages were taking place elsewhere. The additional 10% tax rebate for VFX

has meant France is now a major player in the VFX industry. Without it the country would not have experienced such growth.

The collaboration between the VFX sector and both film and advertising industries has been mutually beneficial. Their technical expertise have garnered international acclaim, making them sought-after partners for filmmakers and advertisers alike.

The academic aspect of France's VFX industry is noteworthy. VFX degrees are offered as comprehensive five-year programmes, equivalent to master's level education in Ireland. This five-year structure allows aspiring VFX professionals to receive an in-depth and well-rounded education in various aspects of visual effects. The first three years provide a strong foundation, covering essential VFX techniques and principles. The subsequent two years allows students to specialise in specific areas, honing their skills to become experts in their chosen fields. A significant advantage of pursuing VFX degrees in France is the integration of work placements into all courses. This practical exposure gives students invaluable hands-on experience, enabling them to work on real projects and

collaborate with industry professionals. Such work placements not only enhance their technical abilities but also nurture essential teamwork and problem-solving skills, prepared them well for the professional world upon graduation.

Research and development (R&D) forms an integral part of the VFX industry culture in France. Studios actively invest in R&D initiatives, continuously pushing the boundaries of visual effects technology. This commitment to innovation ensures that French VFX studios remain at the cutting edge of industry advancements, offering groundbreaking solutions and elevating the quality of their work.

The VFX sector in France has cemented its position as a global leader, driven by its vibrant studio landscape, attractive tax incentives, diverse collaborations with film and advertising, and comprehensive education system. The combination of practical experience through work placements and a focus on research and development highlights France's dedication to excellence in the world of visual effects, making it an exciting and dynamic hub for VFX professionals and enthusiasts alike.

UK


The UK VFX sector holds a crucial position within the UK screen industry, providing state-of-the-art digital skills that have a profound impact on both film and high-end television (HETV) productions. Prominent UK VFX studios, such as DNEG, Milk, Framestore, and BlueBolt, have made contributions to highly innovative and award-winning projects.

In the UK, VFX does not have its standalone tax rebate. Some projects accessing tax relief may dedicate their VFX work exclusively to the UK, where the Film Tax Relief (FTR) and High-End Television Tax Relief (HETR) require a minimum of 10% of a project's core expenditure to be spent in the UK, which VFX spending alone may satisfy for certain projects.


Between 2017 and 2019, the UK witnessed a gradual increase in spending on VFX services for Film Tax Relief, High-end Television Tax Relief, Animation Tax Relief, and Children's Television Tax Relief projects, reaching £363.5 million in 2019. Correspondingly, the direct economic impact of VFX production within these tax reliefs grew significantly, amounting to £303.9 million in 2019. These figures underscore the enduring importance and substantial contribution of the VFX sector to the thriving UK entertainment industry.

The UK VFX sector has solidified its position as a global leader, boasting 59+ studios and employing between 3,000 and 10,000 skilled professionals. The diverse workforce is a testament to the industry's international appeal, with 53% of staff from the UK and an additional 34% representing the European Union (EU), European Economic Area (EEA), and Ireland.

The VFX sector in France has cemented its position as a global leader, driven by its vibrant studio landscape, attractive tax incentives, diverse collaborations with film and advertising, and comprehensive education system



To meet the demand for qualified talent, the UK offers more than 20 dedicated four-year degree programmes in VFX



Education plays a pivotal role in sustaining the sector's excellence. To meet the demand for qualified talent, the UK offers more than 20 dedicated four-year degree programmes in VFX. These programmes equip aspiring VFX professionals with essential technical skills and creative acumen, preparing them to tackle the challenges of the industry.

One of the most commendable aspects of the UK VFX sector is its dedication to equality, diversity and inclusivity. The industry actively works towards creating a welcoming and supportive environment for all individuals, regardless of their background or identity. By embracing diverse perspectives and talent, the sector fosters creativity and innovation, enhancing the overall quality of its output.

The commitment to equality and inclusivity extends beyond the workplace. VFX studios in the UK are often involved in community outreach and mentorship programmes, encouraging young talent from diverse backgrounds to pursue careers in the field. These initiatives not only enrich the talent pool but also contribute to a more inclusive and representative industry.

The UK VFX sector continually evolves to address societal challenges and promote positive change. Studios frequently engage in projects that tackle important social issues, leveraging their visual storytelling prowess to inspire and educate audiences.

The UK VFX sector's remarkable growth and success can be attributed to its expansive studio landscape, highly skilled workforce and strong educational foundation. Its commitment to equality, diversity and inclusivity ensures that it remains a hub of creativity and innovation, pushing the boundaries of visual storytelling and leaving an indelible impact on the global entertainment industry.

New Zealand

New Zealand has a globally recognised VFX industry, with 14+ major VFX studios offering high standard VFX and post-production. There are between 1,500 and 5,660 full time employees in the VFX sector.

The New Zealand Film Commission (NZFC) plays a pivotal role in supporting the country's film industry by providing essential financial assistance to filmmakers and businesses. The NZFC's primary objective is to empower the creation of extraordinary, original, culturally significant New Zealand films that resonate with audiences both locally and globally. To qualify for funding, projects must have substantial New Zealand content, with consideration given to the film's subject matter and the individuals involved in the production.

The NZFC offers various types of funding to cater to different stages of filmmaking. Development Funding is granted to support the early stages of a project, helping filmmakers refine their ideas and screenplays. Production Financing, on the other hand, is provided as equity

investment, enabling the NZFC to share in the project's profits.

Talent Development Funding is dedicated to nurturing emerging filmmakers, helping them to develop their careers within the industry. Additionally, the NZFC extends support to industry guilds to enhance services and opportunities for their members.

Distribution Funding is available to ensure that New Zealand films receive ample exposure within the country, reaching diverse theatrical audiences. This ensures that the films created with NZFC support have a platform to be appreciated by the local community.

For international collaborations, the NZFC offers International Relations Funding, which helps New Zealand filmmakers collaborate with overseas partners and promote their projects internationally. The funding provides financial support and facilitates connections with potential co-production partners.

The New Zealand Screen Production Grant aims to attract international productions that bring economic and industry benefits to the country. It is divided into a New Zealand grant and an international grant, supporting both local productions and international projects filmed in New Zealand.

Through its comprehensive funding programmes, the New Zealand Film Commission propels the growth and success of the country's film industry, fostering a rich cinematic landscape and contributing to the global film community.

The New Zealand Screen Production Grant provides financial support to international productions filming in New Zealand. The baseline International grant is 20% of Qualifying New Zealand Production Expenditure (QNZPE). For post, digital, and visual effects productions,



the grant is 20% of QNZPE up to NZ\$25 million, and 18% for amounts above that. Some productions may be invited to apply for an additional 5% uplift if they can demonstrate significant economic benefits to New Zealand. To be eligible for the 5% uplift, applicants must meet QNZPE thresholds, pass the Significant Economic Benefits Test, and provide value to New Zealand equal to or exceeding the 5% uplift applied for.

Aspiring VFX professionals have the advantage of dedicated college training and studio-based programmes that provide comprehensive and specialised education in the field. The country's esteemed colleges offer a range of four-year degree programmes tailored to nurture VFX talents at different stages of development. These courses equip students with essential technical skills, artistic creativity and industry knowledge, preparing them for the dynamic challenges of the VFX industry. Additionally, New Zealand's VFX studios, specifically WETA, actively participate in talent development by offering studio-based training programmes. These immersive experiences provide aspiring VFX artists with hands-on opportunities to work on real projects and collaborate with industry experts, fostering practical expertise and networking opportunities. The combination of dedicated college training and studio-based programmes in New Zealand ensures a well-rounded education that prepares VFX enthusiasts for successful careers in the ever-evolving world of visual effects.

Comparative to Ireland

Providing a comparative overview of these three major VFX competitors and the Irish VFX sector highlights the areas in which the Irish VFX sector has the opportunity for growth.

Currently the number of staff in Ireland is far smaller than any of these countries. While Ireland is competing for the same client base, the sector does not have the seat count to compete with the much larger numbers of staff. While each of the jurisdictions have a differing tax incentive strategy, Ireland could do more to attract clients. Increasing the Irish tax

rebate would have a positive impact on the sector and allow for further growth. Regarding education, Ireland does not have any VFX degree programmes. Irish courses offer aspects of VFX through a variety of other courses. They are not specifically directed at the VFX sector. France, the UK and New Zealand have numerous dedicated VFX degree programmes. They offer specialisation, work placement and studio training as part of their education system. France also has a culture of VFX research and development which helps to fund the sector.

Figure 16 below clearly details this comparison

Figure 16
How Ireland compares

Region	No. of staff	Incentives	Client base	Education and training
France	7,790	TRIP 40% tax rebate	Film and advertising	5 years dedicated training, involves 3-year college degree plus 2 years specialisation. Workplace as part of each course.
UK	10,944	Film Tax Relief, minimum 10% spend	Film and advertising	20 dedicated 4-year VFX degree programmes offered
New Zealand	5,660	Qualifying New Zealand Production Expenditure (QNZPE)	Film and advertising	Dedicated college training and studio placements.
Ireland	258	S481 32% tax rebate	Film and advertising	No dedicated VFX degrees. In-house training and short courses to provide support.

VFX IN IRELAND

VFX is a high-growth potential, high-tech indigenous industry, with the ability to create around 2,500 full-time jobs in Ireland



CHAPTER

05

VFX in Ireland

The industry leaders with a collective goal of building a sustainable future for the domestic VFX sector



VFX in Ireland

This section showcases the vibrant VFX ecosystem in Ireland, detailing key industry players, innovative development strategies, and the collaborative efforts between all stakeholders to enhance Ireland's global VFX footprint and fulfil the sector's potential.



EGG VFX is a Dublin-based visual effects company that was an IFTA winner in 2023 and BAFTA nominee in 2022. In the last year EGG has delivered shots for Bad Sisters (Apple TV), Evil Dead Rise (Warner), The Woman King (Sony) and Good Omens (Amazon).



Element Post/VFX is a collaborative of individual creative thinkers who share a common passion for visual storytelling. Since 1998 Element has indulged its passion for film and advertising through work with incredible creative teams that have shaped its perspective and allowed the company to implement memorable campaigns.



Outer Limits is a post-production facility based in Dun Laoghaire, between the filming locations of Wicklow and Dublin city centre. The company provides editing, grade and sound, with a focus on excellence and innovation. In 2015, Outer Limits established a VFX department, which is led by Andy Clarke and offers international clients a wide range of services.



PIRANHA BAR

Piranha Bar is a VFX and animation studio with a 20-year history of high-end VFX-driven commercials and long-form content. The studio specialises in advanced digital characters and offers a full performance capture pipeline capable of delivering incredible emotional depth and sophistication in facial animation and body capture. A robust compositing department of Nuke and Flame complements the animation studio running Maya, Houdini and Cinema 4D.



SSVFX is an internationally acclaimed visual effects house based in Dublin, with offices in Los Angeles and London. SSVFX caters for big-budget feature film work, independent feature films and high-end TV series. SSVFX is proud to boast an array of awards and nominations that include a VES win for Game of Thrones, and other BAFTA, VES, HPA, RTS, AEAFA and IFTA nominations and wins.



Windmill Lane Pictures is an award-winning Dublin-based facility with a 45-year track record in picture and sound post-production and VFX for international film, television, and animation projects. Windmill delivers high-end TV and feature films to international clients including Disney+, Netflix, HBO, AMC+, Universal, Sony, Paramount, Bron, BBC, ITV, Sky, and many others.

Structure of VFX Ireland



Jake Walshe
CEO Screen Scene Group
[Chairperson]



Dave Burke
MD Piranha Bar
[Secretary]



Dhruva Banerjee
MD EGG VFX



Catherine Synnott
CEO Windmill Lane



Eugene McCrystal
MD Outer Limits



Gareth Young
CEO EGG



Bernard Rogan
MD Element VFX & Post

Members' business model and business development

Like film/TV drama production in Ireland, and as referenced in the Olsberg updated report of January 2023, the VFX industry depends heavily on the S481 tax incentive to thrive. The business model is based around serving a certain amount of local VFX needs, while mainly depending on pursuing international projects with international productions that had not considered shooting their content here.

Individual members of VFX Ireland secure these international projects by marketing their services in various global markets, resulting in significant VFX projects being awarded and completed in Ireland over the last 3-5 years. These successes have allowed companies to expand their talent and infrastructure, instilling confidence for further investment.

A strong VFX sector is now seen as a vital and fundamental part of a thriving and healthy film/TV ecosystem. VFX is a high-growth potential, high-tech indigenous industry, with the ability to create around 2,500 full-time jobs in Ireland. These would be quality jobs across different grades, from producers, to technicians, to coders, as well as artists.

However, the international VFX landscape is becoming increasingly competitive and mobile. The future of the sector to scale and succeed in its growth ambitions requires some analysis of other jurisdictions. Adjustments to the S481 tax incentive to match VFX offerings from countries such as Canada, New Zealand, Australia and France should be carefully considered.

While the post-production and VFX digital production sector in Ireland has grown significantly in recent years, the challenges include a focus in the Section 481 tax credit on live action and animation production and competition from other jurisdictions including other EU member states, where enhanced incentives for VFX digital production in particular are provided.

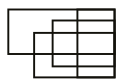
Audiovisual Ireland in Ibec believed that a study should be undertaken to consider increasing the Section 481 tax credit, modelled on the French TRIP tax incentive of 40%, and would specifically apply to projects with a substantial portion of their VFX digital work completed in Ireland

By attracting international VFX work through more competitive incentives, Ireland can:

- Sustain and grow its talent pool;
- Contribute to the development of the indigenous VFX industry in Ireland, and
- Strengthen its position as an attractive destination for film and TV productions.

The projected growth of the global VFX market presents an enormous opportunity for Ireland, and aligning with Government policies such as Project Ireland 2040 and the White Paper on Enterprise 2022-2030, it will help to support the long-term vision of building a resilient and sustainable future. By nurturing and retaining local talent, VFX Ireland aims to create a thriving VFX sector that contributes to the overall success and reputation of the Irish film and TV industry.

Stakeholders



Fís Éireann
Screen Ireland

Fís Éireann/Screen Ireland

As the national agency for the Irish creative screen industry, Fís Éireann/Screen Ireland is the creative partner to the sector; investing in talent, creativity and enterprise. The agency is inspired by original storytelling that will emotionally move audiences at home and abroad. Through a wide range of practical funding supports across development, production, distribution, promotion and skills development, Screen Ireland supports the sector at every stage. The agency supports filmmakers in their creative pursuit to share valuable artistic, cultural and commercial stories on screen.



Cultural & Creative Industries Skillnet

Cultural & Creative Industries Skillnet was established in January 2023 as a consolidation and expansion of three existing and established Skillnet Business Networks (Animation Skillnet, Screen Skillnet and Immersive Technologies Skillnet) to support the following cultural and creative sectors: animation, visual effects, games, film, TV, documentary, post-production, immersive technologies, AR/VR, virtual production, digital media, entertainment events, music, theatre and visual arts.

The arts, culture, media and creative sectors are critically important to Ireland both in terms of economic value but also in terms of social and cultural value and in terms of Ireland's reputation globally. These sectors are also experiencing significant expansion and related challenges. One of the most important challenges facing these sectors is ongoing support for skills and talent development. Cultural & Creative Industries Skillnet was set up to respond to this challenge and become the core skills and talent development engine for the entire creative and cultural ecosystem in Ireland.

Cultural & Creative Industries Skillnet is co-funded by Skillnet Ireland and network companies. Skillnet Ireland is funded from the National Training Fund through the Department of Further and Higher Education, Research, Innovation and Science.



Creative Media Academy Ireland (CMAI)

CMAI was established to help graduates take their first steps into the creative industry. The goal is to set students up to best succeed in the industry through professional industry-focused courses that have been designed and delivered by professionals in the industry today. CMAI has partnered with Screen Ireland, Cultural & Creative Industries Skillnet and studios to tailor and deliver short courses with a view to offering employment opportunities upon completion of the course.



Enterprise Ireland

Enterprise Ireland is the Government organisation responsible for the development and growth of Irish enterprises in world markets. The organisation works in partnership with Irish enterprises to help them start, grow, innovate and win export sales in global markets, supporting sustainable economic growth, regional development and secure employment.

Funding support is vital for a variety of purposes, ranging from nurturing start-ups to fueling expansion plans and enabling the execution of robust R&D business strategies. Additionally, export assistance plays a pivotal role by furnishing essential in-market services, furnishing local market insights, and leveraging the resources of Enterprise Ireland's expansive international office network. To enhance competitiveness, the programmes assist companies in streamlining their operations, fostering leaner and more agile structures to thrive in global markets.

Enterprise Ireland offers incentives to invigorate in-company R&D endeavours, promoting the development of new products, services and processes which ensure sustainability and facilitate growth. Collaborations with research institutions to bring innovative technologies, products, or processes to market are also part of the support system. Enterprise Ireland also facilitates connections and introductions to overseas customers, granting access to a vast global network that spans from influential Government figures to end consumers.



Ibec

Ibec is Ireland's largest lobby and business representative group. Ibec's purpose is to help build a better, sustainable future by influencing, supporting and delivering for business success. With over 260 employees, Ibec engages with key stakeholders in Ireland and internationally through six regional offices and a Brussels office, along with an extensive international network in the UK and US.

Ibec positions are shaped by diverse membership, which range from small to large, domestic to multinational, and 39 trade associations that cover a wide range of industry sectors. Ibec members employ over 70% of the private sector workforce in Ireland.

As well as lobbying, Ibec provides a wide range of professional services and management training to members on all aspects of human resource management, occupational health and safety, employee relations and employment law.

Apprenticeship challenges

In 2018, Screen Ireland, Animation Skillnet, Technological University Dublin and other industry partners teamed up with SOLAS to introduce a CGI apprenticeship, addressing the talent shortages in Ireland's film industry. The programme was designed to train CGI technical generalists, equipping them with extensive creative and technical skills, including a deep understanding of technical pipelines and studio practices.

Despite thorough planning, the apprenticeship encountered obstacles such as studios' financial and resource concerns, and an industry that hasn't traditionally embraced apprenticeships. The Covid-19 pandemic exacerbated these challenges, as the shift to remote and hybrid work affected training and mentoring.

Of the six apprentices who completed the programme, five continued with their employers, one went freelance, and all found the experience rewarding. However, the initial resistance, fuelled by training inefficiencies and misalignment with project timelines, highlighted the need for a more flexible, financially incentivised and streamlined apprenticeship model.

METHODOLOGY

The report's goal was to examine roles within the VFX sector, current and future needs of studios, and future growth prospects

CHAPTER

06

Methodology

Crafting a detailed research framework to examine Ireland's evolving VFX landscape



Terms of reference

In January 2023 VFX Ireland, with the support of Screen Ireland, set out to commission a report to investigate and analyse the visual effects (VFX) sector in Ireland. The report aimed to examine the roles within the sector, studios' current and future needs and requirements, and future growth prospects in this area of the Irish film and television industry.

VFX Ireland is seeking to raise visibility in Ireland of the domestic VFX sector, and to highlight the growing demand for new Irish talent. This applies not only to graduates of third-level institutions, but also to school leavers and young people with untapped skills that could be fostered within the VFX sector.

The results of this report have a dual purpose: to inform industry stakeholders and training providers about sector growth, sustainability, and training needs, and to bridge the gap and foster relationships between the sector and graduates, enhancing visibility and hiring strategies.

A comprehensive collection of primary statistics has been collated from VFX Ireland member studios, a wide range of training providers, current students in Ireland and graduates who have since secured employment in the Irish VFX sector. The data collected from surveys and individual discussions has been analysed and presented in tables and graphs to highlight areas where VFX Ireland and other stakeholders have access to valuable information for the growth of their sector.

The goals of the report included:

- Assessing the current VFX sector data in terms of staff numbers and skills in the Irish VFX sector;
- Forecasting future investment requirements to strengthen the Irish VFX sector;
- Identifying areas for the VFX sector to enhance visibility and awareness;
- Evaluating the current equality, diversity and inclusivity (EDI) of the VFX sector in Ireland, and act in areas that have a lack of EDI understanding.

Research methodologies and data analysis methods

The data collected for the VFX skills analysis report was both quantitative and qualitative. The surveys and questionnaires purposefully collected numeric results to capture the current status of the member studios' individual requirements due to the nature of the VFX sector and the data captured.

The data collected from the surveys also captured equality, diversity and inclusivity (EDI) within the sector, and future needs of the sector in Ireland to further grow and promote to a broader talent pool, both nationally and internationally.

The analysis of the survey data is used to provide both quantitative results and to flag areas where further focused analysis might benefit the sector.

The same method of data collection was used to get an overview of the current college and training courses available in Ireland that provide VFX training.

Current students were also surveyed to capture their knowledge regarding VFX positions in Ireland, their expectations of the Irish VFX sector after they graduate, and to capture current EDI data from the cohort.

A document was prepared to describe an overview of the report, and VFX Ireland member studios were invited to participate in a questionnaire. The questionnaire was designed as a survey and was made accessible through a web-based platform, sent by email.

The studios completed the survey, then the most suitable person within the organisation participated in a follow-up video call and a subsequent one-to-one discussion. The one-to-one meetings gave members an opportunity to expand on their survey answers, and to discuss their broader thoughts on the VFX sector, and the Irish film and TV industry, as well as its impact both nationally and internationally.

The questions focused on various aspects, including the type of content produced by the studio and its target audience, the number of recent Irish graduates hired and the typical duration of their contracts, the availability of paid internships, and the platforms used for advertising vacancies. Additionally, the questionnaire sought the studios' perspectives on the quality of work and software skills of Irish graduates compared with their international counterparts employed by the studio.

The Human Resource Manager and VFX Supervisors were also asked to complete a separate survey that focused specifically on areas under their specific supervision that impact the companies' employment policies, upskilling, recruitment and future staffing requirements in the VFX department.

To maximise participation, potential respondents received a number of follow-up emails encouraging them to complete the survey. In cases where respondents encountered difficulties with the survey, they were contacted via email and offered a video call. During the call, the survey questions were discussed and the data was recorded manually.

The survey results served as the foundation for the subsequent video discussions, providing valuable statistical data that was incorporated into graphic representations.

VFX Ireland member studio participation

Survey responses	6
Target studios in database	6
Target studio responses	6
Response rate	100%

College and training providers

Providers contacted	16
Survey responses	11
Response rate	69%

Graduate student survey

Graduate students contacted	20
Survey responses	17
Response rate	85%

Current student survey: c.375-1,900 students**

Registered students contacted (via course leaders/lecturers/college admin)	c.375-1900**
Survey responses	18
Response rate	0.9 - 4.8%

** The survey had the potential to be completed by up to c.1,900 registered students across courses varying from 1 to 4 years in duration, within 16 colleges and training providers that offer VFX taught courses, modules or workshops. There was a low response rate to the surveys which further highlights the necessity to make the VFX sector in Ireland more attractive to its potential talent pool going forward.

Timeline of the Report

- January 2023**
Project requirements outlined and agreed
- February 2023**
Overview of the sector and drafting survey questions
- March 2023**
Identifying target colleges and training providers
- April 2023**
Surveys released for responses
- May-June 2023**
Follow up video interviews and data analysis
- July 2023**
Draft report and stakeholder feedback opportunities
- September 2023**
International case studies added
- November 2023**
Draft 2 sent for stakeholder review
- January 2024**
Feedback implemented and draft 3 sent for stakeholder review
- March 2024**
Additional sections added to reflect new industry tax break news
- April 2024**
Graphic design treatment and proof
- May 2024**
Report delivered



www.vfxireland.ie



To view this report online
please visit the VFX
Ireland website here

