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Screen Production on the 'biggest set in the world': Northern Ireland Screen and the case of *Game of Thrones*

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Abstract

The publicly funded screen development agency Northern Ireland Screen has been the key institutional actor in the exponential growth of the screen industries in Northern Ireland. The most prominent production to be based in Northern Ireland has been Home Box Office's *Game of Thrones*, which had much of its eight seasons filmed in the region. Significant amounts of public finance have been offered to the screen industries, with direct funding provided to augment UK-wide tax breaks. However, there has been a lack of critical analysis of the recipients of this finance, on the precarious nature of many of the jobs that have been created, or on the stated benefits to the economy. This article subjects the role of Northern Ireland Screen to policy analysis, to attempt to fill this scholarly gap. Setting the subject into the context of public support for film and television across the UK, it is argued that the economic argument for providing direct financial support to the screen industries needs to be viewed in the context of the overall impact on society.

Keywords: Screen Industries, Northern Ireland Screen, Film and television production, Policy analysis, Tax relief, *Game of Thrones*.

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Introduction

The publicly funded screen development agency Northern Ireland (NI) Screen has been the key institutional actor in the exponential growth of the screen industries in NI. This has led to NI becoming one of the main production centres for film and television in the UK, outside of London. The production which has received the most significant attention has been Home Box Office’s (HBO) *Game of Thrones* (*GOT*) (2011–2019), which had much of its eight seasons filmed in NI. Other major productions to have filmed in NI include *City Of Ember* (2008), *Lost City Of Z* (2016), *The Fall* (2013–2016), *Line of Duty* (2012–), *Philomena* (2013) and *Dracula Untold* (2014). There has been almost universal support among the political classes of NI for the growth of the screen industries, with the view becoming hegemonic that such a development has benefited wider society. However, the claims that support this position have received very little scrutiny.

While significant amounts of public financial support have been offered to the screen industries operating in NI – through direct funding packages offered by NI Screen, and through UK-wide tax breaks (the Film Tax Relief or High-end TV Tax Relief schemes) –there has been a lack of critical analysis of the recipients of this finance, on the precarious nature of many of the jobs that have been created, or on the stated benefits to the economy (the so-called ‘Game of Thrones effect’). Moreover, there has been a lack of analysis of the corporate reports on developments in the screen industries, especially in relation to how the economic contribution of these industries to the NI economy has been prioritised over their cultural significance (eg. NI Screen, 2010, 2014). In this article we subject the role of NI Screen to policy analysis, to attempt to fill this scholarly gap. We set the subject into the context of public support for film and television production across the UK, as well as in Europe and North America. We argue that that the economic argument for providing direct financial support to the screen industries needs to be viewed in the context of the overall impact on society.

Though what follows is a regionally specific policy analysis, we need to be mindful of how it can potentially be set into a wider context. The very notion that it makes strategic sense to provide financial support for a regionally defined screen industry always already presupposes that the ‘city region’ is a significant, autonomous and rationally coherent economic and political agent in its own right. To some this may seem obvious enough to the point of banality, but argue that developing a historical consciousness of how the economic and political currency of the ‘city region’ has evolved over time is of real importance. That is to say, we follow economic and cultural geographers such as Thrift (2005) and, in particular Harvey (2006), in understanding the ‘city region’ as a key site of capital accumulation, one that provides the necessary empirical evidence needed to begin to comprehend, more globally, the uneven geographies of development in contemporary urbanised capitalism. Intriguingly, at one point in *Spaces of Global Capitalism*, Harvey briefly mentions the ‘long-standing problems of Northern Ireland as a site for capital accumulation’, pointing out how a history of political conflict in the region has undermined the ‘coherence’ of its ‘governance structures’ (Harvey, 2006: 103). The findings and conclusions we present in this article question whether the political divisions that have historically shaped the everyday governance of a region like NI can actually coexist and cohere with emerging and contemporary forms of culturally driven capital accumulation, such that we find in the creative industries (see, for example, Porter, 2018).

Analytical Framework and Methodology

The dominant trends in creative industries literature make sobering reading for the industry. For example, a wealth of literature shows the creative industries sector is broadly: non-meritocratic (O'Brien et al., 2016), contributes to structural inequalities in society (O'Brien et al., 2017), often produces jobs that are precarious in their nature (Gill and Pratt, 2008), and is often non-friendly to carers (Dent, 2017). It is also one where the concerns of capital continually take precedence over labour (Curtin and Sanson, 2017). While 'creative industry labour is presented or assumed [in a range of UK policy documents] to be an *intrinsically* progressive form of work' (Banks and Hesmondhalgh, 2009: 416, *emphasis in original*), it often ends up being exploitative, something which is far from being a recent phenomenon (see Ursell, 2000).

It is to policy research that many scholars have turned their attention, with the creative industries policies of New Labour particularly attracting attention (eg. Hesmondhalgh et al., 2015). This article follows in that tradition, and takes a qualitative document analysis approach (Atkinson and Coffey, 2004), incorporating thematic analysis techniques (Herzog et al., 2017), to a range of publications from state and non-state institutions. This approach is also informed by the critical political economy of communication approach (Mosco, 2009: 2) where the researcher is engaged in 'the study of the social relations, particularly the power relations, that mutually constitute the production, distribution, and consumption of resources, including communication resources'. As such we are required to take account of the relationships between NI-based institutions and the UK-wide government, and the policy framework that they operate under. Before turning to the current forms of public support for the screen industries in the UK, we turn first to the international picture.

Public Subsidy and Tax Credits for the Screen Industries

In multiple international settings, states have offered various forms of financial support to stimulate or consolidate screen production. In North America, tax credits have long served as an incentive for companies to base their operations in a particular location (Christopherson and Rightor, 2010; Coles, 2010; Mayer, 2017). The use of tax credits in this way has received criticism from those who view them as little more than 'welfare for the wealthy' (Guback as quoted in Mayer and Goldman, 2010), or from those who question whether or not they constitute anything more than 'tax windfalls' (Rollins Saas, 2006: 1). Tax credits have been termed 'generous', with Tannenwald (2010: 1) taking the view that in 2010 subsidies of \$1.5 billion across a range of US states was 'money that they otherwise could have spent on public services like education, health care, public safety, and infrastructure'. For example, through the use of a limited liability company, the production of HBO's *Treme* (2010–2013) received significant levels of 'state tax credits' for basing its production in New Orleans (Mayer, 2017: 71).

Given the financial impetus that tax credits and other financial subsidies generate for production companies, plans made to scale them back will often be met with opposition: for example, the 2015 announcement that film tax credits in the state of Massachusetts might be cut was met with criticism by both the industry and unions (Gay, 2015). In the period 2010–2014 in Europe, public funding for film and television grew by 13.4% to a total of €2.41 billion in 2014, with 249 separate funds operating across 35 countries (Talavara Milla, Fontaine and Kanzler, 2016: 10–11). One of the Council of Europe findings is that 'By and large, few funds require the full repayment of the amounts granted regardless of the performance of the project

or activity subsidised’ (Talavara Milla, Fontaine and Kanzler, 2016: 48), underlining the position from which the kinds of criticisms seen in the US context have emanated.

Historical Context for Public Subsidy in the UK

Before turning to the contemporary policy picture in the UK, a brief historical outline of how these conditions emerged is warranted here. UK government support for film can be traced as far back as the 1920s (Magor and Schlesinger, 2009: 316), with the formation of the British Film Institute (BFI) in the 1930s as the point at which we can first identify the ‘beginnings of an *explicit* cultural policy’ (Hill, 2004: 33, *emphasis in original*). However, under Thatcher’s Conservative Government (1979–1990), the economic intervention element for film that had been government policy for many decades was reversed (Dickinson and Harvey, 2005: 421–422), which included the replacement in 1985 of the public National Film Finance Corporation by British Screen Finance (Kelly, 2016: 650–651). Later, the Major government established tax relief for those films with a budget of more than £15m (Newsinger, 2012a: 135). Thus, from 1990 onwards, a decade followed where ‘a series of supportive interventions took place’ (Steele, 2004: 14), which saw the British Film Commission being set up, and screen agencies established in NI, Scotland and Wales.

Under the UK’s New Labour government (1997–2010), Magor and Schlesinger (2009: 300) assert that ‘two key elements – cultural nationalism and economic intervention – [were] ... at the heart of the UK government’s ... “creative economy” policy’. Indeed, it was the New Labour government that introduced a raft of initiatives and policies in relation to the creative industries, seen not least the introduction of their creative industry mapping documents. In detail, New Labour’s *Finance Act 1997* included further provisions for tax relief in Section 48 of the Finance (No. 2) which remained in place until 2004 (Magor and Schlesinger, 2009: 300) when new provisions were made (Dickinson and Harvey, 2005: 427). For Hill (2016: 711) the introduction of tax relief incentives ‘may be seen to be in line with the neo-liberal turn in economic policy inaugurated in the 1980s insofar as tax incentives for film production came to be regarded as a more “market-friendly” alternative to quotas and levies’. In addition, the New Labour government also moved to set up the UK Film Council (UKFC) in 2000, a merger of four existing agencies (BFI, 2003). Kelly (2016: 649) argues that the UKFC sought to ‘professionalise an independent sector that had seemingly become reliant on state handouts’. However, following the election of the Conservative-Liberal Democrat coalition government (2010–2015), the decision was taken to close the UKFC and transfer its powers to the British Film Institute. The swiftness of the decision caught many by surprise, including its Chief Executive, who had no prior knowledge of the move (Newsinger, 2012a: 139).

Public support for the UK Screen Industries

Under the current policy conditions, a range of national agencies, and the devolved governments at the level of the UK’s constituent countries (NI, Scotland and Wales) directly fund film and television production, while a series of tax breaks from the UK government are available to eligible production companies. In this section we map the role of tax credits, and outline differences in conditions in the devolved nations of the UK: Scotland, Wales, and later NI (as the central case study).

Tax Credits

Fundamental to the way that tax credits operate is the ‘British Cultural Test’, administered by the British Film Institute, which applies to film, high-end television, animation, computer games and children’s television. The Cultural Test was implemented when tax credits were introduced as a way for the government to link tax relief to the sustenance of a specifically ‘British’ film industry in a cultural sense (Hill, 2016: 712). At present, qualifying productions in film and television are required to gain 18 points out of a possible 35 (BFI, 2017a); one example of where points can be awarded for a film is if it ‘demonstrates British creativity, British heritage and/or diversity’ (BFI, 2017b). When the British Cultural Test is passed, the following can then be claimed: for Film Tax Relief (FTR) at 25% on particular costs (BFI, 2017c), and for High-end Television Tax Relief (HTR), tax relief is available on ‘expenditure on the lower of either 80% of the total core expenditure or the actual UK core expenditure incurred’ (BFI, 2017c).

These schemes have allowed for very substantial inducement for production companies to meet the qualifying requirements for FTR and HTR, and they remain a key plank in the Department for Digital, Culture, Media and Sport’s creative industries strategy. In conjunction with NI Screen’s direct funding schemes – discussed below – they form the primary means of attracting film and television productions to NI. It is worth noting here that, in its own words, NI Screen ‘was at the forefront of lobbying’ for the introduction of the HTR (NI Screen, 2014: 38). Moreover, the British Film Commission directly addressed GOT as a case study in its work on the matter, with its Chief Executive quoted as saying: ‘HBO basically shared with us and with government the amount of money they were spending, and we looked at how the crew base had been developed as a result of it’ (Midgley, 2014).

In the period 2006–2014, 1,240 films had £1.22bn of FTR granted (HMRC, 2014). The figures for 2016–2017 show that £415m of FTR was granted (HMRC 2017). For HTR,¹ since its introduction in April 2013 to the first half of 2017, the Treasury made payments of £374m to qualifying productions. Taking the year 2016–2017 individually, £163m of HTR was successfully claimed (HMRC, 2017). In the case of HTR, the independent consultants for the scheme state that the introduction of the tax relief had a massively beneficial impact on the economy, where each pound of tax relief led to Gross Value Added (GVA) of £8.31, and where ‘£79 million in tax relief generated £196.3 million in additional tax revenue’ (Olsberg SPI and Nordicity, 2015: 49). Within the framework of this analysis, there appears to be an evidence base for arguing directly for such forms of tax relief; later in our analysis we return to these arguments attempting to subject these figures to further analysis.

Public Support for Film in the UK’s Devolved Nations

By addressing total public funding for film at the UK national level – which takes into account direct funding in addition to tax relief – we provide the context for public funding in for the screen industries NI. In 2015–2016 total public ‘support’ for film across all agencies was £557.1m (which includes £338.4m of FTR granted by HMRC) (BFI, 2017d: 5). As is set out in table 1, NI Screen was the fourth highest spending film agency (£18.2m), representing 3.3% of the total. As shown in table 2, per capita funding for film in NI is massively disproportionate to Scotland and Wales, and England in particular (the NI figures take into account Arts Council of Northern Ireland funding). Such levels of provision have led to NI gaining a significant advantage over the Scottish and Welsh screen industries.

Table 1. Public Funding for Film in the UK, 2015–2016

Select Agencies	Funding in millions (£)	Percentage of total
HMRC	338.4	60.7
BFI	82.8	14.9
Film 4/Channel 4	25	4.5
Northern Ireland Screen	18.2	3.3
NFTS	12.6	2.3
Creative England	11.8	2.1
Scottish Agencies	10.4	1.9
BBC Films/BBC	10	1.8
Into Film	8	1.4
EU Media sub-programme	7.8	1.4
Creative Skillset	7.7	1.4
Film London	5.5	1.0
Screen Yorkshire, Screen South and Northern Film + Media	5.3	0.9
Welsh Agencies	5.2	0.9
Arts Council England	4.1	0.7
English Regional Film Archive	2.6	0.5
British Council	1.5	0.3
Heritage Lottery Fund	0.3	<0.1
Total	557.1	100

Source: BFI, 2017d: 5.

Note: Figures are used directly from the BFI data, which reflects their rounding of funding and percentages.

NI gained a considerable advantage over Scotland in establishing a major film and television studio ahead of its much larger neighbour. The hitherto lack of purpose-built studio has been a long-standing ‘topic for consternation’ in the sector (Munro, 2015: 277), and caused problems in attracting productions to Scotland (Burt, 2017). This has had a knock on effect in terms of the availability of labour, with a production manager noting: ‘The best people are working, but they’re not working in Glasgow. They’re working in London, Dublin, Budapest, and Belfast. They’re following the work’ (Burt, 2017: 175). While Scotland does have the *repurposed* facility Wardpark Studios where *Outlander* (2014–) is filmed, plans to augment that facility by building what would have been the Pentland Studios were dealt a blow in 2018 through a legal case (BBC News, 2018).² Some of those who bemoan Scotland’s slow progress on this issue in recent years also point to Wales for comparison, a country that like NI took a strategic lead over Scotland (Doyle, 2017: 185). In Wales, screen production activity was considerably boosted by the building of the BBC’s Roath Lock Studios in Cardiff, officially opened in 2012 (McElroy and Noonan, 2016). Before turning to the current policy conditions that NI Screen operates under, we first sketch out how the screen industries in NI have developed up to the present day.

Table 2. Per Capita Public Funding for Film by UK Nation, 2015–2016

Nation	Total Dedicated Investment in Millions (£)	Population (millions)	Spending per capita (£)
England	29.2	55.3	0.53
Northern Ireland	18.2	1.9	9.56
Scotland	10.4	5.4	1.93
Wales	5.2	3.1	1.68

Source: BFI, 2017d: 7.

The Development of the Screen Industry in Northern Ireland

The partition of Ireland in 1921, and with it the establishment of the NI state, coincided with the arrival of cinema as a form of mass entertainment with international reach. At the time, NI officials were not much concerned with the new mass medium; nevertheless, the 1920s and 1930s established the terms of a debate about cinema within the region that continues to resonate now. As Hill (2006) highlights, the history of film production in NI is marked by precarity, and a fissure between those for whom cinema is potentially of cultural and artistic value, against others with an instrumentalist view of film production as being primarily of economic value to the region. Enthusiasts of a cultural cinema emerged in the 1930s, with the establishment of a society, a journal and screenings of ‘unusual films’ in Belfast. Despite this, there was scant film production in NI in the period of the 1930s–1980s. As Hill (2006) notes, the idea of film as an art form remained marginal in NI until the Arts Council of Northern Ireland, established in 1962, began to see film as culturally significant.

It is noteworthy that from the late 1970s to the early 1990s a number of films were produced in NI for their cultural and artistic reasons rather than for their economic role in stimulating the screen industries in an economic sense (McLoone, 1994). However, the establishment of the peace process, the achievement of a political accord and the anticipated peace dividend, have brought with them a reassertion of instrumentalist thinking about filmmaking, and latterly television production in the region. That was explicit in the policy document *The Most Powerful Industry in the World* (Northern Ireland Film Commission, 2001), which as Hill (2006: 182) remarks, referenced educational policy and cultural production, but was ‘overwhelmingly industrial in character’, focusing on job creation and the projection of a positive image of NI to global audiences. Later in the discussion, we argue that it is this narrative which become imbued in NI Screen’s policy agenda, as film and television production has begun to overwhelmingly serve market logic.

The Political Economy of Northern Ireland Screen

NI Screen’s work is principally underpinned by the argument that its work to build capacity in the screen industries has a benefit to the wider economy (Ramsey and Waterhouse-Bradley, 2018: 205). This officially sits alongside its role for ‘maximising the ... cultural and educational value of the screen industries for the benefit of Northern Ireland’ (NI Screen, 2016: 4), but despite this policy discourse, it is its economic function that is paramount in terms of its activities (cf. Ramsey and Waterhouse-Bradley, 2018). There are two main ways that this is

framed: first, through the jobs that have been created; and second, through the expenditure in the ‘Northern Ireland economy’, which encompasses overall economic impact.

Jobs

NI Screen has argued that having ‘large-scale film and television production’ (NI Screen, 2014) based in NI has helped to develop a skills base in the screen industries (NI Screen, 2010, 2012, 2016). At the core of the narrative around the impact on skills and jobs, is the attention given to the impact of *GOT* on the labour market:

There are two units based out of Belfast: Dragon with about 150 permanent crew and Wolf with around 120 but these figures always increase. Last year there were 3 units ... shooting for 9 weeks with 150 crew on each unit and on one memorable day in Belfast, they had a total of 5 units shooting simultaneously! (Byrne as quoted in NI Screen, 2016: 20)

Moreover, the much-vaunted Season Six episode ‘Battle of the Bastards’ was said to include ‘600 crew members; 500 extras; ... 25 stunt men and women; 25 shooting days for one battle’ (NI Screen, 2016: 24). The mention here of extras takes us to a key element of the industry, whereby NI Screen gives prominence in *Adding Value Vol. 2* to the number of extras employed across its productions: in 2015, this equated to 3,900 extras used for 20,167 man days; however, as the report itself notes, this equated to the ‘[e]quivalent of 80 people employed full time’ only (NI Screen, 2016: 33). Overall, NI Screen estimated that by the end of 2014 its investments through the Northern Ireland Screen Fund would have created ‘1,150 direct full-time equivalent jobs years’ (NI Screen, 2012a: 7). By March 2018, this was projected to be ‘2,800 direct full-time equivalent job years’ (NI Screen, 2016: 7). (Here ‘job years’ is taken to refer to a 1.0 FTE unit, as opposed to numbers of people employed *per se*). To provide context, the most recently available statistics show that in 2013 NI had 43,000 people working in jobs in ‘creative employment’, equivalent to 5% of NI’s employees (Department of Culture, Arts and Leisure, 2015: 3).

Expenditure in the ‘Northern Ireland economy’

Second, the principal way that NI Screen measures its economic impact is through calculating the economic return to the NI economy of its direct spending on goods and services. NI Screen’s direct spending (through its Screen Fund) was projected by March 2018 to be £42.8m across all of the sectors that are eligible, with a claimed expenditure on goods and services in the NI economy of £250.75m (NI Screen, 2016: 7). In detail, direct funding is actualised first as development funding, where funding is available for script, project and ‘slate’ development (NI Screen, 2017a). It is however the second form, production funding, which dwarfs the money spent by NI Screen on its development projects. In this case it is the Northern Ireland Screen Fund which provides funding based on a number of stipulations.³ Despite these provisos, the Screen Fund represents a very significant investment and commercial opportunity for production companies given the relative size of NI, a point which is no more clearly seen than in the case of *GOT*.

The case of Game of Thrones

NI Screen's relationship with *GOT* has been its most significant and most renowned partnership during its lifespan. An analysis of the political economy of how this relationship has functioned is central to understanding how the NI screen industries have reached their current strong position. *GOT* initially had filmed its \$13m million pilot episode in NI (NI Screen, 2010: 43), with £1.6m offered in direct funding by NI Screen (see Table 3). The financial climate in which NI Screen attracted HBO to produce its pilot in NI Screen was in-part influenced by the exchange rates at the time, which the agency stating that being in the Sterling currency-area made it more attractive to US companies as compared to Euro-zone production destinations (NI Screen, 2010: 20). This appears to correlate with the difference between the fifteen-year high of the dollar against the pound in Autumn 2007, to the massive drop-off in Spring 2009 (the pound would later fall lower than the Spring 2009 rate by Spring 2017).

In the period addressed in this article, *GOT* has received £14.85m of public funding from NI Screen, a major investment which peaked at £3.2m in 2012–13 (see Table 3). In addition to this direct funding, what is strongly apparent in NI Screen's documentation is the extent to which its overall policy was being shaped and impacted by its relationship with *GOT* during the period 2010–2014: first, it noted that the future of the Northern Ireland Screen Fund would be limited in 'the breadth of the portfolio of projects we support' (NI Screen, 2010: 34), due both to reduced funding and NI Screen's 'commitment' to *GOT*; second, as we noted above, NI Screen was active in lobbying to bring in the HTR, which it states allowed it 'to reduce its incentive to HBO's [*GOT*] from £3.2 million to £1.6 million' (NI Screen, 2014: 38); third, it notes that the agency returned to major film production with *Dracula* in 2013, having previously 'stepped out of the market to ensure a positive experience for HBO's [*GOT*] during the first 3 seasons between 2010-13' (NI Screen, 2014: 13). As such, in agreeing to the financial support programme with *GOT*, the nature of the screen production which took place was altered throughout this period.

NI Screen's core argument on the benefits to the economy stemming from *GOT* is based around expenditure on goods and services in the NI Economy, generated by seven seasons of *GOT* (with the final season 8 being filmed throughout 2018). Here the NI Screen figures draw on independently evaluated figures, drawing on economic categories such as 'gross value added', 'additionality', 'dead weight' and 'market failure'. On these measurements, NI Screen's public spending is rated very favourably: for example, in the category of additionality – that spending that is additional what would otherwise have occurred – the total NI Screen rating of 83.8% (Screen fund solely: 97.06%) during the period 2007–2010 is very favourable, some '29.3 percentage points higher than for 'sector/cluster support' interventions across the UK regions (where it is 54.5%)' (Cogent Management Consulting/Invest NI, 2012a: 55). In relation to the first two years of the *Driving Global Growth* strategy (2010 – 2014), the additionality of NI Screen's spending of 87.8% (Screen fund solely: 90%) (Cogent Management Consulting/Invest NI, 2012b: ii) was exceptionally high. In sum, most of the production directly supported by NI Screen would otherwise not have occurred had it not been for the interventions of the agency.

Table 3: NI Screen funding provided to *GOT* and reported economic return

Year	GOT Series	NI Screen Funding (millions)	Expenditure in NI economy (millions)
2009–10	Pilot	£1.6	£3.2
2010–11	Series 1	£1.6	£18
2011–12	Series 2	£2.85	£21.8
2012–13	Series 3	£3.2	£22.5
2013–14	Series 4	£1.6	£23.2
2014–15	Series 5	£1.6	£26.3
2015–16	Series 6	£1.3	£31
2016–17	Series 7	£1.1	£20 (estimate)
Total	-	£14.85	£166 (inc. 2016-17 estimate)

Sources: NI Screen, 2012a: 10; 2016: 10.

In addition to the economic support mechanisms outlined up to this point, one explanation offered in the policy discourse (e.g NI Screen, 2018a) for why NI has become one of the leading sites for film and television production outside of London is the relative proximity of studio space to a diverse range of natural filming locations, compared to other places in the UK, or in other international settings. As such, Titanic Studios in Belfast – which has primarily housed *GOT*'s studio-based production – is geographically close to dozens of picturesque coastal, forest, river and mountainous locations, which are mostly accessible within one hour from Belfast (the entire of NI can be traversed either East-West or North-South in 2.5 hours by road). For example, the location for Winterfell in *GOT* is only 31 miles from central Belfast. This is perhaps unparalleled, especially when the case of London is considered, where industrialization and population density make such conditions almost impossible. Indeed, in a direct pitch to the US industry, NI Screen (2016: 23) make the case for NI's compact geography, stating that it is 'a relatively small region ...which is just slightly larger than the Greater Los Angeles area of 4,850 square miles'.

Discussion

As outlined above, there are a range of factors that have led to the rapid development of NI's screen industries, with the establishment of strong local funding schemes to bolster UK-wide fiscal incentives being at the core of this. In approaching a critical analysis of these factors, it must be noted that there has been much positive impact from the development of the screen industries in NI. As outlined above, the levels of additionality that have been achieved through NI Screen's direct funding provide evidence that public funding has generated screen production in the region that would otherwise have been absent. Indeed, we can suggest that were it not for NI Screen's interventions the industry would be a fraction of the size that it is.

However, there is a clear disjuncture between the attention given to screen industries in NI and the extent of their economic impact.

Here we argue that highlighting economic return to the NI economy, that stems from direct spending in the expenditure on NI goods and services, has very little to say about overall economic growth in the region, capital flows in or out of NI, or taxation arrangements for those businesses in receipt of the spending. For example, ‘expenditure on NI goods and services’ may be of limited impact if that business’s tax arrangements are such that while spending has occurred in NI, its profits are sequestered to other jurisdictions. We thus argue that while NI Screen’s approach might be a standard economic measurement appropriate to the assessment of public spending, it might ultimately be a limited one in terms of measuring societal benefit. For example, in terms of employment, we note that the projection of 2,800 direct full-time equivalent job years through NI Screen’s investments is rather miniscule compared to a total NI workforce of 837,000 employees (NISRA, 2018: 3). While precarity in the workforce in the creative industries is again not unique to NI, figures such as the 80 FTE equivalent jobs that were created for extras in one year tells a much more sobering story than the overall policy narrative would suggest.

Indeed, the transitory employment nature of many of the crew members who come to NI to work, and then leave in quick succession once a shoot has finished (cf. Burt, 2017: 175) is mostly absent from the policy narrative. For example, if a crew member resides in NI for six months of filming, then moves to their next location, they may have had very little impact on the wider NI economy in terms of their personal expenditure, especially given the long hours that they are working. While we do not query the audited NI Screen figures of expenditure in the economy, we do note that it is the quantification of salaries in the economy that has been a preferred measurement of both Invest NI and the NI Executive over many years as a way of justifying the distribution of public funds to the private sector (eg. The Executive Office, 2016), and as such more analysis needs carried out on how these salaries are spent by NI-based crews.

In addition, scrutiny must also be placed on the ethics of providing £14.85 million of public funding to a company of the scale of HBO (cf. Ramsey and Waterhouse-Bradley, 2018), an area very much under scrutinized. Returning to Guback’s point that tax credits are ‘welfare for the wealthy’ (as quoted in Mayer and Goldman, 2010) (and in our argument, direct funding also), this critique comes into clear view when HBO’s financial performance is considered. The company is a subsidiary of the global-national TimeWarner Inc., which in the financial year ended 31 December 2017 had a revenue of \$31.3bn, with an operating income of \$8.2bn. These figures were in part driven by an 11% increase in subscribers to HBO (TimeWarner, 2018). In the three months to the year end alone, HBO alone-contributed revenue of \$1.68bn, 19% of the Q4 2014 revenue of \$8.61bn that the parent company earned (TimeWarner, 2018). Here we make a distinction between NI Screen’s provision of funding to attract HBO to film the pilot episode in NI, and the funding that carried on year after year long after any financial risk had passed for the company over the production. This is especially the case as *GOT* was an immediate success, in contrast to many other ‘slow burning’ television hits of recent years. As such, the £3.2m contribution for Series 3 (see table 3) seems somewhat generous (cf. Tannenwald, 2010).

‘We’re on the biggest set in the world. We’re in Belfast’

As we note above, it is argued in the policy discourse that the geography of NI has helped to contribute to NI’s development as a leading site for screen production. However, this adds to the argument that NI is simply extended studio space ripe for exploitation, encapsulated in a

promotional video when the Hollywood actor Bill Murray can be heard to say, ‘We’re on the biggest set in the world. We’re in Belfast’ (NI Screen, 2012b), or in the description of the region as ‘the most compact 5,196 square miles of back-lot in the world’ (NI Screen 2018a). The way that NI Screen has presented NI as one large-extended studio space is tied up with wider cultural and political trends in ‘post-conflict’ NI, centred around the concept of the ‘New Northern Ireland’ (McLaughlin and Baker, 2010; Ramsey, 2013), a form of neoliberal hegemony that has supplanted all forms of civic and social concern in the way the economy and the built-environment have been developed following the ending of the worst phase of the Troubles. Commenting on these trends, Jewesbury and Porter (2010: 36) chart how economic development came to trump all opposing narratives, when referring specifically to Belfast, they stated how: ‘post-Agreement Belfast has ... become a story in which the twin moral goods of political progress and privatised, neo-liberal economic development are folded into one another’. The out workings of these *twin moral goods* mean that NI is increasingly seen as a *tabula rasa* (Baker, 2017), ‘a mere location for economic activity far removed for the cultural lives and experiences of people who live there’ (Baker, 2016).

We posit that the development of the screen industries in NI has been driven by the same imperatives, primarily serving an economic agenda, and instead abstracted from everyday culture and society. It is here that we argue that NI Screen’s work is disproportionately skewed towards its economic objective, rather than its cultural and educational remit (see NI Screen, 2018d). While it runs schemes that support the latter two objectives, we argue that these pale into insignificance when compared to the attention and funding directed toward the former. Returning to our point from above in relation to the greater focus on the cultural aspects of film (in particular, rather than television) that existed in the history of screen production in NI, we note the comparative absence in this domain today. NI Screen points to, for example, the presence of NI’s film festivals and the Queen’s Film Theatre as evidence of activity in this area (NI Screen, 2018b), but this is scant— as we have evidenced — compared to the scale and scope of those programmes supporting the agency’s economic function.

Overall, then, there is a strong sense in which the work of NI Screen, and the impact of *GOT*, needs to have its level of success seen in the context its overall impact on society. That said, we note that those members of the labour force who are able to be mobile have seen greater opportunities for work within the UK created, while a small but significant number of screen production workers based permanently in NI have benefitted from a boom of opportunities to work on international productions. We do not go to the extent of arguing that it would be better if *GOT* had been based elsewhere; such an approach would seem churlish, and we eschew it. However, we do argue that there has been a lack of critical scrutiny paid to the screen industries in NI, a contribution which this article has aimed to address.

Conclusion

We would like to conclude with a few comments that we hope will allow the reader to glimpse the broader relevance or more general import of the regionally specific policy analysis set out above. The findings presented here are part of a broader research programme which is concerned with whether the political divisions that have historically shaped the everyday governance of a region like NI can actually coexist and cohere with emerging and contemporary forms of culturally driven capital accumulation (seen in the screen industries, and elsewhere). Drawing on Harvey, we would argue that capital accumulation within a given ‘city region’ presupposes governance structures that allow it to cohere and operate as a well-determined rational economic actor in a competitive marketplace (Harvey, 2006: 103). The problem with NI is that its governance structures often spectacularly fail to cohere, namely in

the way the Stormont Executive and NI Assembly have limped from one crisis to another.⁴ Without any consistent structure or coherence at the regional-national level, governance practices effectively get outsourced to other actors: sometimes this happens at the supra-regional level (e.g. Westminster), sometimes at the municipal level (e.g. Belfast City Council), and sometimes through publically funded organisations like NI Screen. As we saw above, NI Screen present a very clear, structurally coherent, concept of region: namely, the ‘Northern Ireland Economy’ defined as the direct spending on NI goods and services that result from screen industry activities. To be sure, we have put a clear question mark against the way economic claims are made regarding the wider societal impact of the screen industries, but, can we even begin to draw any wider social or political conclusions in this context?

Perhaps the outsourcing of the governance of regional economic development to the broader cultural-public sphere, through culturally led forms of capital accumulation, implies the emergence of a certain class of people (business people, intellectuals, academics, creative workers and artists) who agitate for, and indeed bring about, a kind of *economic and cultural deterritorialisation of the region*. What we mean by using this phrase is the creation of an abstract space of economic and cultural activity that somehow sits outside or cuts across the more traditional political-institutional forms (in this case, a constitutionally fragile NI Executive and Assembly) through which economic regional development is facilitated. Our claim, therefore, drawing on the research findings presented above, is that additional policy analysis of other publicly funded organisations or institutions in NI (and perhaps in other regions of the UK) may well further bring to light the various ways in which the governance of economic regional development is effectively being outsourced, and outsourced largely in the absence of any sustained public or critical scrutiny.

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Notes

¹ The reporting period used here is not the same as FTV, which would have allowed for better comparison.

² Our thanks go to Lisa Kelly for drawing our attention to this point.

³ Funding is ‘in the form of a recoupable loan with profit participation or in limited circumstances a grant’; companies applying must have already secured at least 65% of its funding; qualifying productions should which ‘contribute to building a sustainable screen industry in Northern Ireland and which can show a direct economic benefit to the region’; there must be some evidence of how a production, whether film or television, will be sold or distributed; the fund invests ‘a maximum of £800,000 for feature film and television production funding and a maximum of £500,000 for interactive content production’, but this can only fund a maximum of 25% of the budget (NI Screen, 2017b).

⁴ As we write in mid-October 2018, the citizens of NI yet again find themselves without a functioning Executive and Assembly, even though the power sharing government at Stormont collapsed back in January 2017.