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An All-Ireland screen policy? Public subsidy and screen employment on the 'shared island'

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Abstract

This paper takes a holistic, cross-border view of screen production in Ireland. Following a brief overview of policy history in both Irish jurisdictions, industry data is mobilised to assess the total amount of screen production activity on the island. As each jurisdiction competes with the other to attract incoming production through the deployment of increasingly generous levels of screen subsidy, the economic and cultural objectives of current screen policy are examined. Conclusions address screen employment quality, the decreasing availability of reliable industry data, and possibilities for increased North-South cooperation through the Shared Island policy initiative.

Keywords: screen production; screen policy; Northern Ireland; shared island; economic data

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Introduction

By virtue of its political division, the island of Ireland contains two screen industries, publicly supported by parallel funding agencies, tax credits and TV licence fees[1]. In the Republic of Ireland (RoI), Fís Éireann/Screen Ireland funds the development and production of film, television drama, documentary and animation, while the Section 481 tax incentive subsidises production costs incurred in Ireland for both indigenous and overseas projects. Further public funds are delivered through the commissioning departments at state broadcasters RTÉ/Raidió Teilifís Éireann and TG4/Teilifís na Gaeilge, with additional supports available from Coimisiún na Meán, formerly Údarás Craolacháin na hÉireann/Broadcasting Authority of Ireland (BAI)[2]. In Northern Ireland (NI), similar subventions are available from Northern Ireland Screen, the UK's Film (FTR) and High-End Television (HETV) tax relief schemes, and the regional BBC and ITV broadcasters. These separately funded and regulated industries on each side of the border have been growing rapidly in recent times. Both jurisdictions vie to provide an attractive environment for international productions like *Game of Thrones* (HBO, USA, 2011-2019) in NI and *Vikings* (History Channel, Canada, 2012-2020) in the RoI. Each funding system also provides development and production money for local productions. The resulting Irish-made film, television, documentary and animated content for the theatrical, television and streaming markets has achieved commercial success, critical acclaim, and affirmation from the wider international industry—as illustrated by the record number of Oscar nominations (fourteen) in 2023 representing people and productions on both sides of the border (Clarke, 2023).

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This paper takes a holistic view of Irish screen production, with a focus on both sides of the border. Following a brief overview of the history of screen policy in each jurisdiction, I draw on industry data to assess the total amount of screen production activity on the island of Ireland. As each jurisdiction competes with the other to attract incoming production through the deployment of increasingly generous levels of screen subsidy, I examine the main policy instruments of both jurisdictions, where film and television supports are to varying degrees predicated on cultural and economic justifications. In conclusion, I address employment quality and volume and suggest that more sustainable policy goals might be developed through increased North-South cooperation—a process that could leverage recent proposals such as the Shared Island initiative[3].

In the RoI, both film and television production have been publicly supported in some form for more than sixty years. In NI, although BBC Northern Ireland (1953) and Ulster Television (1959) predate the RoI television broadcaster RTÉ (1961) by several years, specific film policy has a shorter history. While film, drama and other screen production is often thought of as a cultural project, industry funding and development in each jurisdiction have been conditioned by prevailing economic priorities through the decades. In the Republic, industry development commenced with the embrace of international trade and foreign direct investment in the 1950s during the Lemass era (TD from 1924, holding multiple Ministries from 1939 and An Taoiseach, the Irish elected head of state from 1959–1966). The NI film counterpart developed most rapidly after the peace process and the post-'Troubles' drive for international economic investment as political and economic conditions stabilised following the Good Friday (or Belfast) Agreement in 1998 (Hill, 2006).

As the two Irish industries evolved, both benefitted from public investment in studio infrastructure along with increasingly generous state incentives to attract incoming productions from abroad. While these subsidies have been justified in terms of job creation, infrastructural development, and knock-on benefits like induced economic activity and increased tourism, little attention has been paid to the validity of these claims, nor indeed the quality of the employment created. This paper addresses that notable gap.

The policy context

Republic of Ireland

Early RoI state supports for film production were limited mostly to sponsorship of government information films in the 1940s and 1950s. The state also financed the establishment of Ardmore Studios in 1958 (see Rockett, 1988, p. 98-100). While Ardmore's ambitions to develop film production in Ireland were initially promising, the studio soon found itself in difficulty as Irish and British unions representing film workers clashed over the right to work on British productions locating in Ireland. Right away, questions of access to employment became central to Ireland's national cinema project. Indeed, the state, by calling in its loans, forced Ardmore into receivership in 1963 in an attempt to improve the studio's prospects by releasing it from film worker labour agreements (Murphy, 2022, p. 253-254). The failure of the studio project prompted local filmmakers and workers to unite in a 'bottom up' lobby for better policy supports, a long process that culminated in the establishment in 1981 of Bord Scannán na hÉireann/Irish Film Board (IFB), renamed Screen Ireland in 2018. While progress was initially slow in the economically challenged 1980s, production levels

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picked up dramatically in subsequent decades. The industry benefitted from the Celtic Tiger boom during the 1990s and early 2000s and was greatly assisted by a second major policy initiative, Section 481, which has evolved into one of the world's most generous screen tax incentives (Lodderhose, 2016) over the course of numerous revisions since its establishment in 1987.

These policy instruments helped the RoI capture increasing amounts of incoming production from overseas producers as digitalisation and other technological, geopolitical and regulatory changes contributed to the globalisation of screen production (Miller et al., 2005). The transition, partly driven by risk reduction through capture of international subsidies, blended well with the Irish incentives. In recent decades film and television drama production has thrived in the RoI, weathering the 2008 global financial crisis and the ongoing Covid-19 pandemic, the latter due to a particularly robust policy response during the initial lockdown periods (Barton et al., 2023). Although employment figures are difficult to verify, the most comprehensive industry employment breakdown yet produced suggests that production, post-production and distribution of film, television and animation supported just over 7,000 full time equivalent (FTE) jobs in 2016. In terms of economic impact, the same sectors produced an economic GVcovA of €303 million[4].

Northern Ireland

Early filmmakers in NI might have expected to benefit from wider UK film policy, especially the establishment of the British Film Institute (BFI) in 1933. However, the BFI would prove to have limited influence, partly because Belfast - London arrangements hampered its ability to fund film culture and film production in NI (Hill, 2006, p. 167-170). Consequently, film activity in the region was just as sporadic as in the RoI. BFI funding became more available from the 1980s, however, enabling some significant local productions (e.g., 1981's *Maeve*, directed by Pat Murphy). At the same time Channel 4 TV investment in community film workshops provided important support for activist filmmakers, building momentum towards the establishment in 1989 of the Northern Ireland Film Commission (NIFC) (renamed Northern Ireland Screen in 2007). A combination of lottery funding, BBC film investment, and co-production with the RoI's Irish Film Board greatly expanded film and television drama production in the North in the 1990s. Following the Good Friday Agreement in 1998, the need to stimulate NI's depressed post-industrial economy dovetailed well with UK 'New Labour' creative industries policy, a top-down initiative that earmarked cultural production as a driver of urban renewal, employment and tourism, further blurring the lines between cultural and economic screen policy objectives. With increased government funding, the NIFC embarked on an ambitious strategy to expand production, taking over Belfast's struggling Paint Hall Studios to ensure the availability of necessary infrastructure. The studios attracted large-scale US film productions like *City of Ember* (2008) and *Your Highness* (2011). Following a successful pilot production, Northern Ireland Screen (NIS) then landed the HBO series *Game of Thrones* (2011-2019).

The production levels, critical acclaim and commercial success achieved over eight seasons of *Game of Thrones* raised the NI industry's profile considerably. An emboldened NIS pledged to 'make Northern Ireland the strongest screen industry outside of London in the UK and Ireland' (NIS 2017, p. 7). Such a goal would require continued investment and considerable policy interventions to direct greater amounts of production away from the Metro London area where UK screen production is highly concentrated[5]. Determining the impacts of such regional investment in recent years is far from straightforward, as industry statistics tend to be published on a UK-wide basis. Nevertheless,

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Oxford/Gilchrist (2020, p. 38-40) estimated that NI film and television production contributed an average GVA of about £60 million (€74 million) per annum between 2014-2017. NIS (via email correspondence with author) estimated total freelance full-time equivalent (FTE) employment at 1,775 for 2021.

Table 1: Average regional public screen investment 2017-2019 (£ per capita) (Source: Extrapolated from Olsberg-SPI, 2021)

	2017-2019			
Country-specific	*Avg. Annual (£m)*	%	*Pop. (m)*	*per cap (£)*
N. Ireland	15.5		1.9	8.16
Scotland	14.9		5.4	2.77
Wales	4.1		3.1	1.32
England	27.5		55.3	0.50
Subtotal	62.1	8%	65.7	0.94
Non-Country Specific	697.7	92%		
Total	759.8	100%	65.7	11.56

The scale of the subsidy

In their *Game of Thrones* case study, Ramsey et al. (2019) analysed public investment in film and episodic drama production in Northern Ireland. Using data compiled by the British Film Institute (BFI) for the 2015-2016 fiscal year, they noted the scale of total screen subsidy in the UK and how NI enjoys the highest level of country-specific funding on a per capita basis within the UK (Ramsey et al., 2019, p. 849-851). In this section, I draw on additional industry data to build on this observation and compare, to the extent the limited data allows, the scale of the two Irish screen industries and the public subsidies they receive.

Table 1 revisits the country-specific statistic for 2017-2019 period using BFI regional public investment data, showing that NI continues to receive the largest subsidy in per capita terms (£8.16 on average over the period). As the table also shows, however, country-specific funding amounts to only a small fraction (8%) of total subsidies available, so it is not reflective of the overall spread of investment through the UK regions. Taking all public funding into account, the UK per capita average (£11.56) is considerably higher than the NI-specific figure. Furthermore, as about three quarters of film and major television drama production in the UK takes place in the Metro London region (Figure 2), it is likely that a similar proportion of overall funding flows to this area. Indeed, as Figure 2 demonstrates, a total of 92% of film and high-end television drama spending between 2017–2019

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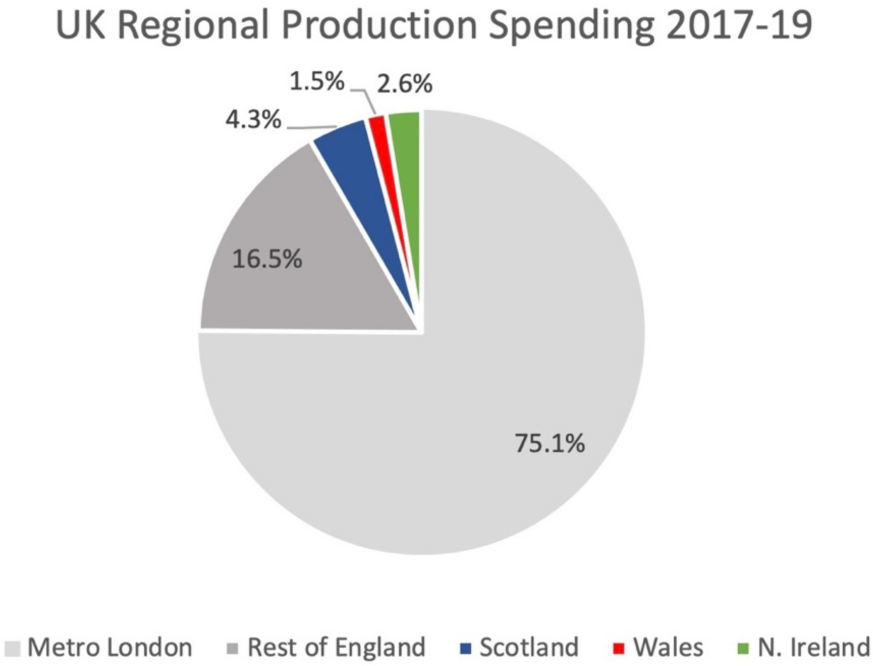
took place in Metro London and the Rest of England. The proportions for film employment are similar. With only 2.6% of overall UK spend, the challenge to make NI the most important production region outside of London (and Dublin) seems formidable.

Figure 2: Combined FTR/HETV production spending 2017-2019 (Source: Extrapolated from Olsberg-SPI, 2021)



A more thorough analysis of the NI region's place within the UK firmament is beyond this paper's scope. As the focus is on the screen production ecology on the island of Ireland, a more relevant comparison is between the North and the Republic. For this analysis, I estimate total public funding for production in each jurisdiction based on a combination of tax credits, NIS/Screen Ireland production funds, and funding provided to the independent production sector from public service television commissions[6].

The analysis covers 2017-2019, a period chosen mainly because region-specific UK tax credit data is available for these years. The period provides a useful benchmark as it directly precedes the Covid-19 disruptions that affected production levels. As Table 3 shows, public funding for NI screen production comes mainly from the various schemes operated by NIS, the UK tax credit, and local production spending by BBC Northern Ireland, the single most important source (ITV does not provide details on programming budgets for its constituent regional companies). In RoI, the Section 481 tax credit is the most important source, followed by independent television production funding, with Screen Ireland/IFB production funds contributing a much smaller proportion of the total.

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Table 3: RoI vs NI production spend 2017-2019 (Sources: BFI, Olsberg-SPI, BBC, NIS, SI, WDRC, Revenue, RTÉ, BAI)

	2017	*2018*	*2019*	*Avg.*
NI	**€m**	**€m**	**€m**	
NIS funding	20.0	20.6	21.4	20.7
N. Ireland tax credits (est.)	35.5	21.3	7.8	21.6
BBC NI local TV spend	34.9	32.8	37.6	35.1
Total	**90.4**	**74.7**	**66.8**	**77.3**
RoI				
IFB funding	12.8	13.2	13.6	13.2
WRAP fund	0	0.6	0.5	0.4
Section 481	100.0	42.0	110.8	82.3
IPU TV spend	38.9	36.0	39.2	38.0
TG4 commissions	18.9	21.3	20.7	20.3
BAI Sound and Vision (TV/Film)	10.2	10.6	10.4	10.4
Total	**180.8**	**123.8**	**195.1**	**166.5**
All-Ireland total	271.2	198.5	261.9	**243.8**

Overall, the RoI industry is roughly twice the size of the NI industry when measured in this way. In both jurisdictions, of course, all major funding strands combine to create a production ecology that cannot be easily separated into distinct film, television and other screen production sub-sectors. This is because in relatively small audiovisual production markets like those in each Irish jurisdiction, screen workers and production companies tend to operate across film, TV and other market segments and often across borders, so that film and television production can effectively function as a single activity, even though budget and wage levels might vary considerably between (and indeed within) each sub-sector. (See Barton and Murphy (2020; 2022) and O'Hagan et al. (2020) for an extensive analysis of Irish screen worker mobility between different activities and market sectors.)

A consideration of funding sources available from television and tax credits, then, allows a more nuanced appreciation of overall regional funding than the country-specific figures in Table 1. It should be noted however that the period in question includes the latter end of the *Game of Thrones* era, which ended when HBO departed NI in the summer of 2018. The industry has struggled to replace this series, and production spending declined steeply in its wake. Considered on an all-Ireland level,

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a sharp increase in 2019 production levels in RoI makes up for NI's decline. While it is clear that both jurisdictions demonstrated considerable volatility during the period, the volatility is less apparent at an all-island level, suggesting that a more cooperative approach to screen production might have benefits on both sides of the border.

The aim of the subsidy

Screen Ireland has a remit to 'assist and encourage by any means it considers appropriate the making of films in the State and the development of an industry in the State for the making of films' (Irish Film Board Act, s4, (1)). The organisation was constituted as a semi-autonomous agency of the Department of Industry and Commerce, whose minister appoints its seven Board members. Its largely *industrial* focus is tempered by a *cultural* objective: 'In so far as it considers it appropriate, the Board shall have regard to the need for the expression of national culture through the medium of film' (Irish Film Board Act, s4, (2)).

Leaving aside the considerable flexibility afforded Screen Ireland to design 'appropriate' policy instruments, the legislation clearly distinguished between industry (economic) development and cultural expression, a dual remit that remains today, and one that suggests that economic and cultural objectives cannot be easily separated in a binary fashion. Screen Ireland funding principles explicitly aim to foster 'original' and 'high-quality' projects that 'tell Irish stories, drawing on and depicting Ireland's culture, history [and] way of life (Screen Ireland, 2024). There is equal emphasis on the need to develop Irish talent, create employment and develop the industry through inward investment. In recent years, in response to substantial criticism (e.g., Liddy, 2016; 2020a), there has been considerable emphasis on improving training, increasing gender equality, and addressing wider issues of class and ethnic diversity within Irish film crews. The imperative to 'develop an industry in the State' for screen production had succeeded in building an industry capable of producing increasing volumes of indigenous content and servicing international producers. Yet it is clear from the establishment of recent initiatives such as Screen Ireland's POV scheme, aimed at developing more female talent, that the industry had been less successful in ensuring equality of access to the employment and entrepreneurial activities generated.

RoI's Section 481 tax legislation makes similar references to culture and economics, requiring applicants to demonstrate how their project will 'either or both' promote the national culture and/or stimulate the film industry through quality employment and other means (DCHG, 2019, p. 3). The inclusion of the term 'quality' in relation to the employment generated by the tax credit is important. As an institutional support of good pay, working conditions, and (presumably) workforce diversity, the requirement gives trade unions and other film worker organisations considerable leverage in industrial relations. This is because the tax credit, as a form of state aid, can only exist if it continues to be exempted (on cultural and industry development grounds) from EU limitations on state aid to industry. Producers and production companies, who depend heavily on the subsidy, cannot afford to ignore criticisms of deteriorating employment conditions, as was recently demonstrated when criticisms of employment practices from within the industry catalysed a renewed interest in labour organisation and a renegotiation of the 2020 'Shooting Crew' agreement (Murphy, 2020).

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While Northern Ireland Screen has a dual industrial/cultural remit akin to Screen Ireland's, its aspirations are on the surface more overtly commercial. Its board has up to sixteen directors, some nominated by government departments, some by industry bodies, others co-opted by the Board itself. It is funded mainly by the Department for Communities, Department for the Economy, the UK Dept for Culture, Media and Sport, and the Arts Council of Northern Ireland. According to its latest annual report,

> Northern Ireland Screen is committed to maximising the economic, cultural and educational value of the screen industry for the benefit of Northern Ireland. This goal is pursued through our mission to accelerate the development of a dynamic and sustainable screen industry and culture in Northern Ireland (NIS, 2021, p. 3).

While these commitments emphasise broad cultural and economic objectives like those of Screen Ireland, there is less emphasis on employment quality, a notable difference between stated screen policy objectives north and south. Although the notion of a 'dynamic and sustainable screen industry' arguably includes such an objective, the emphasis is considerably less direct. Productions seeking subsidy under the UK FTR and HETV tax credits must pass a cultural test, and while the test applies a points system that takes location of production and the national origin of key creatives into account, there is no overriding equivalent to Section 481's 'either or both' definition that effectively equates cultural value with industry development and employment quality. In this regard RoI places far more direct emphasis on employment, reflecting the historic *raison d'etre* of wider foreign direct investment in the economy—to address what O'Connor (2010) calls a 'structural failure' of Irish economic planning since independence: the provision of adequate and sustainable levels of employment (see also Brodie in this issue).

It is quite striking that the RoI's foregrounding of employment quality as a crucial element of the 'industry test' is not accompanied anywhere in the legislation by a coherent definition of 'quality employment'. While all projects seeking the tax credit must be certified as compliant by the Minister for Culture, there is no requirement to publicise how (and why) certified projects contribute to culture and/or industry. And while EU state aid regulations require the publication of tax credit details on a per-project basis, only partial information is released (e.g., Revenue Commissioners, 2024).

As a result of these shortcomings, one can only assess the quality of Irish screen employment through analysis of occasional industry surveys and sporadic academic research into this question. To date, there have been two industry surveys, published in 2008 and 2023. The more recent of these, carried out by consultants Olsberg SPI (2023), evaluated employment quality using a survey structured around Cohen's (2020) 'Good Jobs' model. While we do not have room for a detailed analysis of the survey, Olsberg SPI reported high average income (over €57,000, well above the national average of €45,000, although this is partially achieved through long working hours). Employment stability was evaluated in a few ways, including career length, with more than half of all respondents working in the industry for ten or more years. Health and Safety measures were found to be high (although this was measured almost exclusively in terms of Covid-19 protocols, avoiding other criticisms). In general, screen workers reported high levels of work satisfaction, and the survey appeared to demonstrate a high level of employment quality.

The survey would appear then to be at odds with numerous critical assessments of work in the creative industries in recent times, many of which have highlighted issues like casualisation,

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insecurity, self-exploitation and the need for extreme flexibility in creative work (see Hesmondhalgh and Baker, 2011, for an overview). A significant strand of recent Irish research echoes these concerns. Barton and Murphy (2020; 2022) link career stability with access to public funding, supplementary employment opportunities, favourable geographic location, and supportive professional networks. A growing body of gender-focused work highlights persistent structural inequalities faced by women screen workers. These include difficulties negotiating male dominated networks (O'Brien, 2014), unfair societal expectations about childcare responsibilities (O'Brien, 2019), and evidence of unconscious bias among ostensibly gender-neutral funding organisations (Liddy, 2016; 2020b).

While Olsberg SPI's industry survey offers a counterpoint to these studies (and indeed the earlier 2007 industry study by PriceWaterhouse Coopers, which revealed low average wage levels), their analysis seems at best unaware of this recent academic research. Indeed, the more positive findings of the Olsberg survey are conditioned by the response pattern, which included a very high relative participation (about one in three) from producers and production department workers. As producers are effectively employers, and the production department includes several management roles (location manager, unit manager, production manager etc.), these jobs are perhaps more intrinsically and financially rewarding than the 'rank and file' film grades, with a potential skewing of survey results.

In relation to employment quality in Northern Ireland, there is some engagement with this question in the independent evaluations of Northern Ireland Screen's Strategic Plans. For instance, the evaluation of NIS's 'Opening Doors' 2014-2018 strategy concluded that the strategy had resulted in more people working in 'better' jobs. However, the evaluation was based solely on wages with little or no consideration of other aspects of the work (Oxford/Gilchrist, 2020, p. 61).

Concluding thoughts

In conclusion, it is important to consider whether the employment generated by the substantial public subsidies enjoyed by the screen industries—even when it is of a good quality—is sufficient in scale. While much of our discussion is based on 2017-2019 data, the push for higher levels of production (incentivised by higher absolute levels of subsidy) has continued. 2021 saw record production levels in RoI: over €515 million of spending, incentivised by over €168 million of tax credits[7]. Can we justify such high subsidy levels? Even if the employment created is of high quality, tax credits represent funds foregone by state Exchequers that could have been spent in other areas. The scale of the RoI tax credit seems high in relation to the amount of direct employment sustained: only 3,265 FTE jobs, according to the latest cost benefit analysis of the scheme (Dept. of Finance, 2022, Appendix I, p. 29). That same analysis computed a net exchequer loss of €78 million in 2020, in stark contrast to the net economic benefits routinely claimed for Section 481 scheme by industry boosters[8]. As Ramsey et al. (2019) have pointed out in relation to *Game of Thrones* subsidies, international screen incentives underwrite risk-free productions made by some of the biggest and most profitable corporations in the world: HBO, Apple, Disney and others. The record subsidy levels available in Ireland are happening at a time of full employment—so there is little reason at present to assume a smaller screen industry would mean less overall employment in the economy. The subsidies also

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take place at a time when the state struggles with social spending in many areas like housing and healthcare, raising further questions about fiscal priorities.

NI Screen's cultural and economic effectiveness is regularly questioned via a requirement for independent evaluation of the agency's performance, usually measured against the objectives it sets itself in its four-year strategic plans. There does not appear to be a similar evaluative process for RoI screen bodies, placing a greater onus on critical industry observers (from academia and elsewhere) to hold Screen Ireland and the framers of tax policy to account. However, this task is made difficult due to a paucity of routinely released, independently evaluated data. While the Revenue Commissioners release limited annual data on tax credit allocations, and Screen Ireland publishes basic headline annual figures, there is no standardisation of the type of data released. Industry expenditure totals are provided for film, TV drama, animation and documentary, but there is little useful detail. Despite the legislative focus on employment quality, it is frustrating that labour expenditure (a feature of Screen Ireland 'industry snapshot' data until 2019) is no longer published. That Screen Ireland's omission of this data has gone largely unnoticed is troubling for the labour movement. While it reduces the transparency of industry funding, it also suggests a lack of interest in the value of the craft contribution of screen workers—reflecting, perhaps, a general devaluation of labour and its contribution to society, industry and culture more generally.

Such data gaps make the work of industry critics more difficult and are doubly frustrating because it is clear that the relevant data is routinely collected, for the operation of the tax credit system would not be possible otherwise. Failure to publish this information in a reliable and standardised manner is an odd oversight that deserves an explanation, because both the formation and evaluation of Irish screen policy require the availability of good, reliable long-term data. The tendency in the RoI has been towards a reduction rather than an expansion of publishing these figures. And although data for NI can be difficult to extract from general UK figures, it is certainly the case that the UK (via the British Film Institute's statistics department) publishes extensive annual industry data on production, public financing, reception, employment, economic impact and a wealth of other areas. While the annual statistics published by Screen Ireland are welcome, there is no reason that more extensive data cannot be produced, in the interests of transparency but also to facilitate informed, evidence-based screen policy formation and evaluation.

Finally, what of Northern Ireland Screen's ambition to be the second strongest screen production region in the UK and Ireland? As Table 1 above shows, the Northern Ireland industry had by 2017 already surpassed Scotland and Wales, at least as measured by dedicated country-specific, per capita public investment in film. But despite the high levels of funding enjoyed by NIS as a dedicated screen agency, total production spending in Northern Ireland, at 2.6% (Figure 2), is a slight underperformance as NI comprises 2.8% of the total UK population. As already suggested, NI as a small production region of the UK will always be subject to instabilities due to overdependence on large single projects. The high spend on *Game of Thrones* had propelled NI to a 12% share of UK TV drama spending, but HBO's departure saw this share drop to 1.4% in 2019—a sharp illustration of the overdependence of the NI industry on a single production (BFI, 2021, p. 154).

It is worth noting that the 2023 Hollywood writers and actors strike halted production on several major US productions in Ireland, revealing the vulnerability of the outward-looking Irish industries to international developments. One of the first productions to be shut down was the *Blade Runner 2099*

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television series in development in Belfast[9]. The series subsequently relocated to the Czech Republic, ending hopes that the project might return NI production to previous levels[10]. But the NI region will always have to be wary of such large swings, which allows for a slightly provocative note on which to end this article. Instead of competing with RoI, could the NI industry more sustainably align itself with its RoI counterpart, in the interests of creating a stronger all-island sub-region of the UK and Ireland? Arguably, NI/RoI already functions as a supranational region servicing the global anglophone market, with some productions (*Game of Thrones* included) accessing subsidy in both areas. The screen industries in both Irish jurisdictions are already highly aware of how easily production can migrate across the border: in 2009, four years before UK HETV subsidy was created, HBO executives considered locating *Game of Thrones* in the RoI, forcing a revision of NI Screen policy to deliver additional incentives including free use of the Paint Hall studios (Cogent, 2012, p. 84). A few years later *Dracula Untold* (2013), earmarked for Ardmore Studios, also departed to the North (Webb, 2013).

While the international competition inherent in the capture of mobile capital through subsidies continues to be a feature of the global screen industry, the emphasis on North-South cooperation that forms Strand 2 of the Good Friday agreement provides a useful framework for building increased cooperation between the Irish screen jurisdictions (Northern Ireland Office, 1998). There is already a substantial history of co-production, and North-South screen collaboration could perhaps be further encouraged through policy measures still emerging from the 1998 Good Friday Agreement. One possible avenue for exploring this question might be the Shared Island Initiative, launched in 2020 with a budget of one billion euros through to 2030 to ‘enhance cooperation, connection and mutual understanding on the island’. The project has been dismissed in some quarters as a ‘slush fund for a United Ireland’ (see McGee, 2023), but its scope includes broad cultural as well as economic objectives, and it is already being used to fund cross-border, cross-community collaborations via the Creative Ireland Programme (Department of An Taoiseach, 2024). While it would be far from straightforward to scale such collaborations to the level required for screen production, perhaps this is a question that could be further explored through the Shared Island Initiative’s research funding provisions.

The Irish border—from a production mobility point of view—is obviously fluid. Could it disappear altogether? The positive link between the NI industry’s expansion and the Good Friday Agreement, coupled with major population demographic changes and Brexit, means there is increasing (if yet unlikely) momentum towards the border poll that might herald a reunited Ireland (Carroll, 2022). Perhaps this is a possibility for which both Irish screen industries should begin to prepare.

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Endnotes

[1] For this article, the screen production industries comprise feature film, television drama, animation and documentary for the broadcast, theatrical and streaming markets.

[2] Coimisiún na Meán was established in 2023 and absorbed the functions of the BAI. The latter's Broadcasting Funding Scheme awarded grants funded through a portion (7%) of the TV licence fee.

[3] The Shared Island Initiative is a RoI funding programme aimed at 'all island' partnerships. See https://www.gov.ie/en/publication/f9f9a-building-a-shared-island/

[4] Employment and GVA figures extrapolated from Olsberg-SPI (2017, p. 19, 23). Excludes cinema employment and the radio, games, and commercials sectors, all of which were included in Olsberg-SPI's overall breakdown producing total direct employment of 10,560 and GVA of €523 million.

[5] In the same year that NIS made its regional ambitions known, over 76% of production spending on films receiving tax credits took place in the Metro London region, with a corresponding figure of 66% for television drama (Olsberg-SPI 2021, p. 154, 158).

[6] This is a more expansive set of figures than those in Table 1 and Figure 2, which do not include total television commissions beyond the HETV category.

[7] Figures supplied to author via email from Revenue Commissioners. Comparable figures are not yet available for NI.

[8] For example, annual financial reviews conducted by IBEC between 1993 and 2010 invariably concluded that tax incentives generated a net exchequer gain (e.g., Audiovisual Federation, 2011, p.12).

[9] https://www.bbc.com/news/uk-northern-ireland-63206462; https://www.bbc.com/news/uk-northern-ireland-65715949

[10] https://www.screendaily.com/news/prime-videos-blade-runner-2099-series-confirms-june-shoot-in-prague/5190883.article

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