Connecting the regional and the global in the UK film industry

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Since 2000, policy makers have sought to boost the global competitiveness of the film industry in the United Kingdom and to enhance its capacity for endogenous development through the territorialisation of filmmaking as an economic and cultural activity at the regional level. National bodies, such as the UK Film Council, sell the UK as a 'film hub' to the global film industry, while responsibility for implementation of film policy has been devolved to the regional screen agencies (Redfern 2007). The issue of scale and the interaction between actors at different scales in the UK film industry has, therefore, become central to understanding the development of the British film industry.

The purpose of this article is to explore the nature of these interactions by focussing on feature film production at the regional level within the context of different territorial scales. Specifically, I examine the relationship between production clusters in order to gauge the level of autonomy of a region by enumerating the types of films produced and by analysing their spatial organisation. I begin by locating the creation of the regional screen agencies within the broader regionalisation of the cultural and creative industries in the UK under New Labour. Next, I place regional film policy in the contexts of national film industry of the UK and the global film industry to establish how 'so-called film industry clusters or industrial districts are embedded in, and shaped by, a complex web of multi-scalar network connections' (Coe and Johns 2004: 188). Finally, I look at the connections between productions to shoot shot in three UK regions – Northern Ireland, Scotland, and the South West of England – and other film production/creative industries centres both within the UK and beyond from 2004 to 2006.

The regionalisation of film policy in the United Kingdom

The regionalization of film policy has been framed within a broader regionalization of the cultural and creative industries that has effected a shift from a national to a regional basis for cultural industries policy making in the UK, and which has led to the formation of a regional cultural industries agenda (Pratt 2004). This process was initiated by the publication of the *Creative Industries Mapping Document* by the Department of Culture, Media, and Sport (1998), which analyzed the contribution of the cultural industries to the UK economy; and was followed by a range of institutional interventions that seek to increase the productive capacity of the sector as a path to endogenous growth. These interventions were implemented through the appointment of a senior official with responsibility for the cultural industries in the economic development remit of the Regional Development Agencies; the placing of a DCMS representative in the Government Offices for the Regions; and the creation of Regional Cultural Consortiums in England in 2000. These consortiums replaced the existing cultural forums, and are responsible for representing the cultural and creative industries (including tourism, heritage, and sport), and to create links within the sector between firms, local government, Regional Arts Boards, and the Regional Development Agencies for the delivery of cultural services (see Lutz 2006).

The impact of the regionalisation of cultural policy has been to transform the objectives of policymakers and the delivery of support to the film industry in the UK. Regional film policy previously had been the responsibility of the Arts Council of England and the Regional Arts Boards, the arts councils of Scotland, Wales, and Northern Ireland, and the British Film Institute (BFI). These bodies provided limited financial assistance to filmmakers, with an emphasis on supporting non-commercial productions and video art (McIntyre 1996). By the late-1990s, this arrangement was out of step with the efforts of policymakers to develop a globally successful commercial film industry; and its inadequacies were exposed by a consultation process on film in the English regions initiated by the DCMS and published in 2000 by the newly-created UK Film Council (2000). This process revealed that the film industry at the regional scale was characterised by a sense of alienation felt by regional film delivery agencies with regard to centralised national bodies, and a history of institutional tension and disorganisation in the relationship between the BFI, the arts councils, and the Regional Arts Boards. The creation of a single body to represent the industry in the form of the UK Film Council went some way to addressing these problems, and the Council has assumed responsibility for the planning and funding functions that had been held by the arts councils, and the BFI.

The signature recommendation of the report on film in the English regions was the creation of a Regional Investment Fund for England administered by the UK Film Council. Amongst its provisions, the Fund included up to £250,000 for the development of integrated planning models and up to £1 million for the establishment of regional screen agencies (RSAs) charged with ensuring 'integrated planning for film in England along government Office and Regional Development Agency boundaries' (UK Film Council 2000: 42). The inspiration for the RSAs came from developments in the Celtic periphery of the UK. Alienation from London-based decision making and a need to restructure a range of fragmented and dissociated institutions led to the creation of single bodies to represent and co-ordinate the film industry in Scotland, Wales, and Northern Ireland in 1997 (Petrie 2000). In extending this process of decentralisation to England, the bottom-up regionalism of film policy in the Celtic periphery has been co-opted into New Labour's top-down regionalisation of film policy.

The establishment of the RSAs represents an attempt to remedy long-standing weaknesses of the film industry in the UK that emerged in the early-twentieth century. Baillieu and Goodchild (2002: 152) characterise British film production as 'a cottage industry, with small independent producers struggling to survive, and, almost against the odds, occasionally producing a hit.' The sector is fragmented, with undercapitalised producers forced to sell distribution rights to raise finance and to rush into production with underdeveloped scripts. Distribution and exhibition are dominated by global media empires, restricting the opportunities for British films to reach audiences in the domestic market; and, at the same time, the UK lacks distributors with access to overseas markets. These problems are recognised at the national level by the DCMS, the UK Film Council, and the BFI; but since 2000 policymakers have attempted to formulate solutions at the regional level, with responsibility for delivering national policy objectives devolved to the RSAs. The RSAs combine this role with considerable autonomy in their individual regions with a view to encouraging a sense of community and identity, developing individual businesses and a sustainable industry, and encouraging the growth of skills and learning.

Policies for film production at the regional level seek to territorialise filmmaking through the promotion and development of assets that can be accessed within a specific geographic context (the region). The RSAs promote the existing resources in a region (locations for filming, the range and depth of the skills base, the range of production and post-production facilities) to producers nationally and internationally. This is typically achieved through the creation of databases that make the relevant information available to producers, as well as allowing the RSA to gather data on the industry within defined a region. In order to add to these resources, the RSAs seek to overcome the fragmentation of the film industry through the stimulation of 'useful agglomeration effects that would otherwise be undersupplied or dissipated in the local economy' (Power and Scott 2004: 9). The predominance of micro-businesses, information poor firms, and the perceived high-risk nature of production have all been identified as obstacles for growth in the screen sector (South West Screen 2004), and the RSAs promote collective competitive advantage by providing a framework for the creation of inter-firm relationships that are intended to form the basis for sustainable forums, networks, and clusters. The significance of this element of regional film policy has been enhanced following a government report on business clusters in the UK economy (Department of Trade and Industry 2001), and by a commitment to the creation of cultural clusters on the part of the DCMS in a recent report on the UK's creative and cultural industries (Department of Culture, Media, and Sport 2008).

The territorialisation of filmmaking is a strictly bounded process, and although regional film policy in the UK must be understood in the context of the global film industry, the eligibility criteria for the activities of the RSAs are intended to develop those assets that 'result in enduring commitments to particular places, which can in turn be a source of competitive advantage and so serve to reinforce those commitments' (Cox 1997: 5). The need to reinforce the presence of the film industry at the regional level is intended to overcome the perception of the creative industries in general, and (despite is long history) the film industry in particular, as new and lacking a 'historical legacy' of economic significance. The spatially bounded programmes of the RSAs allows for the promotion of films through their specific economic and/or cultural relationship with the region – as either production originating in a region or coming to a region to access skills and services. This is intended to develop a broad-based film culture in which filmmaking is perceived as a significant economic and cultural activity.

Regional film policy beyond the region

Regional film policy in the UK has sought to develop the production capacity of the British film industry at a specific territorial scale through the creation of localised production clusters. These clusters exist within networks extending beyond the geographical constraints of the RSAs, and so it is necessary to contextualise how such clusters are embedded in a film industry that operates at the national and global scale.

The importance of these connections is derived from the limited ability of firms at the regional level to make autonomous decisions. Rather, this decision-making power that lies in the hands of a small number of global media companies based in a handful of global city-regions.

> The forces shaping the industry remain beyond the control and influence of local actors. The agenda is shaped by the activities of large media companies, and local or regional production industries can only struggle to adapt to the adverse conditions of this environment (Robins and Cornford 1994: 235).

While globalisation and attempts to restructure the film industry at the regional level may change the geography of production they have not fundamentally altered the *governance* of the film industry. Distribution and financing remain in the hands of the major Hollywood studios, which, through a process of conglomeration beginning in the 1960s, have now emerged as part of globalised multimedia empires. In their survey of regional production centres in the film and television industries of Canada and the UK, Coe and Johns (2004) noted that the production system was dependent upon the finance and distribution relations between global media conglomerates, who act as 'gatekeepers,' major centres that dominate national industries, and regional production clusters. The result of these relationships is that 'power within the system largely resides with those that have the resources to finance and distribute films' and that while film production is typically carried out by a localised agglomeration of small firms 'it is precisely the key finance and distribution connections that are most likely to be extra-local in nature.' Consequently, regional and local production centres are 'dependent on financial and creative decisions, and short-term inward capital flows' that originate elsewhere (Coe and Johns 2004: 194-195). In the case of the film industry in the UK, this decision making power is held by the major conglomerates, and these decisions are made in London and other global media centres (New York, Los Angeles, Paris, Tokyo).

Although regional film policy since 2000 has sought to restructure the film industry in the UK, London continues to dominate the sector in four ways. First, London has historically dominated the film industry since the early twentieth century as the major production and financing centre of the UK with the development of production facilities at the suburban limits of the capital (Twickenham, Denham, Islington, etc) and the concentration of the business in around Wardour Street in Soho, and this remains the case today. The capital accounts for over-70 per cent of all jobs in the production and distribution of film and video (Turok 2003), and the number of VAT-based enterprises in the film and video sector in the London region overwhelms that of other regions (see Table 1). The film industry in London cannot be easily separated from that of the East or South East of England, regions that are home to the major studio complexes in the UK at Pinewood and Shepperton in Surrey, and Leavesden in Hertfordshire. In total, these three regions accounted for 76% of production companies, 80% of distribution companies, and 50% of exhibition companies in the UK in 2006. London is, then, the largest production cluster in the UK and is able to distort the production sector through its gravitational pull.

TABLE 1 VAT-based enterprises (SIC 2003) in the UK motion picture industry, 2006

	Production (92.11)	Distribution (92.12)	Exhibition (92.13)	Total
Scotland	240	15	10	265
Wales	120	5	10	135
Northern Ireland	65	0	20	85
North East	65	5	5	75
North West	220	15	10	245
Yorkshire & Humber	145	10	10	65
East Midlands	105	5	10	120
West Midlands	170	15	5	190
East	310	35	25	370
South East	900	60	20	980
London	3475	235	55	3765
South West	385	15	15	415
United Kingdom	6200	410	200	6815

Source: Office of National Statistics, *UK Business: Activity, Size, and Location 2006*. London: Office of National Statistics, 2007.

Second, London is home to the industry's policy makers either in government at the DCMS and the Treasury or in semi-autonomous bodies, such as the UK Film Council. While the RSAs have improved the representation of the regions to these bodies, policy making is a London-based affair. Third, London's role as a major global financial centre also sustains its dominance – the financing of the industry is based in the City and, as such, this is where production and distribution deals are made and key creative and financial decisions are taken. Fourth, as a 'global city' London is able to attract key creative firms and personnel in a way that is not possible for the rest of the UK (Sassen 1991, Florida 2005), and is the main base for global media conglomerates whose UK (and often European) offices are based there. The net effect is that key financial and creative decisions are made in London, with productions moving out to the UK's regions to take advantage of locations and facilities, and the reduced cost of production either through the low cost of living and/or financial incentives (e.g. regional production funds), before returning to the capital for post-production, marketing, and merchandising.

London may be a major decision making centre for the British film industry, but it is also subject to the governance of the major media conglomerates that operate at the global scale. The top five distributors in the UK – 20th Century Fox, UIP, Sony Pictures, Buena Vista International, and Warner Bros. – have dominated the market with 79.7% of the total box office gross in 2004, 81.5% in 2005, and 80.3% in 2006 (UK Film Council 2007: 75). Consequently, the film industry in the UK finds itself in the position of being subject to international, and particularly Hollywood-based, firms and this has both an industrial and a creative impact on British filmmaking. As early as 1995, *The Economist* observed that,

> while Britain may have lost a national industry, it has found itself a role in a global industry, which will provide plenty of jobs even if it does not quite match up to national aspirations. Britain has become a low-wage, offshore production base for the American film industry (1995: 51).

Kim (2003) has noted that in the 1990s, British producers sought to align themselves with Hollywood distributors, and that this had a material impact on the allocation of production funding in the UK by a diverse range of organisations, which demonstrated a common preference for films that had the potential to secure an international distribution deal. British films were produced for an international audience, and their nationality a means of particularising a product in a global market. Wayne (2006) identifies an 'Atlanticist paradigm' in British film production in which British producers are forced to take a 'cultural detour' through the American domestic market. British producers cast American stars in order to secure financing from Hollywood producers and to gain an international release, while scripts are adapted to suit American audiences' conceptions of life in Britain and narrative preferences (see, for example, Wayne's discussion of *The Full Monty* [1996] and *Billy Eliot* [2001]). The habit of releasing British films in an American market first means that rather than being tailored to specifically British tastes, the distribution and exhibition of films in the UK often follows the lead of the American market, one consequence of which is that UK films are promoted as American successes. This phenomenon gives rise to unique cultural moments such as the promotion of *Four Weddings and a Funeral* (1994) in the UK as 'America's No.1 Smash comedy.' British cultural products are therefore shaped by American cultural attitudes to serve the commercial interests of Hollywood producers.

The relationship between the regional, national, and international scales in the film industry can be represented by locating which activities occur at which scale in the film value chain. For the UK, these relationships are presented in Figure 1, where the UK functions as a production hub within the global film industry and the regions of the UK function as production centres in the UK film industry.

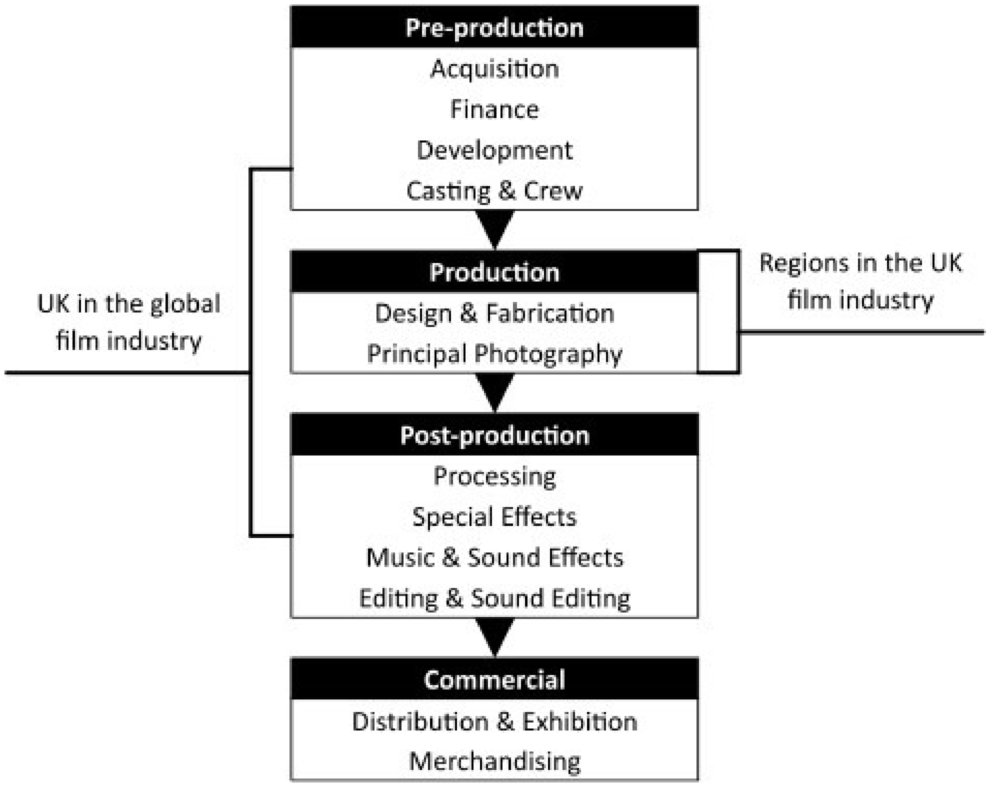


FIGURE 1 The United Kingdom in the value chain of the global film industry and the regions within the UK film industry

The need to maintain connections with national and global media centres has led the RSAs to adopt a number of strategies in promoting their screen industries beyond the limits of the region. The regions are promoted within a global market place and in the annual reports produced by the RSAs there is greater emphasis on the international or global (these terms are used interchangeably) than the national context of the region: since 2007, South West Screen has promoted the region as 'an international centre of excellence for creative media industries' (South West Screen 2008: 2), while Northern Film and Media (which serves the North East region) currently defines its mission statement as 'building a commercial and expert regional media sector with an international reputation.' Distributors and exhibitors are brought to the region in both formal (conferences, organised pitching events, training programmes, film festivals) and informal settings ('meet-and-greet' social events). Firms based within a region are supported in their efforts to access national and global distribution networks to major markets and festivals, with RSAs providing travel bursaries and other financial support to cover the costs of entering the international festival network. The space of the region has even been extended into these major decision making centres. South West Screen, for example, provides office space in Soho for firms from the region to bring firms into closer proximity to the decision making centre of the industry.

As film production has become globalised and as Hollywood productions have been ‘offshored’ and ‘outsourced’ producers look for new creative partnerships and to production centres that offer competitive advantages in the form of reduced costs and/or tax incentives (Vang and Chaminade 2007, Lorenzen 2008). In 1998, The Film Policy Review Group set the current course of UK Film policy with an explicitly internationalist agenda in order to secure a substantial portion of this market:

> Film is an international business. Even if our plans to boost the domestic market have the major impact that we intend, receipts from overseas, in the form of export earnings and inward investment, will still be of crucial importance to the UK film economy. We need to build on our strengths in these areas by creating an environment that is attractive to foreign investors and supportive of British exporters (Film Policy Review Group 1998: 42).

The UK Film Council has been the major agent for this internationalist approach and the focus on the investment at the regional level has been accompanied by the positioning of the UK as a ‘film hub’ in a global context.

> A film hub which is a natural destination for international investment. A film hub which is a natural supplier of skills and services to the global film market. A film hub which consistently creates British films that attract world-wide distribution and large audiences, while still using subsidy to support cultural productions and new talent (Parker 2002).

The regional and the global are intertwined such that national film policy in the UK therefore involves the marketing of the UK at a global level through the provision of incentives that are tied to production activity at the regional or local scale.

Connecting the British film industry

Given the transnational and the territorial dimensions of British film policy, data is needed that can quantify the degree to which film production in the UK is connected to the global film industry and the distribution of film production at the regional level. Although there has been a ‘statistical revolution’ in the UK since the mid-1980s as a range of public institutions and commercial companies have provided a wealth of economic data in the absence of government statistics (Todd 2000), *geographical* data remains limited. In terms of production, it is possible to state with some confidence the number of British films produced and the level of production investment, but a methodology is required to locate *where* in the UK this filmmaking activity takes place.

It is possible to construct a usable data set that can be utilised in mapping filmmaking activity in the UK; although with little direct geographical data available an interested researcher must, as Pratt (2004: 24) notes, work with ‘pragmatism and ingenuity.’ There are a wide range of sources that can be utilised, including the British Film Institute database of British cinema, the output of the UK Film Council research and statistics unit, the annual reports of the regional screen agencies and other institutions in the sector, and the Britfilms database hosted by the British

Council. These sources provide information on the registration of films as UK productions or co-productions, the details production companies involved, and the dates of production. Where the production companies are given but the location of their registered offices is not specified, these may be identified using the database at Companies House, production handbooks and industry guides, or the websites of the companies themselves. In addition to these sources, it is necessary to broaden the search to include 'unofficial' sources. Official sources of data in the UK only list films that are UK productions and co-productions, and exclude non-UK films to have been produced – either wholly or in part – in the UK. Using the 'power search' function on the Internet Movie Database it is possible to search for films produced in specific locations and released within a specific time period, and so the official data may be supplemented in order to gain a more rounded view of the total level production activity in a defined area. Secondary and web-based sources can then used to identify the dates of production of these films and to determine the base of the production companies involved. Though such unofficial sources can provide valuable information, the method by which this data is collected is frequently unclear and may rely on the public inputting data. This does not mean that such data is necessarily inaccurate, but it is important to ensure that such sources are used only in conjunction with official sources that can be used to assess the value and reliability of the information obtained.

The data set used here has been constructed from the information available in the databases identified above, but has been modified to exclude some films. Documentary features pose a range of methodological problems relating to the duration of production (which may exceed the time period covered here) and the use of existing or library footage. Short films are an important element of film production at the regional level, with the RSAs providing specific funding and development streams to encourage this form of cinema, but as the data on locations for short films is highly variable these films are not included here. These restrictions do, however, limit the range of productions to commercially produced fiction feature films, and so the films are consistent in their orientation to the distribution and exhibition markets. Consequently, the data set used here is smaller than that indicated by the official figures provided by the regional screen agencies. The data includes both productions that are indigenous to the home region and mobile productions that have come to the regions to source locations, production/post-production facilities, and/or personnel. The data set used here includes micro-budget digital productions, low-budget independent films, and films produced by Hollywood majors. Most of the films included in the data set have had some sort of theatrical release, though many have not had a general release while others have gone straight to DVD. What the data set does not reveal is the extent to which a production was based in a particular region or the size of the production spend. While the data on UK film production at the regional level has some significant shortcomings, it is nonetheless one of the few available indicator of the geographical distribution of film production in the UK and the efficacy of regional screen agencies in enhancing the productive capacity of the regions.

The regional, the national, and the global

Three regions were chosen for this analysis – Northern Ireland, Scotland, and the South West of England. These regions were chosen for their distance from the London/South East; and because their level of filmmaking is sufficient to provide a large enough number of films to be included in the analysis where other regions (e.g. the West Midlands, the North East) have only a few productions over a three year period. The data collected was used to address two main questions: to what extent are the three regions in question connected to the global film industry through co-productions and non-UK productions; and how are these regions connected to the global film industry and the rest of the British film industry in terms of the base of UK production companies?

The data set is comprised of a total of ninety-five fiction feature films, of which 17 were produced in Northern Ireland, 47 in Scotland, and 31 in the South West from 2004 and 2006 inclusive (see Table 2). Films were then sorted according to their involvement of UK and international producers into three categories: UK productions, in which a film's main producer(s) are from the UK and is classed as a UK film only; UK co-productions, in which a UK producer is in partnership with a non-UK producer, including majority and minority co-productions; and, non-UK productions, in a film's main producer(s) are not based in the UK and which is not classed as a UK film. From Table 2 we can identify two main trends for these categories of production. For Scotland and South West, UK productions account for approximately half the total number of films. In these regions, non-UK productions account for only a small number of films in Scotland and none in the South West. In Northern Ireland, UK productions account for less than a quarter of the total number of films, with international productions being more numerous and non-UK productions of much more significance than in the other two regions.

TABLE 2 Feature films produced in three UK regions, 2004-2006

	Northern Ireland	Scotland	South West	Total
UK Productions	4	24	16	44
UK Co-productions	6	19	15	40
Non-UK Productions	7	4	0	11
Total	17	47	31	95

Table 3 shows the nations involved in UK co-productions, and the number of connections each nation has to film production in the three regions. Scotland has connections to the widest range of co-production partners, although these are dominated by member countries of the European Union. The South West has a narrower range of partners, but, as with Scotland, the majority of connections are with other major European producing nations (France and Germany) and the United States, which is the single largest co-producing partner for both regions. Northern Ireland is the only region in which the single largest source of connections is not the

United States. The main co-producing partner for productions in Northern Ireland is the Republic of Ireland, and the region has no connections to continental Europe. Connections with producers outside North America and Europe are limited in all cases, with one each to Nigeria and South Africa, and two to Australia.

TABLE 3 Connections in UK co-productions to three regions, 2004-2006

	Northern Ireland	Scotland	South West	Total
Australia	-	1	1	2
Belgium	-	1	1	2
Canada	2	-	-	2
Denmark	1	2	-	3
France	-	6	6	12
Germany	-	5	3	8
Iceland	-	1	-	1
Italy	-	2	-	2
Lithuania	-	1	-	1
Netherlands	-	1	-	1
Nigeria	-	-	1	1
Republic of Ireland	5	3	-	8
Romania	-	1	-	1
South Africa	-	1	1	2
Spain	-	-	-	0
United States	3	8	6	17
Total	11	33	19	63

Where a co-production has more than one partner it is counted as one connection to each country.

Where a co-production is shot in more than one region it is counted as one connection to each region.

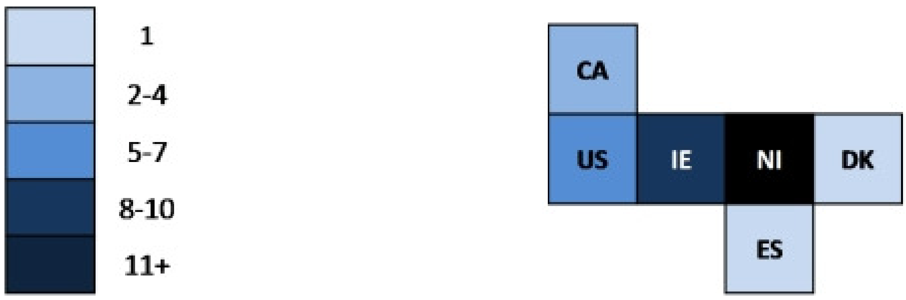
Table 4 shows that the number of non-UK productions to be located in these three regions is small: a total of eleven films accounting for twelve connections, with no films produced in the South West without the involvement of a British production company. In Scotland, the United States is the major source of productions, with one connection to Germany (in partnership with a US producer) and a single connection to a production company in Canada. The largest number of productions to come to Northern Ireland was from the Republic of Ireland, which again proved to be more significant than the two films United States (including a co-production between the US and the Republic of Ireland). There was a single production from Spain, and, taken alongside the single connection between Scotland and Germany, it is clear that the Europe is not a significant source of incoming productions to the British film industry without a UK co-producer.

TABLE 4 Connections in Non-UK autonomous productions in three regions, 2004-2006

	Northern Ireland	Scotland	South West	Total
Canada	-	1	-	1
Germany	-	1	-	1
Republic of Ireland	4	-	-	4
Spain	1	-	-	1
United States	2	3	-	5
Total	7	5	0	12

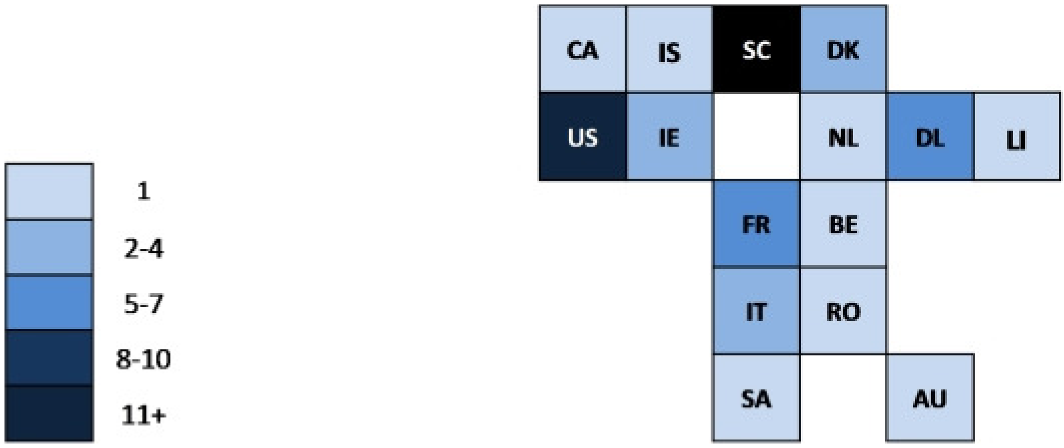
Where a co-production has more than one partner it is counted as one connection to each country.

In Figures 2 through 4 the data from Tables 3 and 4 is combined to map the connections between these regions and the global film industry, with a co-production in a region counting for one connection and a non-UK film produced within a region also counting for one connection. These maps are based on Mould (2008).



Key: CA – Canada; DK – Denmark; ES – Spain; IE – Republic of Ireland; NI – Northern Ireland; US – United States.

FIGURE 2 Connections between Northern Ireland and the global film industry



Key: AU – Australia; BE – Belgium; CA – Canada; DK – Denmark; DL – Germany; FR – France; IE – Republic of Ireland; IS – Iceland; IT – Italy; LI – Lithuania; NL – Netherlands; RO – Romania; SA – South Africa; SC – Scotland; US – United States.

FIGURE 3 Connections between Scotland and the global film industry

Key: BE – Belgium; DL – Germany; FR – France; NG – Nigeria; SA – South Africa; SW – South West; US – United States.

FIGURE 4 Connections between the South West and the global film industry

In Table 5 it is clear that UK film production in Northern Ireland is limited, with a single indigenous film plus three other productions to have originated in the UK. Comparing this data to that in Tables 3 and 4, it is evident that with six co-productions and seven non-UK films Northern Ireland's connections to overseas producers are (in simple numerical terms) of more significance than its connections to the rest of the UK. This pattern is not reflected in Scotland or the South West, where connections to the UK are equally as numerous as those to the global film industry. The registered base of production companies for productions shooting in Scotland is equally distributed between Scotland and the rest of the UK, with only a small number of films to involve a partnership between a Scotland-based producer and a producer based in another UK region. In contrast, approximately two-thirds of UK productions to shoot in the South West originate with producers based outside the region, with no partnerships between regionally-based producers and the rest of the country. From this we conclude that Scotland has been relatively successful in developing home-grown productions and attracting UK films to the region, while the South West has succeeded in attracting films to the region but has fared less well in developing home-grown productions.

TABLE 5 UK feature films produced in three UK regions, 2004-2006

	Northern Ireland	Scotland	South West
Regional production companies only	1	11	5
Regional plus other UK production companies	0	2	0
Other UK production companies only	3	11	11
Total	4	24	16

Table 6 shows that the involvement of production companies based in the three regions in UK co-productions is limited. As a film may be listed as a co-production if a sufficient level of production activity takes place within the UK allowing the film to be registered as 'British,' it is possible for a film to be a UK co-production but have no UK-based producing partner. Each region has one such film, but only in the case of Northern Ireland where the number of co-productions is small does this have a significant impact. Of a total of 19 co-productions to shoot in Scotland, only three had a Scottish production company as a partner, with a further film involving a Scottish producer along with other UK-based producers. Co-productions to shoot in Scotland are overwhelmingly based outside the region; and, in fact, in each of these fourteen films the production companies in question were registered in London. All of the co-productions to shoot in the South West involved partners based outside the region, and again these were all London-based production companies. The three co-productions to originate outside Northern Ireland all have London-based production companies. This indicates that the connections between feature film production in these regions and global film industries are, for the most part, not direct but mediated through London. The dominance of regional film production by London-based production companies is unsurprising given the extent to which the film industry in the UK is concentrated in London.

TABLE 6 UK co-productions in three UK regions, 2004-2006

	Northern Ireland	Scotland	South West
Regional production companies only	2	3	0
Regional plus other UK production companies	0	1	0
Other UK production companies only	3	14	14
No UK production company listed	1	1	1
Total	6	19	15

In light of this, it is necessary to make a distinction between feature *film production in Northern Ireland or Scotland or the South West*, which demonstrates numerous connections with the rest of the United Kingdom and the global film industry that account for a majority of productions to shoot in these regions; and *Northern Irish* or *Scottish or South West feature film production*, which is (to a significant degree) closed, with connections to the global film industry that are few in number. From looking at the UK productions and co-productions in Tables 5 and 6 we can see that from 2004 to 2006 South West feature film production comprised only five films, while total UK feature film production in this region totalled 31 films. Similarly, for Scotland in the same time period, we have a total of 43 UK films produced in the region, of which 17 can be classed as 'Scottish;' and for Northern Ireland there are 10 UK films produced in the region, but only three can be classed as 'Northern Irish.'

The results presented here provide a snapshot of feature film production in three UK regions, and the picture that emerges is one of regional production centres that remain dependent upon London as both the major centre of distribution and finance in the British film industry and as a gateway to the global industry. Regional film policy has sought to redistribute the production capacity of the UK film industry, but this has not lead to increased autonomy for the regions. Scotland has only a limited number of connections outside the main channel to London; while the autonomy of the South West is even more circumscribed. Northern Ireland, as the only part of the UK to share a border with another nation-state – the Republic of Ireland – and one with which it has string economic and cultural ties is subject to this subordination twice over. The relationships between Northern Ireland, Scotland, and the South West, London, and the global film industry are represented in Figure 5.

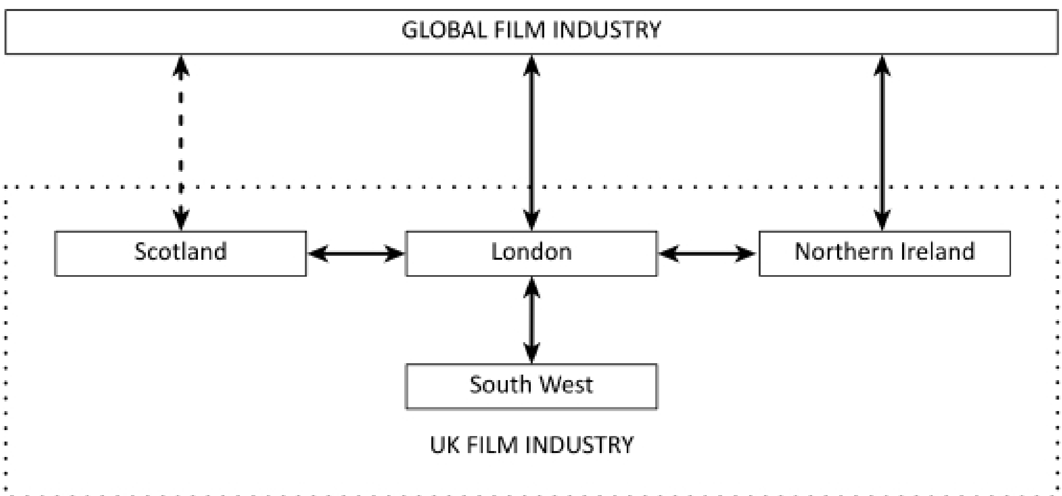


FIGURE 5 Connecting the global and the regional in the film industry in the United Kingdom, 2004 to 2006. Solid arrows indicate major connections between production centres, while dotted arrows indicate limited connections.

Conclusion

Although it is natural to take the UK film industry as a whole, as a national cinema, it is also necessary to recognise that there exist variations in the ways in which different parts of the country an interrelated with one another and with the film industry beyond the UK. As film policy in the UK is comprised of complimentary trends that operate at different territorial scales, such a multi-level approach is of increasing importance to British cinema studies. This article has approached the issue of scale by enumerating the different types of production that occur in the UK's regions, and has identified a number of trends that are: the limited nature of connections of the UK's regions to the global film industry, the role of London on mediating those connections, and the importance of non-UK productions to Northern Ireland relative to the other UK regions. These trends warrant further research by testing the conclusions and models presented above against other data on connections between centres of cultural production, by extending the analysis to the UK's other regions, and by repeating this type of survey over time to follow the ebb and flow of regional film production in a changing global industry.

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