The Fabulous East: On Peripheral Media Capitals and the Streaming Fantasy Television Genre

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Major media industries across the world are increasingly shooting in studios and locations of less wealthy nations to save money. Using the case of high-end, streaming fantasy television series, which are often produced in Central and Eastern Europe, this essay develops the concept of "peripheral media capitals," or cities that have become major sites for servicing foreign media productions, especially Hollywood productions. Based on fieldwork conducted in Budapest, Hungary, I show how peripheral media capitals across the region are at the confluence of economic, political, physical, and cultural geographies that have allowed them to establish competitive advantages in certain genres of television, particularly the high-fantasy genre. Investigating high-fantasy television production in Budapest reveals how a chain of regional peripheral media capitals must work together to service the insatiable needs of the global media industries and, through that process, attain a relatively durable competitive advantage.

Keywords: global media, media capitals, Central and Eastern Europe, media industries, fantasy television

Netflix's *The Witcher* (Brown et al., 2019–present) shot its first season primarily at Mafilms Studios near Budapest. The backlot served as an exterior for Stregobor's tower, but the internal scenes used the Jaki castle cloister near Vajdahunyad Castle in Budapest's City Park as the background. Other prominent locations near Budapest included the Szentedre Skansen History Museum and a replica of Eger Castle. However, large portions of the series were also filmed outside Hungary: The Polish castle of Ogrodzieniec was the site for the Battle of Sodden Hill in the final episode, and exteriors for the Kingdom of Meria were shot at Kreuzenstein Castle in Austria. Meanwhile, many of the more spectacular backdrops, including desert scenes and the Brokilon Forests, were located in the Canary Islands.

The dizzying political, economic, and cultural geographies of *The Witcher*'s (Brown et al., 2019–present) production have become commonplace for series produced by large SVoDs in the region. *Halo* (Bathurst

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et al., 2022–present), the TV series, a futuristic fantasy, shot its first season in and around Budapest and the Central and Eastern European (CEE) region during COVID restrictions in 2020 and 2021. Amazon Prime's *Wheel of Time* (Judkins et al., 2021–present), which is legally located in Prague, also traveled the region and the continent to bring the locations of the *Wheel of Time* book series to the screen. In the past five years in Hungary, six of the 10 most expensive foreign productions were television series, with a single nine-episode season of *Halo* (Bathurst et al., 2022–present), spending more than $125 million in Budapest (National Film Institute Hungary, n.d.). By contrast, the feature film *Dune* (Villeneuve, 2021), which was shot mainly at Origo Studios, spent less than $100 million of its total $165 million budget in Hungary.

How do we explain the trend toward shooting prestigious, high-end fantasy series in CEE? How sustainable is this trend? Do peripheral media capitals like Budapest and Prague possess any unique strengths in streaming fantasy series production that make them desirable locations? To what extent might cooperation among peripheral media capitals contribute to their generic competitive advantages, and how replicable might this model be for peripheral media capitals elsewhere?

The production of streaming fantasy series in CEE demonstrates how media production service industries in major world cities, or "peripheral media capitals," can gain a competitive advantage in popular streaming genres. While material conditions, such as tax rebates and cheap, nonunionized labor, can create an environment that attracts global media capital, in an era of HD streaming, expertise in high-end television genres is crucial to maintaining the competitive advantage necessary for a popular production location to develop into what I call "peripheral media capital," where a large and extensive local production industry services film, television, and video production from around the world. Production companies in peripheral media capitals, such as Budapest, are actively involved in producing industry discourses that link the appeal of a genre like high fantasy to local geographic features and cultural allusions that are difficult to find elsewhere. With the high-fantasy genre, however, the demands of production outstrip the capacity of any single peripheral media capital in CEE to service a single production, much less the growing number of high-fantasy series seeking to shoot there. Consequently, it makes sense to think of the peripheral media capitals of CEE as a regional chain of production hubs, where each depends on the other for its success. The resulting media geography that this case reveals is one where regional identities and production capacities are as important as individual media capitals.

Research for this article comes from 10 months of fieldwork in Budapest, including interviews with 24 people working in the production services industry there, many of whom were interviewed multiple times. Interviewees included owners of major production companies in Budapest; production workers from several professions, especially production managers and location managers; and several members of the Hungarian National Film Institute. I also reviewed English and Hungarian trade journal articles related to foreign media production in CEE and compiled a database of international television series shot in CEE between 2011 and 2022 using the Internet Movie Database.

In what follows, I lay out the general category and conditions of peripheral media capitals in CEE, the genres of television that have typically been shot in the region, and the growth of fantasy series production over the past five years. Next, I focus on a case study of the high-fantasy subgenre, specifically on how Budapest's production services companies use unique shooting locations and broader cultural

associations of CEE to shape industry discourses about the high-fantasy genre in a manner that benefits the region's peripheral media capitals.

Defining Peripheral Media Capitals

Curtin's (2004) productive metaphor of "media capital" has spurred a substantial amount of research into the strategies by which certain global cities rise to be major producers of screen media, as well as the cultural and policy consequences of that rise. One fundamental question in media capital research is what the competitive advantages are by which some cities rise to the status of global centers, while others do not.

Miller (2012) extends and modifies the media capitals metaphor by coining the term "alternative media capital" (p. 120) to describe cities in the Global South with few formal connections to the worldwide networks of global cultural industries. Focusing on media production and distribution in Lagos, Nigeria, Miller (2012) argues that the informal structures of these industries have created alternative media industries that are "near invisible to dominant ones, and governed by some very different industrial logics" (p. 120).

I focus here on an intermediary classification of media capitals that sits between "metropolitan" media capitals and alternative media capitals, the peripheral media capital. Taking my cue from Szczepanik's (2021) and Dasgupta and Imre's (2021) designation of the CEE media region as "peripheral" or "semi-peripheral," I develop the concept of peripheral media capitals using the case of high-fantasy television production in Budapest and surrounding cities. Peripheral media capitals are not major producers and distributors of media; rather, they are major sites for foreign production, where the local media industries are mainly geared toward providing services and locations for these productions.

Peripheral media capitals share several attributes that can be broken down into material conditions and sociocultural conditions (see Table 1). These conditions were gleaned from local informants, trade journal articles, and academic literature on media service industries. Material conditions, or what Goldsmith, Ward, and O'Regan (2010) call "film friendliness" include hefty tax rebates for foreign film and television productions; a large pool of highly trained, comparatively cheap, nonunionized labor; legal stability, particularly respect for contract law; governmental offices and institutes dedicated to facilitating foreign production; and access to desirable filming locations. Meanwhile, sociocultural conditions that I identified include architectural diversity that can serve the needs of a range of productions; widespread fluency in English among the population; and all high-end amenities of a world city that major stars, who come to shoot in these media capitals, demand, including five-star hotels and Michelin-rated restaurants. In addition, in the list of sociocultural conditions, I included locations with global associations that fit the thematic needs of particular successful global genres. Several of the peripheral media capitals in CEE, for instance, specialize in servicing vampire-themed films and series because of ready access to abandoned or decrepit medieval castles. As HDTV has led to deeper, more elaborate, and more realistic backgrounds in series, the connotations of those backgrounds have become more central to a series' narrative themes. In *The Witcher* (Brown et al., 2019–present), for instance, different settings become indexes of the kinds of dangers and themes we can expect to encounter there (Aroni, 2019).

Table 1. Conditions of Peripheral Media Capitals.

Material Conditions	Sociocultural Conditions
Tax rebates for foreign producers	Architectural diversity
Highly trained, nonunionized labor	English-language workforce
Legal stability	High-end amenities
Several cutting-edge studios	Locations with global associations
Government film agencies and offices	
Unique locations	

The concept of peripheral media capital is similar to what Goldsmith and colleagues (2010) call "local Hollywoods" or those cities around the world that have successfully "pulled" Hollywood productions to their locales. Because they focus on how various types of local media businesses court Hollywood media capital, Goldsmith, Ward, and O'Regan (2010) lump together cities like Budapest and Prague, which have small national industries with minimal exports, with cities like Gold Coast and New Orleans, where internal production industries share a common language and national legal framework with major media capitals such as Sydney and Los Angeles. These "internal" peripheral media capitals mainly rely on domestic production projects for survival.

A peripheral media capital like Budapest, on the other hand, generates minimal domestic revenue but sits at the intersection of multiple flows of capital and media professionals from abroad, such as music videos from South Korea, films from Syria, and television commercials from Italy. While Hollywood productions are crucial to the reputations and operations of all local Hollywoods (Goldsmith et al., 2010, p. 195), these other foreign production projects are equally crucial. In Budapest, for instance, every major production service provider earns most of its revenue from commercials (J. Kerpel, production manager, Pioneer Stilking, personal communication, January 29, 2022). Peripheral media capitals, then, are hubs for the production of screen media of all kinds from a wide range of foreign media capitals, a fact that the term "local Hollywood" fails to fully capture.

Budapest as Peripheral Media Capital

Material Conditions

Budapest, Hungary, is the epitome of peripheral media capital. The city is currently the top film and television production center in continental Europe in terms of production spending and the hours of film and TV produced. Of course, as already alluded to, referring to productions as "shot" in Budapest when they often spend months at a time in other cities and countries is dubious and points to the limitations in our current vocabulary for dealing with the complicated media geographies at work in global media production today (cf. McNutt, 2021). Rather, foreign producers hire a local production services company, which employs local crews and studios to produce projects often shot around Europe and the world. In 2021, foreign investors spent around 200 billion Hungarian Forints (HUF) on film and television production in Hungary, or more than $600 million (Helmeczi, 2021).

Budapest has maintained its ranking as the EU's most active media hub since 2008, when it replaced the prior leader, Prague. Efforts to improve Budapest's ability to attract runaway production capital began when the Hungarian Socialist government passed the Motion Picture Act and Corporate Tax Act of 2004, establishing a 20% tax rebate for foreign productions that employ local production workers. Each production receives a score depending on the percentage and type of local production workers it employs, and productions that score sufficiently high on the scale qualify for the tax incentive. The domestic production services company, meanwhile, receives a tax reduction if it donates a percentage of its revenues to the National Film Institute. Hungarian law itself takes advantage of EU free-trade regulations that have carve-outs for national cultural industries to protect European cultural diversity. Implementation of the Motion Picture Act and Corporate Tax Act was delayed until 2008, as the EU reviewed it for anticompetition and requested several changes, but ultimately the law was allowed to take effect (A. Havás, producer and former CEO of the Hungarian National Film Fund, personal communication, September 7, 2021).

Today, the tax rebate has grown to 30% of production spend in Hungary, including up to 25% of production spending outside Hungary. In other words, when *The Witcher* (Brown et al., 2019–present) travels to the Canary Islands with its Hungarian production crew, Netflix can receive the Hungarian tax rebate on its production spend in the Canary Islands as long as those costs amount to 25% or less of the total claimed production costs. The structure of the law, then, permits and even encourages productions to travel beyond Hungary. While the tax rebate is the first thing that everyone involved in production services in Budapest mentions when asked why foreign productions choose to shoot in the city, the rebate alone could never attract or hold major Hollywood productions for long. Nearby Sofia and Bratislava, for instance, offer similar tax rebates, while the mixture of corporate and individual tax rebates in Prague makes the city nearly as economically attractive as Budapest (Hundic, 2019).

In addition to tax rebates, Budapest boasts several major film studios and high-end equipment rental houses, although sufficient studio space has become a chronic problem across the region. For most high-end global productions, however, including fantasy series, studio space is not sufficient by itself: They also require extensive backlots and specific studio setups. All productions prefer to shoot in studio or on the backlot and surrounding areas because it gives them more control over the space and does not require the time and expense of getting permits for location shoots or of moving tons of equipment on flatbed trucks (G. Csoma, production manager, *HALO*, personal communication, September 16, 2021). Green-screen studios, permanent backlots, massive water tanks, and increasingly virtual sets that allow for three-dimensional, ultra-high-definition backgrounds are all requirements for peripheral media capitals to attract foreign media capital (Goldsmith et al., 2010, p. 195; A. Názér, location manager and producer, personal communication, October 19, 2021).

Of course, high-end filming of moves and TV series requires specialized production equipment, particularly lights, cameras, and lenses, which continually evolve. For peripheral media capitals to survive and compete for high-end productions, they need an extensive amount of sunk capital in equipment and studios. Given the expense of this equipment and its frequent turnover, equipment leasing companies tend to hold them and rent them out to productions when they are in need. The largest equipment company in Europe, Munich-based ARRI, has relationships with equipment rental houses across CEE, including

VisionTeam in Budapest, where film and television productions can turn for uncommon equipment (G. Rajna, producer and cofounder, Laokoon Productions, personal communication, November 12, 2021).

Finally, Hungary possesses the necessary political stability and bureaucratic effectiveness for foreign productions shooting on location in Budapest and surrounding areas. As discussed, location managers need to secure government permissions, private contracts, and utilities assessments for filming to go smoothly, and these agreements, in turn, rely on individuals and organizations that respect the legal authority of the agreements (A. Stegriu, locations manager, Iwanyk et al., 2023–present, personal communication, November 2, 2021). In Moscow, Belgrade, Minsk, and other cities further to the East, local power brokers, politicians, and landowners often show up to authorized productions, demanding additional payments and bribes (anonymous locations manager, personal communication, 2021). By contrast, in places like Warsaw, Prague, Bucharest, Zagreb, Budapest, Sofia, and Bratislava, local and national governments have made foreign media production centerpieces of their economic priorities. The Hungarian government, for instance, established a local location office in Budapest, which seamlessly facilitates approvals for shooting on government-owned properties and troubleshoots problems that arise during shooting (R. Radványi, Director, Hungarian Location Office, personal communication, January 6, 2022). Moreover, the National Film Institute employs a small army of accountants who can speedily turn around requests for tax rebates when productions are finished, saving major productions hundreds of thousands of dollars by allowing them to quickly repay loans after production (B. Bottyán, Head of Compliance, Hungarian National Film Institute, November 14, 2021).

Sociocultural Conditions

The primary sociocultural conditions that contribute to Budapest's status as a peripheral media capital are its English-language workforce, its architectural diversity, and the range of locations with global cultural associations. Because of their focus on the Australian city of Gold Coast, Goldsmith and colleagues (2010) miss the importance of an English-speaking workforce for attracting and maintaining not only Hollywood productions but productions from nearly everywhere, as English is the lingua franca of transnational media production, and foreign executives and workers from beyond Hungary inevitably work in English (Á. Havas, personal communication, June 3, 2022).

Across the dominant genres in which Budapest's production companies specialize, architectural diversity is crucial to securing major Hollywood and streaming projects, as are unique locations. Importantly, as discussed above, both architectural and natural locations need to possess ready global associations that fit the dominant themes of the production and the genre as a whole. Even when Budapest doubles for other cities in Europe and around the world, as it often does in spy dramas, the reason that foreign productions choose to shoot in Budapest is because the range of different architectural styles in the city alludes to architecture in places like Paris, Berlin, London, and Buenos Aires (J. Bihari, Production Coordinator, Mid Atlantic Productions, personal communication, August 5, 2022). Simultaneously, when Budapest stands in for Moscow, for instance, the architecture alludes to a range of geopolitical associations, depending on the time period. Obviously, shooting in each of the cities for which Budapest doubles would carry the same allusions but would also be substantially more expensive. Given the large number of spy series and films shot in the peripheral media capitals of CEE, major producers clearly see the region as architecturally well-suited to the genre. Cold War and World War II

dramas make similar use of Budapest to represent German, Soviet, British, and American locales with similar geopolitical associations. Fantasy series and historical dramas frequently use nearby castles and undeveloped wildernesses, especially forests, as common locations, which, as we will see below, alludes not only to a bygone era of royalty but Europe's multiracial past and present, which becomes a major theme, especially of fantasy series. In all these instances, although there may be small differences in locations and architectural styles among peripheral media capitals in CEE, they all possess sufficiently similar buildings and natural environments to carry these allusions.

During the era of standard-definition television, the quality of the image downplayed these locational allusions, opting instead for generic landscapes and cityscapes. As Tinic (2004) has shown regarding the location industry in Vancouver, Canada, runaway Hollywood productions and productions from elsewhere chose to shoot there because the city offers a wide range of natural and urban settings that could double for any number of places. The resulting productions, according to Tinic, tended to emphasize placelessness as backgrounds—indoor, vaguely middle-class domestic and work settings, and generic cityscapes that looked like any modern city—as productions sought to downplay or erase the evidence of where they were shot. The widespread adoption of high-definition television screens, by contrast, has led to a visual style that fetishizes visual detail, from ornate scenery to period props and spectacular settings and landscapes.

Fantasy Series, Industry Discourses, and Peripheral Media Capitals

Until now, I have invoked genres as stable and definable textual properties, but as Mittell (2004) has shown, genre definitions do not emanate from texts themselves but are the products of discourses that circulate among industry insiders, audiences, and critics, identifying which elements of discrete texts are characteristic of a specific genre. Mittell's (2004) genre histories examined genres that developed during the era of national broadcasting, but today's transnational media production environment includes multiple industrial actors from different parts of the world who collectively shape and struggle with genre definitions. For fantasy series, particularly the subgenre of high fantasy, the large SVoDs define the genre in ways that serve their corporate interests. Likewise, production service owners and workers in Budapest, working with the grain of streamers' genre definitions, highlight how the material and sociocultural conditions of the city and the region uniquely position them to fulfill the production demands of the genre. Significantly, the high-fantasy television genre did not exist until recently; it developed from the complimentary commercial interests of both the large SVoDs and the production services industries in CEE.

Fantasy Genre Discourse and Large SVoDs

Original television series have been central to the business strategies of subscription video services like HBO since the 1990s because they reduce churn. That is, popular series draw viewers week after week, unlike films, which attract one-off subscribers and encourage a cycle of subscribing to watch particular films. If a subscription service can find four of five popular series and schedule them throughout the year, subscribers are more likely to maintain their subscriptions year-round.

Of course, Netflix pioneered the scheduling strategy of simultaneous release, where entire seasons of television series become available at once. Still, given the sheer volume of screen time associated with television series—perhaps eight to 10 hours per season—they are more effective than individual films at maintaining subscriptions, and a steady stream of series throughout the year is as important for Netflix as they were for HBO during the linear distribution era.

In addition to reducing churn, television series have the potential to become tentpoles for entire media universes that can produce reliably popular additional films, television series, and games. Media universes have become central to the corporate strategies of large SVoDs to provide a reliable and consistent flow of new content. Television series are again key to developing media universes because of their capacity to retain viewers. Disney +, for instance, has built multiple series and films around its Marvel universe, while Netflix bought rights to the Millarworld universe in 2017 (Kit & McMillan, 2017). Universes provide a coherent second world populated by numerous characters and potential storylines that can feed new content to subscribers month after month and year after year, and they can also help give brand coherence to services that are otherwise so broad and deep as to have diffuse identities (Havens & Stoldt, 2022).

Fantasy series provide popular fodder for media universes. Disney +'s use of television series rooted in the Marvel and Star Wars universes as the core of its streaming service rollout is a good example of this trend, but most other SVoDs lack the rights to similarly well-established universes. Particularly for Netflix and Amazon Prime, popular high-fantasy novels have provided the grist for several media universes they have sought to create.

Uncovering whether and how industry discourses identify and define fantasy series is a hit-and-miss proposition, in part because media executives hold their cards close to their chests, and in part because such definitions can be so immanent to executive thinking as to be unremarkable. However, when new genres or subgenres, such as high fantasy, become salient industry categories, we can more easily see how that discourse operates. Three primary subgenres of fantasy seem to be operative in the SVoD industry: superhero, science fiction, and fantasy. Internet Movie Database (IMDB), which is a source of both fan reviews and an international forum where media professionals network (Á. Havas, personal communication, June 3, 2022), distinguishes between science fiction and fantasy at the level of genre, and between superhero and fantasy at the subgenre level. Likewise, the trade journal *Variety*, in a list of top fantasy series since *Game of Thrones* (Benioff et al., 2011–2019), identifies some of the central elements of fantasy as "magic, monsters and mighty heroes" (Moreau, 2021, para. 1). The article further distinguishes fantasy from science fiction in its discussion of *Wild Cards* (Martin, Snodgrass, & Gerardi., in production), which it calls "a sci-fi superhero series," and justifies it as relevant to the list because the series is based on novels by George R.R. Martin, author of *A Song of Ice and Fire*, the source material for *Game of Thrones* (Benioff et al., 2011–2019). Literary theorists often refer to this genre as "high fantasy" because it constructs an entirely different universe with distinct natural laws, as opposed to "low fantasy," which includes a single supernatural character in an otherwise recognizable reality (Fowkes, 2010). Meanwhile, trade journals often refer to the genre as "epic fantasy." For the sake of consistency, I refer here to the genre simply as "fantasy." In addition, since these series are designed to spawn universes that SVoDs can exploit for intellectual property across multiple media, they are bound up in additional textual categories beyond their genre. The distinction between genres, media universes, and franchises is a fruitful area for investigation but is not within the scope of this essay.

As already suggested by trade journal articles, HBO's *Game of Thrones* (Benioff et al., 2011–2019) set the standard and began the trend for present-day, high-end prestige fantasy series. At an initial per-episode cost of about $6 million, the series budget ballooned to $15 million per episode by the end of the series (Clark, 2019). While predominantly shot in Ireland and Spain, the series used several locations in Croatia as recurring backdrops, including King's Landing and Braavos. Jeff Bezos, CEO of Amazon, could be credited with developing the modern fantasy television genre when he allegedly told executives at Prime Video, "I want my *Game of Thrones*" (Baron & Schube, 2021, para. 13), resulting in the SVoD's pursuit of *Rings of Power* (Atienza et al., 2022–present), set in the *Lord of the Rings* universe, and *Wheel of Time* (Jundiks et al., 2021). Bezos's actions made fantasy series major pawns in the streaming wars, inaugurating industry-wide discourses and practices surrounding the fantasy genre. That is, if *Game of Thrones* (Benioff et al., 2011–2019) had not spawned any imitators, the current fantasy television genre would not have developed.

We have already seen that SVoD definitions of the fantasy genre include heroic stories of epic scale set in the mists of a legendary past. In addition, fantasy series boast A-list stars; massive budgets, casts, and production crews; extensive visual effects and multiple-location shoots, generally in CEE; and 8- to 10-hour-long episodes per season (Schwartzel, 2019). In addition to monsters and magic, locations are probably the most common element of the genre mentioned in trade journals. Television producer Andy Greenwald, for instance, claims that "from a production standpoint, everything they pulled off on *Thrones* someone would've told you was impossible. The sheer scale of it, the locations, the cost, the ambition of it—that blew the lid off what people were expecting" (Baron & Schube, 2021, para. 11). Industry discourse also contains a clear reference to CEE as the primary region where these series are shot. Though it comes from a critic, not an industry insider, Mike Hale (2019) of the *New York Times* noted the conventional industry trend of shooting in CEE locations as early as 2019, when he caricatured the genre in his tongue-in-cheek review of *The Witcher* (Brown et al., 2019–present): "Armies gathering in the south to attack northern kingdoms. Dragons threatened with extinction. A magic tree. Softcore nudity. Eastern European locations" (para. 2).

In summary, SVoDs, building on the strategy of HBO—a linear subscription cable channel at the time—view fantasy series as central to their business models and have spent previously unheard-of sums producing them. For our purposes, perhaps the most salient element of the fantasy genre is its reliance on location shootings in Eastern Europe, a trend that has developed for both material and sociocultural reasons.

Fantasy Genre Discourses in Budapest's Production Services Industry

While the previous section established the importance of CEE media capitals for producing SVoD fantasy series, how important are the series to the local production services industry? One way to measure their importance is by total production spend. As of 2021, *The Witcher* (Brown et al., 2019–present) and *Shadow and Bone* (Bardugo et al., 2021–present) were number eight and nine, respectively, on the list of all-time direct production spending in Budapest, each spending about $50 million (Hungarian National Film Institute, n.d.). Since then, *Shadow and Bone* (Bardugo et al., 2021–present) has wrapped shooting another season, which likely puts its total spend in Budapest above $100 million, rivaling the most expensive productions in the city's history.

Another method of exploring the importance of series production is by examining genre trends over time, both across the region and in Budapest. An examination of television series listed in IMDB as produced in

the region since 2011 reveals that series production in general has increased sharply. Of course, because of production shutdowns during COVID, the overall number for 2021 declined markedly but rebounded strongly in 2022. Fantasy series, which were almost nonexistent before 2014, became by far the dominant genre by 2021, accounting for nearly all series production in 2021. Of course, IMDB's data are not completely reliable, especially given that the database often does not distinguish between *filming* locations and the location of the *legal* registration of a production. Nevertheless, in all cases, I double-checked location designations that were unclear against trade journal reports. The resulting data set is therefore relatively reliable.

Table 2. Number of New Foreign Television Series Produced in CEE by Genre, 2011–2022.

	'11	'13	'14	'15	'16	'17	'18	'19	'20	'21	'22	TTL
War Drama				3		1	1	3	5			13
Crime Drama					2	1	2	2	2		2	11
Fantasy		1	1		1	1	3	4	2	3	3	19
Misc		1	1		1	3	1	4	2		4	17
Period Drama	1			1	1	3	1		2	1	2	12
Spy Drama	1	2	1		1		4	2	3	2	2	18
SciFi				1	1	1			2	1	4	10
Superhero							1			1	1	3
TTL	**2**	**4**	**3**	**5**	**7**	**10**	**13**	**15**	**18**	**8**	**18**	**103**

Table 2 shows the number of new foreign television series produced across the CEE region by genre since 2011. Note that series continuing production from a prior year are not included in these numbers, only series that began shooting in the designated year. Fantasy series were once a trickle of what was produced in CEE, but since 2018, the genre has been tied with spy dramas for the most-produced genre in the region. Table 3 reports the genre breakdown for Hungary specifically. Here, we can see that the trend toward fantasy series production in Budapest is even more pronounced than the regionwide trend we saw in Table 2.

Table 3. Number of New Foreign Television Series Produced in Hungary by Genre, 2011–2022.

	'11	'13	'14	'15	'16	'17	'18	'19	'20	'21	'22	TTL
War Drama				1					2			3
Crime Drama						1		1	1			3
Fantasy							1	1	1	2	1	6
Misc						2		1				3
Period Drama				1	1		1				1	4
Spy Thriller	1	1	1		1		2	2	1	1	1	11
SciFi					1	1					3	5
Superhero											1	1
TTL	**1**	**1**	**1**	**2**	**3**	**4**	**4**	**5**	**5**	**3**	**7**	**36**

Finally, Table 4 utilizes the IMDB database and trade journal articles to report all fantasy series production across CEE media capitals, including both new and returning series. Not only has the total number of fantasy series increased in the past three years, but the majority of series shooting in those three years are returning series with multiple seasons planned.

Table 4. Fantasy Series in Production in CEE Media Capitals, 2018–2022.

	Number of Fantasy Series in Production				
	2018	2019	2020	2021	2022
Belgrade	2		2	2	
Bratislava			1		
Bucharest			1	1	1
Budapest	1	1		3	4
Dubrovnik		1	2		1
Prague		1	1	2	2
Vilnius		1	1		1
Warsaw	1				
Total	4	4	8	8	9

Since 2019, two-thirds of all fantasy series produced in the region have been made for SVoDs, while before 2019, only two fantasy series had been produced in the region: *Game of Thrones* (Benioff et al., 2011–2019) and a *Britannia* (Butterworth et al., 2017–2021), an Epix series. Clearly, the regionwide trend is for an increase in the number of high-end fantasy series produced by large SVoDs, and this trend is particularly noticeable in Budapest, where all but one fantasy series, a Swedish limited series titled *Home Invasion* (DiPietro, 2021–present), have been produced by large SVoDs.

Material and Sociocultural Conditions of SVoD Fantasy Production in Budapest

Several material conditions of contemporary SVoD fantasy series lend themselves to production in Budapest and the surrounding media capitals. While these conditions are important to the discursive production of Budapest as an ideal place to shoot high-end content of all kinds, none relate specifically to industry discourse about the fantasy genre. However, because material conditions are important in attracting fantasy productions, they are worth detailing in more depth.

As explained in the introduction to this article, fantasy productions require massive crews and multiple shooting locations across several countries, mainly those in Europe. Budapest has a sufficient supply of skilled production workers to service these massive productions, and local production services companies often bring in crews from other CEE media capitals to help round out their crews. Series production keeps these crews employed for 10 or 11 months out of the year, since fantasy series shoot between 8 and 10 episodes per season. Moreover, they typically return for three or more seasons, which means that, although production crew are hired on a project-by-project basis, many of them can make good salaries working on a single fantasy series (J. Cserven, supervising location manager, Mid Atlantic Productions, personal communication, April 8, 2022).

Because the nations of CEE are part of the European Union, both crew and equipment have freedom of movement across the continent, which productions located outside the EU would not enjoy. Furthermore, as mentioned in the article's introduction, *The Witcher* (Brown et al., 2019–present) traveled to the Canary Islands to shoot several scenes, a popular destination for many films and series serviced in Budapest and across the CEE region. Often, these shoots last for months at a time, requiring the local production crew to spend that time outside the country, which is particularly challenging for workers with families. When it comes to the labor conditions of production service workers, these periods of forced absence offer an important counterpoint to their otherwise comparatively good salaries (Sanson, 2014).

Beyond striking locations, local studios have backlots and studio setups that easily fit the shooting needs of fantasy series. Korda Studios in Budapest has permanent medieval villages constructed on its backlot where several fantasy series are shot (Korda Studios, n.d.), and Barrandov Studios in Prague has a similar backlot (Barrandov Studios, n.d.). Moreover, the Hungarian Film Institute's Locations Office can facilitate easy access to national parks and protected nature reserves for television productions (J. Kerpel, production manager, Pioneer Stillking, personal communication, January 29, 2022).

Finally, the visually spectacular and expensive sets, locations, and backlots where fantasy series are shot require the newest cameras, lenses, and equipment. The director of photography for *Shadow and Bone* (Bardugo et al., 2021–present), for instance, used lenses and 8K digital sensors manufactured the same year that the series began shooting, each of which costs tens of thousands of dollars. "We were able to lend the show a very classical feel and impart a lot of texture because of the way the [digital sensor] captures the lens," explained series cinematographer David Lanzenberg ("Controlling Elemental," 2021).

Turning to the sociocultural conditions that champion Budapest as a site for locating fantasy series production, we can see how the local production industry seeks to intervene in the industry discourse about fantasy genres in a manner that benefits the local market. Moreover, we can see how the selection of locations is linked to specific themes that are common in the genre, namely whiteness, racism, and hypermasculinity.

Given the history of the fantasy genre, particularly the outsized impact of J.R.R. Tolkien's Hobbit universe and the continuing use of serialized novels as source material for fantasy television series, it comes as no surprise that their stories are conventionally set in the Middle Ages in Europe, although *Shadow and Bone* (Bardugo et al., 2021–present) and *Carnival Row* (Bloom et al., 2019–2023) stretch into the 1800s, with multiple palaces, villages, rivers, forests, and open spaces serving as recurring locations. These are the sites that the *New York Times* critic quoted above ridiculed as "Eastern European locations" (Hale, 2019, para. 2). They include castles, mountains, forests, and medieval villages. Hungarian producers and location managers insist that Hungary has all these locations in spades and are within close driving distance to Budapest—a crucial consideration because the foreign crew and, especially, A-list talent insist on sleeping in their hotel rooms in Budapest rather than overnighting in the countryside (B. Kovács, locations manager, *Shadow and Bone*, Bardugo et al., 2021–present, personal communication, January 14, 2022). "Locations like old run-down castles or well-preserved castles, and woods and villages—we have all that close by," explains Julia Kerpel, a locations and production manager for *Shadow and Bone* (Bardugo et al., 2021–present; personal communication, December 10, 2021).

Informants explained that CEE media capitals were particularly superior to Western European ones for shooting natural locations because the use of wide-angle and drone shots in fantasy series demands that a large swath of land is free of all modern developments, even power lines and telephone wires. Western European cities, they claimed, were too overdeveloped for locations such as these. Similarly, several of the people I interviewed insisted that Budapest was better equipped than nearby media capitals, with these locations in close proximity to Budapest. "Prague is a beautiful city with fantastic castles," explained one of the owners of a major Budapest-based production company, "but the area around the city is so built up that it's hard to find the number of rundown castles and unspoiled natural areas that these kinds of production require." Obviously, comments such as these are fewer statements of fact than they are an effort to promote Budapest over Prague as a location for fantasy series production.

Objectively, Budapest does not have a more unspoiled wilderness in close proximity than Prague does. In fact, as we have already discussed, every fantasy production travels around the region and the continent in search of the right locations. In terms of the visual and aesthetic elements of fantasy series, it probably makes little difference whether it is located in Budapest, Prague, or other nearby media capital. David Brown, the producer of *Wheel of Time* (Judkins et al., 2021–present), initially wanted to locate the production in Budapest. He "spoke to friends in Budapest who'd worked there, and they just said, 'You won't get in' [because production schedules are so full]" (Baron & Schube, 2021, para. 18), so instead he decided to locate in Prague. Clearly, for this producer, at least the two CEE media capitals are roughly equivalent.

Instead of thinking of any one CEE media capital having an advantage over any other, it may be more accurate to think of them as having roughly equal access to the kinds of locations that fantasy series production demands. Production designers and art directors often have very specific looks when it comes to communicating the mood of a background, especially recurring places. Thus, rather than being satisfied with the nearest castle, they will often travel far and wide to find the right one, and then production travels to that location for weeks or months to shoot. In many cases, as in *The Witcher* (Brown et al., 2019–present), those castles may not be located in the same country. Both the built architecture and the natural surroundings of nations in CEE fit the inherently European mythologies of the fantasy genre. Stone castles across Europe and Western Russia, for instance, share several design similarities across centuries and differ substantially from similar kinds of fortifications outside of Europe (Kilimnik & Kholodova, 2014).

The Europeanness of fantasy series, their staging in the mists of time, and their stories of powerful heroes, monsters, and magic all anchor a set of ideological themes that are taken up in industry discourses about the genre. Anikó Imre (forthcoming) has forcefully argued that *The Witcher* (Brown et al., 2019–present), in particular, creates a fantasy space on the Eastern borders of the EU, where a sense of "white innocence" is reconstructed through the retelling of ancient histories filled with foreign dangers, yet devoid of colonialism and racism. Imre's (forthcoming) analysis of *The Witcher* (Brown et al., 2019–present) seems accurate, and such critiques of the series do not escape the producers of other fantasy genres. The showrunner for *Wheel of Time* (Brown et al., 2019–present) sought to create a non-hypermasculine, woman-centered series to counteract what he saw as an excess of violence in the genre (Baron & Schube, 2021). *Shadow and Bone*'s (Bardugo et al., 2021–present) showrunner¸ on the other hand, sought to infuse its cast and storylines with racially diverse and queer main characters, in a direct response to the Whiteness and heteronormativity he saw in the genre (Power, 2021). These thematic issues—of race, nation,

Whiteness, hypermasculinity, sexual identity, and Europeanness—are central aspects of the ideological problematic of the fantasy genre, or sets of discourses and oppositions that individual texts in the genre exhibit (Feuer, 1992). Clearly, industry discourses about the genre pick up on these themes as readily as critics and scholars.

Regional Production Services and Peripheral Media Capital Chains

The relationship between media capitals is often characterized as one of competition (Goldsmith et al., 2010; Miller, Govil, McMurria, Maxwell, & Wang, 2004). Certainly, production service companies battle fiercely to attract major Western productions. In the past few years, both Prague and Budapest have added several new film studios to accommodate more projects, and studio executives and venture capitalists in Budapest are currently in discussions to greatly expand studio capacity there over the next five years (G. Rajna, CEO and Producer, Laokoon Filmgroup, November 12, 2021). Even with this expanded capacity, the shortage of studio space is likely to remain.

At the same time, we see a good deal of cooperation among the production industries in the region. When productions travel to nearby countries and cities, they need permission and cooperation from local governments. In addition, location managers across the region help one another's productions when they come to town. Inevitably, during every location shoot, something goes wrong that requires an immediate fix, and location managers are experts in local troubleshooting. Generally, local location managers provide these services free of charge for visiting productions (J. Cserven, managing locations manager, MidAtlantic Productions, personal communication, April 8, 2022; I. Légmán, locations manager, *FBI: International*, Wolf et al., 2021–present, personal communication, December 10, 2021; A. Stergiu, locations manager, *The Continental*, Iwanyk, et al., 2023–present, personal communication, November 2, 2021). Even for studio spaces, investors are careful not to overbuild across the region, spreading the risks of future production funding and locations across multiple locales. Instead, studios across the region achieve some sort of equilibrium with foreign productions. Because regional media capitals, including Budapest, Prague, Warsaw, Zagreb, and Bratislava, all have the capacity to handle location shooting for high-end fantasy series, no one peripheral media capital is likely to corner the market on fantasy series productions. Rather, these cities form a regional chain of media capitals that collectively gain a competitive advantage in producing series in the genre.

The idea that peripheral media capitals within the CEE region are interdependent complicates the cultural geographies of media capital. While the original model correctly replaced the nation-state, with the global city as the main container of global media production and distribution capacity, the example of SVoD fantasy series brings in the region as a central geographic category that organizes domestic and foreign direct investment in media capacity, pools creative labor, spreads of global media production capital, personnel, and production locations across multiple, cooperative media capitals in CEE.

Although the example of fantasy series production could be expanded to science fiction series, superhero series, and spy thrillers, as well as films in these genres, the question of whether similar kinds of peripheral media capital regionalization occur in specific genres in other parts of the world is difficult to pin down. The vast majority of research into media industry clustering has focused on individual cities or a series of cities within the same country (Medel & Gossel, 2015), likely because such research is often

designed to aid the development of national media industries. In their metanalysis of film clustering studies, Medel and Gossel (2015) found only one study examining clustering beyond national boundaries, the case of feature-length European animation production.

Production services companies across Southeast Asia might offer a similar example of the regional clustering of peripheral media capitals. Hollywood studios and large SVoDs frequently shoot across multiple cities and nations in the region, including superhero films and remakes of traditional folktales. However, without fieldwork, it is impossible to know whether the kinds of collaborations among workers and producers that we see in CEE also take place in this region. Likewise, it is difficult to assess the extent to which high-end streaming series are shot in Southeast Asia and coalesce around particular genres. In CEE, however, high-end streaming series have changed both the economics and geographies of the production services industry, as well as the power relations between peripheral media capitals in the region and global media giants. Their example may portend an evolving media production structure where regionalized media capitals around the world gain expertise in particular high-end genres that are rooted in regionally specific locations and cultural allusions, allowing those peripheral media capitals to capture what has been relatively footloose global media capital.

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