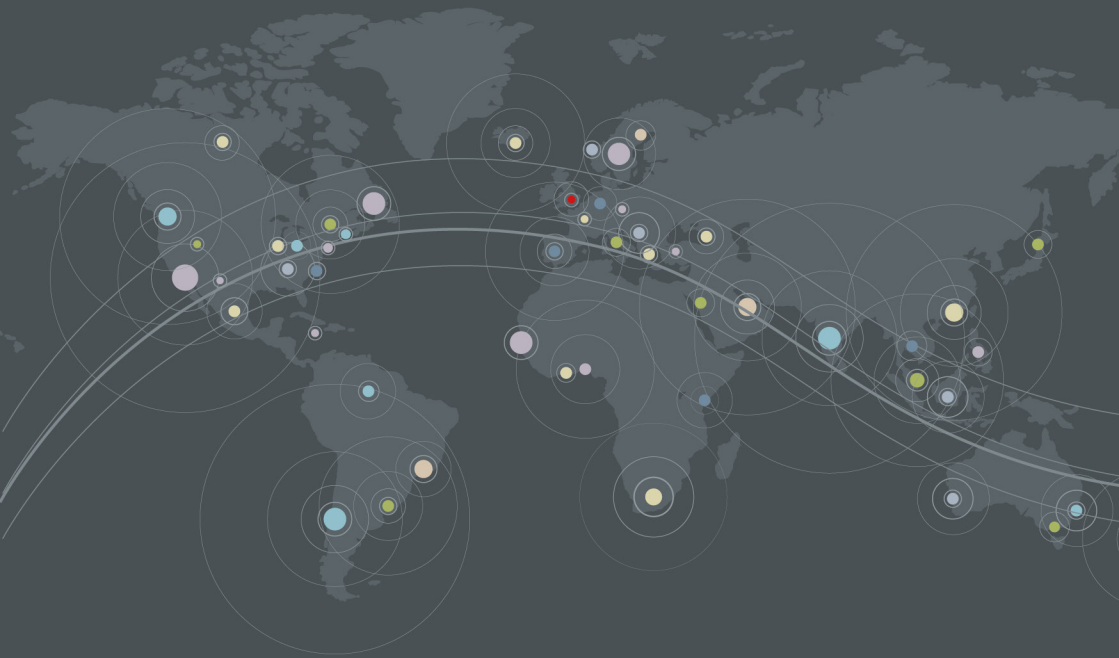


The strategy consultancy
for the creative industries



OLSBERG • SPI

Olsberg • SPI (SPI*) provides a range of expert consultancy and strategic advisory services to public and private sector clients, specialising in the worlds of film, television, video games and digital media. Formed in 1992, it has become one of the leading international consultancies in these dynamic creative industries.

* Strategy, Planning, and Implementation

www.o-spi.com

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For over 33 years, SPI has provided trusted insight and expertise to a diverse client base, which includes:

- National governments, including culture and economics ministries
- National film institutes and screen agencies
- Regional and city development agencies and local authorities
- Multinational cultural funds and authorities
- National and regional tourism agencies
- Established studios and streamers
- Independent companies at all points of the screen business value chain
- National and international broadcasters
- Trade associations and guilds
- Training and skills development organisations
- Publishers and conference organisers.

SPI has expertise in all areas of the fast-moving global creative industries. The firm's services span:

- Strategy and policy development for the creation and management of healthy and sustainable national and regional screen sectors
- Advising on the creation and implementation of fiscal incentives for the screen sector
- Research projects on all aspects of the value chain, including sector mapping and economic impact assessments
- Business development plans for content companies
- Strategic development plans of studio facilities, including business planning and feasibility studies
- Acquisition and divestment advice for owners of SMEs
- Advising on regulatory frameworks that govern the screen sector
- Presenting sector insights at industry markets, conferences and seminars
- Evaluations of publicly-funded investment programmes
- Creating prospectus-style funding proposals
- International cost comparisons for film and television productions
- Advising on inward investment and exports for national and regional public bodies
- Identifying and measuring the cultural and social value of a productive screen sector
- Analysing workforce skills, diversity and related best practice strategies
- Assessing the value of tourism generated by a nation or region's film and television output, and developing strategies to maximise future impacts
- Providing strategic advice to screen commissions, including business and marketing plans.

A selection of projects undertaken by SPI are explained in more detail over the following pages, along with a short list of example studies for each area.

Further details on past projects are available on request.

Strategic Sector Development

SPI provides strategic insight and advice that ensures the screen sector in our clients' jurisdictions are primed for growth.

SPI's work in this area includes developing holistic national sector strategies, as well as strategies for specific areas of need, such as workforce and skills development and studio provision.

SPI also has experience in designing and implementing new film commissions around the globe.

Selected Examples of SPI's Strategic Sector Development Projects

- *Best Practice in Screen Sector Development*, for the Association of Film Commissioners International (AFCI)
- *A Roadmap for the Future of the Film Industry of the Philippines*, for the FDCP
- *Development of a Multi-Annual Strategic Plan for Portugal's Cinema and Audiovisual Industry*, for the Portuguese Institute of Cinema (ICA)
- *Strategic Recommendations for the Development of the Screen Industries in the Republic of Benin*, for Sèmè City
- *Economic Development Plan for Cornwall and Isle of Scilly's Screen Sector*, for Screen Cornwall
- *Sámi Screen Sector Impact Study*, for the International Sámi Film Institute (ISFI)
- *UK Video Games Sector — A Blueprint for Growth*, for UKIE
- *Screen Sector Development Strategies (Phases 1 and 2)*, for the Newfoundland and Labrador Film Development Corporation (now PictureNL)
- *A Strategic Plan for the Film Industry of Trinidad and Tobago*, for FilmTT.

Economic Impact Assessment

Incentives and selective funding models represent significant investments by national and state/provincial governments into the screen sectors. Consequently, it is important to evidence the impacts of these, identifying how and to what extent they generate economic activity, jobs and tax revenues – as well as wider economic value.

Economic impact assessments are therefore an important part of the policy toolkit for governments and other interested parties working in the sector, as they allow a comprehensive understanding of the industry to be presented. Aside from the direct value generated (e.g., GVA, output, employment), this can include regional variations, private investment attracted, and spillover impacts, such as screen tourism.

In addition to evidencing the standard macro metrics, SPI has pioneered a more granular approach to identifying the on-the-ground, micro impacts of individual productions through an innovative 'Ripple Analyses'. These demonstrates how screen production expenditure 'ripples' through the economy, benefiting a particularly wide range of other business sectors. SPI also maps the expenditure across geographies and the supply chain via vendor heatmapping.

SPI has undertaken several such studies, providing granular detail for the commissioning agencies about how investments in the screen sectors deliver value. Such reports assist national screen agencies in explaining to their government stakeholders, and the wider public, how their activity generates value, and allows policy changes to be made from a position of knowledge.

Selected Examples of SPI's Economic Impact Assessment Projects

- *Screen Business – How Screen Sector Tax Reliefs Power Economic Growth Across the UK, 2017–2019*, for the British Film Institute
- *Economic Impact Study of Spain's Rebates for Investments in International Film and Television Series*, for the Spain Film Commission
- *Potential Economic Impact of a National Audiovisual Production Incentive in Brazil*
- *Economic Impact Study of Georgia's Entertainment Industry Tax Credit*, for the Georgia Screen Entertainment Coalition
- *Global Screen Production – The Impact of Film and Television Production on Economic Recovery from COVID-19*
- *Film and Creative Economy – How Film & TV Drama Productions Grow the Creative Industries*.

Production, Infrastructure and Capacity Analysis (PICA)

A PICA provides a bespoke analysis of a jurisdiction's production capacity constraints and opportunities. This includes recommending and designing related sector support and growth strategies.

SPI developed this service in response to authorities around the world requiring a more comprehensive understanding and evidence of the size and shape of the current production infrastructure, and where interventions are most needed.

Each PICA is bespoke to the jurisdiction, but typically covers:

- Assessment of the above-the-line and below-the-line workforce and physical production infrastructure – A detailed assessment of the current capacity across 80+ production components to support multiple productions simultaneously, including creative and technical roles, facilities, equipment, production services, vendors, and more
- Skill gaps – Highlighting specific skill gaps in current production capacity, and how these can be strategically addressed
- Sector growth – Strategic analysis of the jurisdiction's production sector in recent years and insight into its potential to grow further and increase future economic and strategic impacts.

Selected Examples of SPI's PICA Projects

- *Production Infrastructure and Capacity Analysis (PICA)* – *Australia*, for Screen Australia
 - *Fort Worth, Texas*, for the Fort Worth Film Commission
 - *Greater São Paulo*, for Spcine
 - *Mid-West Ireland*, for Innovate Limerick and Film in Limerick
 - *North Carolina*, for the North Carolina Film Office
 - *Sweden*, for Film i Väst.
- *Production and workforce strategy advice* – *worldwide*, for a major studio.

Production Incentive Design and Development

SPI has significant global experience in designing successful production incentives, with the firm's advice leading to the creation and improvement of a range of major programmes.

Incentive design work typically aligns the objectives of a client with the potential of the production sector, as well as SPI's best practice insight into the use and effectiveness of all incentive models. Such projects generally consider the feasibility of a new incentive from industry and government perspectives, with detailed technical design advice provided. This is so that the incentive can be formulated and effectively marketed in order to have the maximum positive economic and industrial impact.

SPI also undertakes competitive re-engineering of existing systems, examining their take-up and administration and providing full redesign services to improve their function and ensure they are primed to deliver maximum impact.

Selected Examples of SPI's Production Incentive Design and Development Projects

- SPI has undertaken incentive feasibility, development, and design work in a range of countries including the US, Mexico, Brazil, Finland, Portugal, Trinidad and Tobago and the UAE
- *Global Incentives Index*, for SPI (updated biannually)
- *Global Film Production Incentives White Paper*, for the Motion Picture Association (MPA).

Sector Research and Analysis

SPI provides cutting-edge sector research and analysis that enable our clients to develop informed data-driven strategies, design and test new policies, and understand their position within a dynamic and fast-changing sector.

Through the use of cutting-edge tools, SPI provide the following services:

- Infrastructure and workforce mapping
- Data collation, processing and analysis
- Skills auditing
- Sector consultation
- Focus group facilitation
- Literature reviews.

Selected Examples of SPI's Research and Analysis Projects

- *Skills Study for the Animation, Post-Production, Visual Effects, Video Games and Emerging Tech Sectors*, for the British Film Institute
- *Study into the Arctic Indigenous Audiovisual Sector in Canada*, for the Arctic Indigenous Film Fund
- *The State of the UK Independent Film Sector*, for Producers Association for Cinema and TV (Pact)
- *Skills survey of below-the-line workforce across 22 Latin American and Caribbean countries*, for the Inter-American Development Bank (IDB) and Netflix
- *Quantifying Film and Television Tourism in England*, for Creative England.

Studio Feasibility and Business Planning

SPI undertakes a range of work in relation to new and existing film, television and digital production facilities, providing robust and well-evidenced business planning, feasibility, and investment insight. The firm has been commissioned by clients to explore the potential of further investment at existing facilities, as well as by investors looking to develop new studio businesses.

Such projects can include:

- Market feasibility, covering all aspects of the related production landscape, including underlying supply chain and potential production demand
- Creation of an optimal specification for new facilities
- Detailed risk analysis
- Financial planning and modelling, including capital expenditure, projected revenue and operating costs, and funding structure
- How a production facility would create economic impact and link to other regional areas of focus, such as skilled workforce development and education
- The success potential for an associated cluster of creative and supply-chain companies.

Selected Examples of SPI's Studio Feasibility and Business Planning Projects

- SPI has undertaken private work for operators across the UK and internationally, including in Croatia, Lithuania, New Zealand and the Middle East. These have included full business plans or prospectus-style documents for potential investors.

Impact and Programme Evaluation

SPI provides robust evaluations that enable our clients to evidence where their work or funding is having impact, where they are providing value for money, where adjustments should be made, and to make the case for their work.

SPI has sector-leading in-house capabilities for developing bespoke methodologies that assess the economic, cultural and social impacts of interventions.

SPI's evaluation services include:

- Development of bespoke evaluation frameworks and Theory of Change / Logic Models
- Data tracking and visualisation tools (e.g., dashboards)
- Case study development
- Confidential consultations
- Focus group facilitation
- Survey design and analysis.

Selected Examples of SPI's Programme Evaluation Projects

- *Evaluation of BFI Locked Box Initiative*, for the British Film Institute
- *Impact Evaluation of the TorinoFilmLab*, for the TorinoFilmLab (TFL)
- *Evaluation of the Eurimages Fund*, for the Council of Europe
- *Evaluation of the Toronto International Film Festival*, for TIFF
- *Film Forever Evaluation*, for the British Film Institute
- *Impact Evaluation of the Sarajevo Film Festival*, for Sarajevo Film Festival.

Screen Tourism Assessment and Strategy

There is growing interest in screen tourism globally, with jurisdictions increasingly acknowledging its economic and cultural significance.

Screen tourism offers tangible financial benefits, as evidenced by substantial spending in local economies. Additionally, it serves as a platform for showcasing unique locations and cultural heritage to an international audience – thereby enhancing cultural visibility and appreciation.

SPI specialises in guiding jurisdictions to capitalise on these opportunities. SPI's expertise lies in strategising effective methods to attract screen tourists and in meticulously assessing the impact of screen tourism.

SPI employs a diverse range of data collection techniques, ensuring a comprehensive understanding of the sector's influence and potential. SPI's approach is tailored to each jurisdiction's unique characteristics, ensuring that the resultant strategy is both effective and culturally sensitive.

Selected Examples of SPI's Screen Tourism Projects

- *Quantifying Film and Television Tourism in England*, for Creative England and VisitEngland
- *Maximising Screen Tourism in Barcelona*, for the Barcelona Film Commission
- *How Film and Television Programmes Promote Tourism in the UK*, for the UK Film Council
- SPI's various economic impact assessments also assessed the spillover effects of screen production on the tourism sector.

Foresight

This unique, customised service offers creative content-led companies specialising in production and distribution the opportunity to devise their future business strategy.

Developed by SPI, this bespoke product enables content companies to focus on their wider corporate development, which leads to strengthened support for content creation.

The process involves a detailed evaluation of the company, its market position, and the aims of its executives and key staff. This is conducted within the framework of a moderated away day, with the team taken out of the immediate business context and guided by SPI's experienced team in creating sustainable strategies for growth.

The Foresight process results in a bespoke development strategy based on the away day findings and SPI's own research, expertise and insight. The strategy can be delivered in a number of formats including a full business plan or a funding prospectus that can be used by the client to attract investment.

Selected Examples of SPI's Foresight Projects

- SPI has undertaken such work for a range of private companies and has also delivered business strategy courses in Australia, the UK, Scandinavia and Portugal.

Latin America

Latin America is an exciting growth opportunity for domestic and inward productions. SPI has introduced new initiatives to support this growth, providing a range of services accessible in local languages.

These activities include:

- Sponsorship of and contribution to the publication of a collection of essays, *The Audiovisual Public Policy Landscape in Latin America*, covering topics such as COVID-19 recovery and developing a holistic audiovisual growth strategy
- Participation in webinars on selected topics, such as public policy support required for Latin America's audiovisual sector to recover from the effects of the COVID-19 pandemic.

Selected Examples of SPI Latin America Projects

- Skills survey of below-the-line workforce across 22 Latin American and Caribbean countries, for the Inter-American Development Bank (IDB) and Netflix
- Studies into potential impacts of an audiovisual production incentive in Mexico and Brazil
- *Production Infrastructure and Capacity Analysis (PICA) of Greater São Paulo*, for Spcine.

Film Markets, Conferences and Seminars

SPI executives are regularly invited to be speakers, moderators and panellists at international festivals, conferences and events.

These include:

- AFCI's Cineposium (Los Angeles)
- Berlinale
- Busan International Film Festival
- Canacine Convention
- CPH: DOX (Denmark)
- Durban FilmMart
- Expocine Brasil (Brazil)
- FOCUS (London)
- Guadalajara International Film Festival
- Industry@Tallinn and Baltic Event
- International Film Festival Rotterdam
- Marché du Film, Festival de Cannes
- Miami Media and Film Market
- San Sebastián International Film Festival
- Saudi Film Confex
- The Screen Finance Forum (London)
- Screen Forever (Australia)
- SPADA Conference (New Zealand)
- Toronto International Film Festival
- Ventana Sur Latin American Film Market. (Buenos Aires).

Clients for these services include:

- Amazon Prime Video (US)
- Arctic Indigenous Film Fund
- Association of Film Commissioners International (US)
- Ausfilm (Australia)
- Australian Film, Television and Radio School
- Australian Screen Association
- Barcelona Culture Institute (Spain)
- BBC Worldwide (UK)
- The Bottle Yard Studios (UK)
- The British Film Commission (UK)
- The British Film Institute (UK)
- Canada Media Fund
- City of Selkirk (Canada)
- Connecticut Office of Film Television & Digital Media (US)
- The Council of Europe
- Creative England
- Creative Scotland
- Croatian Game Development Alliance
- Department of Culture, Heritage and the Gaeltacht (Ireland)
- Directors UK
- Doha Film Institute (Qatar)
- Emerging Pictures (US)
- Estonian Film Institute
- The Eurimages Fund (France)
- The European Audiovisual Observatory
- Film Cincinnati (US)
- Film Fiji
- Film i Väst (Sweden)
- Georgia Screen Entertainment Coalition (US)
- The Government of Hong Kong
- Greater Cleveland Film Commission (US)
- Greek Film Centre
- FDCP (Philippines)
- HBO (US)
- Instituto do Cinema e do Audiovisual (Portugal)
- Irish Film Board
- Mauritius Board of Investment
- The MEDIA Programme of the European Union
- MG ALBA (Scotland)
- Ministry of Cultural Heritage and Activities (Italy)
- Motion Picture Association (US)
- New Mexico Film Office (US)
- New Zealand Film Commission
- PictureNL (Canada)
- Norfolk County Council (UK)
- North Star Film Alliance (Estonia, Finland and Latvia)
- The Norwegian Film Institute
- Pinewood Group (UK and Malaysia)
- Polish Audiovisual Centre Foundation
- Producers Alliance for Cinema and Television (UK)
- Sarajevo Film Festival
- Screen Australia
- Screenwest (Australia)
- Screen Ireland / Fís Éireann
- Screen Yorkshire (UK)
- Sèmè City (ReBenin)
- Spain Film Commission
- Spcine (Brazil)
- Tourism NI (Northern Ireland)
- Toronto International Film Festival (Canada)
- Trinidad and Tobago Film Company (FilmTT)
- Ukie (UK)
- Utah Film Commission
- Vic Screen (Australia).

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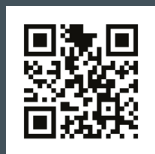
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