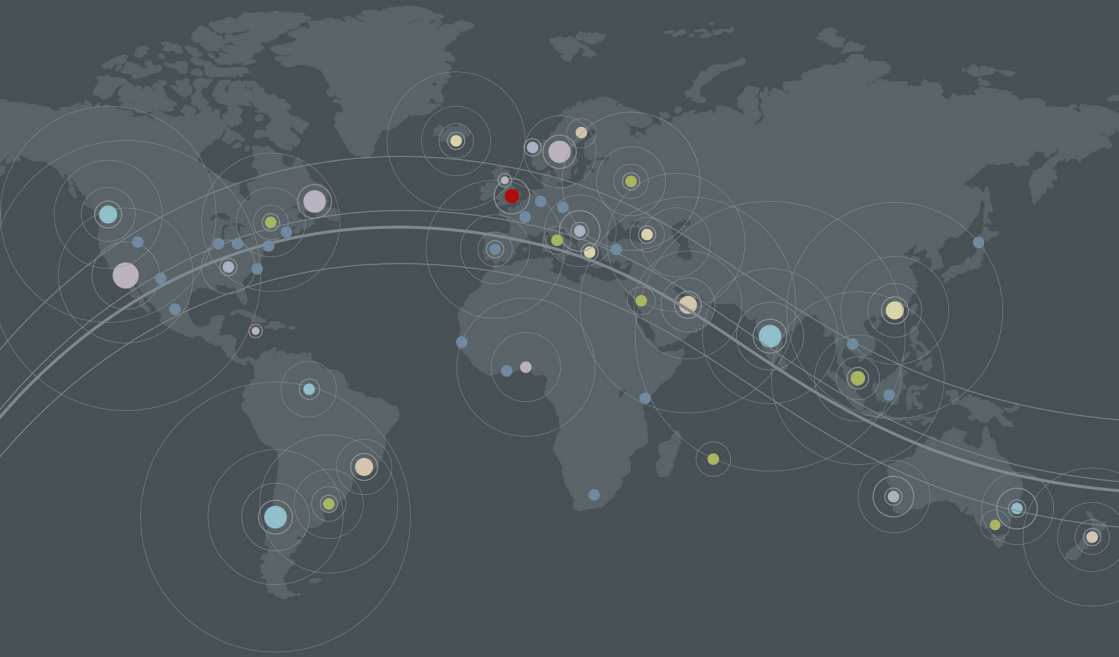


The strategy consultancy
for the creative industries



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

The strategy consultancy for the creative industries

For over 30 years, SPI has provided its 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, and 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 studies
- Business development for content companies
- Strategic development 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 webinars and conferences
- 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 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.

Production, Infrastructure and Capacity Analysis (PICA)

This service, created by SPI, provides a bespoke analysis of a country or region's production capacity constraints and opportunities, including strategies for developing the sector. With film and television drama production at unprecedented levels, and expected to grow substantially, such insight is crucial in order for clients to understand where capacity gaps exist and how they can be filled so that production opportunities can be maximised.

Drawing on SPI's unrivalled international production insight, PICA involves undertaking a detailed analysis of a locale's current ability to attract and service specific levels of international production, including major footloose projects. This includes the competitive offer of a production destination, and how it compares with other locales that might attract similar projects.

Production and infrastructure capacity, including facilities, talent and workforce, is mapped in detail alongside related issues such as quality of provision. The resulting analysis provides clients with clear strategic insight into the capacity gaps that can damage their ability to benefit from production opportunities, as well as the degree of production upturn likely to result from improving provision.

Selected Examples of SPI PICA Projects

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

Economic Impact Studies

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.

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 our innovative Ripple Analyses. These demonstrates how screen production expenditure 'ripples' through the economy, benefiting a particularly wide range of other business sectors.

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 Economic Impact Projects

- *Screen Business – How Screen Sector Tax Reliefs Power Economic Growth Across the UK, 2017–2019*, for the British Film Institute
- *Impact of Film and TV Incentives in Australia*, for the Australian Screen Association
- *Economic Impact Study of Georgia's Entertainment Industry Tax Credit*, for the Georgia Screen Entertainment Coalition
- *Study of the Norwegian Film and Series Incentive Scheme*, for the Norwegian Ministry of Culture and Equality
- *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*.

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, and to make the case for their work.

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

Our 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 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.

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, we provide the following services:

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

Selected Examples of SPI 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)
- *Review and Recommendations for the Development and Marketing of Norfolk's Screen Sector*, for Norfolk County Council and District Council partners
- *Quantifying Film and Television Tourism in England*, for Creative England.

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, 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 Production Incentive Design and Development Projects

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

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 Studio Feasibility and Business Planning Projects

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

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 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. Working with SPI's Latin American Associate, we have introduced new initiatives to support this growth, providing a range of services accessible in local languages.

These activities include:

- A new low-cost *Latin American Audiovisual Public Policy Strategic Advising Service (LAPS)* for public sector entities in the region. SPI will review a jurisdiction's existing audiovisual legislation, public policies and strategy plan, providing bespoke recommendations for increased efficiency and international competitiveness in the global audiovisual ecosystem
- 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

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)
- Africa Network Meeting
- Berlin International Film Festival
- Canacine Convention
- CPH: DOX
- Durban FilmMart
- Expocine Brasil (Brazil)
- FOCUS (London)
- Guadalajara International Film Festival
- Industry@Tallinn and Baltic Event
- Miami Media and Film Market
- San Sebastián International Film Festival
- The Screen Finance Forum (London)
- Screen Forever (Australia)
- SPADA Conference (New Zealand)
- Toronto International Film Festival
- Ventana Sur Latin American Film Market

Clients for these services include:

- 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
- Department of Culture, Heritage and the Gaeltacht (Ireland)
- Directors UK
- Doha Film Institute (Qatar)
- Emerging Pictures (US)
- Estonia Film Institute
- The Eurimages Fund (France)
- The European Audiovisual Observatory
- Film AIUla (Saudi Arabia)
- Film Cincinnati (US)
- Film Fiji
- Film i Väst (Sweden)
- Vic Screen (Australia)
- The Government of Hong Kong SAR
- Greater Cleveland Film Commission (US)
- Greek Film Centre
- 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
- Newfoundland and Labrador Film Development Corporation (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
- Prime Studios (UK)
- Producers Alliance for Cinema and Television (UK)
- Sarajevo Film Festival
- Screen Australia
- Screenwest (Australia)
- Screen Ireland
- Screen Yorkshire (UK)
- Spcine (Brazil)
- Sigma Films (Scotland)
- Tourism NI (Northern Ireland)
- Toronto International Film Festival (Canada)
- Trinidad and Tobago Film Company (FilmTT)
- Ukie (UK)
- Utah Film Commission.

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