

ANIMAR

EUROPEAN ANIMATION CONVENTION

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Animar_BCN 2024: A New Milestone for the European Animation Industry

From November 26 to 28, Barcelona once again became the European hub for animation with the third edition of Animar_BCN. Gathering over 90 delegates from 60 European organizations representing 24 European countries, this year's European Animation Convention addressed crucial topics shaping the animation industry, including the impact of artificial intelligence, sustainable animation practices, media regulation and co-production enhancement.

Animar_BCN 2024 brought together leading figures from the animation and media industries, including Lucia Recalde, Deputy Director and Head of Unit Audiovisual Industry and media support programmes DG Connect, European Commission; Patricia Hidalgo, Director of Children's & Education at the BBC; and Edgar Garcia Casellas, Director of ICEC. Their expertise, alongside that of the producers, distributors, broadcasters, film funds and governmental bodies in attendance, played a pivotal role in shaping discussions on the future of European animation. As the core component of Animar_BCN, thematic working groups addressed the pressing challenges and opportunities facing the animation industry and offered recommendations to scale up the European animation sector.

Animar_BCN is an initiative by [PROA, the Spanish Federation of Independent Audiovisual Producers](#) and [ProAnimats, the Association of Independent Animation Producers](#) with the support of the [ICEX Invest in Spain](#) (Spanish Public Trade Agency), the [ICEC](#) (Catalan Institute of Cultural Enterprises), the [Spanish Ministry of Culture](#), the [ICAA](#) (Spanish Institute of Cinematography and Audiovisual Arts), the [Barcelona City Council](#) and [Animation in Europe](#) (The federation of the European national Animation Producers' Associations), as well as the collaboration of [CEE Animation](#), [DSAFI](#), the [European Animation Journal](#), [Blanquerna-Ramon Llull University](#) and [DIBOOS](#).

Inclusive.

Involving the representativeness of all European territories and the whole value chain of the animation sector.

Collective.

Focused on associations, clusters, and other European sectoral organizations.

Dynamic.

A live space for debate, identifying the sector's challenges and focusing on solutions.

Driving force.

Pursues the implementation and follow-up of the actions derived from the final recommendations.

Methodology

1. **Topics** to discuss agreed with the Animation in Europe Board.
2. Identification of **animation key figures** by country (representing producers' associations, national funds, TV commissioners, and so on) and from pan-European entities and bodies.
3. Invitation and **confirmation of attendance** and participation in the working groups.
4. Identification of the **working group Chairs**.
5. Meetings with the Co-Chairs to establish the **main lines** of discussion.
6. Working papers prepared by **professional advisors** (in constant dialogue with the Co-Chairs of the working groups) were submitted to the participants before the Congress, allowing the attendees to prepare the framework of the discussions.
7. Experts from EEA countries gather **together**.
8. Experts are divided into diverse, balanced working groups to **discuss** the topics.
9. Information and cultural exchange within a **trusting, safe atmosphere**.
10. Generation of **standard conclusions** applicable across the continent.
11. Approach of **concrete recommendations** in line with each topic's conclusions.
12. **Dissemination** of recommendations to the European animation sector stakeholders

2024 Discussion Topics

At Animar_BCN 3rd Edition, four critical topics were addressed, discussed on four separated Focus Groups:

1. **Legal Framework for European Animation AV Works**
The AVMSD implementation follow-up, the definition of independent producers, the importance of IP retention, etc.
2. **Fostering European Animation Co-productions**
Coproduction Conventions, public funding schemes, nationality rules, raising public aid intensity, etc.
3. **AI & Animation**
New regulations for a new era. The impact on the sector: a different way to think, create, and consume.
4. **Green Animation**
Sustainability criteria in animation workflows. Challenges and initiatives when coproducing internationally.

2024 Recommendations approached by AiE

Strengthening media regulation

Recognizing the immense audience reach of platforms like YouTube and TikTok and the critical need for child protection, the working group on media regulation recommends the application of the Audiovisual Media Services (AVMS) Directive to all services providing access to audiovisual content. Additionally, the group advocates for a reinforced definition of "European works" within the Directive to safeguard intellectual property retention within Europe, thereby supporting the long-term growth of the European ecosystem.

Fostering European co-productions in animation

Faced with underfunded children's programming and a global animation crisis, the group stressed the need for stronger tools and collaboration between funding bodies and broadcasters to support project development. For production, they advocated creating enhanced tax incentives by linking them to the retention of intellectual property (IP) by European companies and to the European relevance of the content, strengthening the competitiveness of the independent sector and avoiding a shift to a mere service industry.

Embracing Ethical AI for a Human-Centered European Animation Industry

The European animation industry supports a human-centered approach to integrating artificial intelligence (AI) within their companies.

Animation in Europe recommends the development of a Best Practice Guide for the legal, ethical, and sustainable use of trusted AI tools. Alongside this, the group calls for enhanced access to training programs and AI experts to help industry professionals acquire both educational and practical skills, aligning with the sector's creative and productive goals.

Driving Sustainability with Common Green Production Standards

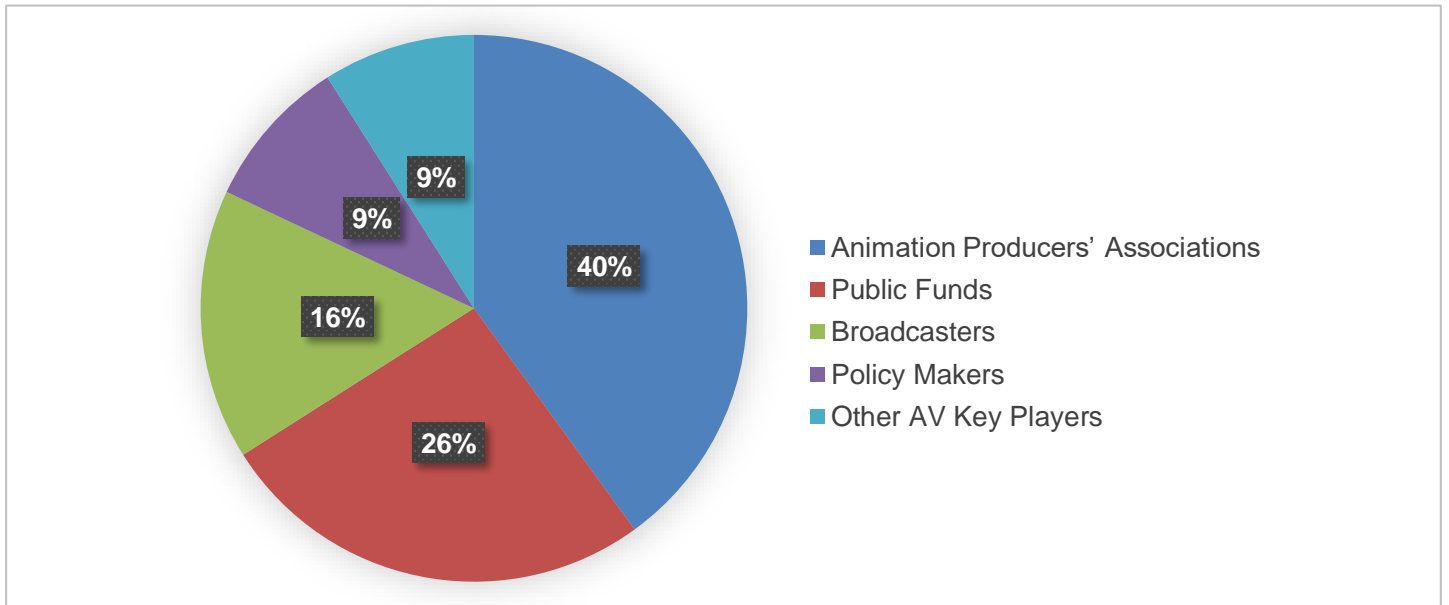
Participants of the sustainability think tank highlighted the urgent need for shared environmental sustainability tools to facilitate co-production across Europe. As part of this commitment, attendees agreed to engage their respective national stakeholders to join an existing international working group dedicated to developing green animation production standards. This collaborative effort aims to establish a unified approach to sustainable animation practices across the continent.



2024 Experts

High-level professional profiles from all around Europe attended Animar_BCN 2024; gathering over 90 delegates from 60 European organizations representing 24 European countries, plus European Entities representatives:

- Animation Producers' Associations from EEA countries
- Audiovisual Funds
- Public Broadcasters
- Policy makers
- Other European, National and Regional Key Players



Territories	Croatia	Germany	Norway
		Cyprus	Greece
Austria	Czech Republic	Hungary	Portugal
Belgium-Flanders	Denmark	Ireland	Slovakia
Belgium-Wallonia	Estonia	Italy	Slovenia
Bulgaria	Finland	Lithuania	Spain
Catalonia (Spain)	France	Luxembourg	UK

Entities	CEE Animation (Central and Eastern European animation)	ICAA (Spanish Institute of Cinema and Audiovisuals Arts)
	CEPI (European Audiovisual Production Association)	ICEC (Catalan Institute for Cultural Companies)
ABAP (Bulgarian Animation Producers)	Comisiún na Meán (Ireland's Media Regulator)	Independent expert (Ecoprod)
ALPA/XR (Luxembourg Association of Producers of Animation and Immersive Experiences)	Council of Europe	Independent expert (Dandeloo)
Anima Mundi (HORIZONTE Funded Program)	Creative Europe MEDIA	Independent Expert (The Children's Media Foundation)
Animation Denmark	Creative Greece (Hellenic Film and Audiovisual Center)	LAA (Lithuanian Animation Association)
Animation in Europe	Czech Film Fund	Lithuanian Film Center
Animation Ireland	Deputy Ministry of Culture, Republic of Cyprus	MIA (Women in Animation. Spain)
Animation UK	DFI (Danish Film Institute)	NFI (Norwegian Film Institute)
AnimFrance (French Animation Film Producers' Union)	DIBOOS (Federation of Animation and Visual Effects Producers of Spain)	NPA (Animation Norway)
APAF (Slovak Association of Animated Film Producers)	DR (Danish Broadcasting Corporation)	Polish Film Institute
APFI (Audiovisual Producers Finland)	DSAF (Slovene Animated Film Association)	PROA (Spanish Federation of Audiovisual Producers)
APPA (Portuguese Animation Producers Association)	Estonian Animation Association	ProAnimats (Catalan Association of Audiovisual Producers)
ASAF (Association of Czech Animation Film)	Estonian Film Institute	Producentforeningen (Danish Producers Association)
ASIFA Austria (International Animation Film Association)	European Animation Journal	Produzentenallianz (German producer's alliance)
BBC (British Broadcaster Corporation)	European Commission	RTP (Portuguese National Television)
BFI (British Film Institute)	FFA (German National Film Fund)	RTVE (Spanish National Television)
BKM (German Federal Government Commission for Culture and the Media)	Film Fund Luxembourg	Screen Brussels
BNFC (Bulgarian National Film Centre)	French Ministry of Culture	Screen Ireland
BNT (Bulgarian National Television)	HAPA (Hungarian Animation producers association)	SPPA (Polish Animation Films Producers' Association)
CAA (Cyprus Animation Association)	Hellenic Animation Association	UPFF (Union of French-speaking film and series producers)
CARTOON (European Association of Animation Film)	HNFI (Hungarian National Film Institute)	VOFTP (Flemish audiovisual producer's association)
CARTOON ITALIA	HRUP (Croatian producers association)	Wallimage (Wallonia Audiovisual Fund)
Catalunya Film Commission	ICA (Portuguese Institute of Cinema and Audiovisual)	3CAT (Catalan Public Television)

WG 1 – LEGAL FRAMEWORK FOR EUROPEAN ANIMATION AUDIOVISUAL WORKS

Co-chaired by: Ms. **Els Hendrix**, Representative in charge of European Affairs in the German Cultural Ministry and Mr. **Philippe Alessandri**, Chairman of Animation Europe.

Advised by: Ms. **Margaux Chielle**, EU. Policy Advisory of CEPI – European Audiovisual Production Association.

Participants

- Belgium: Mr Gregory Zalzman. UPFF (Union des Producteur·ice·s Francophones de Films & Séries). Board Member.
- Belgium: Mr Eric Goossens. Flemish audiovisual producer's association VOFTP. Representative.
- Bulgaria: Mr Todor Ignatov. BNT (Bugarian National TV). Representative.
- Cyprus: Mr Yiannis Georgiades. Deputy Ministry of Culture, Republic of Cyprus. Cinema Officer,
Department of Contemporary Culture.
- Czech Republic: Mr Adam Parma. ASAF Association of Czech Animation Film. Representative.
- Estonia: Ms Kerdi Oengo. Estonian Animation Association. Chairwoman.
- France: Ms Noémie Danos. Ministère de la Culture. Bureau des affaires européennes. Secrétariat général. Chargée de mission affaires européennes.
- Germany: Mr Johannes Kagerer. Produzentenallianz (German producer's alliance). Head of Politics.
- Greece: Ms Evi Boulougouri. Hellenic Film and Audiovisual Center-Creative Greece. Head of the Audiovisual Investment and State Aid Directorate.
- Ireland: Mr Rónán Ó Domhnaill. Comisiún na Meán. Media Development Commissioner.
- Italy: Ms Alessandra Principini. CARTOON ITALIA. Vicechairwoman.
- Luxembourg: Ms Emmanuelle Vincent. ALPA/XR (Association Luxembourgeoise des Prodcuteurs d'Animation et d'Expériences Immersives). President.
- Norway: Ms Kristine Knudsen. Animation Norway (NPA). Co-Chair.
- Slovakia: Mr Juraj Krasnohorský. Asociácia producentov animovaného filmu/ Slovak Association of Animated Film Producers (APAF). Chairman.
- Spain: Ms Veronica Buide. MIA (Women in Animation). Chairwoman.
- Spain (Catalonia). Ms Muntsa Tarrés. 3cat (Catalan Broadcasting Corporation). Executive Producer Children's and Animation Co-Productions.
- UK: Ms Kate O'connor. Animation UK. Executive Chair.
- UK: Mr Greg Childs. The Children's Media Foundation. Director.

I. WG 1 CONTEXT AND BACKGROUND DOCUMENTATION

Introduction

In recent years, the European animation production industry has faced significant challenges in securing stable financing. We've seen a decline in investment from audiovisual media services, as well as a gradual retreat from private channels in funding European animation projects. Additionally, major international platforms, particularly those based in the US, have largely overlooked investing in European animation, creating a gap that impacts both the variety and quality of content available to European audiences.

The European animation industry is unique in its strong focus on youth-oriented content, making it a powerful tool in shaping the next generation of EU citizens. By creating culturally relevant stories that reflect European values, animation serves as an educational and entertaining medium that promotes democracy, diversity, and inclusion. As young viewers engage with animated works, they are exposed to a wide range of languages, cultural perspectives, and narratives that foster a shared European identity. This underlines the essential need for European works in the animation sector—not only to sustain the industry but also to support a cultural ecosystem that reflects the values and diversity of Europe's young audience. But animation is also a versatile medium that appeals to audiences of all ages, with stories that address complex themes and foster cultural dialogue. From adult-oriented series to animated films tackling social and historical issues, European animation plays a unique role in enriching the cultural landscape and providing a platform for diverse voices across generations.

In this environment, European and national legal frameworks play a crucial role in sustaining the financial backbone of the animation sector. These regulations are designed not only to ensure that European content thrives but also to protect the industry from the fluctuations of a market increasingly dominated by global players.

For players in the animation industry, understanding these frameworks is essential. European legislation sets out obligations and rights that directly impact how production is funded, distributed, and protected across the EU. National legislations as well as interprofessional agreement sometimes directly derive from European norms and principles.

Key regulatory measures include:

- Quotas obligations in the AVMS Directive, which mandates both broadcasters and streamers to have a minimum of European works in their transmission time or catalogues.
- Investment obligations in the AVMS Directive which gives Member States the possibility to impose investment obligations on broadcasters and on-demand platforms to dedicate a portion of their revenues to the production of European content.
- Geo-blocking measures, that are based on territorial licenses, are essential to preserve the financial model of audiovisual works. By preserving territorial exclusivity, geo-blocking enables studios and distributors to maximize revenue from each market, sustaining production budgets and allowing for reinvestment into future projects.

What role can the EU and national legislation play over the next years in supporting the animation industry? How can the future regulatory landscape, both through new regulation or through revisions of existing ones, be oriented to allow European animation to thrive further?

1. Investment obligations and quotas in the AVMS Directive

The EU Audiovisual Media Services Directive (AVMSD), first adopted in [2010](#), is a cornerstone of the European audiovisual policies. Replacing the '[Television without frontiers](#)' Directive, it aimed at creating and ensuring the proper functioning of a single European Union market for audiovisual media services, while fostering cultural diversity and ensuring consumer and child protection. The AVMSD has been revised in [2018](#), introducing several new provisions in support of independent production and greater availability of European content.

Key provisions of the AVMSD:

- Article 16 (from 2010): Requires broadcasters to reserve a majority (over 50%) of their transmission time for European works, excluding certain categories such as news, sports, games, advertising, and teletext services. This measure applies to traditional TV broadcasters, helping maintain a significant presence of European content on linear channels.
- Article 17 (from 2010): Requires broadcasters to allocate at least 10% of their transmission time or, alternatively, 10% of their programming budget for European works created by independent producers. This requirement excludes news, sports, games, advertising, teletext, and teleshopping content, with a proportion dedicated to recent works (produced within the last five years).
- Article 13(1) (from 2018): Mandates on-demand platforms to ensure that at least 30% of their catalogs consist of European works and that these works are prominently featured. The directive only gives indication regarding 'prominence', giving examples such as creating a dedicated section for European works on the homepage or using European works in marketing campaigns.
- Articles 13(2) and 13(3) (from 2018): Allow, but do not require, Member States to adopt at national level an investment obligation on media service providers, mandating financial contributions to the production of European content. Member States may opt for a direct investment in production, a levy to national film funds, or both. This obligation applies on the basis of the revenues generated by the provider in the targeted Member State and must be proportionate and non-discriminatory. Providers with low turnover or small audiences can be exempt.

As of April 2024, 18 countries have imposed a financial obligation on on-demand audiovisual media services (non-linear services)¹, and 15 countries have imposed a financial obligation on TV broadcasts (linear services)².

These obligations apply only to "media service providers of on-demand audiovisual media services," meaning providers who have editorial control over the content available on their platform.

¹ Although three countries (Czech Republic, Netherlands, Slovakia) have only imposed an obligation on services that are established in their country, not on services which propose a service in their country but are established elsewhere

² Although seven countries (Bulgaria, Germany, Greece, Croatia, Hungary, Romania, Slovakia) have only imposed an obligation on services that are established in their country, not on services which propose a service in their country but are established elsewhere

This excludes video-sharing platforms like YouTube and social media platforms like TikTok, where the content is user-generated, and the platform does not select or curate the content directly.

The very definition of what is a 'European works' is important because it determines which productions are to be included in the calculation of the quotas and investment. This definition includes several non-EU countries (such as Albania, Norway, Switzerland, Türkiye, the UK), allowing these countries to benefit from this support without being subject to the same production and investment obligations.

"European works" are defined as:

- Works originating in Member States and in states party to the Council of Europe's Convention on Transfrontier Television of the Council of Europe (including Albania, Norway, Switzerland, Türkiye, the UK - find the full list [here](#)), as long as one of these conditions are respected:
 - Produced by one or more producers established in one of these countries.
 - Supervised and controlled by producers based in one of these countries
 - Preponderantly funded by co-producers from these countries, without control by producers established outside of these countries.
- Works co-produced under agreements between the EU and third countries that meet specific criteria defined in those agreements.

Implementation of the obligations

The Directive is directly responsible for the increase of European works in VOD services catalogue, which represent an average of 35% of catalogues³.

However, resistance to these obligations is already emerging.

In September 2024, Netflix filed an appeal in the Belgian Constitutional Court against the investment obligation in the [AVMSD decree for the French-speaking community of Belgium](#), seeking to annul the requirement that VOD providers must invest up to 9.5% of their turnover in local content. Netflix argues that the decree violates EU principles, including the country-of-origin rule, imposes excessive rates, restricts freedoms, and constitutes illegal State Aid. This case could have far-reaching consequences for AVMSD provisions, with potential clarification from the Court of Justice of the European Union (CJEU).

Additionally, Google, Meta, and TikTok [have filed appeals](#) with the Belgian Constitutional Court on September 30 and October 1. They are challenging the Flemish decree implementing the AVMSD, which decided on a broader scope than initially intended and obliges them to contribute to audiovisual funding in Flanders—a measure they believe contravenes EU law and the Belgian constitution.

By December 2026 at the latest, the European Commission will review the application in the Directive, taking into account its impact and its added value. It can be accompanied by proposals to review and revise the Directive.

³ in a selection of 21 Member States and Norway. [European Commission report on the application of article 13,16 and 17 of Directive 2010/13/EU as amended by Directive \(EU\) 2018/1808 for 2020-2021, 2024](#)

Reflection for the working group:

- Has your country implemented an investment obligation? If so, have you noticed changes in your relationships with other industry players? If not, are there any discussions underway at the national level? What are the obstacles to its implementation?
- How can the AVMS Directive further support independent and animation production across Europe?
- How can we strengthen the ability of European producers and/or European entities to retain IP rights?
- Do you find the current definition of "European work" too broad, including non-EU productions that benefit from EU quotas and investments?
- Do you think that AVMS Directive should also apply to Users Generated Content Providers such as YouTube as well as social networks?

2. Territoriality and the Geo-blocking Regulation

The financing of audiovisual works largely depends on presales agreements, where production companies secure funding for a project by selling distribution rights to specific territories before the content is even completed. These presales typically grant exclusive distribution rights to distributors, cinemas, TVs or platforms, for certain countries or regions, forming the basis of territorial agreements. This territorial licensing of rights is especially important in Europe's independent film and television markets, where pre-sales provide essential funding that supports diverse and locally produced content across all Member States.

Territorial licensing is vital to the audiovisual sector as a whole, enabling it to produce varied content tailored to different European audiences. Striking the right balance between territoriality and cross-border accessibility is essential, as eliminating territorial licensing could result in significant financial losses. In the short term, the sector could face losses of approximately €8.2 billion annually, with viewers experiencing a reduced content offering worth about €9.3 billion. Long-term projections estimate producer losses around €3.6 billion annually, while viewers could face losses valued at €4.5 billion⁴.

In Europe, territoriality is regulated by the [2018 Geo-blocking Regulation](#). Geo-blocking is defined as a discriminatory practice that prevents online customers from accessing or purchasing products or services from websites based in other EU Member States. While the Regulation was introduced to reduce such barriers within the EU's internal market by prohibiting unjustified geo-blocking, audiovisual services and other copyright-protected content, like sports, are excluded from its scope, thus can continue being distributed on a territory basis. This means that online platforms providing audiovisual content may legally restrict access to their content by geographic location, maintaining the practice of territorial licensing. The exclusion of AV services from the Regulation safeguards territorial agreements and preserves exclusivity through geo-blocking. For example, if a distributor acquires exclusive rights for Italy, geo-blocking enables them to restrict access, ensuring that Italian viewers cannot access the same content from another country's streaming service. This practice is essential to protecting the value of exclusive rights, thereby supporting the presale model and providing a stable foundation for financing audiovisual productions.

⁴ [The impact of crossborder access to audiovisual content on EU consumers](#), Oxera and O&O, May 2016

Discussion at EU level

In December 2023, the European Parliament published a non-legally binding report to review the implementation of the 2018 Geo-Blocking Regulation in the Digital Single Market (find [the final report here](#)). The purpose of this report was to assess whether the Regulation has effectively achieved its intended goals and to provide recommendations. In its amended form, the final Report adopts a more balanced approach and rejects the wording asking for a lift of the exemption for copyrighted services. In turn, it now expressly acknowledges the critical role of territorial exclusivity in the audiovisual sector. While the report still mentions the “*negative effect of geo-blocking practices on citizens living in cross-border regions or belonging to linguistic minorities*”, it explicitly states that “*maintaining geo-blocking for copyrighted works and protected subject matter is a vital tool in upholding cultural diversity*”.

In July 2024, the European Commission published [a stock-taking report on the Geo-blocking Regulation](#), highlighting increased demand for audiovisual content across the EU, driven by digital platforms and streaming services. While content availability has diversified, the report notes that no concrete progress has been made on improving cross-border access to AV content. The Commission states that it continues to gather evidence on consumer demand and explore ways to enhance content distribution, including dubbing and subtitling under the Creative Europe MEDIA program.

The Geo-blocking Regulation is set to be evaluated by the European Commission by November 2025. The report will consider the impact of the Regulation on the internal market and can be accompanied by proposals to review and revise the Regulation.

Reflection for the working group:

- Are you aware at the national level that challenge or question the use of territory-by-territory licenses?
- Do you frequently negotiate multi-territorial licenses? If so, what has your experience been with these agreements and with other players?

3. Authors remuneration and transparency in the Copyright Directive

As they manage the production budget and negotiate the contracts, it is the producers' responsibility to ensure that artists contributing to a production are paid. As such, they must respect unions and guilds requirements as well as national and European laws.

Article 19 of the [2019 Copyright in the Digital Single Market Directive](#) ('Copyright Directive', 'DSM Directive' or 'CDSM Directive') establishes a right for authors and performers to receive regularly information regarding the exploitation of their works and performances from the producers. This includes notably information related to modes of exploitation, all revenues generated and remuneration due. The information must be up to date, relevant and comprehensive. The goal is to ensure that creators have clear insight into the financial and operational aspects of their works' usage, enabling a fairer distribution of income.

There are exceptions to this obligation, for instance if it's a disproportionate burden on the producer, or if the author or performer didn't make a significant contribution to the work – those terms are however not defined in the Directive.

One of the aims of the Directive is to balance the rights of the authors and performers in the exploitation of their work. Traditionally, authors and performers have been considered as the weak part in license contracts, a position which does not give them the means to renegotiate their licenses revenues based on the actual manner of exploitation of their work. In order to obtain such a balance, the Directive lays down this transparency obligation.

Challenges in the audiovisual industry

In the audiovisual sector, this transparency requirement faces practical challenges, as producers themselves may not always have access to detailed exploitation data. With the rise of digital streaming, the issue is even more pronounced, as streaming platforms are generally reluctant to share detailed audience data—such as viewership numbers, audience demographics, or engagement metrics—with producers.

This lack of transparency from digital platforms has become a major concern, as these metrics are increasingly critical for understanding a work's performance and negotiating future deals. For producers, access to detailed audience data is valuable not only for fulfilling the Directive's transparency requirements to authors but also for improving their own market knowledge and negotiation leverage. Data on content performance allows producers to make informed decisions on licensing terms, distribution strategies, and revenue-sharing agreements, ultimately supporting fairer remuneration for talent.

Due to the complex chain of exploitation in the audiovisual industry, obtaining this data can be challenging. For many producers, meeting the transparency obligation to authors and performers may require additional administrative resources to gather and distribute relevant information, especially when reliant on third parties for sales data.

Regarding transparency, Netflix has, for the last couple of years, released an 'Engagement report', sharing what people have watched on Netflix over a six-month period. This report takes the form of an excel sheet, which contains whether the title is available globally, the hours viewed for every title, the runtime and the numbers of views.

You can find the report for the [first half of 2023 here](#), [second half of 2023 here](#) and [first half of 2024 here](#).

Reflection for the working group:

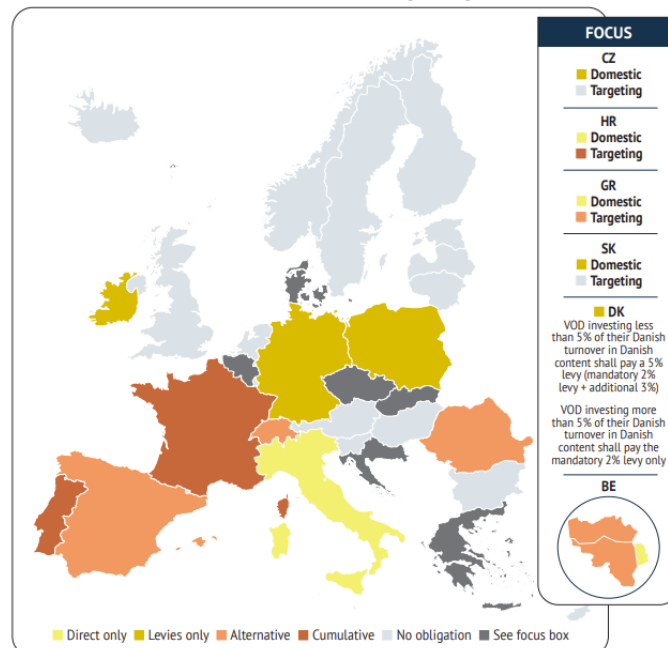
- What are the transparency measures that are in place at national level? Are they put in place through laws, or through interprofessional agreements?
- Are you encountering challenges in obtaining performance data from distributors or platforms? How does this impact your ability to fulfill transparency obligations to creators?
- How can we improve transparency in the flow of revenue and data?



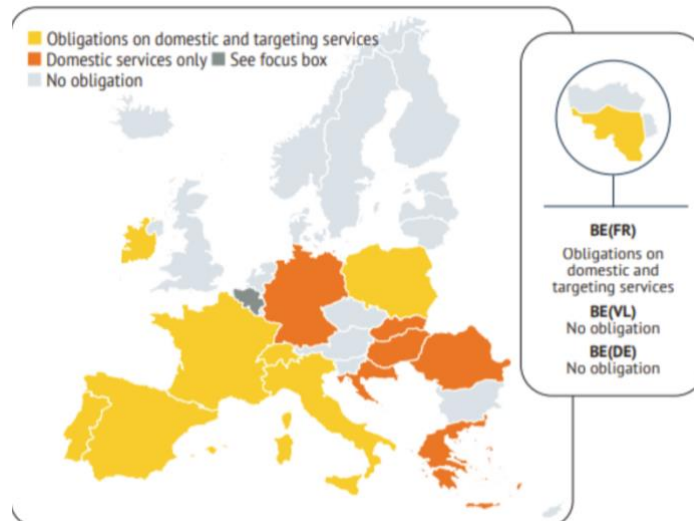
Resources to go further

- June 2024 - [European Commission report on the application of articles 13, 16 and 17 of the AVMS Directive](#)
- [European Audiovisual Observatory Database on the transposition of the AVMSD](#)
- Netflix attacking the Wallonia-Brussels AVMSD Decree: [article by L'Echo](#) and [press release by La SCAM](#)
- [Google, Meta and TikTok retaliate against Flemish decree to fund local films and series](#), by BrusselsTimes
- December 2023 - [European Parliament report on the implementation of the Geo-blocking Regulation](#)
- July 2024 – [European Commission report on the impact of the Geo-blocking Regulation](#)

Implementation of direct and/or indirect financial obligations on VOD services (domestic and targeting services) – AVMSD



Implementation of financial obligations on broadcasting services (domestic and targeting services) – AVMSD



(source: [The promotion of European works](#), European Audiovisual Observatory)

II. WG 1 DISCUSSION HIGHLIGHTS

1. Geo-blocking

A review of the European geo-blocking regulation will take place in 2025, focusing on re-evaluating market limitations and content accessibility within the European Union. Audiovisual exemption critics argue that it undermines the single market principle, making accessing adapted content difficult, particularly for minority language speakers.

The discussion group focused on making proposals to improve cross-border access to content while preserving territorial exclusivity to ensure the survival of the audiovisual sector.

The sector needs to build a strong argumentation, so it is essential to show the European Commission the industry's economic, social and cultural impact, highlighting the potential losses if geo-blocking is not maintained, as well as funding models where territoriality plays a determining role.

2.- Copyright and transparency

The EU has introduced directives to increase the transparency of audience data by global platforms. For the audiovisual sector, this practice would help to better understand how the whole exploitation chain works, better assess competitiveness, adapt to changing market demands and implement strategies to ensure the sustainable growth of the European audiovisual sector.

3.- Implementation of the European Audiovisual Media Directive

The group discussed whether user-generated content platforms should be subject to the same obligations as traditional media. The criterion set so far (the absence of editorial responsibility of the platform itself for the content) is clearly insufficient, considering that algorithms exercise editorial control by prioritising specific videos by parameters, which implies an indirect responsibility of these platforms for the content.

In addition, by profiting from content, such platforms should contribute fairly to the ecosystem from which they obtain revenues, and they should be subject to - at least - the same obligations as other media services.

4.- The definition of 'European work' and mandatory quotas

The group discussed the ineffectiveness of these quotas for 'European content' if 'non-European content' qualifies as 'European' under the current guidelines ("Barbie" or "Stranger Things").

'European audiovisual work' should refer to audiovisual works originating in Member States and States party to the Council of Europe that apply equivalent investment and exhibition obligations and where the retention of intellectual property rights in Europe is proven.

On the other hand, these mandatory quotas do not consider the diversity in the typology of content. This is the specific case of animation and kids' content in general. The introduction of obligations has not boosted original productions, with insufficient investment, mainly focused on acquiring works.

III. WG 1 OUTCOMES

Geo-blocking

- List of reasons that justify why it is crucial to guarantee the audiovisual exception, providing data to support the argument.
- Extending the concept of 'portability' would allow users -with a subscription in their home country- to access content from any EU country.

Transparency

Require global broadcasters to share audience data to make European audiovisual content more competitive.

- Total views
- Unique views (digital media only)
- Rankings
- Market Average

VS Platforms

Video-sharing platforms must assume the same obligations as other media services.

Quotas

- Establish specific mandatory investment for animation or kids' content, as the current results are insufficient and ineffective for the animation sector.
- Increase the European content quota to 50% for VOD Platforms to align with the obligations applying to linear broadcasters.

"European audiovisual works" definition

Revisit the definition to ensure the European retention of IP.

IV. WG 1 RECOMMENDATION APPROACHED BY AiE

Strengthening media regulation

Recognizing the immense audience reach of platforms like YouTube and TikTok and the critical need for child protection, the working group on media regulation recommends the application of the Audiovisual Media Services (AVMS) Directive to all services providing access to audiovisual content. Additionally, the group advocates for a reinforced definition of "European works" within the Directive to safeguard intellectual property retention within Europe, thereby supporting the long-term growth of the European ecosystem.

WG2: FOSTERING EUROPEAN ANIMATION COPRODUCTIONS

Co-chaired by: Mr. **Alex Traila**, Program Manager at Pilot Programme for Series Co-Production, Council of Europe, and Mr. **Iván Ajenjo**, Vice-Chairman, Animation in Europe.

Advised by: Ms. **Mar Sáez Pedrero**, General Secretary, Animation in Europe and Mr. **Francisco Menéndez**, Lawyer, Welaw.

Participants

- Belgium: Ms Stéphanie Hugé. Screen Brussels. Coproduction Manager.
- Bulgaria: Mr Peter D. Todorov. NFC (Bugarian National Film Centre). Representative.
- Czech Republic: Mr Přemysl Martinek. Czech Film Fund. Representative.
- Denmark: Mr Ole Wendorff-Østergaard. DFI (Danish Film Institute). Funder.
- France: Ms Amanda Borghino. AnimFrance (Syndicat des Producteurs de Films d'animation). Deputy Managing Director.
- Germany: Ms Selay Esperling. Germany's national funding institution, FFA. Förderreferentin (Funding Representative).
- HUNGARY: Ms Reka Temple. Hungarian Animation producers association (HAPA). President.
- Ireland. Ms Libbie McQuillan. Screen Ireland. Director of Industry and Corporate Affairs.
- Luxembourg: Mr Sébastien Tasch. Film Fund Luxembourg. Head Project Management.
- Norway: Mr Bendik Heggen Strønstad. NFI, Norwegian Film Institute. Production Adviser.
- Portugal: Ms Andrea Basilio. RTP (Rádio e Televisão de Portugal). Responsável Programas Infantis e Juvenis RTP.
- Spain: Mr Fernando Bigeriego Tejerino. ICAA (Instituto de Cinematografía y Artes Visuales. Subdirector de Fomento de la Industria Cinematográfica y Audiovisuales.
- Spain: Mr Yago Fandiño. Televisión Española (RTVE). Director CLAN.
- Spain. Mr Gonzalo Herrero Mtnéz.-Tutor. PROA. Lawyer.
- Spain (Catalonia): Mr Álex Navarro. Europa MEDIA CREATIVA. Media Desk Catalunya.
- Spain (Catalonia): Ms Blanca Piulats. Institut Català de les Empreses Culturals (ICEC) Departament de Cultura. Head of Development of the Audiovisual Area.
- Spain (Catalonia): Ms Laia Cirera Hidalgo. Institut Català de les Empreses Culturals (ICEC). Departament de Cultura. Audiovisual Area Management.
- UK: Ms Patricia Hidalgo. BBC (British Broadcaster Corporation). Director of Children & Education.
- UK: Ms Denitsa Yordanova. British Film Institute (BFI). Head of UK Global Screen Fund and International Funds.

I. WG 2 CONTEXT AND BACKGROUND DOCUMENTATION

Motivation

Co-production has become an essential mechanism for financing and producing animated content in Europe. By partnering with other production companies across different countries, producers can access a wider range of financial resources, expertise, and creative talent. These partnerships not only allow producers to share responsibilities and risks but also help meet the high costs and complexity often associated with animation projects.

A significant benefit of co-production agreements is that they enable the resulting work to be considered “national” in each participating country. This designation allows the co-produced work to qualify for local public funding and may meet the criteria for European content quotas set out in EU legislation, such as the AVMS Directive. This eligibility can be a game-changer for producers, providing access to funding and distribution opportunities that might otherwise be out of reach.

To ensure that European animation continues to thrive in a competitive global market, it is essential to reflect on how co-production conventions, funding mechanisms, and regulatory frameworks can be optimized for the benefit of producers.

Conclusions from previous editions

The first two editions of ANIMAR_BCN already included one or two working groups talking about the legal framework for animation coproductions and direct public funding (grants) for theatrical and non-theatrical animation content. These groups came out to a set of conclusions agreed by the experts and endorsed by Animation in Europe as recommendations:

- **Making financing schemes more compatible:** coproduction systems are different in each country, so their combination is not always efficient. We need complementary funding rules, mixing automatic and selective schemes as well as adjusting national rules to allow minority co-productions full access to all funds.
- **Raising development funding for market-validated projects:** in order to produce more commercially viable productions, funds should enable producers better liquidity to develop and finance projects to their fullest potential, before entering production.
- **Extending public aid intensity limitation:** children and youth content should be considered as a “difficult work” across the EU in order to surpass the 50% public funding limitation and allow higher state aid intensity limits. A “favoured nations” rule should be established, allowing funds to apply the most flexible country’s rules.
- **Securing intellectual property rights:** funds should focus on helping production companies to retain the rights of their own IPs, while supporting both artistic works, and commercial works, with a validated market potential. A way to do that is by strengthening development funding for longer periods so producers can create better works which can travel internationally.

- **Improving the support for dubbing:** especially when targeting children audiences, the high cost of dubbing is one of the main barriers for distribution, in particular for low capacity countries. We ask funders to provide new and better tools to bear the cost of dubbing, in order that we can exploit more European content and reflect our European cultural diversities.
- **Strengthening the European Coproduction Conventions:** the revised cinematographic coproduction convention needs to include France and Germany to avoid unbalanced relationships between state parties, but also to third countries. Additionally, the new European Convention for the coproduction of audiovisual works in the form of series shall recognize animation's specific needs.

Recent achievements

Some of the objectives set in previous years have been accomplished and have had a direct impact on policy making. As a matter of fact, some new initiatives have been born, such as the EBU Co-development initiative, and some European-level funds have adapted their rules to animation needs, such as Eurimages cinematographic support of the new pilot programme for series coproduction. Moreover, the European Convention for the coproduction of works in the form of series has also included specific terms for animation.

However, there are some other aspects in which policy making is yet to be improved, following ANIMAR's previous recommendations. The aim of this working group is to brainstorm and agree on best practices and potential solutions to solve the pending issues affecting the public and private funding for coproductions:

- Development support from public institutions and/or broadcasters.
- Promotion of projects and companies to access the market and find coproducers.
- Minority financing schemes as a way to build the industry ecosystem.
- Majority financing schemes: selective, automatic, reimbursable, non-reimbursable.
- Eligible costs: nature, time period and territoriality rules.
- Redefinition of the role of private partners: broadcasters, platforms and sales agents.
- Support for distribution, marketing and dubbing: improving circulation of works.
- Tax incentives: nature, rules and beneficiaries.

The European Legal Framework

1. Council of Europe's rules for cinematographic works

The [Council of Europe Convention on Cinematographic co-productions](#), initially adopted in 1992 and revised in 2017, provides a structured framework to make international co-productions more systematic and easier to establish. Cinematographic works that qualify as co-productions under this Convention (by meeting the specified conditions) are automatically eligible for national public funding and local incentives in all participating countries that have ratified the Convention.

To qualify as a co-production under this Convention, a film must meet specific production, creative, and financial criteria for each involved country. Eligibility for co-production status is determined

using a point system, with thresholds that vary for different types of films—fiction, animation, and documentary—based on the contributions of various creative and technical roles. This system is adapted to the unique requirements of animation, ensuring that points are appropriately assigned.

The Convention emphasizes that each co-producer should contribute effectively to the production, including artistic and technical input, proportionate to their financial investment. It also includes requirements for nationality in the crew and post-production work, with allowances for exceptions based on the project's screenplay and requirements.

The key revisions in 2017 of the text aim, notably, to:

- Broaden the scope of the Convention by opening it to non-member States of the Council of Europe and introducing the notion of “official international co-production” to replace that of “official European co-production”.
- Adjust the minimum and maximum proportions of contributions from each co-producer, to make it easier to participate in official co-productions, while at the same time providing safeguards for national authorities, should they wish to bar access to national production funding schemes.
- For multilateral co-productions, the minimum contribution per country is set at 5%, with a maximum of 80%. For bilateral co-productions under the Convention, the minimum is 10%, and the maximum is 90%.

However, certain major European states, including France and Germany haven't ratified this Convention⁵. As a result, co-productions involving these countries are still governed by the 1992 Convention. Additionally, for co-productions between two countries without an official co-production framework, the lack of a standardized approach can create challenges in accessing cross-border funding and incentives.

2. Council of Europe's rules for non-cinematographic works

The Council of Europe is developing a convention for the co-production of drama series. Similar to the Cinematographic Co-production Convention, this new framework would create an official international status for co-productions, making them automatically eligible for national public funding and incentives across participating countries.

This proposed convention is currently under discussion in various Council of Europe Committees, with the goal of establishing a system that would streamline and support international collaboration in television and drama series production. The goal is to have this Convention adopted before the end of the year.

The text is inspired by the revised version of the Cinematographic Convention but includes some new conditions:

- It requires that qualifying works must involve at least two independent co-producers, originating in two different countries party to the Convention. Additionally, the series project shall be initiated by an independent producer (not an AVMS provider) who will participate at the decision-making process of the project in terms of content.

⁵ Although Germany has signed the convention in March 2022, indicating its initial approval, it has not ratified it, meaning Germany is not legally bound by the Convention.

- It confers the status of 'official international co-production' on series qualifying under the Convention, foreseeing their assimilation to national works and thus grants access to any financial benefits foreseen under the legislative and regulatory provisions in force in each co-producing country.
- It sets out thresholds for the minimum and maximum financial contributions to be made by each co-producer and requires their effective technical and artistic contribution following the rules of the Revised Cinematographic Convention.
- It establishes a definition of independent producer based on national legislation, which will always prevail. In the case a member state does not have a definition by itself, the Convention sets some basic criteria based on shareholding relationship and economic dependence between the producer and audiovisual media service providers.
- It enshrines the principle of the sharing of exploitation and revenue rights by the co-producers considering their financial contribution and creative expenditures. The Convention expressly excludes the possibility of AVMS providers holding exploitation rights in perpetuity.
- It introduces an obligation for AVMS providers to provide audience data and information on the exploitation of series to co-producers and to national public authorities for statistical purposes.

It is understood that those series which do not comply with these rules will still exist, but they will not be granted the 'official' condition and so will not be eligible for public funding.

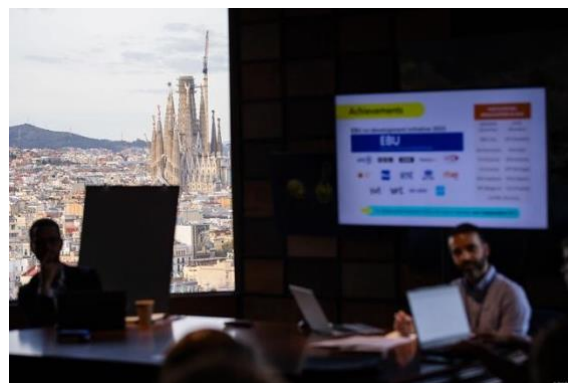
Reflections for the Working Group

- How can existing co-production bilateral or multilateral agreements and conventions be improved to better support the needs of animation producers?
- Why France and Germany do not ratify the new cinematographic convention? Which are the consequences of this convention opening to states that are not members of the Council of Europe?
- What are the sources of financing for the development of projects in your country? Is co-development a real opportunity for animation? What about the co-development funding scheme by Creative Europe MEDIA?
- What barriers have you encountered when seeking public funding for co-productions, and how might these be addressed at both the national and EU levels?
- What are the national rules in your country to access public funding? How do nationality rules influence your ability to access funding? Does your country offer opportunities for minority coproductions?

- Are there ways to make these rules more adaptable to the needs of co-productions? Are there funding schemes specifically designed for coproduction projects with concrete territories?
- How does public aid intensity work in your country? Is animation considered a “difficult work” and thus entitled to more than 50% of public funding limitation? How does the aid intensity work when coproducing with a country with a different system?
- What mechanisms should be added to the public funding schemes (in regional, national or EU levels) to help production companies to retain the rights of their own IPs while supporting both artistic and commercial works?
- How are tax incentives impacting the animation industry in Europe? Are there differences between animation tax credits and other audiovisual tax credits? What about tax rebates for service work and tax incentives for national production?
- Which measures can member states settle in order to improve the circulation of animation works across Europe? Does your country have distribution support, dubbing support or any similar public scheme? How do they work?

Resources to go further

- [European Co-development \(CREA-MEDIA-2024-CODEV\)](#)
- [European Broadcasting Union’s co-development initiative](#)
- [EURIMAGES Co-production support](#)
- [Council of Europe’s Pilot Programme for Series Co-productions](#)
- [Mapping of Film and Audiovisual Public Funding Criteria in the EU](#) European Audiovisual Observatory, 2018
- [Insights into direct public film funding in Europe 2018-2022](#) European Audiovisual Observatory 2024



II. WG 2 DISCUSSION HIGHLIGHTS

Last achievements

Creative Europe MEDIA co-development fund

- This co-development action provides financial support for the creation of a single project intended for commercial release, whether in cinemas, on television, or in digital and multi-platform environments.
- Animation is eligible alongside creative documentaries and fiction, and more easily co-developed than other types of production.
- Is co-development a real opportunity for animation producers, especially in low- capacity countries? Yes, it allows low capacity countries to collaborate with bigger countries in producing.

EBU- European Broadcasting Union's co-development initiative (2023 & 2024)

- A new collaborative model for animation, centered on the collective financing of a pilot project selected by EBU Members from a range of pitches presented at Cartoon Forum.
- The broadcasters have committed over €130,000 to their development.

New / improved public support systems

- Czech Republic
 - Czech Film Fund turns into Czech Audiovisual Fund
 - Extending selective support to TV/VOD production and gaming industry
 - 2% levy for cinemas, broadcasters and VOD platforms, plus a direct investment obligation of 1,5% of public Czech TV.
 - Fund for incentives linked to the financial performance of AV industry
 - Increased audiovisual incentive to from 20% to 25%, but for animation and postproduction (digital production) it goes up to 35%..
- Bulgaria
 - National Film Center (NFC)
 - New animation coproduction fund (50-60K€/call, 2-3 times/year)
 - Production fund for projects with key artistic Bulgarian staff (85K€)
 - Animated features development funding (35K€/call)
 - Animated features production with key artistic Bulgarian staff (500K€)
 - Bulgarian cash rebate: max. 1M€/project, up to 25% local expenditure
 - Bulgarian National TV (BNT)
 - Pre-buy contest for 2 animated series in 2023 (renewed for 2024)

- Catalonia (Institut Català de les Empreses Culturals -ICEC)
 - Recognition of original language version in animation works.
 - Positive language discrimination for works in OV Catalan:
 - OV Catalan: max. 800K EUR / 60% of total eligible costs
 - OV not Catalan: max. 500K EUR / 50% of total eligible costs
 - Promotion of theatrical feature films in original Catalan version:
 - Animation films now eligible if they got previous production fund from ICEC
 - Max: 180K EUR / 60% of total eligible costs

Revision of the rules of European-level funding

- EURIMAGES Co-production support:
 - Full storyboard no longer needed but just a portion / sample
- Council of Europe's Pilot Programme for Series Co-productions:
 - Series format adapted to animation (max 700' / no cap on episodes number)
 - Broadcaster commitment from a different country than the national one

Next steps: open issues

Convention of Coproduction of audiovisual works (series):

- Just approved by the General Secretary of the Council of Europe
- Approval by enough member states of the Council of Europe

Revised Convention of Cinematographic works (feature films):

- Ratification by France and Germany still pending

Compatibilization of direct funds for animation:

- Regional, national and European level

III. WG 2 OUTCOMES

About co-development

The group agreed that public support for animation project development is crucial, whereas, in the case of animation:

- It is a phase that requires more time and investment than live-action animation.
- It is the foundation for a competitive and diverse European animation industry.

Over the last two years, there has been a significant improvement in opportunities for co-productions, meaning more flexibility and more chances. Companies can apply for coproduction grants in both roles, as lead partners and as minor ones. This means companies have more chances to **collaborate**, **co-develop**, and **co-finance** projects, balancing low-capacity and high-capacity countries' participation in European schemes, especially Creative Europe MEDIA. However, the attendees representing low capacity countries raise a flag stating that the existing rules are not yet fully adapted to their needs, so the practical impact of these measures are not yet visible, while European institutions representatives consider the problem might be a lack of understanding of the rules. The group encourages a dialogue between European and national representatives to detect concrete problems and find concrete solutions which Animation in Europe can suggest during the upcoming revision of the Creative Europe program.

The public broadcasters' support for the development phase is convenient (as their expertise is highly valued). However, the participation of many broadcasters (as in the EBU initiative) seems to be difficult; the group considers differences in common interests or criteria between the parties could be an obstacle to their implementation. However, promoting European clusters (due to territorial proximity, language, etc.) could be a good solution to encourage co-development initiatives. Thus, the group suggests a new mechanism which involves a reduced number of broadcasters per project, ideally who share a similar editorial line, while the rest can join in later stages with some established rules.

Moreover, the support of a public broadcaster for a project is a guarantee for public funds when granting subsidies for its development, especially as some funds declare not to have the expertise or capacity to evaluate them. Thus, the group suggests creating a new tool which involves both the participation of broadcasters (who would establish mechanisms to ensure support or interest letters for animation series and films) and funds (who would open funding lines for market-validated animation projects).

The main discussion concerns property, buyouts and ownership of IPs. The pressure from broadcasters to own the copyright of IPs is high. Still, the European public funds (whether national or regional) understand the importance of retaining the majority of IPs in the European independent producer's hands.

To avoid the investment of development public funds in private broadcasters in case the AV work eventually becomes 100% property of a private global broadcaster (the so-called '*originals*'), the group agreed that the development schemes should be refundable when the granted project loses its "European relevance", meaning when the European independent producers who initiated it have lost the whole ownership.

About co-productions

The access to the market and the additional sources of financing are the main motivations to start a multi-territorial coproduction. However, when creating children's content (which is the biggest part of the European animation industry), we must also consider the importance of cultural heritage and diversity, and the impact these audiovisual works have as builders of new audiences based on European values and identity.

The group agrees Europe needs to facilitate these co-productions, making compatible their public funds (European, national and regional):

- Minority coproduction schemes: boosting them, to facilitate low-capacity countries access to European funding and market.
- Selective schemes and direct grants: focus on EEE companies producing content on two basis: IP retention and European relevance (cultural values, characters and visual references must be representative and relatable to European audiences).
- Automatic schemes and tax incentives: although available to all kinds of productions, they should positively incentivize those co-productions aimed to retain the IP on EEE firms.
- Aid intensity: children content shall be able to receive the highest % of aid Intensity possible in each territory, as it shall be understood as "difficult work" in any case. "Children content" shall be defined as content primarily targeting children (whatever the national definition of "children" is, according to national regulators).
- Territoriality of expenses (in and out of Europe): European public money must stay in Europe. Thus, public schemes should focus on international co-productions that retain the IP in EEE companies.

IV. WG 2 RECOMMENDATION APPROACHED BY AiE

Fostering European co-productions in animation

Faced with underfunded children's programming and a global animation crisis, the group stressed the need for stronger tools and collaboration between funding bodies and broadcasters to support project development. For production, they advocated creating enhanced tax incentives by linking them to the retention of intellectual property (IP) by European companies and to the European relevance of the content, strengthening the competitiveness of the independent sector and avoiding a shift to a mere service industry.

WG3: AI & ANIMATION

New regulations for a new era. The impact on the sector: a different way to think, create, and consume.

Co-chaired by: Ms. **Lucía Recalde**, EU. European Commission. Europe Creativa MEDIA Unit Head, DG CONNECT, and Ms. **Moe Honan**, Vice-Chairwoman, Animation in Europe,

Advised by: Ms. **Alba Mejjide**. AI Consultant & Project Manager. MEng AI.

Keynote by: Mr Ibán García del Blanco. Sapin. Former Member of the European Parliament.

Participants

- AUSTRIA: Mr Stefan Stratil. ASIFA AUSTRIA Association Internationale du Film d'Animation. President.
- Cyprus: Ms Maria Pavlou. CAA Cyprus Animation Association. Representative.
- Denmark: Mr Mikkel Mainz. Animation Denmark. Representative.
- EU: Mr Christian Davin. CARTOON. President.
- Finland: Mr Pablo Jordi. Animation in Europe. Treasurer.
- Italy: Ms Francesca Perri. Lawyer and AI Expert. Tonucci & Partners Law Firm.
- Lithuania: Mr Dovydas Vilkelis. Lithuanian animation association (LAA). Representative.
- Poland: Mr Robert Jaszczurowski. SPPA (animation films producers' association). Representative.
- Portugal: Mr Nuno Beato. APPA (Associação Portuguesa de produtores de Animação). Board Member.
- Slovenia: Mr Jure Vizjak. Slovene Animated Film Association/ Društvo slovenskega animiranega filma (DSAF). Board Member.
- Spain: Ms Nathalie Martínez. DIBOOS. Chairwoman.
- Spain (Catalonia): Mr Joan Ruiz. Institut Català de les Empreses Culturals (ICEC). Departament de Cultura. Catalan Films.
- Spain (Catalonia): Alba Sotorra ProAnimats. ProAnimats (Animation Producers' Association). Member.
- Spain (Catalonia): Mr Carlos Biern. ProAnimats (Animation Producers' Association). Board Member.

I. WG 3 CONTEXT AND BACKGROUND DOCUMENTATION

Laying a Realistic Foundation: Current State of AI in the Animation Sector

Artificial intelligence (AI) is transforming the animation industry, and it is critical to analyse its impact from a realistic, fact-based perspective. The film industry at large, including the animation sector, has long been using AI machine learning-powered tools to optimize repetitive tasks and streamline processes. However, it is crucial to take into account the rise and disruption of Generative AI, which enables the creation of entirely new content, such as text, images, audio, or video. This advancement is pushing companies to not only refine their existing workflows but also explore innovative ways to integrate this groundbreaking technology without compromising the creative core. We aim to understand how AI in all its forms, including Generative AI, is perceived across the industry and what concrete actions companies are taking to adapt to these ongoing changes.

In order to reach the above conclusions, the following points will be addressed:

1. **Adoption of AI in Industry:** AI tools currently in use and their tangible impact on production.
2. **Roles affected by the rise of AI:** Areas where AI is having the greatest impact in the context of Animation companies.
3. **Perception of professionals:** Attitudes of animation industry professionals towards the integration of AI.
4. **Innovation Strategies:** How studios and companies are approaching the incorporation of AI.
5. **Impact on the creative process:** Changes in the design and production phases, and the management of the relationship between AI and human art.

Future Opportunities: Potential of AI in the Animation Industry

Artificial intelligence opens up a range of opportunities for the animation industry, and our aim is to identify those future applications that may be of most interest and relevance. We want to explore how AI can be used strategically to expand creative potential, optimize processes and enhance the viewer experience, with a focus on the animation industry leading the way in this integration. This analysis will allow us to envision a future where AI is a tool that responds to the specific needs of the industry, rather than imposing unwanted limitations or transformations.

In order to reach the above-mentioned conclusions, the following points will be addressed:

1. **Areas of Technological Innovation:** New AI applications identified that could revolutionise animation processes in the most mechanical or repetitive tasks.
2. **Applications in creative tasks:** How AI could assist in complex creative phases, such as character creation and environment design.
3. **New forms of human-machine collaboration:** Defining a desirable working model for the sector in which AI and human creativity coexist.
4. **Emerging Business Models:** How AI could open up new business opportunities and distribution models in animation.

Current Limitations: Identifying obstacles to the adoption of AI in Animation

Although artificial intelligence is advancing in the animation sector, it faces several limitations that are crucial to recognise for effective integration. We want to identify and analyse the technological, creative and ethical barriers that currently restrict the use of AI in the industry, understanding its impacts on production processes and artistic quality. The issues of legislation and authorship, given their importance and relevance, will be addressed separately and in depth, although they fit into this theme of limitations. Acknowledging these barriers will allow us to set realistic expectations and define strategies to overcome current challenges, ensuring that the use of AI supports and respects the unique character of animation.

In order to reach the above conclusions, the following points will be addressed:

1. **Technological constraints:** Barriers in the development of accurate and reliable AI tools for animation.
2. **Creative constraints:** Difficulties for AI to replicate nuances of creativity and unique styles.
3. **Ethical issues:** Dilemmas related to the use of AI in animation, such as potential bias in algorithms, transparency in the use of automated tools and the impact on artistic authenticity.
4. **Workflow compatibility:** Challenges in integrating AI without disrupting or complicating established processes.
5. **Accessibility and costs:** Economic and access barriers for companies in the use of AI, especially for small or independent studios.

Ownership: Rights and Intellectual Property in the Age of AI in Animation

The adoption of artificial intelligence in animation raises complex challenges around intellectual property and copyright. We want to explore how authorship is defined when a work is created in whole or in part with AI tools, and what implications this has for animators, studios and software developers. This analysis seeks to generate a clear framework that protects creativity and human endeavour, while regulating the role of technologies in content creation. Addressing these issues is essential to ensure a fair and sustainable use of AI in the industry.

In order to reach the above conclusions, the following points will be addressed:

1. **Current legal framework in the EU:** An analysis of the legislation in Europe reveals how intellectual property and artificial intelligence are currently regulated. This framework will provide the foundation for understanding how authorship and ownership are defined when works are created, either fully or partially, with AI tools.
2. **Opportunities offered by this legal framework:** The working group will explore the opportunities provided by the existing legal framework, such as its potential to protect human creativity and encourage innovation. Discussions will consider how the current system can be leveraged to integrate AI technologies into animation in a way that supports compliance and creativity.
3. **Potential shortcoming in the EU:** Lastly, this group will delve into the challenges posed by the framework, including ambiguities around authorship definitions, issues with transnational cases, and concerns over regulations potentially stifling innovation or restricting access to AI tools.

Sustainability: Balancing Innovation and Responsibility in AI Animation

Sustainability in animation, in the context of artificial intelligence, encompasses both the environmental impact and the economic and social viability of its implementation. We want to explore how AI tools affect the resources needed for animation production, including energy consumption, operational costs and effects on the workforce. This analysis seeks to promote a sustainable approach that allows the industry to benefit from the technology without compromising its future or the environment.

In order to reach the above conclusions, the following points will be addressed:

- 1. Environmental Impact of AI in Animation:** Exploration of the energy consumption associated with the training and use of AI models in animation, and how this can be mitigated through resource optimisation or the use of renewable energy.
- 2. Economic Sustainability:** Analysis of how AI integration can reduce costs in some processes, but also generate new investments needed, and how to balance this aspect to make it viable for studios of different sizes.
- 3. Social Sustainability:** Reflection on how the use of AI affects the workforce in animation, promoting a balance that ensures the preservation of human jobs while adopting new technologies.

Education and Job Transitions: Preparing the Animation Industry for the Age of AI

The integration of artificial intelligence in animation not only transforms creative processes, but also the skills required to thrive in this sector. It is crucial to analyse how educational programmes can be adapted to train professionals who understand and master AI tools, while supporting current workers in the transition to more specialised or hybrid roles. This theme seeks to define strategies that enable the industry to train and evolve, ensuring that technology complements rather than replaces human talent.

In order to reach the above conclusions, the following points will be addressed:

- 1. Review of educational standards and new needs of the sector:** Analysis of how educational institutions and vocational training programmes are incorporating AI into their curricula to prepare the next generation of animators.
- 2. Job Transitions:** Strategies to support working professionals as certain tasks become automated, including further training, relocation into creative roles and the development of new technical competencies.
- 3. New Job Profiles in Animation:** Identification of emerging AI-driven roles in the animation sector, such as creative AI system designers, technology integration specialists and hybrid process managers.
- 4. Industry-Academia Collaboration:** Proposals to foster collaborations between studios, AI developers and educational institutions to ensure that professional training is aligned with real market needs.
- 5. Social Sustainability:** Exploration of workforce-related challenges, such as ensuring equitable access to training, addressing job displacement concerns, and fostering inclusive practices that promote long-term workforce stability in the animation industry.

Best Practices

Once all the issues raised have been analysed, the working group will develop a list of Best Practice recommendations that reflect our collective vision on how to integrate artificial intelligence responsibly into the animation industry. This document will serve as a practical guide, based on the shared discussions and perspectives, to ensure that the adoption of AI supports the creative, economic and ethical development of the sector, while respecting both its artistic essence and its long-term sustainability.

Resources to go further

- [AI in the Audiovisual Sector: Navigating the Current Legal Landscape](#)
- [FUTURE UNSCRIPTED: The Impact of Generative Artificial Intelligence on Entertainment Industry Jobs:](#)
- [Opportunities and Challenges of Artificial Intelligence Technologies for the Cultural and Creative Sectors](#) (European Commission, February 2022)
- [Artificial Intelligence Advisory Council will provide independent expert advice to government](#)



II. WG 2 DISCUSSION HIGHLIGHTS

Current State of AI in the Animation Sector

Most of the members of the group knowingly use some AI tools for different functions, and there is a common agreement on its benefits as a mechanical tool to help streamline certain tasks, but as a broad creative generative tool it is proving much more controversial.

The borderline between AI generated content and human generated content is getting thinner, since there are some people, for example visual artists, and story creators, writers etc. who use AI intensively for producing content.

The quality and accuracy of generative AI is evolving at speed therefore potentially eluding the ability of humans to perceive and to detect it, in particular such content that is generated by AI.

- Potential of AI in the Animation Industry
 - As mechanical tool
 - In the development stage, to inspire and to increase the pace of preparing projects to be pitch ready.
 - To cover certain mechanical work in the animation process.
 - As a translating tool.
 - To break down scripts and calculate budgets.
 - For administrative tasks.
 - For promotion and market (comparing data)
 - All AI tools need to have lots of data to be able to work adequately, and open-source AI might be much more convenient for the future of these technologies.
 - AI could embrace author protection associations in order that IP owners get paid when their images or works are used, just like in applications such as Spotify.
- Identifying the obstacles to adopting AI in Animation
 - Some tools are not trustworthy.
 - The standardisation and homogenisation effect on the content generated by AI tools.
 - Fear of job losses due to AI, including the possibility that it can lead to a lack of experts in certain fields, as there are few AI experts to advise on safe and ethical integration, and adaptation within the animation industry.
 - Loss of control of the work that the AI is doing.
 - Social concerns: Lack of knowledge about AI-related working conditions or economic relations with original creators.
 - Sustainability concerns: Can AI be developed while maintaining environmental sustainability? It's a concern because there are conflicts of interests.
 - Technology does evolve fast. We don't have enough knowledge on how to use the newest tools in safe and ethical ways even now which would also be legally compliant.
- Animation Industry's needs in the current situation
 - Access to finance to integrate AI experts into audiovisual animated projects.
 - More evolved legal tools to help the animation industry protect IP owners and their other beneficiaries (stakeholders, artists, writers, directors, actors etc) as long as

- there are other companies using open source generative AI in the industry, producers won't be able to do this without assistance.
- A balance between innovation and the provision of training of professionals to help them understand new technologies.
 - A combination of different skills in every team to be able to find solutions regarding the use of AI.
 - To share research that is done in our projects to advance together as an industry. If we don't move faster and collaborate on a wider scale, we won't catch up with other global entities, as there are already lots of people using the newest technologies.
 - Training programs to avoid job displacement.
 - A showcase of EU tools where European companies within the animation industry can see what other options, aside from open source tools, such as ChatGPT are available when working with AI. This should be a selection of tools which encompass local, ethical, transparent and sustainable apps.
- Ownership: Rights and Intellectual Property in the age of Ai in Animation
 - As long as we don't really define the object of authorship, we cannot determine who is the author of that object.
 - IP owners and their beneficiaries are losing legal cases currently in the U.S. with respect to visual works taken against AI companies, because these case outcomes are based on the interpretation that AI companies are not actually using their artistic works, but rather creating a new mathematical representation of them.
 - In some cases, there is not much difference between manually creating a work of art and asking a machine to produce that same work. The idea is still human. AI can be a kind of assistant tool to the artist. Some creators can and do enjoy using AI tools this way to help them innovate and create.
 - If authorship is defined in the contract as being of human origin, there shouldn't be any problem. This could be better defined. Current legal framework in the EU is a little vague.
 - The actual problem is that the data that is scraped and used in AI to generate an image for example is not fully traceable yet. So, if we don't know who are the actual authors of the data used to generate an artistic visual written or audio piece, we cannot transfer or assign the rights therein.
 - There could be a tax for using AI, or a royalty system, that could be used to pay to the authors of the sources used by the AI to generate an object/entity/IP
 - There are so many varieties of AI tools. If we could make a classification, we could create different regulations for every kind of AI tool. The same regulations cannot be applied to all tools, since they work very differently.
 - There is a contradiction between having a full legal certainty and having at the same time innovation, since legal certainty can impact creativity. There should be a balance between using AI, deployment and protecting authors.
 - New technologies could be useful to improve the collecting of royalties, which nowadays are not working very efficiently.

- There are problematic incompatibilities between countries from different continents in terms of liberal and restrictive practice regarding copyrights, when importing or exporting products.
- Sustainability: Balancing Innovation and Responsibility
 - There are three strands: economic, social and environmental sustainability.
 - Concerns that AI projects and materials will probably double or triple in size. Storage is very expensive.
 - Could new AI tools reduce energy costs in certain processes, as rendering in studios?
 - There are smaller and more sustainable AI models that don't need a large amount of time of training or an expensive computer. We need access to expertise that can inform us about more sustainable models.
 - We need to know the carbon footprint of AI in our industry, and therefore need reliable carbon calculator tools that are relevant to Animation.

III. WG 3 OUTCOMES

- Training is the key to moving forward and catching innovations regarding AI.
A big technological revolution is going on, and every revolution creates confusion and yet demands passion and progression. It is necessary to understand the right path to take with regard to the adoption of AI with respect to the legal framework, protecting creative human generated works, implementing best and safe practices, to balance the implementation of AI in an ethical and sustainable way as this innovation can't be stopped.
AI is a new technology, so new experts are needed who can understand it for our industry too. Production companies will need to understand that they need to educate, train and adapt their teams to these conditions.
Universality of AI: It is necessary to acquire the knowledge to handle AI's omnipresence in our world, in terms of training.
- We should protect European diversity and culture, avoiding AI global standardization.
Europe should stand up for the safe and ethical use of AI, while also find a path to remain competitive; it's a huge challenge, but, at the same time, it is a big opportunity: if there is collaboration within the European industry and European countries develop tools together, they can be ahead of other world industries.
There is a lack of leadership that could take all European companies together and make them collaborate. This needs to be promoted and incentivised.
- Concrete proposals:
 - Crossovers and collaboration. It can be very helpful to look at companies of other sectors and industries who also create IP that are not focused on audiovisual and learn from them.
 - Create a common AI policy for European companies, acknowledging the Irish company Brown Bag's company on AI as a reference. As an industry we need a

clear legal framework that protects animation companies so that they can move forward in confidence.

- Best practice regarding a basket of tools that we can use with security from a legal, ethical and sustainable perspective in the animation industry, and that helps us to protect our diversity of cultures and people.
- Training in access to AI expertise for companies or individuals.
- Audiences formed by new generations are changing their relationship with content. We should have more awareness of the new audiences to adapt our work and content towards them.

IV. WG 3 RECOMMENDATION APPROACHED BY AiE

Embracing Ethical AI for a Human-Centered European Animation Industry

The European animation industry supports a human-centered approach to integrating artificial intelligence (AI) within their companies.

Animation in Europe recommends the development of a Best Practice Guide for the legal, ethical, and sustainable use of trusted AI tools. Alongside this, the group calls for enhanced access to training programs and AI experts to help industry professionals acquire both educational and practical skills, aligning with the sector's creative and productive goals.

WG4: GREEN ANIMATION

This working group seeks to contribute to the development of European standards for sustainable practices in animation. While establishing comprehensive standards will require time and collaboration, this document outlines the key areas of reflection and the steps needed to drive meaningful progress. We hope that this paper can serve as a helpful basis for a successful working group at Animar_BCN 2024.

Co-chaired by: Ms **Carlota Guerrero**, Catalan Institute for Cultural Companies - Manager of the Catalunya Film Commission, and Mr **Dirk Beinhold**, Vice-Chairman Animation in Europe,
Advised by: Ms **Alissa Aubenque**, Head of operations and international at Ecoprod, and Mr. **Adrien Roche**, International Project Manager at Ecoprod.

Participants

- Belgium: Mr Benjamin Vanhagendoren. Wallimage. Responsible for the green policy.
- Bulgaria: Mr Dimitar Petrov. ABAP (Bulgarian Animation producers). President.
- Croatia: Mr Draško Ivezić. HRUP (Croatian producers association). President.
- Denmark: Ms Marie Bro. Producentforeningen. Board Member.
- Estonia: Ms Mirjam Mikk. Estonian Film Institute. Shorts & Animations Int. Distribution Coordinator and Marketing Specialist.
- EU: Mr Matija Sturm. CEE Animation. Council Member.
- Finland: Mr Timo Suomi. APFI (Audiovisual Producers Finland). Board Member.
- France: Mr Jean-Baptiste Wery. Dandeloo. Co-Founder & Executive producer.
- Greece: Mr Kostas Kakarountas. Hellenic animation association. President.
- Hungary: Mr Gergely Kalocsay. National Film Institute. Lawyer.
- Ireland: Mr Ronan McCabe. Animation Ireland. CEO
- Lithuania: Mr Audrius Kuprevičius. Lithuanian Film Center. Senior Manager.
- Poland: Ms A. Magdalena Król Główny. Polish Film Institute. Specialist Film Production and Project Development Unit.
- Portugal: Ms Angela Maciel. ICA. Técnica Superior (Departamento Cinema e Audiovisual)
- Spain (Catalonia): Ms Mercedes Marro. ProAnimats (Animation Producers' Association). Member.
- Spain (Catalonia): Mr Mikel Mas. PROA (Federation of Audiovisual Production Companies). Board Member.
- With the interventions of
 - Ms Linnea Merzagora. Italy. Green Film.

- Mr Luca Ferrario. Italy. Green Film.

I. WG 4 CONTEXT AND BACKGROUND DOCUMENTATION

Questions for working group discussions

- How can awareness of sustainable production practices be raised effectively, both within the animation industry, to foster a collective commitment to greener practices?
- What specific tools and technologies are needed to support sustainable practices in animation? How can these be standardized and made accessible across the industry?
- How can film funds, commissions, and other institutional players empower studios and producers to adopt sustainable practices? What tools or incentives would be most effective?
- What specific elements should a European standard for green animation include to address the unique challenges of this sector, such as the heavy reliance on digital tools and international production pipelines?
- What obstacles must be overcome to develop and implement a unified green production standard for animation across Europe? How can these challenges be addressed collaboratively?
- How can a future regulatory framework, whether through new policies or revisions to existing ones, help reduce the environmental footprint of animation production while ensuring the industry remains competitive and innovative?

In order to address these questions and in an effort to get everyone on the same page, we would first like to share some context with the experts as follows.

Introduction

The escalating environmental crisis requires an immediate and thorough transformation of production practices across all creative industries, and animation is no exception. As a highly technological field, animation depends on energy-intensive processes like rendering and data storage. While global data storage alone is estimated to consume 240–340 terawatt-hours (TWh) of electricity annually, accounting for approximately 1–1.3% of global energy consumption⁶. This figure represents emissions from all global data storage and does not specifically reflect the emissions of animation. Additionally, there is a significant lack of comprehensive data on the environmental footprint of animation, making it difficult to fully understand the industry's impact. The international nature of animation further adds to its potential environmental challenges. What specific challenges does the international nature of animation pose? How can these be addressed to create effective and harmonized solutions tailored to the industry's unique structure?

The film industry carries a dual responsibility: shaping imaginations and influencing cultural narratives, while also directly impacting the environment through its production practices. Although the importance of the first aspect is undeniable, the focus here is on addressing the environmental footprint of animation as a production-driven industry.

⁶ [Data Centres and Data Transmission Networks](#)

Despite these challenges, the environmental toll of animation often goes unnoticed. Digital workflows, which lie at the heart of the industry, lack the immediate visibility of live-action cinema's physical impacts, such as waste from sets or large-scale transport. This invisibility risks overshadowing the sector's substantial contribution to emissions, leaving its responsibility under-examined.

Specific standards tailored to the unique challenges of animation are crucial to addressing its environmental impact. These standards must adapt to the industry's digital workflows and physical aspects while considering the entire production chain. These standards must also be international to ensure compatibility in a globalized sector and to harmonize practices, avoiding the inefficiencies of fragmented or localized initiatives.

1. Current situation

Existing green standards appear to address general practices such as waste reduction and renewable energy use but may not fully account for the unique environmental challenges of animation, including digital workflows, production infrastructure, and the international nature of its processes.

The importance of green production in animation

Is the animation industry uniquely positioned to lead in the adoption of sustainable practices, particularly as technological advancements reshape its landscape? In 2019, the digital sector (so not just animation) emitted approximately 1,400 million tonnes of greenhouse gases, accounting for 3.7% of global CO₂ emissions⁷. Animation, with its reliance on energy-intensive workflows, exemplifies the growing environmental challenges posed by digital technology and underscores the urgent need for sustainability benchmarks.

As the industry integrates tools like artificial intelligence, how do the efficiency and creativity gains balance against its significant energy demands and resulting carbon footprint? Proactively addressing these challenges could play a significant role in reducing the industry's direct environmental impact and might help position animation as a leader in the creative sector. By exploring ways to demonstrate that innovation and sustainability can coexist, the animation industry has the opportunity to develop a model for integrating cutting-edge technology while striving to maintain ecological integrity.

2. The specificities of animation regarding green production

A unique structure, leading to unique emission factors

Animation, like other creative industries, operates within a project-based structure but stands out due to its unique integration into studios and pipelines rather than functioning as fully isolated projects. This interconnected framework means that environmental considerations are often embedded within broader corporate social responsibility reporting at the studio level, rather than being limited to individual projects. Additionally, the sector presents unique challenges due to its strong international dimension and reliance on specific workflows and specialized infrastructure. These include energy-intensive digital pipelines, purpose-built facilities such as rendering farms and studios, and the complexities of managing global production networks. The environmental

⁷ [Study - The environmental footprint of the digital world](#)

impact of these elements, as evidenced by significant emissions, underscores the necessity for tailored strategies to address the sector's unique sustainability challenges.

International dimension

Animation is a global industry, with production spanning continents and heavily reliant on rendering and digital tools for coordination. This dependence significantly contributes to the environmental footprint, particularly through energy-intensive processes like cloud-based rendering and data storage. Given the transboundary nature of these challenges, international collaboration is critical for developing harmonized solutions.

Concrete actions for studios

Animation studios can focus their sustainability efforts in three particular areas: equipment purchases, infrastructure optimization, and production workflows. Strategic investment in energy-efficient and durable equipment is essential, as outdated or inefficient tools can undermine broader sustainability measures. Infrastructure improvements, such as rehabilitating existing buildings instead of new construction, replacing oil or gas heating systems with cleaner alternatives, installing energy-efficient lighting, and designing server rooms for optimal cooling, can significantly reduce emissions. Additionally, optimizing production workflows through the adoption of real-time 3D technology, avoiding redundant equipment setups, and standardizing file exchanges to limit unnecessary conversions can further enhance efficiency and minimize environmental impact. To provide a clearer understanding of a studio's emissions, an example of a carbon footprint analysis is included at the end of the document.

Another key area of focus is transportation, as flights and other travel—particularly for studio executives—represent a significant source of emissions. Addressing this by prioritizing virtual meetings, optimizing travel schedules, and exploring sustainable transportation alternatives can help mitigate this impact.

3. Learning from the challenges faced by live-action productions

The live-action industry has faced challenges in green production, including an overabundance of tools and fragmented workflows. While the variety of tools and regulations is ultimately positive, as it reflects progress, their abundance can sometimes overwhelm producers.

Three mechanisms currently drive green production in the film industry: eco-conditionality, eco-bonuses, and voluntary incentives. In live-action cinema, each country advances its own regulations at different paces, sometimes complicating processes in the context of international co-productions. For animation, with its reliance on global networks and workflows, this issue poses challenges but also presents opportunities to foster collaboration and streamline sustainability efforts with the right guidance and resources.

A European-wide standard could provide an opportunity to streamline practices, reduce administrative burdens, and ensure no country or producer is left out of the transition to greener practices. Such harmonization is essential for fostering efficiency and collaboration in an industry that cannot afford the inefficiencies created by varying national regulations. By working toward this unified framework, animation could address its specific challenges and lead in setting an example for global creative industries.

Existing resources

In France, for example, a comprehensive **Green Guide for Animation** has been developed by Ecoprod to help studios adopt sustainable practices tailored to the sector's specific needs. While this guide is a valuable resource for reducing the environmental footprint of French animation, its national scope highlights the challenge of fragmented efforts in addressing global sustainability. Several CO2-calculators, such as the Carbulator, developed specifically for animation, as well as more general tools (Albert, Carbon'Clap...), assist in assessing and managing carbon footprints and are used in many countries. It is important to distinguish between calculators, which measure emissions, guides, which offer practical steps for improvement, and certifications, which confirm compliance with sustainability standards, as each serves a distinct role.

The effort has therefore expanded internationally, with **Ecoprod, Green Film, and several Cine Regio members**, including ALCA (Book, Audiovisual and Cinema Agency in Nouvelle-Aquitaine), Catalonia Film Commission - ICEC, EC1 Lodz Film Commission, Film London, Screen Scotland, Trentino Film Commission & Fund, and Viken Filmsenter collaborating on a global guide for sustainable animation. This collaborative approach highlights the shared responsibility of all stakeholders in the animation industry to contribute to a greener future. However, a lack of detailed, sector-wide data on animation's footprint remains a challenge. Additional tools and resources to support green production are listed at the end of this document.

4. Conclusion: Defining specific standards for animation

Specific standards are necessary to adapt to the unique digital tools, workflows, but also to traditional and physical aspects of production, and to address the entire production chain. These standards must also be international to ensure compatibility in a globalized sector and to harmonize practices, avoiding the inefficiencies of fragmented or localized initiatives.

What actions should be prioritized next, and which institutions or stakeholders are best positioned to lead these efforts following Animar?

Resources to go further:

- [Cardiff report : a net zero animation industry](#)
- [French Guide for Green Animation](#)
- [Stop Motion Green Guide by StopMoLab](#)
- [Québec Best Practices Guide for Animation and VFX](#)
- [Green Film Certification Criteria \(live\)](#)
- [Ecoprod Label Criteria \(live\)](#)
- [Carbulator : a carbon calculator for animation](#)
- [Carbon footprints \(season and studio\)](#)



I. WG 4 DISCUSSION HIGHLIGHTS

Overview

[Green Film](#) shares a presentation on their work:

- **A tool** designed to promote sustainability for audiovisual productions and to guide producers in working in a more sustainable manner.
- **A certification** for sustainable audiovisual productions, validated by SNPA

[EcoPROD](#) (France) shares a presentation on what they are doing and how environmental sustainability regulations in production look like. It offers a network, training and different tools (mostly free to use; most of them in French, some in English).

Ecoprod, [CineRegio](#), and Green Film have formed a Green animation International Working Group that aims: collective international working group.

- To foster collaboration through a network dedicated to promoting sustainability in the animation industry.
- To create common tools to share best practices to reduce the environmental impact of animation.
- To agree on common standards and progress towards a harmonized, international certification scheme.

Green production

- **Measure.** Carbon calculators to estimate the GHG emissions emitted by the production process. Some existing carbon calculators: Albert (UK), Eureka (Interreg Project), Green Shooting (Switzerland), Carbulator, Carbon Clap (both from France), Green Producers Club (Norway).
- **Reduce.** Best practices to reduce the impact at each production stage and in all departments. Some existing resources available are: trainings, guides, research papers, toolkits, case studies...
- **Communicate.** Certification schemes and labels offer (guidelines for productions, and a verification process to implement the guidelines successfully through an independent audit).

Green production in Europe

- Eco conditionality
 - Germany: national standards, 18 out of 21 criteria need to be implemented.
 - France: mandatory carbon footprint
 - UK: most broadcaster made the Albert certification mandatory
- Green bonus
 - Belgium: Wallimage offers a bonus to certified productions
 - Austria: 5% bonus on the international tax credit
 - Portugal: bonus on the international tax credit

- Voluntary measures

STEP-UP: Sustainability Toolkit and E-learning Platform

An international resource hub on green production, providing an overview of existing An international resource hub on green production, providing:

- An **overview** of existing regulations, tools and resources in Council of Europe member states and beyond
- A range of training courses tailored to local needs and **co-productions**, a comprehensive approach to sustainability
- A **new learning experience**, complementary to existing training
- A **hands-on approach** with exercises, quizzes and case studies

Green animation

Few tools are available that consider the specificities of the animation industry:

- Carbulator: European carbon calculator for animation studios developed by Anim'France
- Guide de l'animation éco-responsible: Green animation guide developed by Ecoprod and la Cartouch'Verte

Next steps

European animation sector needs a common tool & a common certificate to facilitate European co-productions.

How do we get this common tool?

- Let's try to get a model, even if it's not perfect yet, let's test it!
 - Clear
 - Measurable
 - Standard
 - Consistent
 - Avoiding greenwashing
 - With two levels: project and studio
- Creating the cast of qualified experts
- Creating a scientific advisory committee
- Establishing a **communication** system to control the quality
- Training and educating about efficiency and sustainability (professionals but also animation students)
- Sharing improvements and good practices among the sector (including not only producers, but also Broadcasters, media-platforms and the administration as leading body)
- Lowering the costs of green tools, sharing them between producers and the Administration

What is green animation?

- Two levels (Both levels must include subcontractors, who should also be eco-certified and listed in a green guide funded by local Film Commissions).
 - Long term improvement: the studio
 - Short term improvement: the project
- Key elements of a common definition
 - Production

- Digital sobriety
- Energy efficiency
- Staff practices (catering, commuting, etc.)
- Workflow optimisation
- Remote working
- Rendering location
- Transport & travels
- Education
- Storytelling/content
- Merchandising
- Distribution (separated guidelines)

Next steps for the Green Animation International Working Group

- Use the platform offered by Animar to expand the Green Animation International working group (two categories):
 - High involvement
 - Producer's organisations
 - Film Funds & Film Commissions
 - Environmental experts (researchers, sustainability consultants and organisations, ISO)
 - Educators / schools
 - Informative level:
 - Broadcasters / streamers
 - Big professional events (festivals and markets)
 - Software publishers
 - Distribution
- Launch a survey to identify topics of interest
- Development of the Green Animation Guide that will offer an understanding of the impacts of the industry and share best practices
- Release of the Guide (Annecy)
- Design a formal structure
 - Financing
 - Membership fee (flexible)
 - Public financing
 - Governance
- Establish international common standards for green animation
 - Carbon Calculator
 - Definition
 - Tools
 - Certification
- Dissemination
 - Events & networking
 - Training programs
 - Studies
- Discuss the option of creating a shared certification scheme
- Link to other industries

II. WG 4 OUTCOMES

The attendees of the sustainability think-tank acknowledge the need for common environmental sustainability tools to facilitate coproduction across Europe and thus agree to engage their national stakeholders to join an existing international working group currently developing green animation production standards.

Detailed outcome

As an industry based on international collaboration; animation needs to be at the forefront of the pathway to a common tool promoting and implementing sustainability. While live action production across Europe can make use of different existing protocols and certifications for sustainable production, there are no such resources available for green animation production.

Representing the European animation industry, the attendees of the sustainability think-tank agreed to engage the national stakeholders in their countries to join an existing international working group led by Ecoprod to develop a set of guidelines specific for animation to facilitate international coproduction and act as the blueprint for green animation production standards and tools across Europe.

III. WG 4 RECOMMENDATION APPROACHED BY AiE

Driving Sustainability with Common Green Production Standards

Participants of the sustainability think tank highlighted the urgent need for shared environmental sustainability tools to facilitate co-production across Europe. As part of this commitment, attendees agreed to engage their respective national stakeholders to join an existing international working group dedicated to developing green animation production standards. This collaborative effort aims to establish a unified approach to sustainable animation practices across the continent.

Other Activities

Opening Words

26/11/ 2024 - 3.00 pm – 3.30 pm at [The 19th Hole – Business Lounge \(19th Floor\)](#)

Presented by Ms Mar Sáez Pedrero. Executive Director. Animar_BCN

With the participation of:

- Mr Edgar Garcia. Director of the Catalan Institute of Cultural Companies (ICEC).
- Ms Lucía Recalde. Deputy Director and Head of Unit Audiovisual Industry and media support programmes DG Connect. European Commission.
- Mr Philippe Alessandri. Animation in Europe Chairman.
- Mr Matija Sturm. CEE Animation Council Member.
- Ms Marta Alonso, ProAnimats Vice-Chairwoman.
- Mr Iván Agenjo, PROA Animation Vice-Chairman.



Let's talk, Europe!

27/11/ 2024 - 5.00 pm – 7 pm at [The 19th Hole – Business Lounge \(19th Floor\)](#)

Activity open to professionals with prior registration until reaching total capacity (with the attendance of more than 40 local animation professionals).

Co-production is the bread and butter of animation production in Europe. However, there is not a single answer to the question: "What makes a European animation co-production successful?"

In this session we will discover the meaning and measure of success for some producers, distributors, broadcasters and institutions across Europe.

Study cases:

- Rock Bottom (Ms Alba Sotorra; CEO & Owner. Aba Sotorra S.L.; Spain & Mr Robert Jaszczurowski; CEO & Owner GS Animation; Poland)
- Good partners, good co-productions (Mr Carlos Biern; Content and Distribution Director; DeAPlaneta Entertainment; Spain)

With the participation of:

- Ms Alessia Sonaglioni. Programme Manager at Pilot Programme for Series Co-Productions. Council of Europe
- Ms Patricia Hidalgo. Director of Children's & Education. BBC (British Broadcaster Corporation)
- Mr Yago Fandiño. Clan and Children Content Director. RTVE (Spanish National Television)
- Ms Andrea Basilio. Head of Children's Content. RTP (Portuguese National Television)
- Mr Martin Engelhardt Hansen. Director of Business Affairs. DR (Danish Broadcasting Corporation)
- Mr Todor Ignatiov. Head of Cinema and Foreign Programs Department. BNT (Bulgarian National Television)
- Ms Muntsa Tarres. Executive Producer Children's and animation co-productions. 3CAT (Catalan Television)

Presented by:

Mr Pablo Jordi. Finland. Treasurer of Animation in Europe and CEO of Pikkukala



Closing Session

28/11/ 2024 - 10.00 am – 1 pm at [Auditori Blanquerna | Facultat de Comunicació i Relacions Internacionals](#)

Presented by Ms Mar Sáez Pedrero. Executive Director. Animar_BCN

Welcome Words

Mr Iván Agenjo. Spain. President of ProAnimats & Animation VP of PROA

Anima Mundi

Mr Antonios Vlassis. University of Liège Research Professor. Belgium.

Dissemination Panel

Round table in which we will discuss the conclusions of the experts and present the recommendations of the Animar_BCN European Animation Convention 3rd Edition.

Speakers:

- Mr Philippe Alessandri. Chairman of Animation in Europe and the CEO of Watch Next. France.
- Ms Moe Honan. Vice-chair of Animation in Europe and CEO of Moetion Films. Ireland.
- Mr Dirk Beinhold. Vice-Chair of Animation in Europe and CEO of Akkord Film. Germany.
- Mr Iván Agenjo. Vice-Chair of Animation in Europe and CEO of Peekaboo Animation. Spain.

Moderator: Ms Cristina Angelucci, Publisher in Chief at The European Animation Journal.

With the participation of:

- Ms Els Hendrix. Director at the Federal Government Commissioner for Culture and Media. Germany.
- Mr Alex Traila. Programme Manager at the Council of Europe Pilot Programme for Series Co-Productions.
- Ms Carlota Guerrero. Manager at the Catalunya Film Commission. Spain.



Networking Events

Welcome Dinner

Cocktail – Networking with the local animation ecosystem

Farewell Cocktail



You can see all the pics in the following links:

- [Animar BCN European Animation Convention 26/11/2024](#)
- [Animar BCN European Animation Convention 27/11/2024](#)
- [Animar BCN European Animation Convention 28/11/2024](#)

Press Clipping

- ICEC - https://icec.gencat.cat/ca/actualitat/noticies/detall/Noticia_Animar24
- Box Office https://box-office.es/news/barcelona-se-convertira-en-el-foco-de-la-industria-europea-de-la-animacion-durante-la-tercera-edicion-de-animar_bcn/
- Tivu https://tivu.es/news/barcelona-se-convertira-en-el-foco-de-la-industria-europea-de-la-animacion-durante-la-tercera-edicion-de-animar_bcn/
- Rubik Audiovisual https://rubik-audiovisual.com/el-iii-congreso-animar_bcn-traera-cerca-de-60-entidades-europeas-del-sector-de-la-animacion/
- Audiovisual 451
- https://www.audiovisual451.com/el-congreso-animar_bcn-reunira-a-60-entidades-europeas-en-su-tercera-edicion/
- Panorama Audiovisual
- https://www.panoramaaudiovisual.com/2024/11/20/animar_bcn-2024-reunira-ciudad-condal-60-entidades-europeas-animacion/
- La Pantalla Digital
- <https://lapantalladigital.com/noticia/tercer-congreso-animar-bcn-del-26-al-28-de-noviembre>
- ICEC - https://icec.gencat.cat/ca/actualitat/noticies/detall/Noticia_Animar24
- Cineytele
- https://www.cineytele.com/2024/11/25/icex-respalda-el-tercer-congreso-animar_bcn-el-gran-foro-europeo-de-la-animacion/
- Señal News - https://senalnews.com/es/eventos/-icex-respalda-el-tercer-congreso-animar_bcn
- Produ35
- [Produ.com - https://www.produ.com/television/noticias/el-tercer-congreso-de-animacion-animar_bcn-se-realiza-desde-este-martes-26-al-28-con-el-apoyo-de-icex/](https://www.produ.com/television/noticias/el-tercer-congreso-de-animacion-animar_bcn-se-realiza-desde-este-martes-26-al-28-con-el-apoyo-de-icex/)
- Spain AV Hub - https://spainaudiovisualhub.mineco.gob.es/ca/actualidad/congreso-animar_bcn-
- Radix Animación - <https://radixanimacion.com/eventos/animar-bcn-2024/>
- Cine y teatro
- https://www.cineyteatro.es/barcelona-epicentro-de-la-animacion-europea-con-animar_bcn-2024/
- Panorama Audiovisual
- https://www.panoramaaudiovisual.com/2024/11/29/animar_bcn-pone-foco-ia-sostenibilidad-coproduccion/
- Cine con Ñ - <https://cineconn.es/animar-bcn-2024-ia-animacion-europea/>
- Animation Xpress
- https://www.animationxpress.com/animation/the-third-edition-of-animar_bcn-wraps-up-with-90-delegates-from-24-european-countries/
- La Pantalla Digital
- <https://lapantalladigital.com/noticia/animar-bcn-2024-la-animacion-europea-mira-hacia-el-futuro>
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