Animar 2025

The Annual Think-Tank of the European Animation industry

Barcelona (Spain) · 01-03 Dec · 2025

Animar, celebrated its fourth edition bringing together key European players to advance shared policy priorities and strengthen collaboration across the sector, hosted by La Salle-URL Barcelona Campus University. This especial edition of the leading event for professionals, institutions, and stakeholders from the European animation sector merged the two major industry initiatives of recent years, under the brand of **Animar_BCN Animation Days**:

- Animar_European Animation Convention
- Anima Mundi

Animar is an exceptional platform for dialogue.
It is an exceptional platform for the exchange of ideas and knowledge.
It is an exceptional platform that is shaping a new way of doing things in the audiovisual sector.

Once again, animation demonstrated its capacity for adaptation, resilience, and leadership.

In December 2025, Animar became the meeting point for strategic dialogue, cross-border collaboration, and creative foresight in the European animation industry.

Attendees:

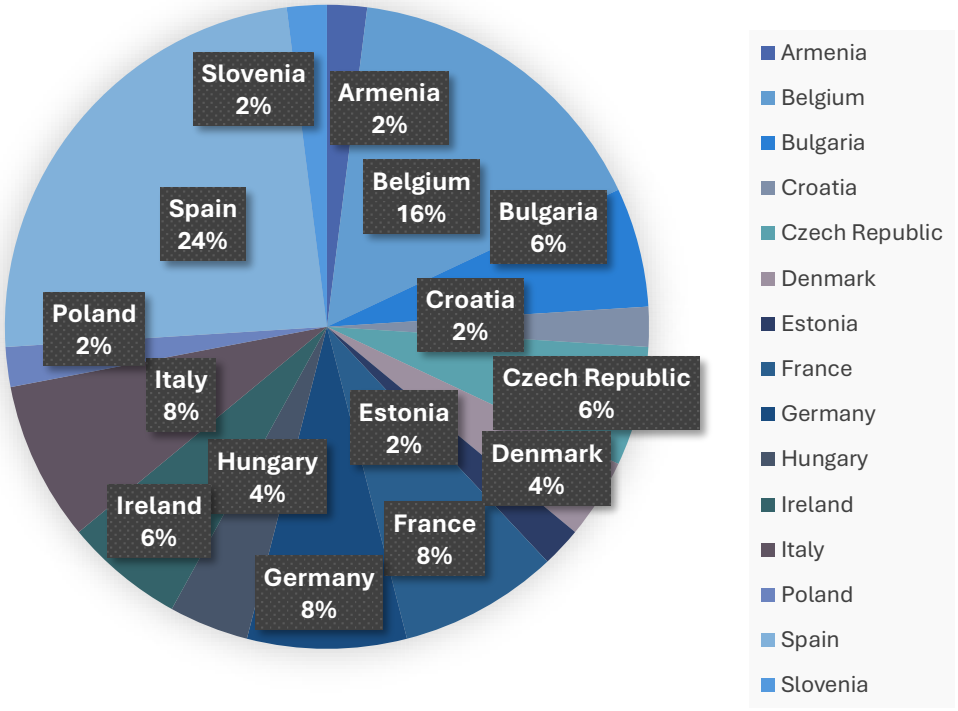
AAA - Armenian Animation Association · ABAP – Association of the Bulgarian Animation Producers · Animation Denmark · Animation in Europe · Animation Ireland · AnimFrance · APA – Audiovisual producers' Association · ASAF – Association of Czech Animation Film · BNT – Bulgarian National Television · CARTOON · CARTOON ITALIA · 3CAT – Catalan Public Broadcaster · CED MEDIA CATALUNYA · CEPI – European Audiovisual Production Association · CNC – French National Centre of Cinema · Coimisiún na Meán Ireland (Media Commission Ireland) · Czech Audiovisual Fund · D'SAF – Slovene Animated Film Association · DIBOOS · DR – Danish Broadcasting Corporation · EAA – Estonian Animation Association · EFAD – European Film Agency Directors · European Commission · European Parliament · EUI- European University Institute · FFA – German Federal Film Board · French Ministry of Culture · HAPA – Hungarian Animation Producers' Association · ICAA – Spanish Film and Audiovisual Arts Institute · ICEC – Catalan Institute for Cultural Companies · ICEX – Spain Trade and Investment · HRUP – Croatian Animation Association · Medienboard Berlin Brandenburg · MIA – Women in Animation · Ministry for Digital Transformation and Civil Service of Spain · NFI- National Film Institute · PROA – Federation of Audiovisual Producers · ProAnimats · Produktionsallianz · RTVE – Spanish Public Broadcaster · SPPA – Polish Animation Producers Association · SSA – Scuola Superiore Sant'Anna · ULiege (Université de Liège) · VUB (Vrije Universiteit Brussel)

Complete Animar_BCN Animation Days photo gallery can be found at:
https://www.flickr.com/photos/197079456@N07/albums

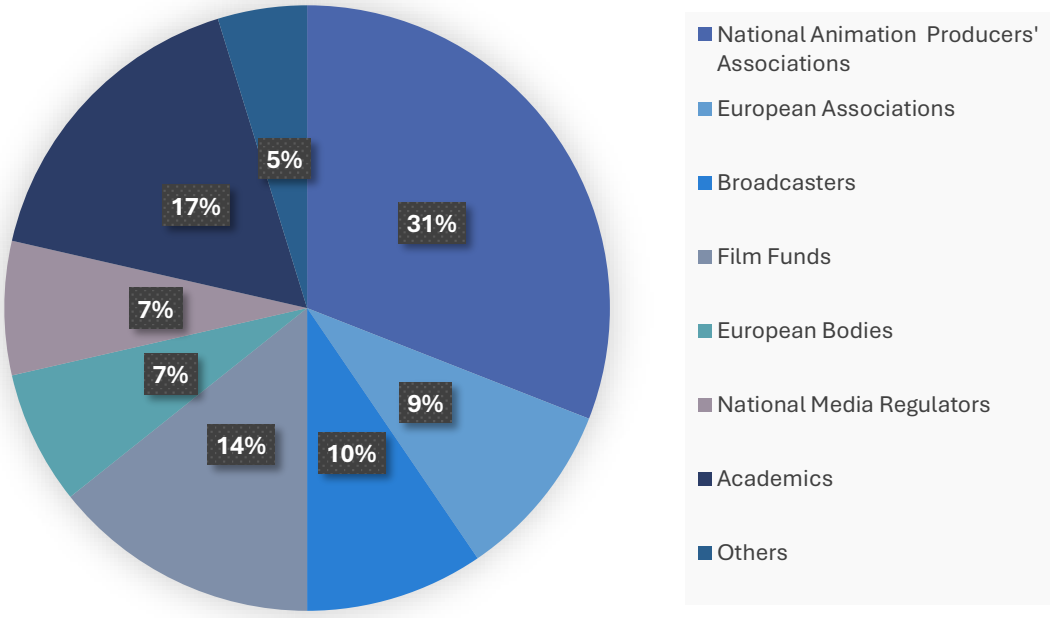
The full agenda can be found at the end of the report, in Annex I.

Animar Working Groups participants: 52 high profile experts

From 15 European Countries



Representing 42 Entities



The full list of attendees can be found at the end of the report, in Annex II.

Opening Words

The sessions were opened by **Diana Riba, Coordinator and Vice-Chair of the Committee on Culture and Education (CULT) of the European Parliament**, who underlined the importance of ensuring a strong and forward-looking framework for European animation. She states: *"Animation acts as an educational medium in which viewers, often young, immerse themselves in languages, perspectives and diverse narratives that contribute to building a shared European identity"*.

Mar Sáez Pedrero -as Animar Manager- welcomed the attendees and gave the floor to the other speakers: Philippe Alessandri -as Animation in Europe Chairman-, Alba Sotorra -as ProAnimats Board Member-, and Iván Agenjo -as PROA Animation Vice-Chair-.

Animar Working Groups

Over the course of the Think Tank, the experts took part in the discussions. Participants represented a broad diversity of institutions and viewpoints, including the **European Commission (DG Connect), governments and regulators, film funds, public broadcasters, animation producers and producers' associations**. Experts were split into two working groups. The first examined **how regulation can support the European animation industry** in the context of the evaluation of the AVMS Directive, while the second focused on **fostering European co-productions**.

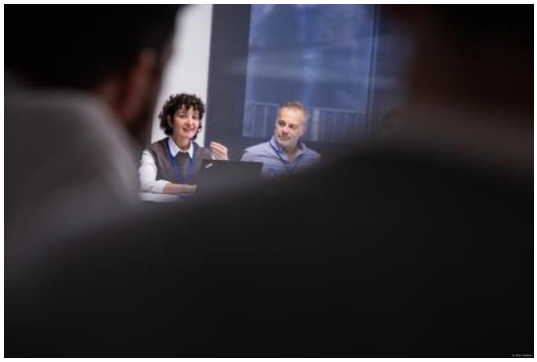
Inspired by the reflection of the regulation working group, Animation in Europe has proposed to revise the AVMS Directive:

- To include video sharing platforms, such as YouTube, in the definition of Audiovisual Media Services, and to broaden the editorial responsibility to algorithmic curation.
- To raise European Quotas applying to streamers to 50% to align with the one of linear broadcasters and have 10% dedicated to independent producers.
- To ensure the prominence of European works on streamers and of European media services on connected TV and internet providers.
- To request transparency on audience data and algorithms to all audiovisual media services.

Following the discussions of the coproduction working group about the new AgoraEU Program, Animation in Europe has recommended:

- Keeping independent production at the heart of the program.
- Earmarking for audiovisual production to ensure its financial visibility.
- Maintaining existing schemes to build on the Media Program's confirmed successes.
- Securing specific support for kids' content considering the sector's challenges.

Both working groups underlined the necessity to invest more in the production of European content for children to preserve the European identity and build the next generation of European citizens.



Working Group 1

EUROPEAN REGULATORY FRAMEWORK: PREPARING FOR THE FUTURE

I.- PREPARATORY 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. 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 encounter a wide range of languages, cultural perspectives, and narratives that foster a shared European identity.

This underlines the essential need for European animation works - not only to sustain the industry but also to support a cultural ecosystem that reflects the values and diversity of Europe's young audience. At the same time, animation's versatility allows it to reach all age groups, with stories addressing complex themes and fostering cultural dialogue. Adult-oriented series and films tackling social or historical issues show how European animation enriches the cultural landscape and provides a platform for diverse voices.

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 industry stakeholders, understanding these frameworks is essential. European legislation sets out obligations and rights that shape how production is funded, distributed, and protected across the EU. National legislation and interprofessional agreements often derive from European norms and principles.

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. AVMS Directive

1. Quotas and investment obligations

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). **The definition of independent producers is left to the Member States - however the Directive specifies that Member States should take into account criteria such as the ownership of the production company, the amount of programmes supplied to the same broadcaster and the ownership of secondary rights.**

- **Article 13(1) (from 2018):** Mandates on-demand platforms to ensure that at least 30% of their catalogues 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 November 2025, 19 countries have imposed a financial obligation on on-demand audiovisual media services (non-linear services)[1], and 16 countries have imposed a financial obligation on TV broadcasts (linear services)[2].

These obligations - non-lineals AV services providers- 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. 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, 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 EU Member States and in states party to the Council of Europe's Convention on Transfrontier Television of the Council of Europe (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.

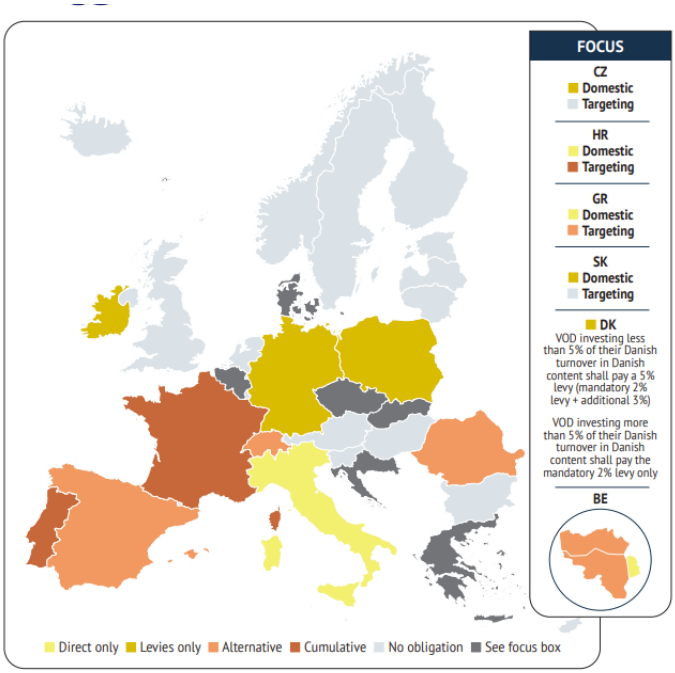
It's important to note that, while the Directive sets the legal definition, it is the national regulators which will give the qualification of "European work" to individual films or series. For example, the European qualification of the movie "Barbie" is linked to its certification by the British Film Institute (BFI).

The Commission is working on the scope of the "European works" definition, particularly worried about the disproportionate part of UK-US coproductions qualifying as European.

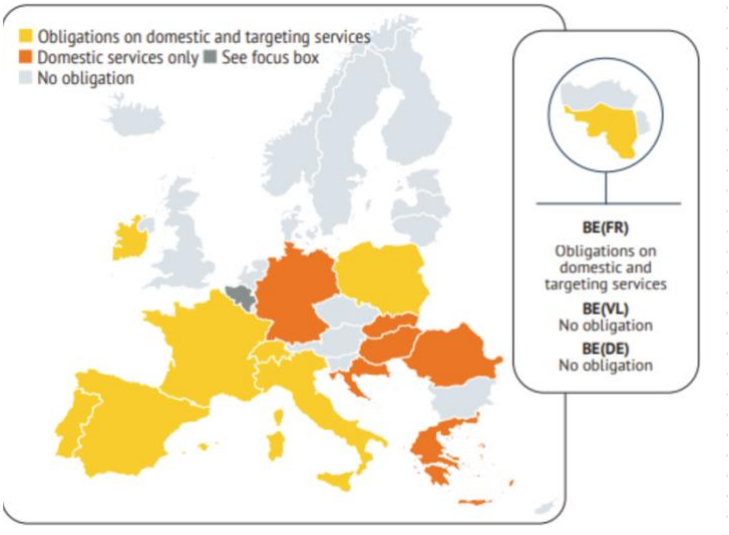
[1] Although three countries (Czech Republic, Netherlands, Slovakia) have only imposed an obligation on services that are established in their country, not on services which propose a service in their country but are established elsewhere

[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

Implementation of direct and/or indirect financial obligations on VOD services (domestic and targeting services) in 2023 – AVMSD



Implementation of financial obligations on broadcasting services (domestic and targeting services) in 2023– AVMSD



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

1.2. Implementation of the obligations and market impact

The Directive is directly responsible for the increase of European works in VOD services catalogue, which represent an average of 35% of catalogues[3]. In 2023, spending on European original content reached EUR 22 billion, with global streamers accounting for 26% of total investment. This confirms that national measures and investment obligations have mobilized substantial resources for European production. However, this growth remains geographically concentrated: the UK and Spain together accounted for 55% of global streamer spending on European originals, while many smaller markets benefited far less.
Resistance to these obligations is also 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.

1.3. Review of the Directive

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.

The Commission is working on the preparation of this evaluation:

- A June 2024 report assessed the application of articles 13, 16, and 17 for the period 2020-2021, and found that seven countries had adopted sub-quotas, that European works represented 35% of VOD catalogues, that US companies were the most frequent third-country participants in co-productions, appearing in 35-53% of all catalogues.
- In September 2025, the Commission held a roundtable in Venice to gather feedback from media stakeholders on the directive's impact.
- The Commission released the second edition of the Media Outlook, analysing sectors such as news media, video games, immersive content, and audiovisual, with added focus on broadcasting and the exhibition sector

[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

- The Commission has organised several roundtables to gather feedback from stakeholders (Cannes, May 2025; Brussels, November 2025).
- The Commission has mandated a study on the AVMS Directive. This is on-going and takes the form of interviews and surveys of stakeholders.
- The European Commission has just launched a call for feed-back on the Audiovisual media services directive in the context of its evaluation and update.
- We are expecting a public consultation to be opened on the topic in Q1 2026, with possible additional Commission roundtables.

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 of specific territories to distributors, cinemas, TVs or platforms before the content is even completed. Especially in Europe's independent film and television markets it is important to maintain this structure as pre-sales provide essential funding that supports diverse and locally produced content across all Member States 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 billion[4].

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. 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.

Discussion at EU level

The Geo-blocking Regulation is set to be evaluated by the European Commission – originally planned for the end of 2025, this will be delayed. Debates are intensifying around whether its scope should be expanded to include audiovisual works.

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

Several groups, particularly consumer organisations and advocates of the Digital Single Market, are pushing for changes.
Their main arguments include:

- Difficulties for minority languages people living abroad to access works in their national languages.
- Geo-blocking going as an obstacle to the digital single market
- Consumers wanting to have access to works that have been created with public money.

3. Copyright Directive and the AI Act

Article 4 of the Copyright Directive (DSM Directive) creates a broad exception that allows text and data mining (TDM) of copyrighted works for any purpose, including commercial activities such as training AI systems. In practice, this means that AI developers may legally analyse and extract information from films, scripts, images, or other protected works unless the rightsholder has clearly expressed an opt-out. This opt-out must be "expressly reserved," typically through technical measures (such as metadata, robots.txt, terms of use) indicating that the work cannot be mined. Without such a reservation, copyrighted content can be used for AI training without prior authorisation, which is why awareness and proper implementation of opt-out tools are increasingly crucial for producers.

The EU Artificial Intelligence Act (AI Act), which entered into force in June 2024, introduces a new regulatory system for AI technologies based on their level of risk. Among its most relevant transparency provisions for the audiovisual sector, AI systems are obliged to publish a mandatory "detailed summary of training content", a tool intended to help rightsholders understand what data has been used to train AI systems.

To support implementation, the Commission is also drafting an AI Code of Practice and a transparency template of the detailed summary, which should guide AI developers on how to meet their obligations under the new law. However, the texts have raised serious concerns among rightsholders: they rely heavily on voluntary commitments, weaken copyright safeguards, and provide only limited visibility into the training data used by AI models. For producers, this means that transparency about whether and how their works have been used remains insufficient.

A parallel debate is unfolding around the possibility of creating a centralised EU opt-out registry, where rightsholders could record their decision to prohibit TDM[5] of their works. In theory, such a registry could make it easier for AI developers to check whether a work is protected. However, many questions remain unresolved:

[5] TDM is defined as 'any automated analytical technique aimed at analysing text and data in digital form in order to generate information which includes but is not limited to patterns, trends and correlations'

- How would the registry be governed and funded?
- Would participation be voluntary or mandatory?
- Would it reduce or increase administrative burdens for producers, especially small companies?

At this stage, the concept is still under discussion and raises concerns about shifting compliance responsibilities from AI companies to rightsholders.

II.- DISCUSSION HIGHLIGHTS & ANIMATION IN EUROPE CONCLUSIONS

Introduction

Ms. Marta Sanagustin from the European Commission presented us the AVMS Directive and the timeline for its possible revision. By Q3 2026, the European Commission will present a proposal to revise the directive. In preparation: Commission is drafting a study on the implementation of the Directive, held several workshops and roundtable with stakeholders and opened public consultations. More of these will follow.

1. Scope of the Directive

The definition of audiovisual media services should be broadened to include video sharing platforms. Those platforms, like YouTube, gain increasing viewers and attention, and aligning them with other media players would ensure a better level playing field.

Additionally, the definition of editorial responsibility should be broadened to include algorithmic curation, as now those platforms shape what audiences see through algorithms recommendations systems.

Currently, AVMS providers with either low turnover or low audience levels are exempt from quotas and investment obligations. **AiE proposes keeping only the turnover threshold and removing the audience criterion. To ensure transparency, AiE also calls for a public registry listing all AVMS providers that qualify for this exemption to make it easier on producers to understand who is in the scope or not**.

Finally, given the significant role of Video-Sharing Platforms like YouTube, in distributing and shaping audience access to content, **AiE asks that proper consideration is given to how these platforms should contribute to investment in European content and ensure its prominence.**

2. Obligations: quotas and definition of European works

AiE asks that the content quotas for VOD platforms be raised to 50% (as opposed to current 30%), with 10% reserved for independent producers. This would align the non-linear services obligations with the linear services ones, reflecting the fact that audiences increasingly consume content on those platforms, which invest more and more into content as well. This

distinction between linear and non-linear is therefore no longer meaningful, and a genuine level playing field is needed. Maintaining separate obligations for services that effectively compete for the same audiences and revenues creates distortions.

Because some genres or countries might be under-represented, the 50% quota should reflect the diversity of European countries.

Those obligations are for European works. **AiE recommends that the definition of European works be limited to productions from EU countries, as well as from countries that uphold reciprocal quota obligations, including diversity requirements.** In addition, a European work should qualify only if European producers retain the majority of the IP rights. Ensuring European IP ownership is essential for the long-term sustainability of Europe's creative industries, allowing producers to reinvest in new projects and maintain control over their cultural output.

3. Definition of independent production

The definition of independent production should remain at national level, but the Directive should guide Member States in setting clear criteria for independent production. These **should include limiting the duration of rights transfers, ensuring that producers hold the majority of IP ownership, and restricting broadcasters' capital ownership in production companies.**

4. Prominence

On prominence of European works: Regulators should verify that at least 30% of the content featured on the homepages of AVMS providers consists of European works, and it's important that regulators must be given sufficient resources to enforce this effectively.

On prominence of European media services: On connected TVs and internet provider boxes, European media services should be displayed at the same level and with the same visibility as major US platforms, ensuring fair discoverability for European players.

5. Transparency

Producers need meaningful access to audience data from all media services, which would include country-by-country figures and audience-retention metrics. The lack of transparency from streaming platforms is a significant concern. This data empowers producers by providing insights into viewership, audience demographics, and content engagement. Armed with this information, producers can make informed decisions for future projects, better integrating audience preferences into their thinking about production.

Transparency of algorithms should follow the principles set out in Article 27 of the Digital Services Act, which requires digital platforms to give information on the main parameters that determine which content is recommended to audiences, and the reasons why these parameters carry particular weight. This level of clarity is essential for fair competition, accountability, and informed decision-making across the audiovisual sector.

6. Importance of children content for Europe (conclusions)

Children's content is a vital part of Europe's audiovisual landscape and is directly linked to the objective of protecting minors. Although children make up around 15% of the European population, the content available to them remains significantly underrepresented. Strengthening European children's content is essential for offering safe, meaningful programming that reflects European values, supports democratic culture, and fosters a shared sense of identity.

In doing so, we help ensure that the next generation of Europeans grows up with stories that speak to their realities and reinforce the cultural foundations of our Union.

Inspired by the reflection of the regulation working group, Animation in Europe has proposed to revise the AVMS Directive:

- To include video sharing platforms, such as YouTube, in the definition of Audiovisual Media Services, and to broaden the editorial responsibility to algorithmic curation.
- To raise European Quotas applying to streamers to 50% to align with the one of linear broadcasters and have 10% dedicated to independent producers.
- To ensure the prominence of European works on streamers and of European media services on connected TV and internet providers.
- To request transparency on audience data and algorithms to all audiovisual media services.

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Working Group 2
CO-PRODUCTIONS: BOOSTING THE EUROPEAN ANIMATION INDUSTRY

I.- PREPARATORY DOCUMENTATION

Introduction

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 think on how co-production conventions, funding mechanisms, and regulatory frameworks can be optimized for the benefit of producers.

Conclusions from previous editions:

- 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 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's 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 showcase our European cultural diversity.

- 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.

During the last Animar edition, the underfunded children's programming and a global animation crisis was underlined, and 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.

Recently, some initiatives that could substantially change the landscape of co-production have been introduced, and these are the ones we need to address in this working group: the Agora-EU Program, which proposes a new MEDIA+ programme, the 2025 MEDIA Outlook presentation, or the Convention on the Co-production of Audiovisual Works in the Form of Series.

The objectives of this working group are:

- **to gain an in-depth understanding of the new European frameworks that will define the capacity of independent producers to co-produce animated audiovisual works;**
- **to assess the advantages and disadvantages these frameworks may offer in preserving diverse and plural animated content with the ability to reach audiences;**
- **to outline the next steps that each territory must take to consolidate these changes, and to identify the key decision-makers;**
- **to design a common strategy for the animation sector across Europe, turning these changes into opportunities that strengthen and consolidate the European animation industry.**

1. AGORA_EU

On July 16th, the European Commission **published its proposal** for the Multiannual Financial Framework (2028–2034), the EU's next long-term budget. A central element of this proposal is the creation of a new programme called AgoraEU.

The general approach of the next MFF (Multiannual Financial Framework) is to ensure ***significant flexibility***, allowing to easily redirect funds within and across programmes ***where most needed***. The Commission, with the objective of reducing fragmentation, improving visibility and enhancing strategic alignment, **reduced the number of programmes from 52 to 16**, with harmonised rules and facilitating access to EU funds through a single portal & unique access point.

The new AgoraEU programme will merge Creative Europe with the Citizens, Equality, Rights and Values (CERV) programme into a single funding instrument covering culture, audiovisual media, journalism, and citizens' rights, with the objective of fostering education and democratic values. It is part of the “heading 2” that includes European Competitiveness Fund, Horizon Europe, Connecting Europe Facility, Union Civil protection mechanism, and Erasmus+, for a total amount of €589,6 Billion. While it includes a dedicated 'Media+' strand, important elements of the current MEDIA sub-programme are not clearly preserved in the text.

The key issues to be addressed include identifying who is responsible for negotiating the content and with whom the budget should be discussed, as well as understanding how the policies of each country influence the final outcome. It is also essential to define how we can establish a common strategy for European animation within the framework of the new program, and to consider whether a permanent working group should be created to ensure continuity and coherence. In the context of the European institutions, in the Council the Cultural and audiovisual working party does not have the remit of discussing the budget nor the structure of the programme. In the European Parliament, the BUDG committee has the remit on the budget, while CULT and LIBE Committees are sharing the competence over the content of the Agora EU.

2. Convention on the Co-production of Audiovisual Works in the Form of Series

On November 26th, the Council of Ministers of the Council of Europe adopted the Convention on the Co-production of Audiovisual Works in the Form of Series.

This is a landmark agreement, the first international convention dedicated specifically to TV series, and represents a major advance for independent European production. The new Convention establishes a modern framework that facilitates the recognition of European and international co-productions and strengthens their access to national funding mechanisms. By introducing a flexible, voluntary system, it:

- Significantly enhances collaboration opportunities for European co-producers,
- Broadens access to cross-border financing, and
- Supports the wider circulation of culturally diverse stories across Europe.

The Convention will be opened for signature in early 2026 and then enter a phase of signature and ratification by member states of the Council of Europe or states party to the European Cultural Convention. It will enter into force once three states have ratified it. The timeline will depend on the pace of national procedures.

Independent producers will see improved protection of their intellectual property, stronger negotiating positions, and better access to international financing. This helps ensure that the creative and financial value of their work remains with them over the long term.

Series qualifying as official co-productions under the Convention will benefit from:

- clearer criteria for financial and creative contributions;
- more predictable rules for ownership, rights allocation, and revenue sharing;
- access to national financial support in participating countries;
- data transparency on the circulation of the work.

As mentioned above, the Convention must be ratified by member states; It will be essential to engage with national decisionmakers to ensure the most exhaustive ratification of the convention for the benefit of the European audiovisual ecosystem.

3. Green Animation

The animation sector identified some years ago that the emerging sustainability regulations in the audiovisual sector penalized animated works in the various public support schemes, as these rules had been conceived for live-action productions. Since then, the sector has worked extensively to highlight the need to establish dedicated tools for animation, built upon the specific needs of the industry. This is a unique case where proposals come directly from the sector to the administrations: AnimaFrance developed the first carbon footprint calculator specifically designed for animation: Carbulator. Animation Ireland is supporting the English adaptation of the tool and together with Ecoprod, is seeking the support of policymakers to establish specific guidelines for animation.

There have been several steps in the last year towards a harmonized sustainability set of tools and regulation in the animation industry:

- Nov 2024 - Animar 2024 served as a platform for early discussions regarding the challenges faced by the European Animation industry, regarding sustainability in Animation.
- March 2025 - CEE Animation Conference GO! 2025 in Nova Gorica provided another platform to continue these discussions.
- April 2025 - Ecoprod launched a new survey about Animation & Sustainability, , adapted to European Eastern & Central Countries needs.

- June 2025 - At the Annecy International Animation Film Festival the Green Animation Guide was unveiled to the world in the English version.
- July 2024 - Statement for European Sustainability Standards in Animation (led by Ecoprod, Green Film and CineRegio), signed by the main European Animation agents.
- October 2025 - AnimFrance and Animation Ireland announced their partnership to roll out Carbulator, the first carbon calculator designed by and for the animation industry, across Europe, with the sponsorship of Animation in Europe.
- November 2025: The Commission launched the MEDIA carbon calculator to help audiovisual producers across the EU to calculate the carbon footprint of their productions.

4. CODA: Codevelopment Animation Awards

CODA – Codevelopment Animation Awards, created to support early stage animated film project development and boost cross-border collaboration, were unveiled last November Initiated and administered by CEE Animation, and supported by national funds from 11 CEE countries, these awards will be distributed across three categories:

- Feature Film Co-Development Award (20.000 EUR)
- TV/Web Series and TV Specials Co-Development Award (20.000 EUR),
- Short Film Co-Development Award (5.000 EUR).

A yearly open call for animated projects is planned, with the first edition expected to launch in spring 2026. The CODA Awards are a long-term initiative developed through more than a decade of CEE Animation activities, culminating in the Think Tank (2023–2025) and the CEE Animation Conference GO! 2025. Their establishment resulted from a collective industry effort and extensive discussions held during panels and sessions at events including Animar_BCN Animation Convention.

5. Potential renewal of the EU-South Korea coproduction treaty

In November 2025, key stakeholders were invited to a meeting with the European Commission DG Connect to talk about the potential renewal of the EU-South Korea coproduction treaty which expires on 30 June 2026. The stakeholders have been entitled to give feedback to the commission on its positioning by December 2nd.

EC Presentation: EU-KOREA Cultural Protocol Renewal of the audiovisual entitlement

II.- DISCUSSION HIGHLIGHTS & ANIMATION IN EUROPE CONCLUSIONS

Agora EU

The new Agora_EU program generates a high level of uncertainty among the different stakeholders in the audiovisual sector, as there is not a clear budget allocation for the Media+ strand versus the rest of programs included. Moreover, since the Agora_EU is supposed to offer more flexibility to the European Commission to shift money between subsectors, for example, from culture to defense or news if priorities change. Thus, funding for news and media may compete with money coming from the audiovisual section. While the working group agrees news and media need support, this cannot be done at the expense of audiovisual creation. This lack of defined percentages among subprograms makes long-term planning difficult for producers.

Thus, the first recommendation of Animation in Europe to the new Agora_EU program is earmarking for audiovisual production to ensure financial previsibility. Financial stability is essential for a proper support to the sector. Moreover, the existing schemes shall be maintained in the new program to continue building on the MEDIA programme's confirmed successes over the years. Animation in Europe advocates for ensuring that the MEDIA share remains equal or higher to the previous program; the proposal is reaching at least €1.8 billion compared to €1.4billion now.

There is a general feeling between the different stakeholders that the proposal is too vague and it lacks structuring and safeguards. The fact independent production is not specifically defined and protected generates a potential risk that should be avoided. Thus, the second main recommendation of Animation in Europe is that independent production should keep at the heart of the Media+ strand program as a guarantee for content diversity.

Additionally, the new Agora_EU program should strengthen the position of animation and children's content as a democratic tool and part of European democratic resilience. Animation and works for children shall receive specific support considering their strategic role at preserving European storytelling and values as well as educating new generations of viewers.

This specific support to animation shall include a wider scope of funding schemes covering the whole value chain - development, production and promotion. Also specific schemes are necessary for audience research, development and education, as well as film and audiovisual literacy. The programme should reaffirm its commitment to supporting creative production within Europe, ensuring that European talent and content remain at the heart of the audiovisual strategy.

The development stage is the one where experts in the working group focus more, as it is the equivalent to R&D or innovation departments in other industries, meaning a crucial step for content creators. It is essential to ensure a significant increase of the development resources while enhancing the flexibility of the eligible formats, including not only feature films, short films and TV series, but also digital first productions, one-offs, short clip content or social network

micro-series. Support of cross-media and cross-platform IP development is essential, including for shorter forms of content that can be leveraged as promotional tools, long-term branding strategy and audience testing.

In addition to these key elements, **Animation in Europe has several recommendations to further strengthen animation and children's content at the new Agora_EU program**:

- **Designated support schemes for dubbing are crucial for children animation** to ensure its cross-border circulation and dissemination. This would also allow better access for broadcasters of low capacity countries to European productions.
- **Approaching European animation content to audiences shall be a key component of the new program,** especially when targeting kids and youth. Some ideas for new funding schemes include the promotion of cinema releases for animated series or encouraging festival-linked promotion strategies.
- **The new iteration of Media+ must consider reducing financial burden on producers** through schemes aimed at covering financing costs, including bank interests, warranties and completion bonds.
- **Part of the funding schemes should be addressed at funding the production companies or studios rather than single projects.** This includes packages of different programs to be defined before or after the application as well as R&D funding for technology, including AI pipelines or tools. However, consensus is that this funding should come from EU tech or competitiveness funds rather than Agora_EU's cultural budget.
- **The Commission should consider the introduction of open calls or increasing the flexibility of calls through the year** to better align with industry development and production rhythms, including with distribution and broadcasters' partners requirements, allowing to enhance and facilitate coproduction processes.

Last, **Animation in Europe recommends and encourages its members to approach the responsible stakeholders and national institutions who will decide on the new Agora_EU program.** These negotiations will happen in two different levels:

- **The Budget committee** will discuss the numbers and allocation of money among the different subprograms. The Ministries of Economy and/or Finance will be the ones to take this decision. It is essential to show them the strategic economic impact of the audiovisual sector in general, and animation in particular as the main content that travels across boundaries inside and outside the European Union.

- **The CULT committee** will discuss the content of the program itself: what schemes it should include, where to put the focus of the discussion. The Ministries of Culture are the ones to take this decision. Here it is essential to highlight our content priorities and industry needs as well as the importance of animation and kids content in cultural resilience and soft power. Artistic and editorial freedom should never be subject to intervention.

Convention on the Coproduction of Audiovisual Works in the form of Series

The Council of Europe is the organism behind the promotion of this Convention which aims at offering a stable legal framework for audiovisual series intended for TV or platforms distribution, whether fiction, documentary or animation. The Convention is designed to support independent producers, strengthen the protection of IP rights and enable access of coproduced works to official nationality certificates, and therefore, to national funding. The working group acknowledges the importance of this tool for the animation sector where international coproductions of series are more common than in other types of works.

The Convention has been ratified by the Council of Europe steering committee and will open for signature by national members in early 2026, after the official signing event in Strasbourg in February. It will enter into force without any retroactive effect as soon as three different member countries ratify it. The ratification responsibility varies from country to country but it is typically handled by either the Ministry of Culture or Media, or the Ministry of Foreign Affairs.

Animation in Europe recommends its member associations to identify the key decision makers at their countries and call their national authorities to ratify the Convention. France and Germany, who have not yet ratified the Revised Convention on Cinematographic Coproduction signed in 2018, are expected to support this one, although the text is being reviewed internally.

EU-South Korea coproduction treaty

In the same way the working group celebrates the existence of the European Convention of coproduction of audiovisual series, **it agrees the collaboration and coproduction with South Korea is an interesting playing field for Animation in Europe. Korea is seen as a high-value creative partner**, as Korean content dominates youth culture globally and offers valuable insights on market trends. However, there are major **cultural, productive and geographical differences that need to be saved.**

This is why, in order to **enhance the collaboration between the EU and Korean industries**, it will be essential to **develop accompanying measures fostering mutual understanding and industry knowledge,** including workshops, trade missions, creative internships, residencies, training exchanges or other similar initiatives.

As for the Protocol, it sits inside a **free trade agreement**, raising concerns about its right to rule on cultural protection, as the EU may not have legal competence to negotiate cultural agreements - member states are the ones ruling it. Moreover, **not a single coproduction between Europe and Korea has occurred under the framework of this treaty during its 15 years of existence** (since 2011 to June 2026, when it is expected to die). There are several factors that appear as potential reasons for this:

- The lack of awareness among audiovisual producers about its own existence.

- The fact that the member countries are concerned about the EU signing agreements with third countries might have contributed to not disseminating its existence among the private sectors.
- There was not a clear reciprocity between the two regions, as Korean works would benefit from belonging to the European quota, but there are not similar obligations in South Korea for streamers that European producers can benefit from.

Thus, **Animation in Europe concludes that renewing the protocol on coproductions with South Korea may be a good help to foster the collaboration but not enough.** Should the protocol be renewed, it will be essential to ensure full reciprocity in terms of access to market, content promotion regulation and broadcasters' obligations. And, in the case it is not renewed, **European institutions should build structured creative and business exchanges with South Korea**. These initiatives could potentially be structured through **specific funding schemes within the new Agora_EU program.**

CODA: Co-development Animation Award

The working group welcomed **CODA** as a positive initiative supporting early development, particularly in a region such as Central and Eastern Europe where most countries belong to the category of low-capacity ones (LCC) and encouraged the promoters to ensure its long-term stability.

Animation in Europe recommends some enhancements:

- **Compatibility with other European** funds which support the development stage, such as Creative Europe Media or Eurimages.
- **Inclusion of public broadcasters** into the awarded projects, potentially through the EBU (European Broadcasting Union).

Sustainability and Green Animation

Animation in Europe members are deeply supportive of the European objective of greening the animation and audiovisual sectors, including the use of calculators to measure the carbon footprint. The sector also celebrates the efforts to create a harmonized or compatible sustainability legal framework. However, there are major challenges that most of these tools need to solve before their use becomes mandatory.

- The carbon footprint measuring system must be flexible and scalable to the different forms of animation studios and production houses. Small studios cannot meet the same criteria than large ones. A Tier-based approach is recommended (small, medium and large companies) based on criteria such as number of employees and yearly turnover.
- The existing tools are fragmented: there are national calculators in some territories (such as Albert in Ireland), or the new EU Carbon Calculator, which allows to merge and

plug the national systems. However, none of them are fully adapted to the animation requirements.

- There is a tool that has been developed from and by the animation sector itself (Carbulator, fostered by AnimFrance) which is totally adapted to the animation idiosyncrasy but is not adapted to work for companies outside France. For example, the mix of renewable energy changes from country to country, as well as the facilities rental/ownership ratios or the kind of food availability. Should this be the common tool to use by animation studios, it needs to be localized to other countries not only through language but also through the composition of its calculations.
- The development and adjustment of these tools should be funded though European projects, potentially under the framework of the new Agora_EU program. In the meantime, the obligations related to carbon objectives should remain optional and informative or be considered an extra when evaluating public funding schemes, but not mandatory.

The same type of problems exists when we jump from carbon calculators to sustainability guides coming from different regional or national institutions: either they are not applicable at an animation production pipeline, or they are tailor-made for animation (such as Ecoprod) but do not recognize the differences between countries and studios. Therefore, adapting the existing tools to national and animation industry realities is essential to ensure their long-term adoption by the private sector.

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Resources to go further can be found at the end of the report, in Annex III.

Anima Mundi Focus Groups

Following the Think Tank, **Animar** **held two producer-focused panels within the ANIMA MUNDI academic research programme**, offering further insight into the evolution of Europe's animation ecosystem.

The Horizon Europe project **ANIMA MUNDI** invited animation stakeholders to attend its targeted focus groups, held during Animar_BCN Animation Days.

These two sessions examined the current landscape of the European animation industry:

- 💡 Managing IP in European animation: from creation to distribution
- 🌍 Identifying key barriers to the circulation of European animation within the EU and worldwide
- 🎬 Exploring the best ways for public bodies to boost European animation's visibility

Participants addressed today's challenges, highlighted industry strengths, and contributed to building a more competitive, connected, and socially relevant European animation industry.

More information about Anima Mundi is available on its website: https://www.animamundi-values.eu/cms/c_13433501/en/anima-mundi

La Salle Students' Project Pitching

La Salle presented its educational program in animation (bachelor's and master's degrees), and the students pitched four projects, receiving valuable feedback from producers, broadcasters, and other animation professionals attending the open session of Animar_BCN Animation Days.

This constructive exchange was highly beneficial, as the feedback not only helped refine the students' projects but also provided them with a unique opportunity to understand industry standards and expectations. For the students, the experience was particularly significant, bridging academic training with professional practice and highlighting the importance of dialogue with key players in the animation sector.

More information about La Salle Campus is available on its website: https://www.salleurl.edu/en

Lecture: ANIMA MUNDI, REBOOT, CRESCINE Cross-Insights from European Projects on the Film Industry

Academics from the universities ULiege, VUB, SSA, and EIU presented to the audience three research programs focused on the audiovisual sector and funded by the Horizon Europe program, in which they are actively involved, each at a different stage of implementation. Their interventions offered a clear overview of the objectives and progress of these initiatives, reflecting the diversity of approaches fostered by Horizon Europe."

These programs are of particular relevance to the industry, as they provide highly valuable information that helps producers, broadcasters, and policymakers anticipate technological changes, adapt to new market dynamics, and strengthen the competitiveness of European audiovisual creation. Beyond their technical scope, they represent a bridge between academia and the professional sector, reinforcing the role of research as a driver of innovation and collaboration across Europe.

The presentation ANIMA MUNDI, REBOOT, CRESCINE Cross-Insights from European Projects on the Film Industry can be found at the end of the report, in Annex IV.

Animation in Europe Recommendations Panel

In the dissemination panel, the Working Groups' Co-Chairs conveyed to the audience the key topics discussed within the working groups, while the Board of Animation in Europe presented its final recommendations. These recommendations carry particular weight, as they synthesize the collective insights of animation producers from 30 countries, 25 of them members of the EU. By highlighting both the challenges and opportunities identified during the sessions, the recommendations provide a roadmap for strengthening cooperation among European territories, enhancing the sector's framework, and ensuring that European animation remains competitive on a global scale. For participants, the presentation of these conclusions was not only a summary of the debates but also a forward-looking vision, offering concrete guidance to institutions, producers, and broadcasters alike. The final recommendations thus stand as a cornerstone of Animar_BCN Animation Days, underscoring the event's role as a strategic forum for shaping the future of European animation.

More information about Animation in Europe is available on its website: www.animationineurope.eu

Press Clipping

Ecran Total: https://ecran-total.fr/2025/12/05/animar-2025-les-leaders-de-lanimation-mobilises-autour-de-regulation-et-de-la-coproduction-en-europe/?srsltid=AfmBOooby9Mc5fWMkvhDShEN3J09QBLHsh3oH1Mslh3jO_94ZIG2_Odm

Le Film Français: https://www.lefilmfrancais.com/television/174280/les-conclusions-de-l-edition-2025-d-animar

Skwigly: https://www.skwigly.co.uk/european-animation-leaders-united-at-animar-2025-to-address-key-audiovisual-policy-challenges/

Kidscreen: https://kidscreen.com/2025/12/10/50-steamer-quotas-and-other-big-ideas-from-animar/

Panorama Audiovisual:

- https://www.panoramaaudiovisual.com/2025/12/01/comienza-4a-edicion-animar-think-tank-animacion-europea/
- https://www.panoramaaudiovisual.com/2025/12/05/52-expertos-15-paises-europeos-debaten-animar-2025-animacion/

Rubik Audiovisual:

- https://rubik-audiovisual.com/barcelona-acoge-animar-2025-el-think-tank-europeo-de-la-animacion/

- https://rubik-audiovisual.com/animar-2025-reune-en-barcelona-a-los-principales-agentes-europeos-para-debatir-el-futuro-de-la-animacion/

Audiovisual 451:
https://www.audiovisual451.com/animar-2025-lanza-propuestas-a-bruselas-para-proteger-la-animacion-europea/

TIVU: https://tivu.es/news/animar-2025-reune-a-expertos-para-definir-el-futuro-de-la-animacion-en-europa/

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Animar_BCN is an initiative of:

FEDERACIÓ PROA DE PRODUCTORES AUDIOVISUALS

PROANIMATS

Curated by:

ANIMATION in EUROPE

With the support of:

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anima mundi

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Annex I - Agenda

Monday, December 1st

- 2.30 pm - Reception of attendees & Opening Words
- 3.00 pm - Animar Working Groups
- 4.30 pm - Coffee Break
- 5.00 pm - Animar Working Groups
- 6.30 pm – Free Time
- 8.30 pm - Welcome Dinner
  Restaurant Xiringuito Escribà

Tuesday, December 2nd

- 10.00 am - Animar Working Groups
- 11.30 pm - Coffee Break
- 12.00 pm - Animar Working Groups
- 1.30 pm - Stand-up Lunch
- 3.00 pm – Anima Mundi Focus Group I **(*)**
  Registration required · Limited seats (Register form)
- 5.00 pm – Free Evening

(*) *3.00 pm – In parallel - Preparatory meeting 3rd day Panel – only for WG Chairs, Advisors & AE Board*

Wednesday, December 3rd

- 9.30 am – 11.00 am - Session "Meet the Local Animation Industry"
  Registration required · Limited seats (Register form)
  - Networking breakfast
    - LaSalle Pitching
- 11.00 am -1.30 pm - Animar_BCN Animation Days
  Registration required · Limited seats (Register form)
    - Welcome
    - European collaborative programmes: *Anima Mundi, Reboost & Crescine*
    - Roundtable Animar 2025
    - Recommendations from *Animation in Europe*
    - Closing Remarks
    - Networking cocktail
- 3.00 pm – 5.00 pm Anima Mundi Focus Group II
  Registration required · Limited seats (Register form)

Main Venue: La Salle-URL Barcelona Campus University

- Monday and Tuesday: Santa Maria de la Estrella Building
- Wednesday: Campus La Salle Building

Annex II- Working Groups Participants

Mr. Philippe Alessandri	Animation in Europe	Europe
Ms. Moe Honan	Animation in Europe	Europe
Mr. Ivan Agenjo	Animation in Europe	Europe
Ms. Reka Temple	Animation in Europe	Europe
Ms. Mar Sáez Pedrero	Animation in Europe	Europe
Ms. Sevara Irgacheva	EFAD - European Film Agency Directors	Europe
Ms. Margaux Chielle	CEPI - European Audiovisual Production Association	Europe
Ms. Marta Sanagustín	European Commission, DG CNECT, Audiovisual and Media Policies	Europe
Ms. Xiomara Villa Perez	European Parliament	Europe
Mr. Àlex Navarro Garrich	CED MEDIA CATALUNYA	Europe
Mr. Christian Davin	CARTOON	Europe
Mr. Tigran Arakelyan	AAA - Armenia Animation Assoociation	Armenia
Mr. Antonios Vlassis	ULiege	Belgium
Mr. Pedro Tinen	ULiege	Belgium
Mr. Heritiana Renaud Ranaivoson	VUB	Belgium
Ms. Anais De Potesta	VUB	Belgium
Mr. Dimitar Petrov	ABAP- Association of the Bulgarian Animation Producers	Bulgaria
Mr. Emil Koshlukov	Bulgarian National Television	Bulgaria
Mr. Anton Andonov	Bulgarian National Television	Bulgaria
Mr. Draško Ivezić	HRUP - Croatian Animation Producers	Croatia
Mr. Premysl Martinek	APA - Audiovisual producers' Association	Czech Republic
Mr. Adam Parma	ASAF - Association of Czech Animation Film	Czech Republic
Ms. Veronika Lengálová	Czech Audiovisual Fund	Czech Republic
Ms. Sarita Christensen	Animation Denmark	Denmark

Mr. Martin Engelhardt Hansen	DR - Danish Broadcasting Corporation	Denmark
Ms. Kerdi Oengo	EAA - Estonian Animation Association	Estonia
Ms. Amanda Borghino	AnimFrance	France
Mr. Vincent Mendes	European Parliament · French Ministry of Culture	France
Ms. Anna Lecomte	CNC - French National Centre of Cinema	France
Mr. Johannes Kagerer	Produktionsallianz	Germany
Ms. Maite Woköck	Produktionsallianz	Germany
Ms. Kristin Holst	German Federal Film Board (FFA)	Germany
Mr. Oliver Zeller	Medienboard Berlin Brandenburg	Germany
Ms. Ildikó Takacs	HAPA - Hungarian Animation Producers' Association	Hungary
Ms. Alessandra Principini	CARTOON ITALIA	Italy
Ms. Mafalda Dâmaso	EUI - European University Institute	Italy
Mr. Sergio Goffredo	EUI - European University Institute	Italy
Ms. Pelin Turan	SSA (Scuola Superiore Sant'Anna)	Italy
Mr. Ronan McCabe	Animation Ireland	Ireland
Mr. Brian Furey	Media Commission Ireland	Ireland
Ms. Anna Głowik	SPPA - Polish Animation Producers Association	Poland
Mr. Jure Vizjak	D'SAF! - Slovene Animated Film Association	Slovenia
Ms. Miriam de Miguel	ICAA - Film and Audiovisual Arts Institute	Spain
Ms. Lucía García	ICAA - Film and Audiovisual Arts Institute	Spain
Ms. Ainara Plaza	ICEC – Catalan Institute for Cultural Companies	Spain
Ms. Diana Bueno	ICEX - ICEX Spain Trade and Investment	Spain
Mr. Jose María Valls	Ministry for Digital Transformation and Civil Service	Spain
Mr. Fernando Garate	Ministry for Digital Transformation and Civil Service	Spain
Ms. Muntsa Tarres	3CAT- Catalan Public Broadcaster	Spain
Mr. Yago Fandiño	RTVE - Spanish Public Broadcaster	Spain
Ms. Veronica Buide	MIA (Women in Animation)	Spain

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Annex III – Resources to go further

- **Animar** - European Animation Convention
  - Final Report 2022
  - Final Report 2023
  - Final Report 2024

- **EAO** - European Audiovisual Observatory
  - Mapping AVMSD Transposition
  - Approaching jurisdictional issues in European audiovisual law: trends and tensions

- **European Commission Endorses French Decree Supporting Animation and Documentary**

- **Public participation:**

  - The European Commission has just **launched a call for feed-back on the Audiovisual media services directive in the context of its evaluation and update - Deadline: 21 December 2025 (midnight Brussels time)**

  - The European Commission is working on an evaluation report of the Directive (EU) 2019/789 ("Sat Cab II") on the exercise of copyright and related rights applicable to certain online transmissions of broadcasting organisations and retransmissions of television and radio programmes. As part of this study, an EU-wide survey has been launched targeting, among others, rightsholders' associations. The objective is to gather insights into the practical effects and challenges arising from the implementation of the Directive.

    The survey covers several key areas:
    - The clearance of rights relative to ancillary online services (simulcast and catch-up) provided in other EU Member States.
    - The clearance of rights relative to retransmission of programmes from other EU Member States by means other than cable.
    - The clearance of rights for transmissions implying the use of the direct injection technique.
    - The use of mediation in relation to retransmission and direct injection You can access to the survey here **– Deadline 5 December 2025 (midnight Brussels time)**

- The European Commission has opened a **public consultation on the evaluation of the Geo-Blocking Regulation**.

Audiovisual services are currently excluded from the scope of the Regulation. While the consultation has therefore limited direct relevance for our sector, it is important to respond in order to ensure that this exclusion is maintained. You can find more information about the consultation and how to respond at this link. **The deadline for submissions is 29 December 2025 (midnight Brussels time)**

- Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL establishing the 'AgoraEU' programme for the period 2028-2034, and repealing Regulations (EU) 2021/692 and (EU) 2021/818

- EAO - The definition of independent production in direct and indirect public support measures
- Official Council of Europe press release here.
- Q&A on the Convention on the co-production of audiovisual works in the form of series
- Convention on the co-production of audiovisual works in the form of series
- Explanatory report
- Council of Europe pilot programme for series co-productions
- CEE Animation Conference GO! 2025 full report
- EAO - Green transition in the audiovisual sector
- CODA: Codevelopment Animation Awards
- EU – Korea Audio-visual Co-productions Background
- Strengthening Industry Ties at the EU-Japan Animation Workshop
- European Broadcasting Union's co-development initiative
- Insights into direct public film funding in Europe – A sample analysis of national and sub-national funds for the years 2018-2022
- Mapping of Film and Audiovisual Public Funding Criteria in the EU European Audiovisual Observatory, 2018

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ANIMA MUNDI, REBOOT, CRESCINE

Cross-Insights from European Projects on the Film Industry

ANIMAR, 03/12/2025

Mafalda Dâmaso, Heritiana Ranaivoson, Pelin Turan, Antonios Vlassis

This project is funded by the European Union's Horizon Europe Framework Programme, under the Grant Agreement no: 101178027.

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Funded by the European Union

How do non-European film professionals perceive the European Film Industry?

Analysing data from Argentina, Brazil, Mexico, South Africa, South Korea, Turkey

Mafalda Dâmaso and Anna Niutta, Erasmus University Rotterdam, Netherlands; Luis Albornoz, Isabela Vargas Miranda, and Maria Trinidad García Leiva, Universidad Carlos III of Madrid, Spain; Marina Rossato Fernandes and Antonios Vlassis, University of Liège, Belgium; Ruken Doğu Erdede, Melis Behlil and Elif Akçalı, Kadir Has University, Turkey

REBOOT
EUROPEAN FILM COMPETITIVENESS

Funded by the European Union

The Research

Dâmaso, M., Niutta, A., Vargas Miranda, I., Albornoz, L., García Leiva, Mª Trinidad, Rossato Fernandes, M., Vlassis, A., Behlil, M., Doğu Erdede, R., Akçalı, E. (2025). **The Framings and Strategies of Cinema Professionals. Report on International Understandings of the European Film Industry.** Developed by the Horizon Europe project REBOOT (Reviving, Boosting, Optimising and Transforming European Film Competitiveness – REBOOT), funded by the European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769. **https://doi.org/10.5281/zenodo.16744614**

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Research questions

- What do non-European film professionals **understand by the EFI**? What do they identify as its **main strengths**?
- In which outlets does European film tend to **circulate**?
- What are the **main obstacles** to the international distribution of European films in theatres and other channels?
- What are the **main needs of the film ecosystem** in the selected six markets?
- Are the p**rogrammes and incentives offered by the EU** to support such film ecosystems relevant?
- How do non-European film professionals **compare** collaborations with European and **with non-European international partners** such as the USA, China or Russia?

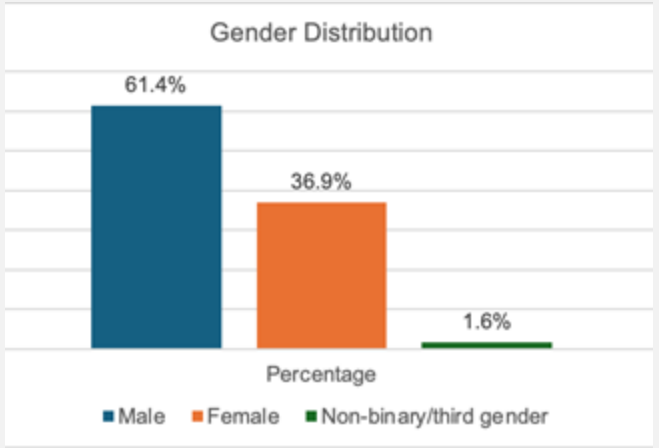
REBOOT
EUROPEAN FILM COMPETITIVENESS

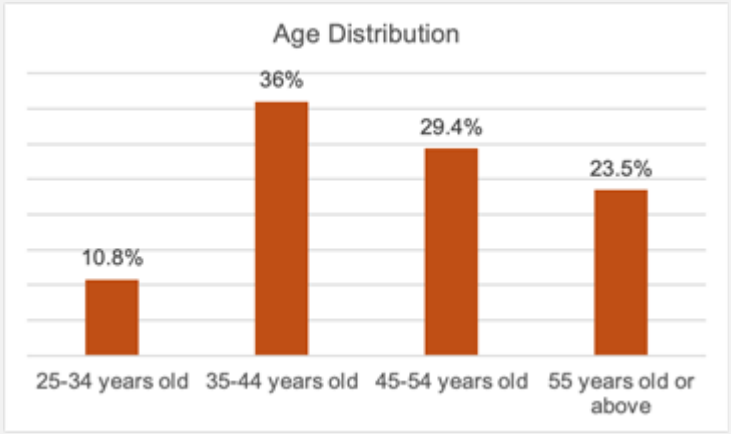
Knowledge needs

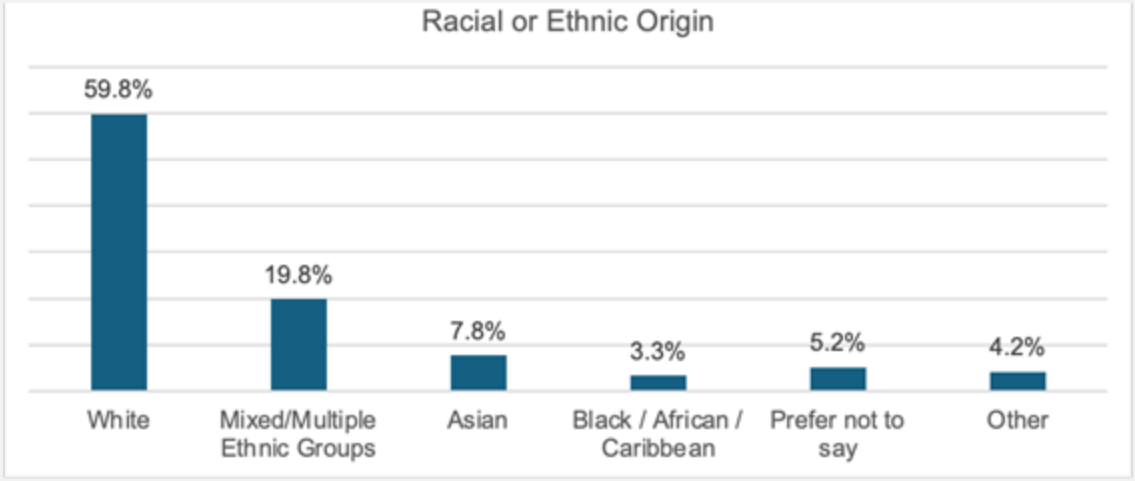
- To **decenter EU film policy** (Keukeleire and Lecocq, 2018); Onar and Nicolaïdis, 2013), that is, to provincialise Europe by questioning a Eurocentric approach to scientific knowledge
- To **provide evidence-based recommendations to support the EU's global audiovisual policy.** The EU uses cultural diplomacy as a strategic tool to promote values such as cultural diversity, freedom of expression, and democratic governance (Portolés, 2019). The European Agenda for Culture in a Globalising World (2007) recognises culture as a central pillar of the EU's foreign policy (Loisen & De Ville, 2011; Vlassis, 2016).
- **To address structural changes to the global film market**. Streaming services are influencing not only the development (or lack) of national regulatory frameworks in various countries but also transforming power relations across the production, distribution, and exhibition sectors (Alvaray, 2023; Albornoz and Krakowiak, 2023; Falicov, 2019).
- **To develop recommendations recognising film festivals and markets as integral to the European film industry's infrastructure**. As Marijke de Valck (2007) outlines, festivals have evolved from national showcases to transnational systems embedded within the global film culture.
- **To advance knowledge of the concept of Europeanness and its relation to cinema** – a contested discussion ground (e.g. Elsaesser 2005; Harrod et. al., 2015).

Methodology: survey

- Available between November 2024 and March 2025
- Distributed via email
- Each questionnaire included an information sheet and consent form
- 515 responses were recorded. **425** responses met the eligibility criteria
- **Six samples:** main sample (425); selected (main minus Turkish respondents, 311), Argentina (70), Brazil (72), Mexico (55), South Africa (28), South Korea/East Asia (32), Turkey (114)







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Methodology: interviews

- **99** semi-structured interviews, held both in person and online between December 2024 and July 2025
- Categories of interviewees
    - **DIR/PRO:** Directors/individual producer and association and groups representing producers.
    - **DIST/SA:** Individual distributor or sales agent and associations.
    - **EXH:** Exhibitors, that is, cinema theatres and broadcasters.
    - **FF:** Representatives working directly with film festivals, such as programmers, and responsible for the industry section on a festival.
    - **FUNDER/POL:** Public funders, policymakers, regulators, national institutes and professional associations.
    - **O:** All other categories.

Category	Interviewees
DIR/PRO	AR 5, BR 7, MX 4, SA 13, SK 6, T 6 = total 41
DIST/SA	AR 2, BR 4, MX 2, SA 1, SK 4, T 1 = total 14
EXH	MX 3, SA 1, SK 1, T 4 = total 9
FF	AR 4, BR 1, MX 2, SK 3, T 2 = total 12
FUNDER/POL	AR 4, BR 2, MX 3, SA 3, SK 1, T 3 = total 16
O	AR 2, BR 2, SA 1, SK 2 = total 7

Findings

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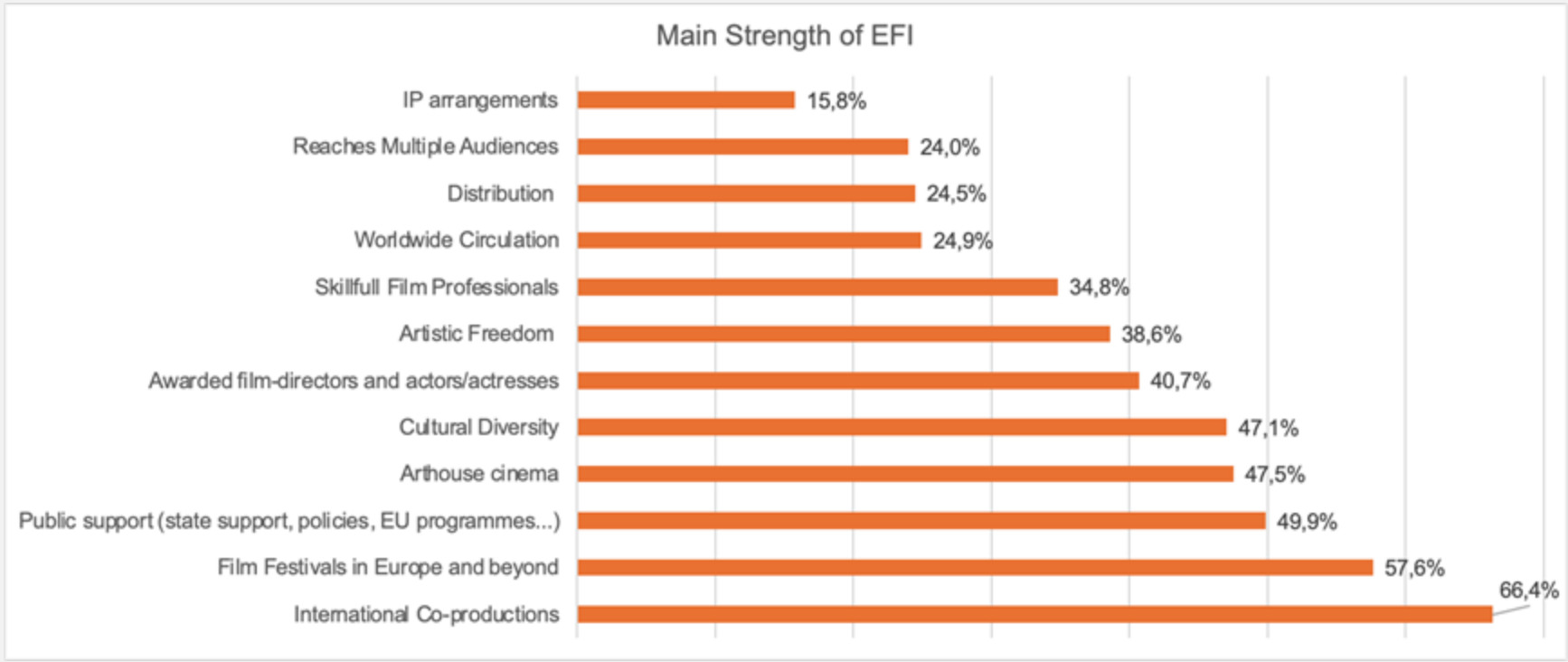
The EFI: perception and strengths

Word that describes the EFI	Count	Percentage
International co-productions	267	62.7%
Cinéma d'auteur	256	60.1%
Art cinema	243	57%
State support	218	51.2%
Cultural diversity	180	42.3%
Freedom of expression	140	32.9%
Multilingualism	137	32%
High culture	121	28.4%
Regional integration	102	23.9%
Successful	85	20%
Experimental	81	19%
Non-commercial	71	16.7%
Competitive	63	14.8%
Slow cinema	52	12.2%
Uncompetitive	18	4.2%
Very hard to define	17	4%
Blockbusters	15	3.5%



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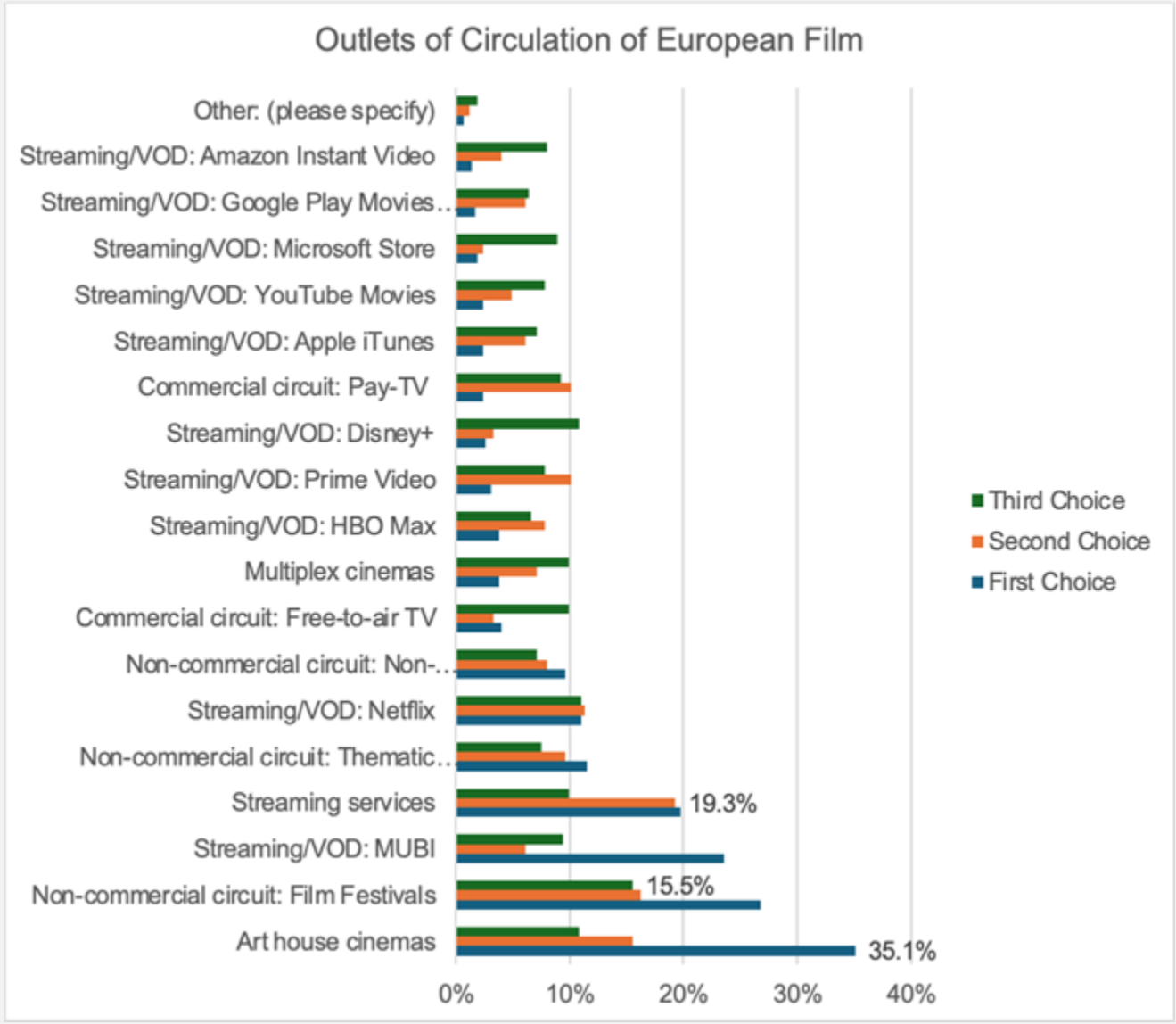
Outlets of circulation of European films



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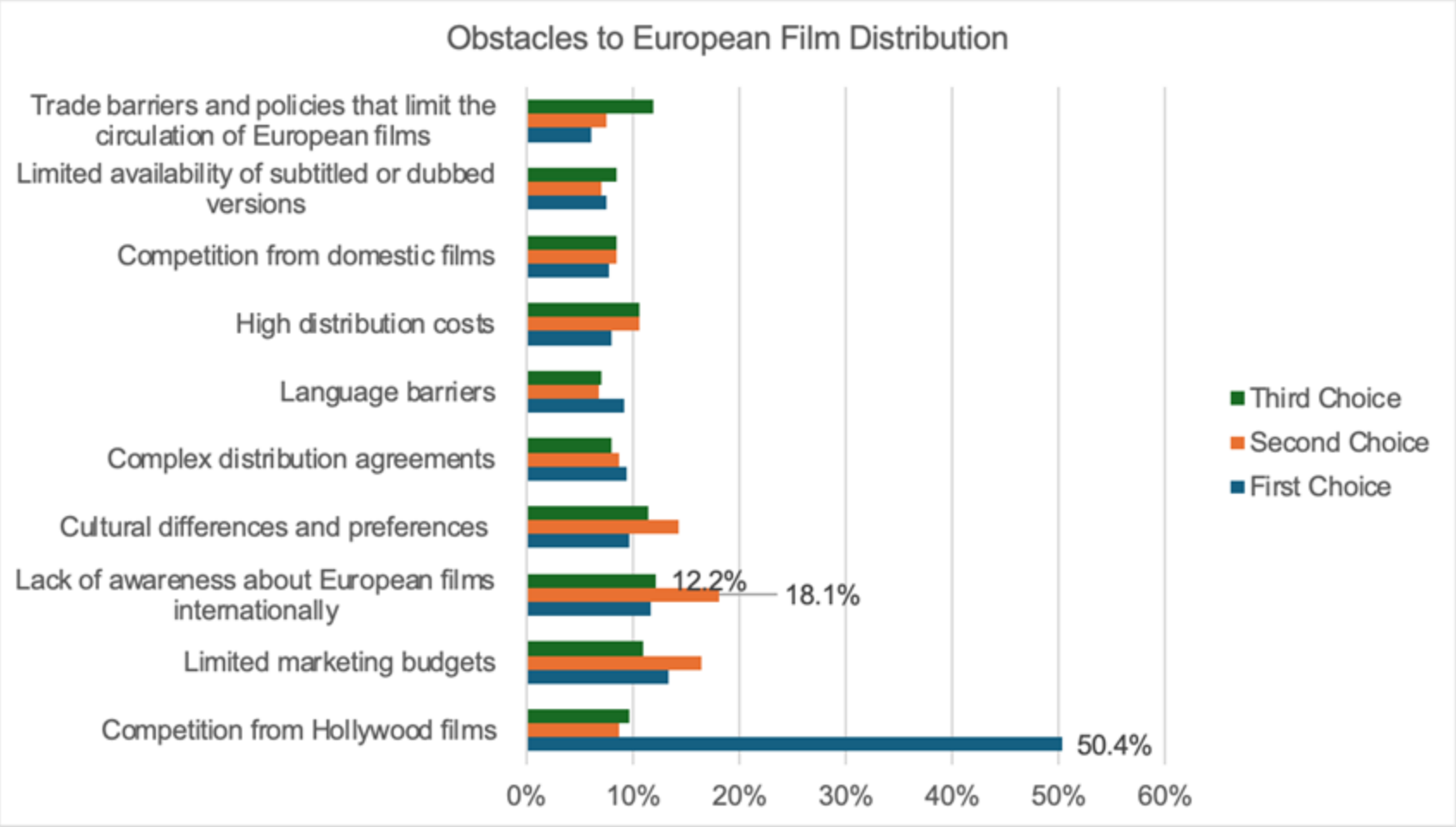
Obstacles to European film distribution



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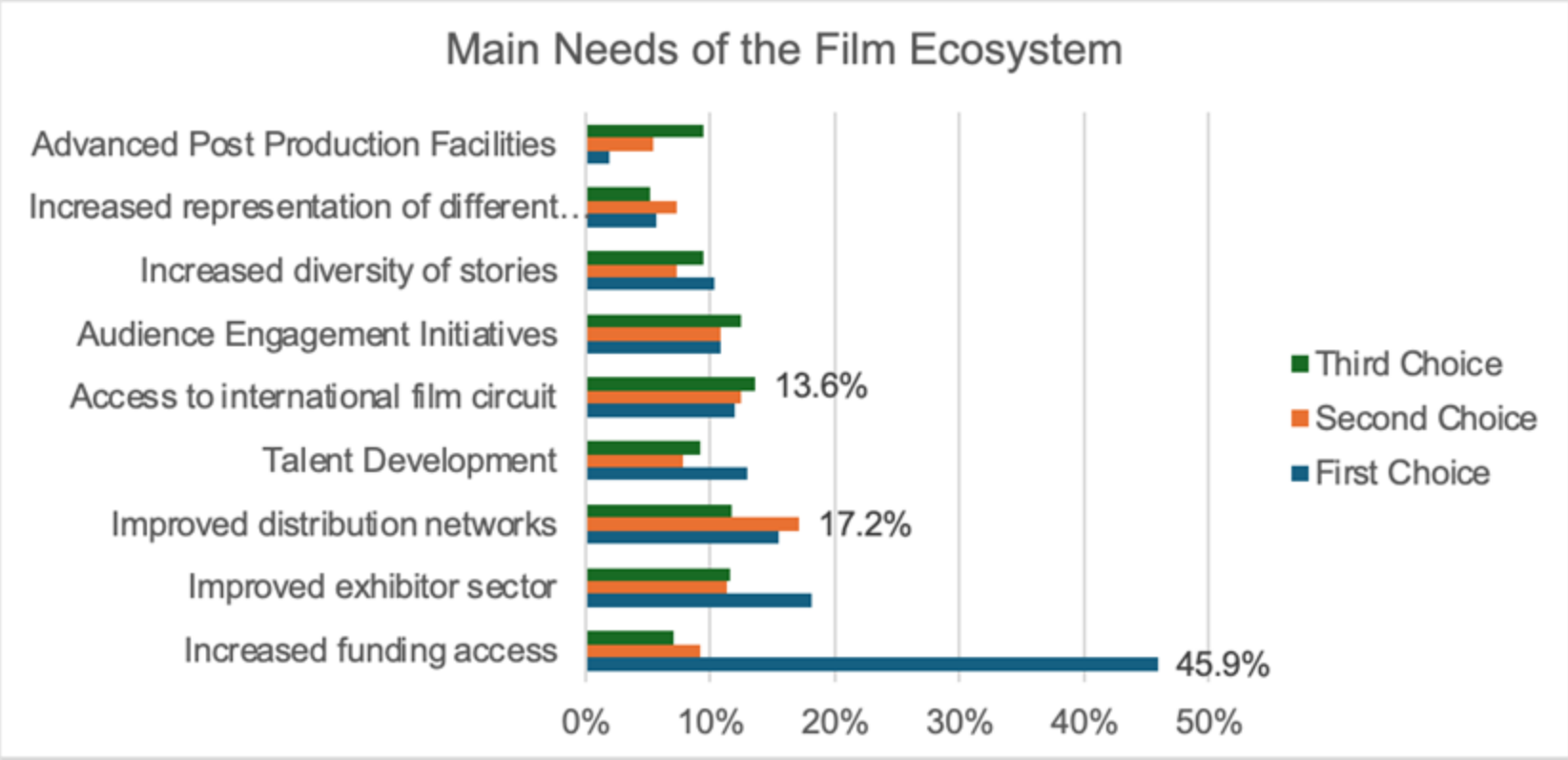
Main needs of local film ecosystems



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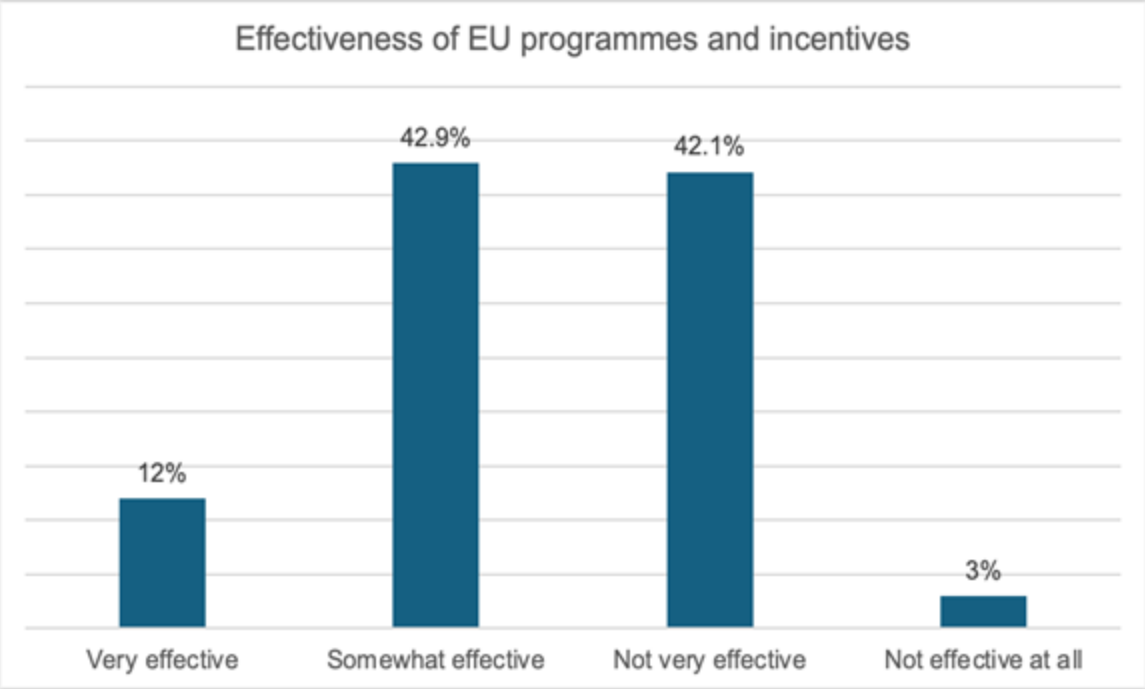
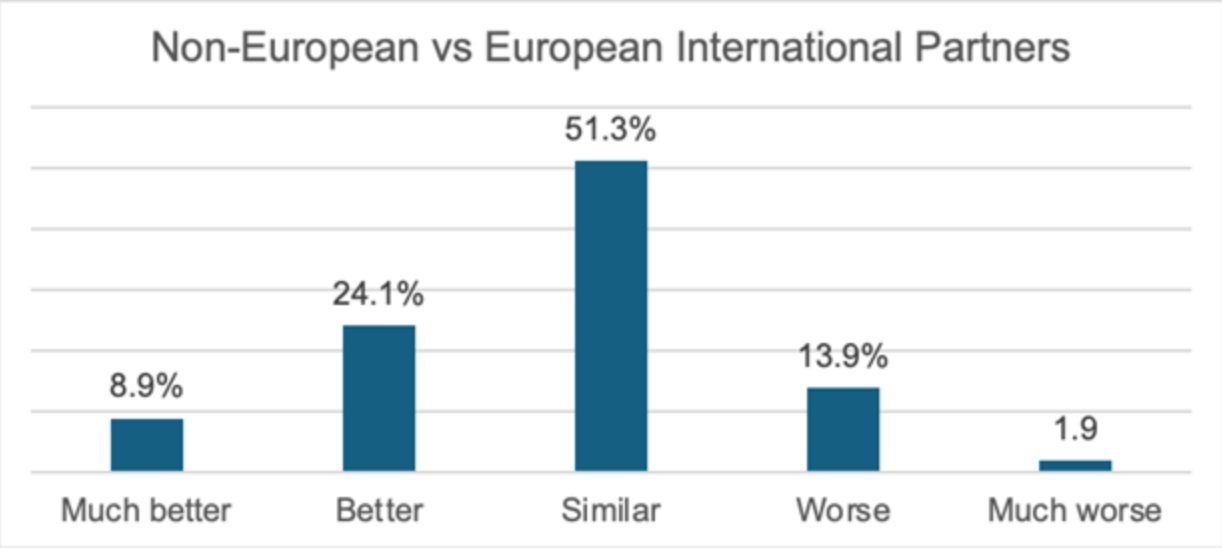
EU programmes vs non-EU partners





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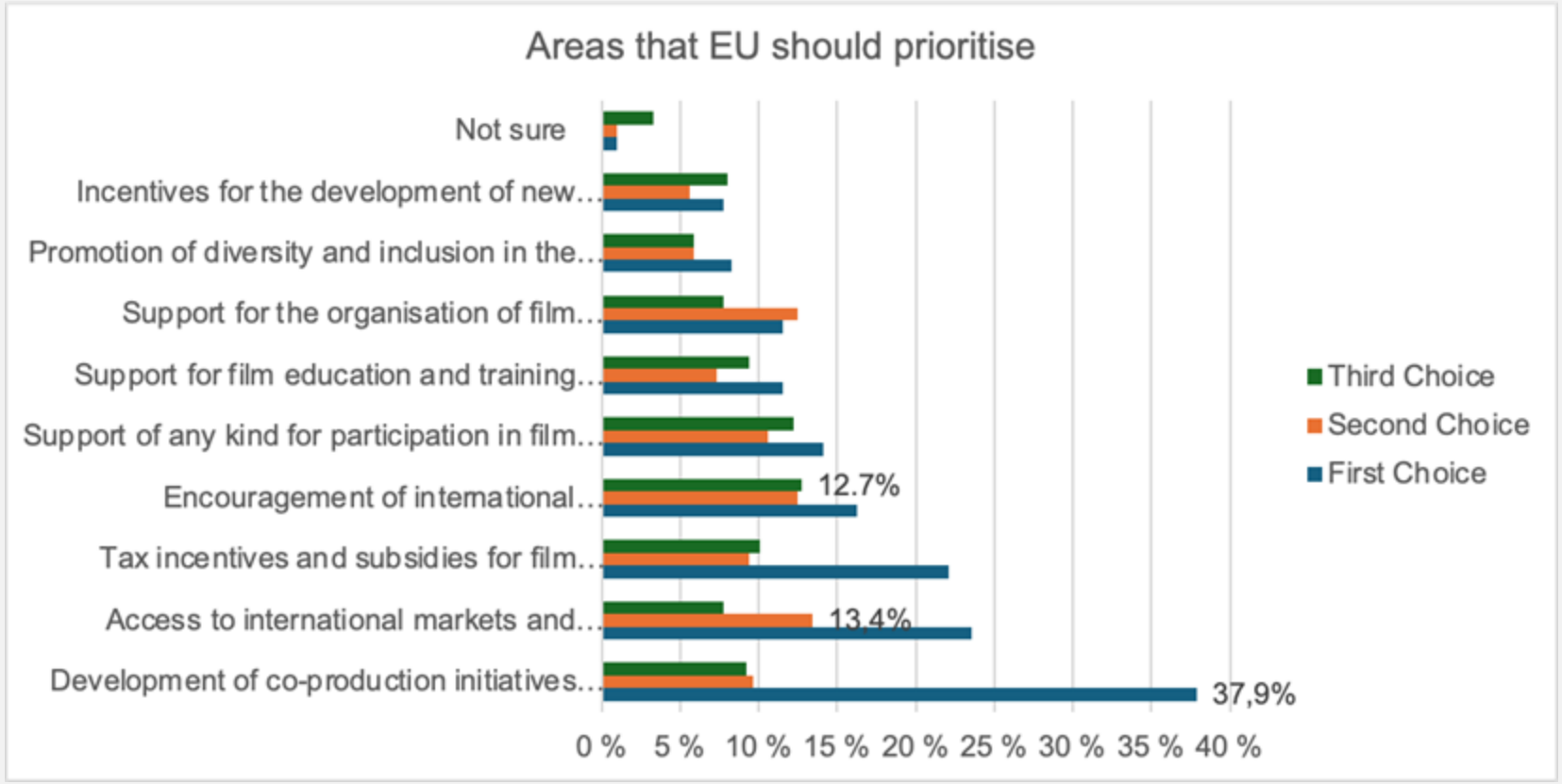
Areas that EU should prioritise



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Implications

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Policy recommendations

- **Co-productions**
  - Update international co-production agreements.
  - Consolidate and make information accessible in a dedicated website.
  - Lower thresholds of co-production financing requirements.
  - Reinforce existing funding available to support international co-productions.
  - Lower bureaucratic burdens.

- **Film festivals**
  - Reinforce and widen existing funding towards the participation of non-European film professionals in film festivals.
  - Strengthen dedicated workshops and events in co-production forums and markets.
  - Revise the positioning of non-European pavilions in European film festivals.
  - Establish funding mechanisms to cover or subsidise screening fees for selected European films, enabling their participation in international film festivals beyond Europe.

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Policy recommendations

- **Exhibition and distribution**
  - Develop new partnerships among publicly managed windows of exhibition.
  - Develop new partnerships among publicly managed streaming services.
  - Provide greater support to European distributors and local exhibitors of arthouse independent European film.
  - Invest in long-term audience building.

- **European programmes**
  - Review and simplify current support schemes for the distribution and the promotion of European films.
  - Revive programmes dedicated to distribution.

- **Modes of working**
  - Include non-Europeans in film funding evaluation committees.
  - Facilitate access to film archives by non-European stakeholders.
  - Improve two-way exchanges.

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Thank you

Dâmaso, M., Niutta, A., Vargas Miranda, I., Albornoz, L., García Leiva, Mª Trinidad, Rossato Fernandes, M., Vlassis, A., Behlil, M., Doğu Erdede, R., Akçalı, E. (2025). **The Framings and Strategies of Cinema Professionals. Report on International Understandings of the European Film Industry.** Developed by the Horizon Europe project REBOOT (Reviving, Boosting, Optimising and Transforming European Film Competitiveness – REBOOT), funded by the European Union's Horizon Europe Research and Innovation programme under Grant Agreement No. 101094769. **https://doi.org/10.5281/zenodo.16744614**

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Film distribution policies in the EU

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crescine

Coordinator

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EUROPEAN FILM ACADEMY

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DAIN STUDIOS

AARHUS KOMMUNE

Baltic Film & Creative Tech Cluster

iadt DUN LAOGHAIRE

VUB VRIJE UNIVERSITEIT BRUSSEL

IRMO

STORYTEK

EFA

MARCHÉ DU FILM

TALLINN UNIVERSITY

CINETOSCÓPIO

Associated Partners

eurospa analytics

ZAGREB FILM FESTIVAL ZFF

Screen Producers Ireland

EFAD EUROPEAN FILM AGENCIES

ICTA INTERNATIONAL CINEMA TECHNOLOGY ASSOCIATION

PROPELER FILM

ANIMATION IRELAND

Creative Business Network

OLFFI online film financing

cine regio

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crescine

What is Crescine

An Horizon funded project dealing with increasing the future competitiveness of the European Film industry.

CRESCINE's overall objective is to enhance the competitiveness and cultural diversity of the European film industry by focusing on small markets.

This will be achieved by understanding, engaging with, empowering, and ultimately transforming European small markets through original research and piloting the results in 7 countries.

The countries within our specific scope are Estonia, Lithuania, Denmark, Ireland, Belgium (Flanders), Croatia, and Portugal.

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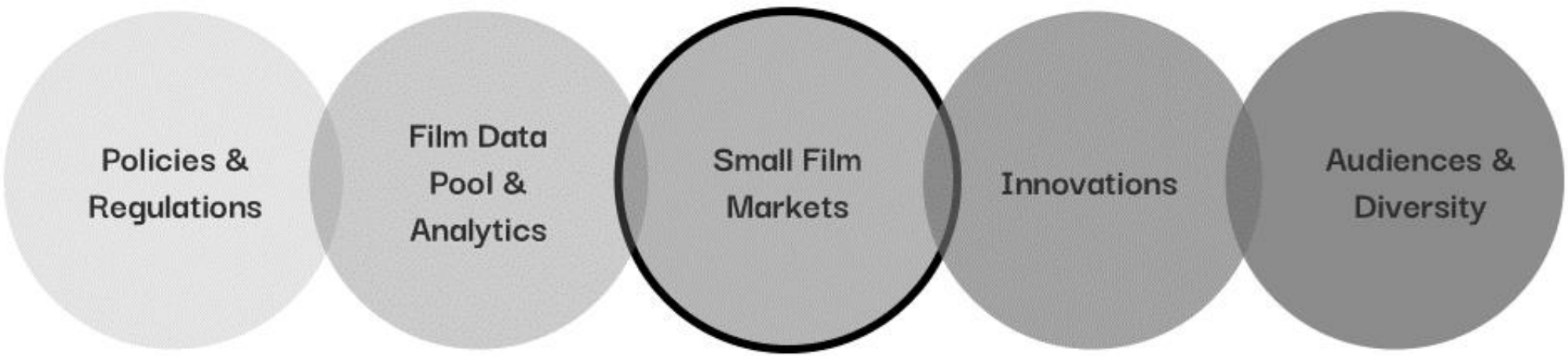

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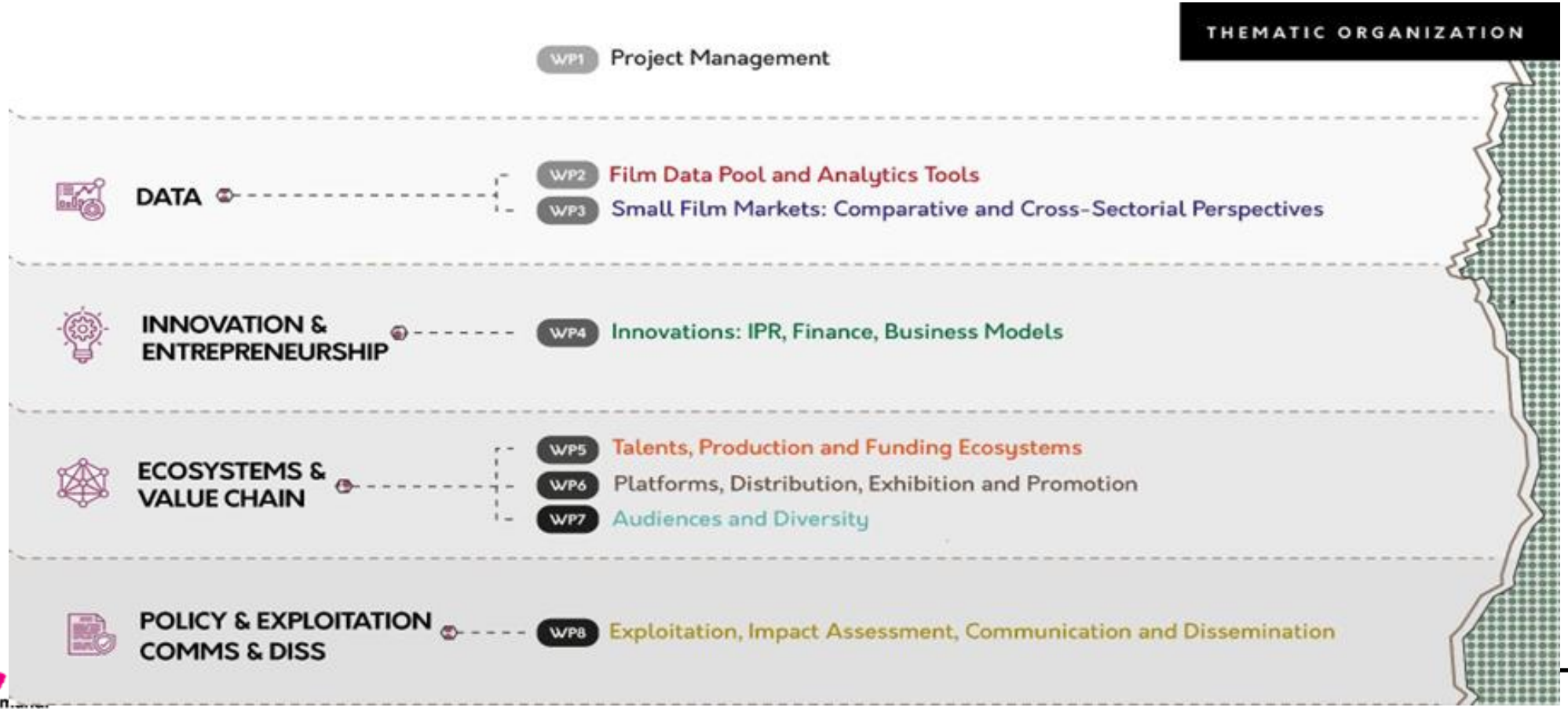
Thematic Organisation



Strategies for Building a S
Arthouse Cinema in Europ

Uncommon Venues for Film
Exhibition & Distribution in Europe

Release Windows in Post-COVID Film
Distribution

ology | Literature Review | Key Findings

s: Challenges and
or Distribution and

Recommendations | Introduction | Methodology | Evolving Landscape

Toolbox for Green Innovation:

A Practical Guide for Film Professionals

Ecosystem Profiles | Case Studies | Compare Ecosystems | Ca

European Industry Skills Report

Methodology | Visualizations | Skills & Competitiveness | Focus Groups Overview

for Films Coming Fro
Markets

Small European Film Markets: Portraits and Comparisons

Performance Indicators | Comparison with Larger Markets | The Bigger Picture | Methodology

Introduction | Methodological Framework

Toolbox for Blockchain and AI in Business
Innovation:

Challenges for film distribution in the EU

Domination of US-based video streaming services

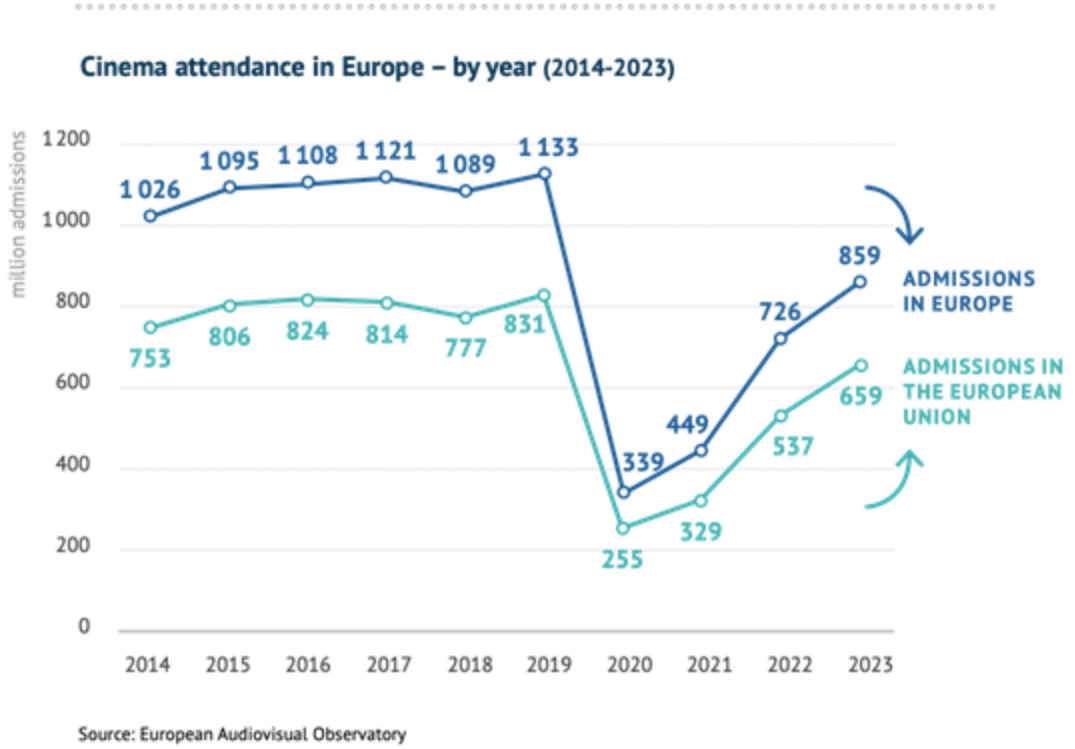
Change in film consumption patterns

BUT

Broadcasters remain the main source of funding

Theatres remain key in film releases

=> Adaptation of distribution strategies



wanna read more?
go check: Release Windows in Post-COVID Film Distribution

Current state of distribution policies

Broad set of film policies in the EU from AVMSD to MEDIA

BUT

Challenges to adapt (distribution) policies to the platform era (quotas, prominence)

Historically focused on production

Huge discrepancies between Member States

(See our policy brief)

Next (final) steps

Mapping and analysis of distribution policies in the EU, with a focus on our small markets

Policy and industry recommendations (State of European Film, volume 3)

Presentation during the Berlinale (13-14/2)

ANIMA MUNDI

Intellectual Property, Discoverability And Partnerships:

Reviving The International Promotion of European Values Through European Animation Industry Ecosystem

ANIMAR, 03/12/2025

Antonios Vlassis, Pelin Turan, Mafalda Dâmaso,

Heritiana Ranaivoson

This project is funded by the European Union's Horizon Europe Framework Programme, under the Grant Agreement no: 101178027.

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At a glance

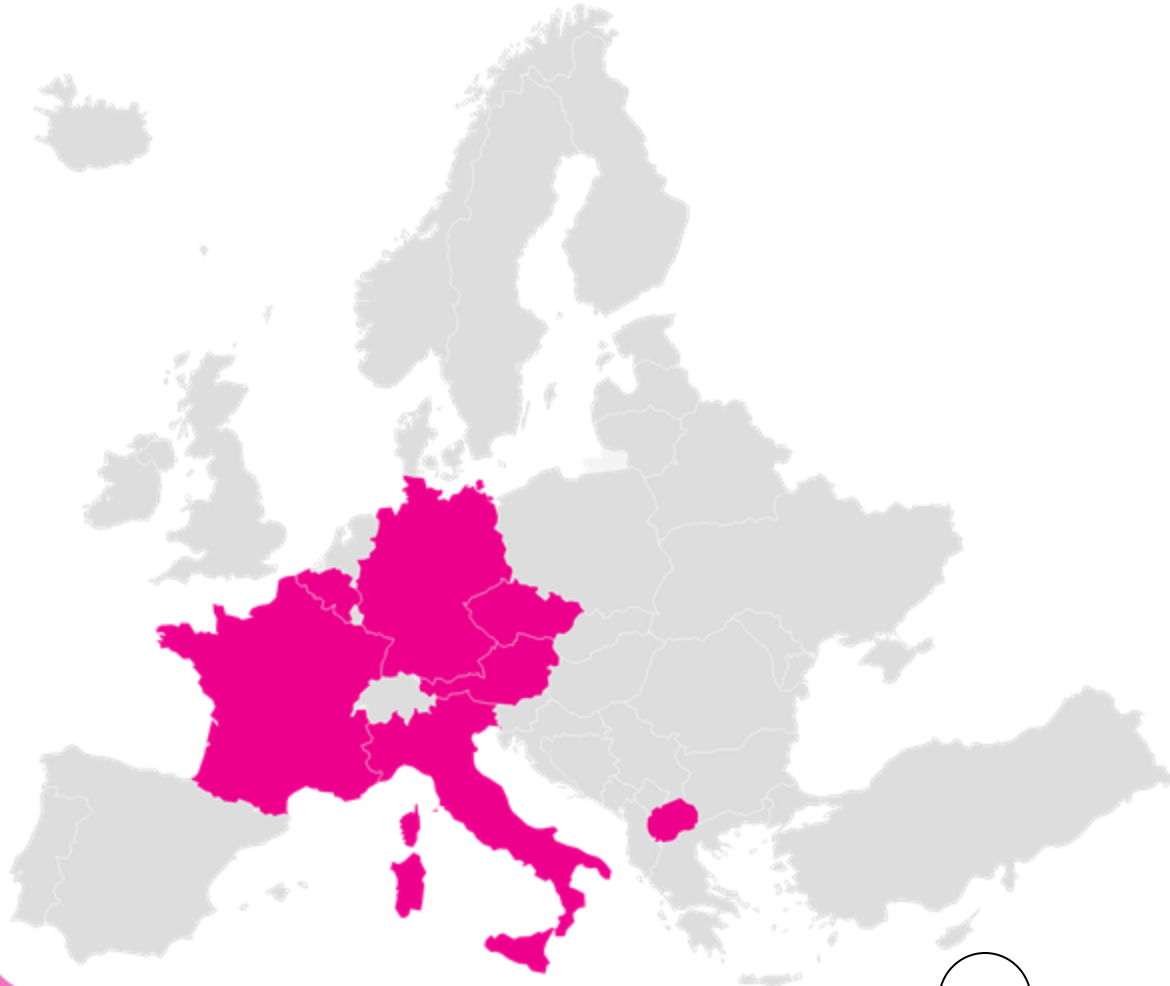
- Topic: HORIZON-CL2-2024-HERITAGE-01-04 - Europe's cultural heritage and arts – promoting our values at home and abroad

- Start Date: 1st February 2025
- End Date: 31 July 2028

- Project Coordinator:
- Project beneficiaries:

Beneficiaries and geographical coverage

ULIEGE	Belgium
EUI	Italy
VUB	Belgium
UNIVIE	Austria
KEA	Italy
UNIFRANCE	France
SSSA	Italy
AiE	France
CEEA	Czechia
CITIA	France
BV	Germany
CutAway	North Macedonia
LMF	Belgium



International Advisory Board

Core Advisory Board

European Film Promotion	
Europa Distribution	
European Broadcasting Union (EBU)	
Europa International	
EVEN	

Pool of engaged organisations

Cartoon	
CineRegio	
Eurocinema	
European Audiovisual Observatory (EAO)	
European Film Agency Directors association (EFAD)	
EU National Institutes for Culture (EUNIC) – Korea	
European Producers Club	
Cultural Relations Platform	

Pool of engaged scholars/ experts

Carmina Crusafon Baqués	
Carla Figueira	
Carlotta Scioldo	
Panagiotis Kyriakoulakos	

Project Objectives & Added Value

What does ANIMA MUNDI do? ANIMA MUNDI explores the specific needs, strengths, current challenges and gaps in the European Animation Industry, which hinder or enable its promotion across EU Member States as well as beyond the borders of the EU.

How does ANIMA MUNDI do it? ANIMA MUNDI focuses on three key aspects of the European Animation Industry:

I. the management of Intellectual Property in the creation, production and distribution of European Animation;

II. the institutional initiatives and partnerships across EU Member States and abroad; and

III. the discoverability of animated content and audience preferences in digital culture, with a special emphasis on children and youth.

Why does ANIMA MUNDI do what it does? ANIMA MUNDI acknowledges that the European Animation Industry is a value-laden field with the potential to celebrate cultural and artistic diversity, to generate significant financial gains, to engage children and young people, and to lead digital innovation. By investigating and boosting its promotion, the project provides valuable insights that highlight the policy action and the enabler role of the European Union in today's international cultural relations, both among EU Member States and abroad.

Expected Results

Targeted understanding of effective ways to increase the visibility of and access to European animation across EU Member States and abroad, involving a diversified set of stakeholders in the reflection; a comprehensive analysis of the impact of European Animation internationally, by investigating narratives and practices, with a special focus on children and youth.

Examples of key deliverables :

European Animation Brand by Animation in Europe;

Workshops on distribution in 2026 and 2027 by Animation in Europe/ANIMAR;

IP-Thlons in 2026 and 2027 by CEE Animation

Trainings on AI and IP in Animation Creation and Exploitation by CEE Animation;

Labs on audiences and marketing strategies in **Asian markets** by Bridging Visions and LMF;

Joint promotional activities on **European animation co-productions** by UNIFRANCE/ANIMA MUNDI;

ANIMA MUNDI Dashboard and 2030 ANIMA MUNDI **Policy Roadmap**;

Toolkits on IP, Discoverability and Partnerships;

And various **reports on management of IP, institutional partnerships and digital discoverability.**

ANIMA MUNDI: Two new reports

- **Report on the literature review on IP practices:**

  It reviews EU policies and academic literature related to IP practices across the animation value chain, and it provides a conceptual background for the project's research activities on IP management in the animation sector. Focus on the European Animation Industry and Copyright issues, on International Partnerships, as well as on IP practices in the global animation industry.

- **Report from the Set-the-Stage Workshops on the promotion of the European Animation across EU Member States and abroad**:

  The report is built on the Set-the-Stage Workshops held between June and September 2025. These sessions brought together 43 participants from policy and industry backgrounds to discuss intellectual property, discoverability, international cooperation, and the broader social role of European animation.

Animation Works through the Lens of the EU Policymaker…

Since the 1980s, the EU media strategy and agenda have been shaped by the multifaceted nature of and the interrelated and interdependent features attributed to audiovisual/cinematographic works, including animation works.

Audiovisual/cinematographic works, including animation films:

- Market-oriented perspective: Cultural goods generating revenues and yielding economic return for the market actors involved in the filmmaking lifecycle and retail chain.
- Cultural perspective: Artistic and creative expressions of the authors that convey a message to audiences of all ages across borders and time.
- Social perspective: Media that capture, document, safeguard and transmit the cultural identity, collective memory and imagery, common values and shared history.

Building Blocks of the EU Policy Agenda for a Competitive European Animation Industry

Cultural and Linguistic Diversity

Free Movement of Persons and Products related to Audiovisual Activities

Expansion of Audiences:

Kids and Young Adults

Digitisation and Preservation of Audiovisual Heritage

International Cooperation and Partnerships

Laws and Regulations: Free Circulation and Discoverability of Animation Films

Overview of the EU Policy Agenda...

- 1990 - Launch of the MEDIA programme
  - New ways to produce and exploit cinema/animation films by utilising the technology and the promises of the Internet.
- 2000-2019 - MEDIA programme and policy documents
  - Digitisation of analogue works,
  - Digital preservation of cinematographic works and heritage,
  - Digital distribution of works,
  - Opportunities provided by online platforms to access to and consumption of "non-mainstream" works,
  - Globalisation of trade, including the trade of cultural goods and services.
- 2019 and onward - Post-pandemic policy documents
  - Increase in demand for online platforms,
  - Dominance of the global digital AV market by non-European market actors.
- Recent policy documents
  - Implications of AI on the production of new works and exploitation of European works via online platforms.

ANIMA MUNDI Research Agenda on "IP"...

European Animation Industry v. Large Overseas Industries

1st Pillar

Public Regulatory Framework

- EU public policies,
- EU legal framework,
- National legal frameworks of the selected EU Member States

2nd Pillar

Private Regulatory Framework

- Contractual practices of the market actors involved in the EAI,
- Impact of the AI on the business models of the EAI and the revenues of the market actors involved in the animation-making lifecycle.

3rd Pillar

Competitors' Public Regulatory Frameworks

- Legal frameworks of China, South Korea and Japan,
- The laws and regulations that curtail EAI's capacity to launch products in these foreign markets.

Insights from the EU Policy Agenda on Animation...

Evidence on the EAI: the reports produced through the EU and CoE cooperation in 2015 and 2024.

Key findings of the EU-CoE reports:

- Animation v. cinema films: Above average investment, production cost as well as production periods.
- Pre-funding of animation films:
  - Significant decrease in the financial contributions from European broadcasters.
  - New funding opportunities provided by online platforms.
- Management of IP: Funding from online platforms v. co-ownership or transfer of IP rights.
- European animation market:
  - European market leaders - French, Spanish and UK industries.
  - Market concentration - Dominance of US animation films, followed by Chinese and Japanese animation films.
  - New market actors - Asian animation industry.
- Trends in the European animation market: Tendency to rely on existing "IPs" rather than producing new content.

Insights from Scholarship...

Key findings of the review of the literature (on EFI):

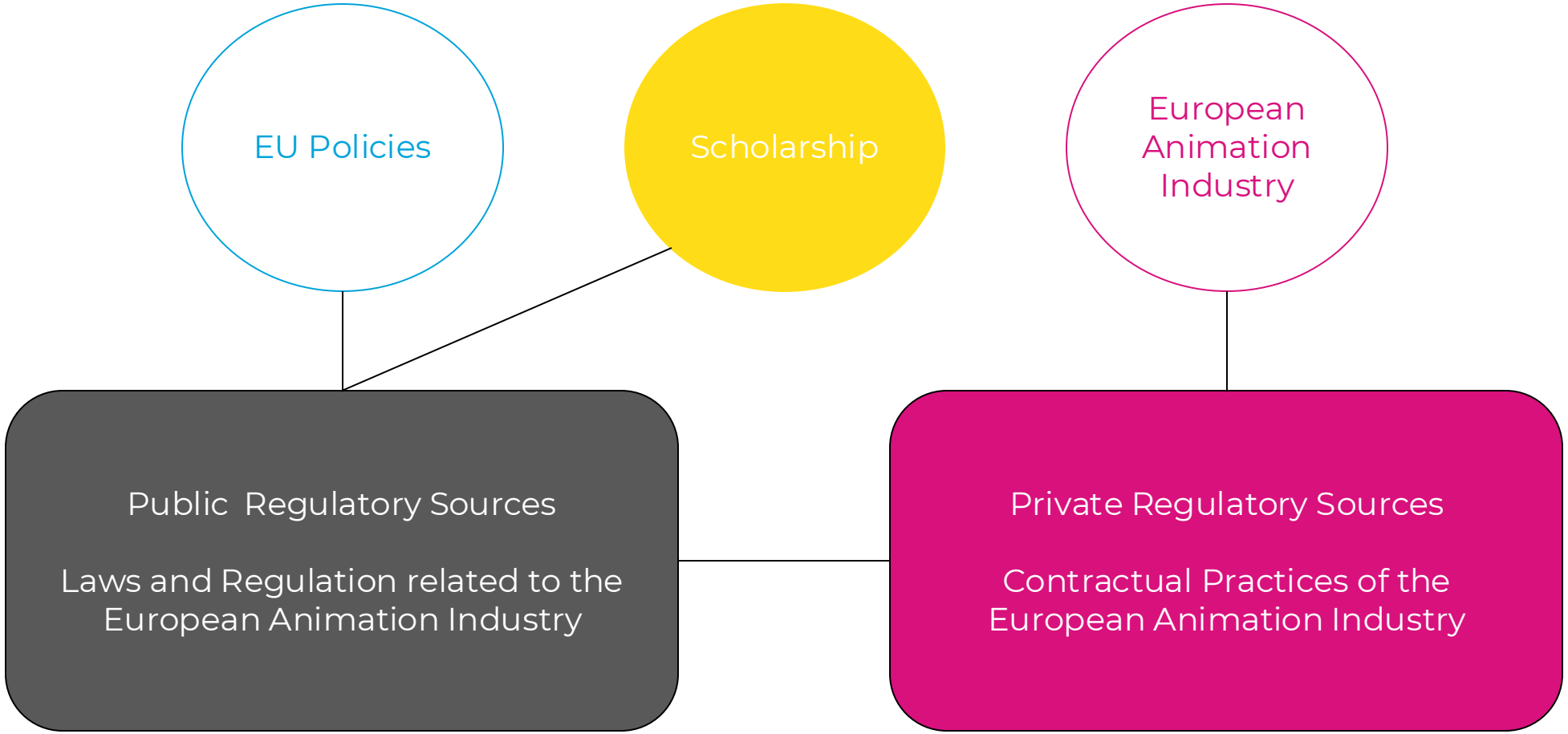
- Generative AI v. EFI:
  - **Promises:** Empowerment of the author to produce "purer" works + time- and cost-efficiency.
  - **Perils:** Copyright management.
  - **Legislative and knowledge gaps:** Authorship of AI-generated content + efficacy of Article 4 of the CDSMD (TDM exception) to train AI algorithms.
- The "authorship" conundrum in the context of audiovisual/cinematographic works.
- The EFI's scepticism about the exceptions and limitations (E&Ls) to copyright and related rights (e.g. quotation, freedom of panorama, parody and pastiche).
- E&Ls for literary works v. audiovisual/cinematographic works (e.g. quotation).
- Determination of the term of legal protection for audiovisual/cinematographic works.
- Access to and re-use of public domain materials and orphan works.
- The business model of online platforms (i.e. buy-out contracts) and its implications on the author's copyright and prospective ancillary rights.

Insights from the Industry's Perspectives...

Key takeaways from the Set-the-Stage workshops:

- Differential conceptualisation of "intellectual property" by the EAI: Intellectual creations that have been disclosed to the public for economic purposes and achieved a certain level of market success.
  - New paradigms: Disclosed/undisclosed | Commercial/non-commercial | Market success
- Original works v. reliance on existing IPs: Adaptation and copyright licensing are key to the EAI's operation for adaptations, prequels and sequels, series, spin-offs, remakes.
- Complications of copyright clearance for existing IPs: Limitations on the creative expressions of authors.
- Complications caused by the author's moral rights: Hardship in modifying the animated content for cultural-relevance, linguistic accessibility (e.g. changing the names of places and characters), and child-friendly format (e.g. dubbing).
- Generative AI v. EAI: Admittance of the advantages + limited knowledge on the legal implications of the training and use of generative AI.
- Agreements concluded with online platforms: Private regulation of the author's freedom of artistic expression.

The Way Forward...



Set-the-stage report

Social relevance of animation and the European Animation Industry

Ex. European animation embodies a dual reality: It sustains cultural diversity, artistic experimentation, and social relevance, yet operates under financial, institutional, and technological pressures that continually test these very foundations. Funding timelines should reflect animation's long production cycles. Dedicated, animation-specific tax incentives and an European Animation envelope within broader programmes would stabilise financing for culturally specific works that struggle in purely commercial settings.

Discoverability, audiences and consumption

Ex. Mixed feelings regarding online platforms when it came to discoverability and consumption for European animation. VoD services and video-sharing platforms have become unavoidable: YouTube has become the primary gateway for children and youth, with TikTok serving as a promotional funnel; however, visibility rarely translated into sustainable monetisation. Commercial logics often privileged global players; platforms also weakened theatrical and festival pipelines even as festivals remained vital for curated audience building.

Institutions, partnerships and promotion – a complex landscape

Ex. There is disagreement as to whether European animation represents certain values that could be seen as distinctively different from those from the American or Asian contexts. The idea of 'European values' emerges, then, as contested. However, conversations about this issue stressed the importance of cultural diversity as a central value that is reflected in the multiple approaches, languages and graphic styles of the EAI, as well as the importance of strengthened collaboration, regulation and public funding to foster diversity in European animation.

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