

The logo graphic for Anima Mundi consists of several overlapping, organic shapes in bright colors: yellow, green, blue, black, and pink. The text 'anima mundi' is written in white, lowercase letters across the center of these shapes.

anima
mundi

D13.1 Policy brief 1: Policy recommendations for enhancing global reach, partnerships, and visibility of European animation

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1. Introduction

Europe's animation sector is a wellspring of cultural diversity, original artistic expressions and creativity. Yet it underperforms internationally relative to its potential: European works account for ~25% of global theatrical animation production but only ~5% of worldwide admissions, while United States (US) animation, with roughly 10% of output, captures ~70% of admissions (Edmery, 2025).

Multiple, interlocking structural barriers constrain internationalisation. Market fragmentation and asymmetries across Europe complicate coordinated export and promotion. While Video-on-demand (VOD) platforms offer opportunities to reach international markets, limited investment in European animation works and prevailing buy-out practices often imposed by global VOD platforms can weaken European intellectual property (IP) leverage and long-term revenue capture, while the discoverability of European works on VOD platforms remains a persistent bottleneck: Article 13(1) of the Audiovisual Media Services Directive (AVMSD) requires the allocation of the 30% share of content catalogues of VOD platforms operating in the European Union (EU) to European works and the adoption of measures to ensure the prominence of European works. Whereas the existence of such catalogue quotas does not necessarily guarantee discoverability of European works on the catalogues of global VOD platforms, this legal regulation does not include a specific sub-quota for European animation works either, which is not a priority for global VOD platforms.. In parallel, the EU's new Culture Compass for Europe recognises intensifying global competition, calls out the pressures of artificial intelligence (AI), and sets an explicit direction to champion international cultural relations and partnerships - signalling that cultural relations and international promotion tools must be upgraded and better connected to industry realities.

This policy brief proposes a preliminary EU-level approach to unlock Europe's animation potential abroad. It outlines measures to:

- Strengthen strategic promotion under a recognisable European Animation brand and unified campaign strategy;
- Deepen international partnerships (with Asia, Latin America, Africa, and the Middle East) that balance cultural exchange with fair market access;

- Leverage international festivals and markets as structured gateways for business-to-business (B2B) matchmaking, talent mobility, and audience-building;
- Embed animation in EU cultural relations, connecting EU Delegations, European Union National Institutes for Culture (EUNIC) clusters and European programmes;
- Boost visibility abroad via discoverability standards, multilingual localisation support, and interoperable metadata for platforms.

The recommendations are targeted to the European External Action Service (EEAS) (cultural relations and external action), DG EAC (Culture Compass implementation, Creative Europe policy), DG CNECT (AVMSD review, data/AI and platform governance), Creative Europe MEDIA (circulation, capacity-building and market access), as well as to national agencies, regional funds, public broadcasters, festivals and industry networks.

Step-change needed. Europe requires a coordinated, EU-level internationalisation strategy for animation that is grounded in values such as equality as well as cultural rights, and leverages cultural diversity as a market advantage. The Culture Compass provides the political mandate; this brief translates it into sector-specific actions for European animation.

2. Context & problem definition

Europe's animation sector combines significant cultural and economic value, yet its global performance does not match its creative output. Although European animation accounts for approximately one-quarter of global theatrical animation production, it generates only around 5% of worldwide admissions, indicating a persistent gap between creation and international reach (ANIMA MUNDI, 2025a). This imbalance reflects structural limitations rather than a lack of artistic or industrial capability.

Despite strong circulation potential, evidenced by animation's longstanding success as an export genre in European television markets, the sector remains highly fragmented across national boundaries (ANIMA MUNDI, 2025a). This fragmentation prevents Europe from projecting a cohesive international presence and makes it difficult for European works to compete with consolidated global ecosystems.

The rise of global VOD platforms and video-sharing services (VSPs) compounds these challenges. Platform catalogues and recommendation systems tend to amplify content

ecosystems with strong pre-existing global demand, particularly from the US (whose dominance is reinforced by hosting most of the world's major streaming platforms) and from Japan, whose animation success is deeply tied to long-established audience consumption patterns and genre-specific fan cultures (ANIMA MUNDI, 2025a). Although South Korea does not match the global market power of the US or Japan, it has nonetheless increased its visibility in international animation and audiovisual content through targeted state investment and strategic co-production models (ANIMA MUNDI, 2025a). Altogether, this competitive environment reduces the discoverability of European works, especially where platforms offer limited transparency regarding ranking, curation, and prominence (ANIMA MUNDI, 2025a).

At the same time, international partnerships involving European animation could be less uneven and more embedded in long-term strategic frameworks. Stakeholder consultations show that diplomatic and cultural actors rarely deploy animation as a tool of cultural relations, despite acknowledging its high potential to convey European values, foster dialogue, and reach young audiences globally (ANIMA MUNDI, 2025b). The absence of structured mechanisms connecting animation stakeholders with EU Delegations, EUNIC clusters, or cultural diplomacy programmes results in missed opportunities for coordinated international outreach (ANIMA MUNDI, 2025b).

Globalisation has also reshaped production, with European studios engaging in co-productions with partners in Asia, including China, Japan, and South Korea. These collaborations expand market access and share financial risk, yet they can also result in challenges linked to the shared ownership of IP rights (ANIMA MUNDI, 2025a). In parallel, the proliferation of all-rights or buy-out deals imposed by global VOD platforms further reduces European producers' ability to retain their IPs and copyright, undermining long-term revenue generation, talent retention, and brand consolidation (ANIMA MUNDI, 2025a).

Taken together, these structural, market, and governance constraints demonstrate the need for a coherent EU-level internationalisation strategy that enhances visibility, safeguards European IP, strengthens diplomatic use of animation, and ensures that European works can thrive in an increasingly competitive global landscape (ANIMA MUNDI, 2025a; ANIMA MUNDI, 2025b).

3. Evidence & key findings

Findings from D4.1 – Set the Stage Workshops

1) “Paradox of strength and vulnerability”: rich creative capital, fragile structures

Workshop participants describe a highly creative European animation ecosystem whose structural fragilities include: (i) public funding instruments not fully tailored to animation’s cost/time profile (e.g., long development, heavy pre-financing, specific dubbing/localisation needs), and (ii) uneven accessibility of such funding across Europe, producing territorial imbalances in capacity to originate and export IP.

2) High diplomatic value; limited tools among diplomatic actors

Stakeholders recognise animation’s strong suitability for cultural relations (youth reach, cross-lingual adaptability, values communication), yet diplomatic actors lack practical toolkits, pipelines and curated offers to deploy animation systematically via EU Delegations/EUNIC clusters.

3) Need for an international industrial strategy and coordinated promotion

Stakeholders call for a coherent EU-level internationalisation strategy for animation (brand, campaigns, export services, and festival/market routing) to overcome fragmentation and to align public funds, diplomatic networks and industry realities.

D5.1’s literature review reaches similar conclusions, stressing IP management, discoverability and partnerships as the strategic levers to close the output-to-admissions gap.

4) Festivals as vital hubs for visibility & professional exchange; dependency on national funding

Workshops highlight international festivals/markets (e.g., Annecy/MIFA, EFM, national markets) as gateways for curated discoverability, B2B matchmaking, and career mobility, while noting their dependence on national/regional support and the absence of a Europe-wide, animation-specific export mechanism.

5) Lack of structured pathways for international cooperation beyond co-production

Participants report few pathways beyond the co-production model (e.g., joint distribution/localisation funds, bilateral training, curated showcases routed via EU Delegations), limiting sustained market presence and policy learning across regions.

6) Cultural diversity is a core strength, but support is uneven across countries

Stakeholders value stylistic, linguistic and thematic diversity as Europe's competitive advantage, while noting uneven national backing (funding access, broadcaster commissioning, localisation resources) that constrains pan-European visibility.

Findings from D5.1 – Literature Review

1) IP management challenges weaken global competitiveness and export capacity

D5.1 shows that IP management has become a strategic bottleneck for Europe's animation: In particular, complex rights stacks—that is, multi-layered and fragmented ownership structures spread across numerous co-producers, broadcasters, funders, and territorial licenses—combine with fragmented licensing practices and uneven bargaining power along the value chain to limit the ability of European producers to build durable catalogues and monetise their works internationally. These frictions are magnified by platformisation, where catalogue control, windowing, and data-driven curation accentuate incumbency advantages, ultimately constraining the global circulation and export performance of European animation.

2) Financing gaps push recourse to co-productions or VOD commissioning—often at the cost of IP control

D5.1 documents the difficulty of securing pre-production finance and the decline of public-service broadcaster investment, which steer European studios toward international co-productions or global VOD deals (ANIMA MUNDI, 2025a). While co-productions expand access and share risk, they typically entail co-ownership, diluting a European producer's ability to manage and exploit IP over time.

Global platforms, by contrast, frequently impose all-rights/buy-out contracts or require transfer of the IP, which reduces independents' catalogues, deepens financial dependency on platform fees, and hampers long-term scaling and talent retention. Recent legal scholarship on creator remuneration in the streaming era likewise highlights asymmetric bargaining power and the need for robust remuneration safeguards in platform contexts (Senftleben & Izyumenko, 2025).

3) Comparative perspective: the US, Japan, China, and South Korea benefit from more centralised promotion infrastructures

D5.1's comparative reading indicates that major competitor ecosystems (US, Japan, China, South Korea) are characterised by more centralised and coordinated promotion/export architectures (spanning trade bodies, festival/market routing, and brand-building) than the fragmented European landscape.

4) Discoverability deficits on global platforms hinder international expansion

Even where availability exists (e.g., national quotas or minimum shares), discoverability remains a core structural barrier for European animation on VOD and VSPs: opaque recommendation systems and prominence policies tend to favour established, globally demanded IP ecosystems, limiting exposure for European titles.

5) Legal fragmentation of copyright rules across Europe generates friction in export and licensing

D5.1 highlights that fragmentation in copyright and contract practices creates transaction costs and legal uncertainty for cross-border licensing, adaptation and distribution of animation IP, slowing down export activity.

4. Preliminary policy recommendations

1) Establish a European Animation Global Promotion Platform (EAGPP)

A permanent EU-level coordination & export hub for promotion, market access, and policy alignment

Scope: A light-structure “networked agency” that (i) curates an annual EU animation export calendar (top festivals/markets); (ii) runs a unified European Animation brand and B2B campaign; (iii) offers deal-flow services (buyers’ briefings, curated slates) and rights/contract clinics; (iv) aggregates market intelligence (discoverability metrics, rights retention benchmarks) for EU and Member State authorities.

Rationale: D4.1 stakeholders call for an international industrial strategy and coordinated promotion; festivals/markets are vital, but fragmentation weakens cohesive visibility and

export. D5.1 shows IP management & discoverability are structural bottlenecks; competitors (US/JP/KR/CN) operate with more centralised promotion infrastructure.

2) Develop an EU Animation Global Partnerships Framework

A rules-of-engagement for structured, reciprocal cooperation with third countries, covering co-creation, circulation, skills, and fair IP terms.

Scope: Bilateral and plurilateral cooperation protocols (with festival circuits, training hubs, public funds), model clauses for shared IP/brand management, and joint localisation & distribution pilots (sub/dub/marketing).

Rationale: D4.1 identifies gaps beyond co-production (few structured pathways); D5.1 shows co-productions often entail shared ownership and, with buy-outs, shrink EU catalogues, undermining long-term scaling and talent retention; a framework makes cooperation predictable and IP-safe.

3) Support EU dubbing, subtitling & localisation for Animation

Targeted localisation support to unlock cross-border circulation and overcome cost barriers, especially for children/Young adults and multilingual markets.

Scope: Calls under MEDIA for sub/dub/AD/SDH packages and market-tailored marketing assets; priority to first-time exporters, small markets, and titles routed via EAGPP's curated showcases.

Rationale: D4.1 flags localisation costs as recurring barriers; D5.1 links circulation limits to discoverability (availability ≠ exposure); scholarship on exposure diversity supports policy tools that expand audience pathways beyond incumbents.

4) Integrate Animation promotion toolkits into EEAS, EUNIC, and EU Delegation operations

Turn animation's diplomatic potential into practice with ready-to-use toolkits and curated pipelines.

Scope: (i) Programming toolkit: off-the-shelf showcases (shorts packages, youth-dialogue titles, Europe-in-Translation selections); (ii) How-to on rights, event formats, localisation; (iii) Partner mapping (festivals, hubs, distributors per region).

Rationale: D4.1: diplomatic actors recognise value but lack tools & pathways; D5.1 and cultural-diplomacy scholarship highlight the implementation gap between EU intent and operational delivery—toolkits make cultural relations actionable.

5) Operationalise and disseminate the ANIMA MUNDI “Empowering Partnerships Toolkit” (D11.5)

Make the project’s Key Exploitable Result a standard reference for EU/global stakeholders.

Scope: A structured roll-out plan to disseminate D11.5 (case studies, model partnership pathways, best practices, recommendations for multi-stakeholder/multi-level cooperation) to: EUNIC Global & clusters, EU Delegations, EEAS, DG INTPA, Creative Europe desks, and major festivals/markets.

Rationale: D4.1 evidences the need for structured cooperation beyond co-productions; D5.1 stresses IP-savvy partnerships and discoverability-aware internationalisation; D11.5 directly addresses these gaps with actionable templates.

6) Rights-retention & fair-deal guidance for Animation contracts with streamers and in co-productions

Voluntary guidance and pilot conditionalities to protect European IP portfolios and long-term scaling capacity.

Scope: Commission model clauses and best-practice notes for: (i) revenue-sharing, (ii) reversion/turnaround and term limitations, (iii) data-sharing for discoverability (exposure reports), (iv) character/brand licensing safeguards. Consider soft conditionalities (MEDIA export support preference) for deals that retain a minimum bundle of rights (e.g., merchandising/sequels or defined territories/windows).

Rationale: D5.1 evidences buy-out/all-rights practices reducing EU producers’ catalogues and leverage; European Parliament-commissioned scholarship documents the systemic impact on

creators and independents; academic analyses urge fair remuneration and re-balancing mechanisms in the streaming era.

5. Relevance to EU policy agendas

Taken together, the preliminary recommendations in this brief translate existing EU cultural and audiovisual ambitions into a focused, animation-specific internationalisation agenda. They activate and connect instruments that the EU already has, such as Creative Europe MEDIA, EU Delegations and EUNIC networks, and the external cooperation toolbox.

EU Strategy for International Cultural Relations

The Strategy calls for mutuality, long-term cooperation and people-to-people links; animation is a natural carrier of these principles because of its cross-lingual reach, appeal to children and youth, and capacity to engage with sensitive themes in accessible ways. The proposed European Animation Global Promotion Platform (EAGPP) and the EU Animation Global Partnerships Framework (EAGPF) operationalise that vision by giving EU Delegations and EUNIC clusters ready-to-use pipelines (curated slates, bilateral festival circuits, joint localisation funds) and practical toolkits to embed animation within cultural calendars and thematic dialogues. This answers the gap identified by stakeholders (that diplomatic actors recognise the value of animation but lack tools and structured pathways—and anchors cultural relations in concrete programming and market access).

Creative Europe MEDIA (circulation).

MEDIA's mandate to support circulation, capacity-building and audience development provides the obvious delivery channel for several recommendations. Dubbing, subtitling and localisation grants for animation would reduce one of the most cited barriers to cross-border reach (especially for children/YA), while export actions routed through EAGPP would make festival/market presence more systematic and data-informed. Because D5.1 shows that financing models increasingly push producers toward co-productions or streamer deals with rights trade-offs, MEDIA can also pilot soft conditionalities and model clauses that encourage rights retention or fair revenue sharing for independents, reinforcing the long-term sustainability of European IP portfolios.

Global Gateway.

As the EU's framework for sustainable, values-based partnerships with third countries, Global Gateway provides the geopolitical and financing context in which the EAGPF can thrive. By setting reciprocal principles (e.g., model clauses for shared IP that safeguard European brand-building; co-funded localisation/distribution; mobility and skills exchanges) the Framework aligns animation cooperation with Gateway's emphasis on fair partnerships and capacity-building, and gives partner regions tangible cultural-economy opportunities. This is exactly where D4.1 saw a gap: co-production alone does not create enduring pathways for distribution, audience-building and institution-to-institution learning; structured cooperation does.

Culture Compass

The Culture Compass urges the EU to upgrade cultural relations tools and face intensifying global competition (including the pressures of platformisation and AI) by building partnerships and reinforcing international visibility. The measures presented in this brief aim to advance that mandate: the EAGPP addresses visibility and coordinated promotion; discoverability pilots address the platform challenge; rights-retention and fair-deal guidance addresses the IP and bargaining-power asymmetry; and the roll-out of ANIMA MUNDI's D11.5 Empowering Partnerships Toolkit reinforces multi-stakeholder and multi-level cooperation across Europe and partner countries. Together, they can convert the Compass' high-level direction into sector-specific actions that put European animation's cultural and economic value to work abroad.

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