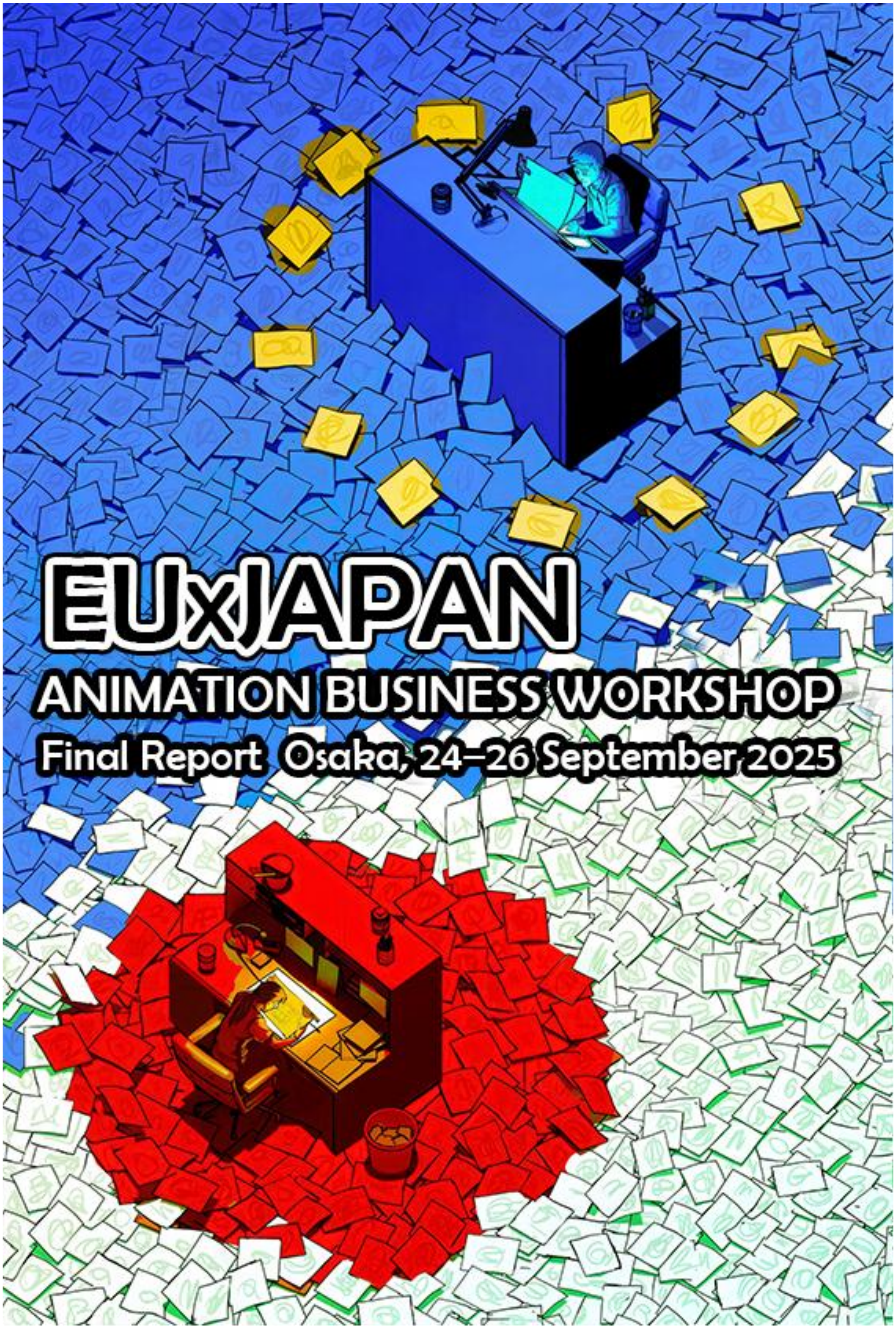

Illustration: Thomas Williams

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Executive Summary

The European Union (EU) and Japan represent two of the most sophisticated and influential ecosystems in global animation. Both possess strong artistic traditions, internationally renowned studios, and vibrant creative networks, yet they operate under profoundly different industrial and cultural paradigms.

Europe builds on a subsidy-based and publicly supported model that encourages diversity, experimentation, and transnational cooperation, but suffers from market fragmentation, complex financing structures, and limited international visibility. Japan, on the other hand, has developed a commercially robust industry anchored in private capital, production committees, and highly exportable IPs, but its over-reliance on existing franchises and limited public support now challenge its creative renewal.

This report compares both markets and summarizes the discussions held during the EU–Japan Animation Business Workshop (Osaka, 24–26 September 2025), identifying opportunities to bridge structural, linguistic, and cultural divides through strategic partnerships. Across the three Working Groups—Intellectual Property & Development, Co-Productions, and Sales & Distribution—several cross-cutting insights emerged:

Structural Divergence and Complementarity

Europe's public–private hybrid model contrasts with Japan's committee-based commercial financing. While Europe's multi-country co-productions foster creative collaboration, Japan's integrated committees secure distribution and merchandising early on. Together, these logics can complement each other: European public support can de-risk Japanese private investment, while Japan's brand-driven model can enhance European visibility.

Audience and Market Alignment

European animation primarily targets children and families, supported by public broadcasters and compliance standards; Japan addresses teenagers and adults through strong fan cultures and transmedia storytelling. Between both extremes lies a fertile middle ground: arthouse, stop motion, preschool, and "kiddult" content, where cultural and aesthetic affinities can meet.

Distribution Dynamics and Festival Gateways

Distribution remains one of the greatest asymmetries. European films entering Japan face a highly curated art-house circuit—small, loyal, and slow-paced—where localisation, dubbing, and release calendars demand patience and precision. Japanese anime, conversely, enjoy robust global exposure but must adapt to fragmented European licensing and the decline of linear TV. Festivals act as the primary gateways on both sides, functioning as both taste-makers and market enablers, yet there is a shared call for closer coordination, a joint EU–Japan festival circuit, and a shared localisation fund to overcome linguistic and logistical barriers.

Intellectual Property and Development Models

Japanese animation relies on proven IPs—manga, novels, or games—activated by production committees and monetized across media. Europe, meanwhile, invests heavily in development bibles, teasers, and pilots for original concepts, supported by public funds and broadcaster compliance. Co-creating IPs from scratch is a complex process, but hybrid pathways are emerging: European IPs adapted by Japanese studios, Japanese dormant IPs rebooted for European audiences, and new stories blending cultural sensibilities from both worlds.

Strategic Recommendations and Forward Vision

The workshop underscored the need to move from sporadic cooperation to structural collaboration. Key recommendations include:

- Establishing coproduction agreements and/or bilateral legal frameworks (e.g. Italy–Japan model).
- Creating joint localisation and distribution funds to support dubbing, subtitling, and marketing.
- Developing EU–Japan Animation Distribution Platforms connecting art cinemas, festivals, and streamers, as a joint curation space.
- Promoting talent exchange programmes and bilingual production consultancy.
- Encouraging co-branded IP incubators for preschool, arthouse, and adult-oriented projects.

The opportunity lies in forming a shared EU–Japan community of studios, universities, schools, festivals, and companies capable of generating regular exchanges and long-term partnerships. Success will depend on sustained institutional support, structured mobility programmes, and festival diplomacy to bring professionals together. While EU and Japan follow different production logics, their strengths are complementary. Obstacles remain—financing, working culture, and audience expectations—but a stable community can transform these challenges into creative synergies. From this ecosystem, co-productions and training agreements can emerge naturally, giving rise to innovative, transnational animation projects.

Contents

1. Introduction

The EU–Japan Animation Business Workshop was organized by the European Union in Osaka from 24 to 26 September 2025, as part of Expo Osaka 2025.

The workshop brought together around 30 leading professionals from Europe and Japan—producers, distributors, rights managers, and institutional representatives—to discuss challenges and opportunities in three key areas: IP & development, co-productions and sales & distribution.

The aim was to develop a set of shared recommendations that could serve as a roadmap for stronger EU–Japan industry cooperation, creating opportunities for joint projects and policy initiatives.

2. Methodology

Following the Animar BCN model[1], participants were divided into three working groups, each addressing one of the selected themes:

- WG1— Intellectual Property (IP) & Development
- WG2— Co-productions
- WG3— Sales & Distribution

Each group was co-chaired by one European moderator, with case studies and state-of-the-question presentations to ground discussions. Simultaneous interpretation (Japanese/ English) ensured a fluent exchange.

On the final day, the moderators presented each group's conclusions in plenary, followed by the outcomes of the EU–Japan Animation Artists Residency, also organised by the EU as part of Expo Osaka.

3. Working Group 1—Intellectual Property & Development

Brief Summary

Japan and Europe are converging on transmedia, merchandising, and cross-platform IP strategies, but their development mechanics are fundamentally different. Japan primarily adapts proven IP (manga, books, webtoons) using production committees, limited public funding, and fast go-to-market once fan-base signals appear. Europe invests heavily upfront in bibles, scripts, teasers/tests, leveraging public development funds and longer 2–3+ year financing cycles with

[1] framework for discussion that is used for the European Animation Convention, the annual forum for the European animation sector

strong broadcaster compliance, especially for kids. Co-creating brand-new IPs from scratch is a complex process, yet collaboration is workable where targets and resources align: adult or preschool focus, hybrid financing (JP private + EU public), European IPs adapted by Japanese studios, reboots of dormant Japanese IPs for Europe, and authentic co-creation that avoids "fake anime."

Discussion

The participants spent the morning part of the workshop explaining their own strategies when approaching new animation IPs, from the origin of the stories or ideas to how they finance the development and production processes, and how they exploit the rights later on. During this stage, they acknowledged the big differences between the business models in the two regions.

During the afternoon, after the lunch break, participants focused on finding successful examples, common strategies, and imaginative solutions to overcome the differences and create opportunities for collaboration.

Objectives

- Study the origin of animation projects in both regions to explore collaboration pathways in IP creation and development.
- Assess the different scenarios between large conglomerates and independent producers, as well as the relationship with the original IP rightsholders.
- Consider the different roles that key stakeholders (broadcasters, licensees) play when approaching original or IP-based animation projects.
- Explore the factors that make an animation IP successful in Europe and Japan.

Case Studies

- **Olfa Berhouma Sakakibara (Toei Animation Europe)** — Their first collaboration with a European IP was *Ladybug*, which came about at the initiative of the European producer, who approached them. Toei was able to participate in the project as the producer was open to include some Japanese components/inputs in the show. The result was a coproduction spanning three seasons, although the 3D pipeline presented a major obstacle as this was completely new to them. They now focus on 2D collaborations for kids content, such as *Le Collège Noir,* targeting international markets, where they follow the Japanese pipeline and have creative control, but most of the production is based in France using European talent.

- **Marika Makaroff (Gutsy)** — Moominvalley: they managed to create a successful show on an IP beloved in Europe and Japan, so much so that there are theme parks in both Finland and Japan. One of the main drivers of this success is the fact the project targets not only kids, but appeals more widely to families and adults; moreover, the DNA of the IP is geared towards respect for nature, and it has a sensibility and emotional pull that resonates with both the Nordic and the Japanese cultures. Last but not least, it was a high-end project that was in part privately funded, which positioned it for strong licensing exploitation.

Key Issues & Outcomes

1. The Japanese Development Process

In Japan, almost all animation projects are based on existing IPs, most commonly a successful manga, but also graphic novels, books, web comics or similar digital products. This is tied to the way the projects are financed: due to the fact that there is almost no public money involved, neither through grants nor tax credits, most of the money is private, commercial investment, which creates a high-level financial risk when it comes to original, unknown IPs. Thus, once a manga or a webtoon gains visibility and builds a fan base, production companies start to bid to get the rights, which are typically held by the manga creators themselves (the publishing house acts like an agent for them and takes a stake on all exploitations).

In order to greenlight the project, a "production committee" is formed, which consists of a group of companies partaking in the financing and exploitation rights: usually a broadcaster, a publisher, a toy manufacturer, the producer, the advertisers which pay for the TV slot (if necessary), and an international sales/licensing agent. The latter typically becomes the "key partner" (as international sales represent the largest share of future revenues) and this partner generally provides the main production cash flow. All the investors hold a share of the IP and the corresponding revenues based on their investment, while the production company usually takes only a small percentage or a margin over the production budget.

This enables the production committee to secure the project's future exploitation of the IP by securing the broadcasting window and the merchandising, as these partners are on board from the outset. It also allows investors to recover their private capital. Only big corporations with in-house production, publishing and licensing business units are able to greenlight projects without forming a committee. It makes sense for these partners to take the investment risk as they are profiting from their other business activities, as well as other successful IPs which may offset potential losses from failed investments.

The result of this process is that there is effectively no development process: as the IP already exists and has been tested, the only required deliverables are a business plan and a brief dossier outlining the adaptation concept. The creator is usually involved in the production process. Even storyboards are rarely required, as manga vignettes already serve as a "proof of concept" of the final look. This allows Japan to launch new IPs fairly rapidly: as soon as a title shows potential (there is an evident fan-base), investors can mobilize and agree on the committee terms and begin work, even before the contracts have been signed, based on a level of trust.

2. The European Development Process

However, in Europe the development process is very different. Whether it is an original IP from a creator (internal or external to the production company) or whether it is an adaptation of a previous IP, the production company must invest its own funds to produce a range of development deliverables: a literary bible, a graphic bible, some scripts in case of a series, or a draft script for a movie, a teaser or animation test or pilot animatic. The development budget varies depending on the number of deliverables required, but it can range from as low as 50K euro up to 150K for TV series, and even 250K–300K for feature films. European independent producers usually rely on public support, such as regional, national or European-level development funds, depending on where they are based. In some cases, they can also secure development deals with broadcasters or streaming platforms. Big conglomerates or IP owners rely more on private financing for the development stage.

Once these development materials are completed, the producer can begin pitching the project to secure financing for the production. Funding sources typically include broadcasters and streaming platforms, public grants for production or co-production, and tax credits, among others. often takes two to three years—or even longer—making the European model considerably slower than Japan's. The exception lies with producers adopting a digital-first approach: those who create short-form content for YouTube or other AVOD platforms. These producers operate with shorter development cycles, financed through their own resources, and aim to recoup costs via advertising and view-based revenues.

The involvement of the IP owner in this lengthy development process can largely vary depending on its nature. For original IPs, the creator is typically an integral part of the above-the-line team. In the case of adaptations, however, larger IP holders often demand a greater degree of editorial control. That said, the primary editorial authority generally lies with the commissioners—most often public broadcasters in recent years—who impose strict compliance standards, particularly for children's content. These regulations, while intended to ensure quality and appropriateness, are often viewed by Japanese producers as overly restrictive. Moreover, since most European animation targets kids and families, this adds another layer of oversight, contrasting sharply with Japan, where the majority of animation caters to teenage and adult audiences. Finally, differences in copyright and residuals systems, which are considerably more stringent in Europe, further complicate collaboration and alignment between the two markets.

3. Strategies to co-create and exploit animation IPs

Considering the above analysis, co-creating an IP together appears to be a highly complex, virtually impossible undertaking, due to the different processes, timelines and origin of the financing sources needed. Internal mechanisms in Japan are quite well oiled and there is apparently no need to collaborate with external partners at the early stages, as of today. However, while this might hold true for big Japanese conglomerates, there could be opportunities with mid-sized animation studios who struggle to participate and bid for big manga titles, against larger players, and might find a solution in partnering with foreign creators and producers.

When it comes to IP exploitation, producers from both regions share the same goals, but have different outcomes. For European producers, success means being able to fully finance and produce the show, then move on to the next one, with low expectations for residual revenues given the challenges of reaching fragmented audiences and the intense competition from

American content. By contrast, Japanese producers need their projects to be profitable in international sales and merchandising so that the production committee partners can recoup their investment. As a result, a strong commercial strategy is an essential component when considering any joint project.

Taking these factors into account, the workshop participants identified potential opportunities for collaboration between the two regions:

a) **Diversifying risk through different target audiences:** apparently, creating a project for adults is an easier way to co-create from the creative perspective, as western commissioners impose fewer compliance requirements, allowing creators more freedom. However, this IP would face limited market penetration in Europe, where adult-oriented anime occupies a niche space. Collaborating on a kids show makes sense for the European market, as production companies are well established in this demographic and there are several broadcasting windows to exploit, but this would face lower demand in Japan, where few buyers acquire kids' content. Thus, a successful mutual strategy between partners in the two regions who want to optimize resources and maximize revenues might involve diversifying audiences and project types: working together on adult shows for Japanese audiences (with Europe a secondary market) or working together on children's shows for the European market (with Japan a secondary market) could be one way to optimize resources and maximize revenues. An example could be Toei's line-up of projects: the Japanese headquarters focus on older audiences than the European unit. Another example could be "Smurfs," a family-oriented animation in Europe, but whose main Japanese audience is formed of adult females.

b) **Diversifying risk through compatible financing models:** Japan's strengths are merchandising/licensing investors and exploiters, while Europe benefits from a strong network of public funding opportunities. In a potential collaboration, private investment from Japan plus public funding from Europe could be the perfect match for both producers. This combination would only be attractive in the case of commercial IPs with a clear licensing strategy in both regions, to lower the risk of the private investment. This model could also extend to arthouse feature films, with a moderate level of private risk recoupable through international box office sales. There is also potential in the gaming industry, which is strong in both regions but not particularly linked to the animation industry: here there is room for improvement on both sides. One example is "Pino & Binoy," a collaboration between Italy's Studio Bozzetto and Yomiuri Telecasting Corporation (YTV). The establishment of a coproduction treaty between Europe and Japan could help foster these kinds of initiatives by providing a safer legal framework.

c) **European IPs adapted by Japanese companies:** since any animation project in Japan is based on publishing IPs, we can also explore the possibility of adapting European IPs, provided the IP has enough creative components to resonate within Japanese audiences. This could appeal to mid-sized Japanese production companies who cannot bid for major Japanese IPs, but can find good ideas internationally. Again, this strategy would require a powerful licensing programme outside of Japan too. A good example is the preschool project “Antón Piñón,” based on a Spanish comic books collection, commissioned by both TV Catalonia and NHK. In this case, NHK discovered the comic book at the Bologna Book Fair and decided to make the animation adaptation; being a Spanish comic, they partnered with Spanish producer Imagic TV, publisher SM and broadcaster 3CAT to produce the series, and maintain editorial control in order for it to fit the Japanese market.

d) **New iterations for Japanese IPs:** Japanese manga and their anime adaptations have enjoyed popularity in Europe since the early 80s, with several generations of Europeans having grown up watching this content. Many of these titles have been successful abroad in previous decades and are still aired by some European broadcasters because of the nostalgia effect, for example “Doraemon” and “Shin Chan,” which are still popular and successful in Italy and Spain, but not known in Northern Europe. Sometimes, these IPs are virtually dormant in Japan and no longer broadcast, as new productions appear. There is an opportunity here for a European company to make a new adaptation or reboot of this old Japanese IP for the European or international market, giving it a second lease of life and generating additional revenues for the Japanese production. This is especially relevant for kids-oriented IPs that no longer fit Japan’s current trends, such as “Hello Kitty Super Style,” a Sanrio property adapted into a new TV series by French studio WatchNext Media, aimed at international audiences.

e) **Relatable IPs for both territories:** there have been some attempts to create Japanese anime from Western territories (often referred to as “French anime” or “Amerianime”) with the aim of reaching Japanese audiences. These have failed. Projects that try to imitate anime rather than originate from authentic collaboration tend to elicit a sense of discomfort or “cringe” among Japanese viewers. That is not how you create IPs that work for both territories at the same time. Co-created IPs need to find common values and a common ground on what both partners want to achieve through the production process, as well as incorporate characters and story elements which resonate with both audiences. For example, European kids’ series tend to feature heroes or aspirational characters, while Japanese shows favour flawed and anti-heroic main characters. In any case, projects need to come from a natural fit and cultural exchange: this means blending creative crew and artists from both places. For TV series, another key factor is the possibility to extend the story for long-running episodes in order to maximize the merchandising potential.

4. Working Group 2—Co-Productions

Brief Summary

EU–Japan co-productions remain limited and complex due to the many differences between the European and Japanese animation industries, yet collaborations are possible and can foster the circulation of content across countries and audiences. Although cooperations can be easier in stop motion, anime features, and arthouse, there are also opportunities for coproduced TV series.

Budgets are broadly compatible (≈ €200k–€300k per 21-minute TV episode; €2–€6m for most features, with a few outliers at €15–€20m), but financing logics, target audiences, and pipelines differ markedly. Europe blends public funding (grants, loans, tax credits) with private finance and multi-country co-productions, whereas Japan relies on private, committee-based and licensing-driven business models with comparatively limited public funds. European animation targets mainly children, whereas Japanese animation addresses teenagers and adults. Despite challenges—business models, audience focus, production methods, language/culture—workable collaboration avenues exist: arthouse features with modest bilateral spend, children's series based on well-known IP, service work, and global-streamer commissions led creatively by Japan with European co-production. Practical enablers include co-production treaties (e.g., Italy–Japan), internships/residencies, and bilingual production consultants.

Discussion

The workshop was split into two parts. During the first half-day, the participants compared the animation industry in Europe and in Japan looking at various aspects (financing, budgets, pipelines, techniques, audiences, genres, etc.). During the second half-day, the participants examined potential collaborations between European and Japanese studios and how to strengthen them in the future.

Objectives

- Review the few collaborations of these last few years (Case studies).
- Identify the differences and similarities between the production systems and provide an overview of the European situation, which varies considerably from country to country.
- Explore the potential for future cooperations.
- Brainstorm on mechanisms to support future collaborations.

Case Studies

- **Frédéric Puech (Something Big) — "Go Astro Boy Go!"** 52x11' produced by Planet Nemo (France) as service work for Tezuka Productions and Yomiuri TV Enterprise (Japan) which aired in 2020 on TV Tokyo. Frédéric's former company, Planet Nemo, convinced Ozamu Tezuka to develop a preschool animation series based on his famous manga. However, without a major presale in France, Planet Nemo was unable to raise the financing but still remained involved in the production of the series as the main services studio (partially financed by the French Services Tax Credit) and with French Director Virgile Trouillot on board.

- **Noriko Matsumoto (Dwarf Studios)— "Mogu & Perol"** 52x7' series coproduced with Zephyr Animation (France). Dwarf Studios produced a short stop-motion film of the same title, directed by Tsuneo Goda. Zephyr's producers loved it and proposed to Dwarf to develop a preschool series based on the film's characters and universe. The series was co-developed and commissioned by France Télévisions, but with no Japanese broadcaster attached, Dwarf was unable to raise domestic financing. Due to both practical constraints (limited stop-motion capacity in France) and budget considerations, Zephyr opted to produce the series in 3D animation instead of stop motion. Dwarf retained an equity share in the series and is still involved creatively for the designs of new characters and locations.

- **Fumi Takeuchi (Asmik Ace) — "A New Dawn"** animation feature coproduced with Miyu Productions and directed by Yoshitoshi Shinomiya. Initiated in Japan and primarily produced by Asmik Ace, Miyu Productions provided both financial and artistic contributions, including the production of one stop-motion sequence. The collaboration was further supported by a minimum guarantee covering French theatrical rights and international distribution .

Key Issues & Outcomes

1. **Comparison of the animation industries in Europe and in Japan**

Budgets. Budgets are quite compatible across regions (≈ €200k–€300k per 21-minute episode; €2–€6m for most features; a handful at €15–€20m). The Japanese production costs, which have doubled over the last decade due to a booming industry, fall within the mid-range of European levels, being higher than those in Eastern Europe, lower than those in France, and similar to countries such as Spain or Italy (e.g. the average monthly salary paid to a Japanese animator is €2,000 per month compared to €1,000 ten years ago).

Business models & financing. The financing structures differ substantially: Europe blends private (presales to streamers/broadcasters and more and more public television, distribution advances, equity) and public funding (selective grants, refundable loans, tax credits) that can cover up to 50% of a series budget, and even more for feature films; multi-country co-productions (often 2–3 countries) are common. Japan uses limited public financing from two selective funds, one operated by the Ministry of Culture and the other by the Ministry of Economy; projects are financed by a production committee involving a distributor, a merchandising company, the producer, a broadcaster, etc. sharing gap-financing. This difference has a major impact on the content, since public-funded, and public broadcaster- commissioned series and films differ from licensing driven and commercial network-commissioned content. In both regions, equity is shared pro-rata to each partner's financial contribution.

Production pipelines. Steps are similar (e.g., 8 weeks for a 22-minute storyboard; After Effects for compositing), but technical approaches differ: hand-drawn animation (using TV Paint software) remains dominant in Japan, while Europe relies more on digital puppet animation (Toon Boom Harmony, Animate). 2D is by far the preferred Japanese technique, whereas Europe produces a roughly even mix of 3D and 2D content.

Audience targets & market access. Europe serves children and families and can rely on public broadcasters commissioning kids' series. Japan skews to teenagers/adults. For children's content, aside from NHK (acquiring very few shows), there is effectively no buyer; consortia have to pay broadcasters to air a show—about €600,000 for 3 months on a national network (≈20× less on a local station). For adult animation the situation is reversed: Japan has ~10 buyers (half international streamers—Netflix, Amazon, Disney, Hulu, Crunchyroll; half domestic—U-NEXT, DMM, docomo, ABEMA, Fuji TV), while Europe has virtually none (with occasional commissions on France Télévisions).

Genres & format. Nearly all anime series are adapted from successful manga or video games, whereas there are still a large proportion of originals produced out of Europe. With a licensing-driven market, Japan favours *Shonen* and super-powered young male protagonists, fantasy, romance, sport, etc. Asked to reach the largest possible audience and to respect strict compliance rules, European producers focus on gender-balanced, meaningful, and child-safe comedies. The formats are the same in Japan and in Europe, with series of short episodes—from 5 to 11 minutes—for children, commercial half-hours for older kids as well as teenagers and adults, and 75 to 85 minutes for most animation features.

2. **Opportunities for collaboration in the production of animation films and series between Europe and Japan**

Series. The contrasting business models limit opportunities for coproducing animation series. There is no financing available in Japan for European series targeting children, except on a well-established brand with strong licensing potential (for instance "Miffy", provided the IP owner agrees to share merchandising revenues). Conversely, there is hardly any financing available in Europe for teenage and adult anime produced out of Japan. However, opportunities may arise with global platforms commissioning anime such as Crunchyroll. These will be challenging, due to the differing production pipelines (anime series require hand-drawn animation whereas European studios are used to digital puppet animation) and because of the "creative points" requirements to qualify as European productions.

Films. The coproduction of feature films seems to be less complex, although the opportunities are in fact limited. Several Western projects—series or films—have been inspired by anime or adapted from manga, but have not achieved much success in Japan. For instance, "The summit of the Gods", based on reached only a modest audience in Japan. Therefore, even for this type of European project, a coproduction with Japan will not bring significant investment. On a movie comics by Baku Yumemakura, such as "Mars Express," released in October in Japanese theatres, a contribution of half a million Euros from Japan (less than 10% of the budget) would be considered significant for a coproduction. Conversely, European film funds and broadcasters invest in local projects rather than in non-European features.

For both series and films, coproduction may be more feasible for stop-motion because its aesthetic is more closely aligned across the two regions, and the same methodology is used on both sides.

Service production could be a way to foster collaborations as Japanese producers are looking for additional workforce in this expanding industry. Subcontracting (colouring or animation for instance) could be an opportunity for European countries with skilled artists and reasonable labour costs.

Enablers. Coproduction Treaties (e.g. the recently signed Italy–Japan Treaty) could help to overcome the challenge of the European qualification (a legal constraint which doesn't seem to exist in Japan) as long as the terms of the Treaties offer certain incentives such as the reduction of the European "creative points" threshold). Internships and talent exchanges (European students in Japanese studios and/or Japanese artists in Europe) will certainly facilitate future coproductions. The hiring of bilingual production consultants for coproductions to act as cultural and operational bridges is recommended.

5. Working Group 3—Sales & Distribution

Brief Summary

Japan remains a complex yet evolving market for European animation, while Japanese anime continues to flourish across Europe under shifting industrial logics. Both ecosystems are built on fragmented, niche-driven distribution models that depend heavily on curators—festivals, art cinemas, and streamers—but they differ in timing, scale, and consumer behaviour. European films can achieve success in Japan when curation, design, and localisation align, as shown by *Song of the Sea*, *Robot Dreams*, and *Flow*, but the process remains slow, costly, and highly selective. As it is commonly known, anime dominates European screens and streaming services, though it increasingly faces challenges of IP dependence, rising costs, and audience fragmentation. As the animation economy globalizes, new collaborative spaces emerge: co-production pipelines with shared distribution strategies, joint localisation funds, youth engagement initiatives, and the creation of a shared EU–Japan art-cinema and festival network.

Discussion

The working group brought together Japanese distributors, European sales agents, and international producers to compare market conditions, explore case studies, and identify enablers for future collaboration. Discussions revolved around how European titles can position themselves within Japan's tightly scheduled theatrical ecosystem, and how Japanese producers can sustain anime exports in a post-streaming boom era. The conversation also explored the transformation of festivals into commercial and reputational gateways, the power of design in connecting with foreign audiences, and the necessity of rethinking localisation and brand-building strategies in the face of generational change.

Objectives

- Compare the current market for European animation in Japan and for Japanese titles in Europe (including Central and Eastern Europe).
- Identify opportunities and challenges for expanding overseas markets in both regions.
- Understand the process of transforming a series into a cross-platform brand.

- Explore selection and acquisition logics among distributors and sales agents, as well as its pathways through festivals, cinemas and TV & streaming platforms.

Case Studies

- **Masako Kudo (Child Film / GAGA)** — European auteur animation in Japan: *Song of the Sea*, *Robot Dreams*, and *Flow* reached highly educated, predominantly female audiences through art cinemas, festivals, and curated screenings. The physical video market is virtually extinct, but art-house cinema networks and festival partnerships remain crucial channels.

- **Jérôme Mandazari (Piece of Magic Entertainment)** — Distribution of *Dan Da Dan* in Europe as a theatrical event film, highlighting new models of audience engagement and "eventisation" of anime titles.

Key Issues & Outcomes

1. **Market Structures and Evolution**

European animation in Japan remains a delicate niche—small, sophisticated, but steadily expanding. Its audience consists mainly of art-house enthusiasts who seek alternative visual languages to mainstream anime. For these viewers, European animation represents not an "imported curiosity," but a space of artistic difference and emotional depth. The success of *Song of the Sea* in 2015 or *Robot Dreams* in 2024 demonstrates that, when aesthetic and emotional universes resonate, barriers between cultures can fade. As one distributor noted, "It's easier to sell a 2D animation film in Japan than in Germany," provided it feels sincere and visually compelling.

The path, however, is long and highly curated. A European film in Japan typically begins its journey at a festival—Tokyo, Niigata, or Hiroshima—where it captures the attention of small distributors such as GAGA or Child Film. If the buyer "falls in love" with the film's design or story, acquisition follows. Yet once the rights are bought, it can take a full year before the release, as cinema slots are booked far in advance and marketing requires careful coordination. Translating or dubbing becomes both a cost and a creative decision: subtitles are cheaper but restrict reach, while dubbing—costing up to one million yen—can elevate visibility if famous voice actors are used. Press coverage in national newspapers and social media buzz are still the best tools for discovery, and word of mouth remains powerful. The average Japanese art-filmgoer sees more than twenty films per year, forming a loyal, cinephile audience open to animated storytelling regardless of origin.

In Europe, the situation is inverted. Japanese animation enjoys enormous popularity, from mainstream franchises (*One Piece*, *Demon Slayer*) to auteur cinema (*Suzume, The Boy and the Heron*), but its commercial base is concentrated in a few mega-brands. Anime has also lost much of its TV space as streamers and social platforms redefine consumption. Central and Eastern

Europe, once peripheral, is emerging as a promising growth area thanks to its flexible licensing and youthful audiences.

2. Opportunities and Challenges

Participants agreed that collaboration should aim at building ***discovery pathways*** rather than one-off sales. For EU films entering Japan, the goal is not only box office, but reputation—becoming a trusted artistic label within curated cinemas and festivals. For Japanese producers, Europe remains a vast but fragmented space, where multi-country licensing and language diversity complicate release strategies. Despite this, synergies are clear: European public funds can support localisation and marketing, while Japanese private investors bring merchandising power and fan-based engagement. New funding formulas—public European money + Japanese equity—could support global launches of independent features or boutique series.

Yet challenges persist: EU content still struggles to find regular television exposure in Japan, and Japan's domestic buyers are reluctant to acquire children's content without merchandising potential. Conversely, anime for teenagers and adults rarely qualifies as "European works" under EU subsidy schemes, limiting co-production prospects. Localisation remains a crucial barrier—not just linguistic, but cultural, aesthetic, and emotional.

3. Festivals and Curation

Festivals on both sides act as gateways of taste and trust. In Japan, events such as Niigata, Hiroshima, and the Tokyo Anime Award function as barometers of international creativity, while in Europe, Annecy and Cartoon Movie set global standards. Yet once a film is sold to a Japanese distributor, its festival life often ends: the theatrical queue takes precedence. This creates a paradox where festivals discover, but rarely accompany films through to audiences. Participants proposed joint festival circuits and a shared EU–Japan animation showcase calendar to overcome this bottleneck.

4. Localisation and Market Behaviour

Distributors emphasized that every release begins by identifying its *persona*—the archetypal spectator they aim to reach. Japanese audiences respond strongly to design and character appeal: large expressive eyes, clean colour palettes, emotional restraint. European films that integrate these visual sensitivities without imitating the "anime look" tend to perform best. Conversely, European distributors of Japanese anime stressed the need to contextualize cultural nuances through accurate subtitles and region-specific marketing materials. Both sides agreed that AI subtitling may offer productivity gains, but human translation remains essential for quality and tone.

5. Learning from Each Other

Europe can draw lessons from Japan's mastery of *brand continuity* and *lifestyle engagement*: how series evolve into universes sustained by music, fashion, and collectibles. Japan, meanwhile, can learn from Europe's long tradition of public support, festival networking, and slow-growth storytelling. Both systems share a fragile equilibrium—between art and commerce, cultural diplomacy and industrial logic—that must be preserved if animation is to remain a laboratory of global imagination.

Conclusions and Next Steps

The participants envisaged a set of concrete steps to strengthen cross-border collaboration:

1. **Joint Localisation Funds** to support subtitling, dubbing, and marketing across languages and platforms.

2. **Coordinated Festival Circuits**, ensuring visibility for EU and Japanese works in both hemispheres. Some initiatives could include launching reciprocal showcases or bridges such as Annecy-Niigata or Cartoon Forum-Chitose.

3. **Persona-Based Marketing** built on audience profiling and micro-content strategies for Gen Z and family segments. For example, *kiddult* narratives, lifestyle branding, and social-media fan engagement.

4. **Shared Rights Databases** simplifying licensing and co-promotion across territories.

5. **An EU–Japan Animation Distribution or Promotion Platform** linking art cinemas, streamers, and festivals to foster mutual circulation and shared audiences.

Ultimately, both Europe and Japan face similar structural challenges: fragmented markets, generational shifts, and increasing dependence on global platforms. Yet they also share a profound commitment to animation as a form of art, communication, and human connection. As one of the participants concluded, "Moviegoers in Japan don't care where the film is from—as long as it's beautiful, moving, and true."

6. Conclusions and recommendations

Over three days, participants discussed successful projects, films with strong box-office performance, unexpected audience reception, or long-running IP with multiple adaptations. They explored diverse perspectives and unanimously agreed on the need to transition from sporadic regional/national cooperation to structured collaboration with established frameworks. Key recommendations included:

- Establishing coproduction agreements and/or bilateral legal frameworks (e.g. Italy–Japan model) harmonizing business models and IP sharing rules.
- Creating joint localisation and distribution funds to support dubbing, subtitling, and marketing, especially for experimental or difficult works.

- Developing EU–Japan Animation Distribution Platforms connecting art cinemas, festivals, and streamers, as a joint curation space.
- Promoting talent exchange programmes and bilingual production consultancy by expanding residencies, internships and university-industry collaborations for cross-training of animators and artists
- Encouraging co-branded IP incubators for preschool, arthouse, and adult-oriented projects, combining Japan's market-oriented financing scheme with European diverse public funding system.

Ultimately, both Europe and Japan face similar transitions: the erosion of traditional TV markets, the dominance of global platforms, and the urgency to reconnect with new generations of audiences. Yet they share the same conviction that animation is not only an industry, but a language of imagination and cultural diplomacy.

Through mutual trust, shared frameworks, and artistic collaboration, EU–Japan cooperation can redefine how stories travel, how audiences engage, and how creativity sustains itself in the next decade.

EU–Japan collaborative workshops can serve not only as an industrial strategy, but as a unique example of soft power and cultural diplomacy—uniting different aesthetic traditions, financing models, and audience expectations into a shared future of innovation and mutual growth.

Annex 1: Experts & Participants

Intellectual Property Group

- Daijo Kudo—Chief Anime Officer at Kadokawa. Former manga/light novel editor and anime business head, now drives global IP and media-mix strategy.
- Shuzo John Shiota—President/CEO of Polygon Pictures. Expanded the studio internationally, chaired SIGGRAPH Asia, and is an AMPAS member.
- Rina Takai—Executive Officer at CyberAgent, leading global licensing in anime. Expert in merchandising and international IP expansion.
- Olfa Berhouma Sakakibara—Producer at Toei Animation Europe, overseeing Japan–Europe–Middle East co-productions. Experienced in TV and gaming.
- Marika Makaroff—CEO/Founder of Gutsy Pictures (Finland). Award-winning creative, former Fremantle Media Creative Director in the Nordics.
- Nele De Wilde—CCO of Audiovisual & Music at Peyo Company (Belgium). Executive producer with experience in global licensing.
- Jiří Mika—CEO of PFX (Czechia), running a 350+ artist studio in Central Europe. Specializes in VFX, animation, and long-term co-productions.
- Caterina Gonnelli—CCO at Xilam Animation (France). Holds a degree in Japanese Studies, fostering France–Japan cross-cultural and co-production ties.
- Catherine Keane—Head of Business & Legal Affairs at Cartoon Saloon (Ireland). Oversees IP strategy, financing, and global co-production agreements.

Co-Productions Group

- Noriko Matsumoto—Producer at Dwarf Studios and nori inc. Known for Domo and Rilakkuma, she leads stop-motion projects and champions new talent (Bottle George, HIDARI).
- Nao Hirasawa—Founder/CEO of Arch Inc., former Bandai Visual and Production I.G. Expert in IP rights, he produced titles such as Promare and The Journey.
- Taiki Sakurai—CEO of Salamander Pictures, ex-Netflix Japan. Screenwriter of Ghost in the Shell SAC and producer of Pokémon Concierge and Resident Evil: Infinite Darkness.
- Nobuaki Doi—CEO of New Deer, distributor and indie animation producer. Former artistic director of New Chitose Festival and author of several books on animation.
- Fumie Takeuchi—Producer at Asmik Ace, credited on INU-OH (Golden Globe nominee). Currently active in international co-productions with Masaaki Yuasa.
- Hiroyuki Tanimoto—Manager at VIPO, supporting talent and market development. Works with major festivals (Cannes, Berlin, Busan) to promote Japanese creators.
- Cristian Jezdic—CEO of beQ Entertainment, with 35 years in animation and VFX. Italian delegate to Animation in Europe, specialized in international co-productions.
- Frédéric Puech—Producer at Something Big, with 17+ series and several features distributed in 130 countries. Built strong Asian ties while resident in Japan.

- Tonje Skar Reiersen—Producer at Oscar-winning Mikrofilm (Norway). Co-producer of Titina and leader of the Nordic Animation network.
- Agata Novinski—Producer at NOVINSKI (Slovakia), former head of the Slovak Film & TV Academy. Produced Living Large, which premiered at Annecy.
- Zilvinas Naujokas—Producer at Tauras Films (Lithuania), with 30 years in cinema and a pioneer in VR distribution. Now developing Horse Dominic and immersive projects.
- Nicolás Matji—Producer at Lightbox Animation Studios (Spain), creator of Tadeo Jones. His films grossed $140M and won 10 Goya Awards.

Distribution / Sales Group

- Masako Kudo—President of Child Film, one of the most high-profile distributors of European animation in Japan. She has released Cartoon Saloon's films among others.
- Francesco Prandoni—Global Licensing Leader at Production I.G. Built and leads the company's international licensing team since 2005.
- Tadashi Sudo—Artistic Director of Aichi-Nagoya Animation Festival & journalist. Founder of Anime! Anime! and author of books on the animation business.
- Shuhei Arai—Producer at GAGA Corporation, formerly Toei Animation. Worked on Digimon Adventure tri. and Dead Dead Demons Dededede Destruction.
- Yohann Comte—Co-founder of Charades (France), sales and co-production company. Handled global hits including Mirai and Flow (Oscar 2025).
- Jerome Mandanzari—CEO of Piece of Magic Entertainment (Netherlands). Previously leading Manga Entertainment UK, specialized in global event cinema.
- Jan Konecki—Sales Specialist at KAZstudio (Poland), managing The Trefliks IP. Also pursuing a PhD on animation distribution.
- Ania Rozenszprung-Clinton—Head of Sales & Acquisitions at Monster Entertainment (Ireland). Launched global shows like Jungle Beat in 200 countries.

Moderators

- Iván Agenjo—CEO of Peekaboo Animation & Vice-Chairman of Animation in Europe. Producer of I, Elvis Riboldi and Mironins, his studio was named "European Producer of the Year" (2022).
- Philippe Alessandri—Founder/CEO of Watch Next Media & Chairperson of Animation in Europe. With 30+ years in media, he has produced 400+ hours of animation including Atomic Betty and Nate is Late.
- Javier Fernández—Cultural Manager at Instituto Cervantes Tokyo & President of EUNIC Japan. With 20 years in CAG industries, he co-founded Doki Doki Festival and fostered EU–Japan industry bridges.

Annex 2: Programme Overview

Wednesday 24 September—Expo Osaka

- Opening session with official welcome from the EU delegation to Japan, and presentations from the Association of Japanese Animations and Animation in Europe.
- Dinner hosted by Cinecittà at the Italy Pavilion.

Thursday 25 September—Osaka Animation College

- Parallel sessions in three working groups (Co-productions / Sales & Distribution / IP & Development).

Friday 26 September—Expo Osaka

- Final presentations of group outcomes & EU–Japan Animation Residency, Hungary Pavilion.
- Lunch reception at Ireland Pavilion.