

# SOLUTIONS AND TOOLBOX FOR A STRONG, COMPETITIVE AND SUSTAINABLE EUROPEAN ANIMATION INDUSTRY

A WHITEPAPER BY A.L.I.C.E,  
THE ANIMATION LEAGUE FOR  
INCREASED COOPERATION IN EUROPE

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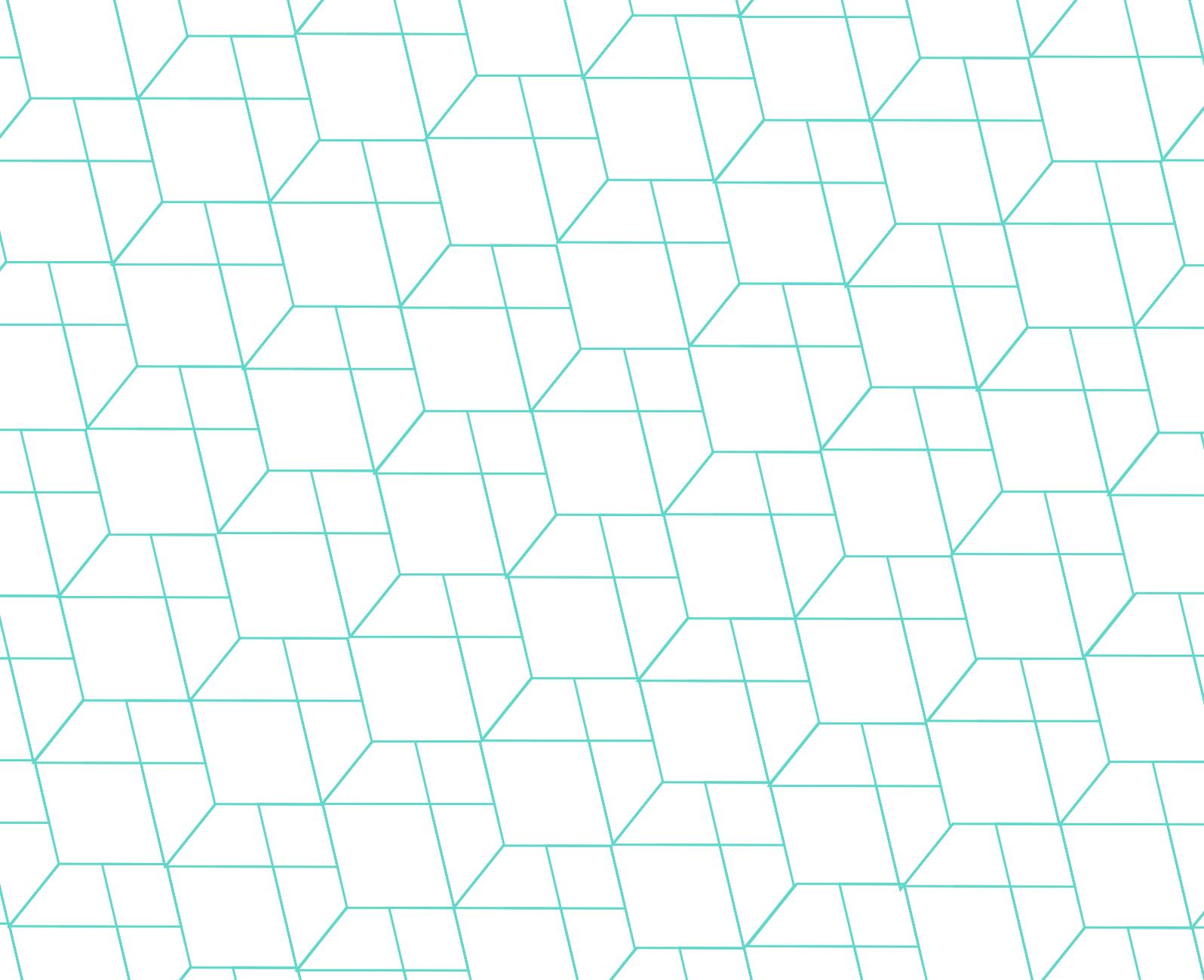


EUROPEAN UNION



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# INTRODUCTION

# A Europe of Animation?

Europe has been home to animation for almost 100 years, starting with the release in 1926 of Lotte Reiniger's animated fairytale "The Adventures of Prince Achmed". Since then, over one thousand animated feature films have been produced in Europe and yet in spite of this history, the European animation industry is not flourishing today.

The fate of the feature animated film "Alice in Wonderland," adapted from Lewis Carroll's classic novel and produced in France and the UK in 1949, is symptomatic of a larger issue that talent across Europe face every day: despite its innovative animation technique, involving puppets made of cardboard and sheets and a team of famous avant-garde animators, this European "Alice" was completely blown away by Walt Disney's adaptation released in 1951. The European animation industry has both talent and capacity and produces excellent films, but the products of the industry are consistently overshadowed in the market.

According to the European Audiovisual Observatory, in 2014, only 15% of the tickets sold in Europe were for animated films, of which only 20% were produced in Europe. The productions from the US, which represented 23% of the animated feature films released in Europe that year, accounted for 72% of the total animated film ticket sales.

The situation has not improved since 2014, and one can legitimately wonder what Europe lacks to be competitive. We need more than fascinating stories, talent, and generous public funding systems to get our films actually seen. Going up against international competition will involve capturing European audiences, training and encouraging the free circulation of talent, and better integrating the functioning of our multiple audiovisual funds.

## Why A.L.I.C.E?

The "Animation League for Increased Cooperation in Europe" (A.L.I.C.E.) was officially created on 1 August 2019 to tackle these challenges. This three-year project, carried out through the EU Interreg programme, includes a two-year exploration phase which is now coming to an end. It is founded on the belief that achieving competitiveness is only possible through active cross-border cooperation. The ultimate ambition of the project is to help the booming European animation sector compete with giants.

The ALICE project brings together six partners from across the European Union, differing in their operating mandates and markets, but united by a common conviction that activating co-productions is the unique answer to fierce competition from major animation studios in the US and Asia alike. These partners come from Belgium, France, Spain, Italy, Slovakia and Poland. They include Wallonia's film fund Wallimage as the lead partner, the Hauts-de-France region's film fund Pictanovo, the Spanish federation audiovisual producers PROA, the Apulia Region's Department of Tourism, Economy of Culture and Territory Valorisation, Slovakia's Ministry of Culture and the Rzeszow Region's Development Agency.

# A Timely European Project

ALICE was only six months old when COVID hit Europe. While the animation industry has been able to continue to function partially amid the crisis by having their creative teams work remotely, it has been profoundly affected. In a deeply collaborative and technology dependent genre, working away from studios proved to be very challenging. With movie theatres and productions being shut down, the crisis has hit the whole film and tv industry hard and the scope of the damage caused by the virus is still difficult to measure. Upheaval on the festival circuit has also been a big setback for producers, and the entire distribution model will have to be rethought.

The crisis has demonstrated the great resilience of the sector and revealed new growth opportunities, especially in terms of digital development and in countries where the industry is still relatively undeveloped. This is why Europe sees animation as a strategic sector to support and plans to invest €2.5 billion into the cultural and creative industries for the 2021- 2027 period through the Creative Europe Media programme. The objectives of the programme are completely aligned with ALICE's goals to encourage cooperation across the audiovisual industry value chain and help audiovisual companies scale up and nurture talent.

## Solutions Fitting the Reality of a Diverse and Changing Market

ALICE's six members spent the past two years studying the sector in depth, in close collaboration with their local stakeholders. All the actors in the industry chain were consulted, from those who make the films and series we enjoy to those who bring them to the screen, provide the necessary funds, train our talents and, last but not least, those who make the policy decisions that shape the ecosystem for the whole industry. Organising themselves into working groups dedicated to key challenges, ALICE's partners have built proposals to develop a collaboration-friendly, hence competitive environment for animation SMEs, leaving no stone unturned to forge a solid, realistic and market-relevant set of policy recommendations to create a bright future for the European industry.

To support the sector's growth and activate long-term policy improvement, the project partners designed solutions adapted to the diverse European markets and capacities, focusing on four main priorities. These priorities include using a common framework to make a comprehensive review of the state of the animation industries in Europe, addressing the pressing lack of a strong European industry network, building a favorable regulatory and funding system for European co-productions, and producing and maintaining competitive talent.

These proposals are compiled in the present whitepaper. Designed to be practical and rapidly implementable everywhere in Europe, they bring with them complete sets of tools and recommendations that will help policy makers from across Europe build a competitive environment for animation that supports growth.



**CHAPTER 1**  
ASSESSING THE CURRENT  
INDUSTRY STATE AND  
DISPARITIES TO TAKE  
APPROPRIATE ACTIONS



The disparities that exist across animation industries in Europe, in terms of production capacities, available skills and funding regulation, makes it very difficult to have a clear picture of the whole animation ecosystem in Europe. Yet, improving collaboration and defining the right co-production policies start precisely with having a global and accurate vision of the sector and depend on having a common language of reference.

In this context and as part of ALICE, PROA initiated the creation of a tool intended to provide a 360-degree picture of animation in Europe. In collaboration with the Ministry of Culture of Slovakia, they developed a methodology to map the industry, incorporating all actors within the animation value chain, including those who make the films and those who influence the ecosystem through education, funding or regulation.

Based on numerous consultations with industry stakeholders and sector experts, as well as the results of studies conducted by ALICE's different working groups and publications of reference<sup>1</sup>, this model identifies the available people, organisations, skills and capacities at each stage of the industry value chain. As such, it supports the development of a large industry network laying the foundation for trans-national collaboration and for the sustainable growth of a European animation industry.

<sup>1</sup>The main sources of inspiration are the Animation Plan for Europe (2017) presented in the section 3 of this chapter, the publication of the European Audio-visual Observatory "Mapping the animation Industry" (2015), as well as PROA's "Models of Public Funding for the Audiovisual Industry in Europe" (2017).

# I. Addressing the Need to Describe, Understand and Assess the Industry Performance

Essentially, the mapping process will provide an overview of the different players involved in the life of an animated production, how they interact with each other and the value they add. For the decision makers of a territory, conducting this analysis will help them grasp the reality of the market, assess the sector's competitiveness and identify potential synergies with other regions. This will be a fundamental step towards improved policies and appropriate actions.

More specifically, the mapping process will provide the information needed to:

- Evaluate the contribution of the animation sector to economic growth.
- Evaluate the sector's market performance in terms of creation of intellectual properties ("IPs").
- Identify the skills and professional profiles the animation market most needs.
- Know the funding sources available and draw comparisons between different funding systems across Europe.
- Better understand animation companies' business models at the different stages of the value chain, eg. from the creation of a product to its distribution.
- Assess the quality and compatibility of regulatory and educational systems across Europe.
- Adapt policies to market realities and co-production needs.

## II. An Overview of ALICE's Mapping Method

Given the disparity of the situations in Europe, it is more accurate to speak of European animation industries than of a single European industry. The intent of ALICE is to provide a tool for decision makers to analyze the industry in their regulatory area, thereby making available a picture of their reality according to a common framework.

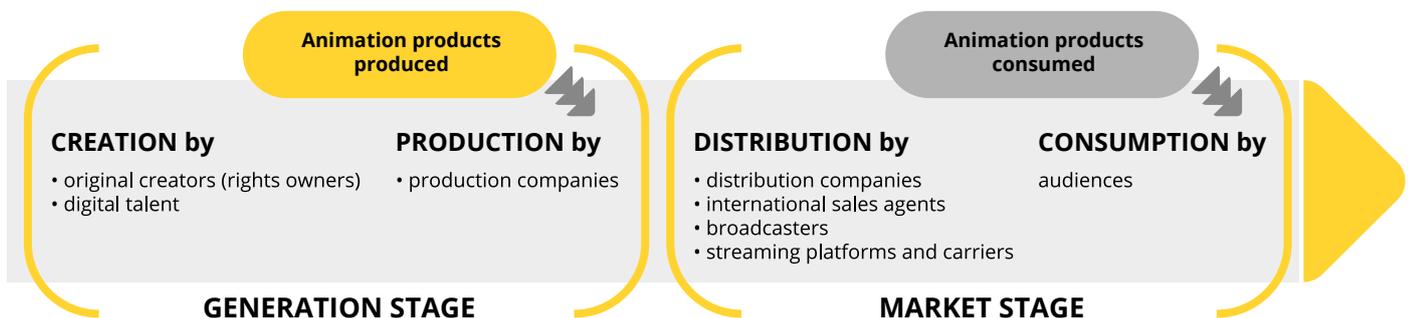
ALICE's model is structured around two types of activities: the main activities relate to the creation and launch of animated products onto the market, and the support activities relate to the creation of a favourable environment for industry development.

Each category of activity is comprised of different stages, which each involves a certain number of key individuals (or "key figures" as defined in the methodology) having specific qualities (or "resources") and carrying out a certain number of actions.

The product of these actions or the way in which they are carried out shapes the production chain and influences the created value. For example, a short film will have a different journey than a feature film, it will probably not use the same funding channels, and will probably attract a different kind of audience. Therefore, the model includes, in addition to key people, the classifications of "objects" (such as the "animated product" created or the "type of screen" used) as well as public or private "bodies" (such as funding entities or event organisers) which are essential to understand the functioning of the ecosystem.

### 1. Mapping out Animation's Main Activities

The graph below gives a quick overview of the key actions, people and elements involved in the main activities and which the ALICE methodology proposes to identify, classify and position in the ecosystem.



#### a. Creating an Animation Product

Looking at the CREATION phase will help decision makers understand where the value added is created while answering the following specific questions:

- Who are the creators and what is their role?
- Who are the digital talents and what is their role?
- What are the skills and profiles the animation market most needs in the creation phase?
- What is the size of the job market?

The table below presents the target results of the mapping of specific figures within the industry, and the indicators used to set up the detailed profiles of those figures. It also indicates the name of the reference table created by ALICE that will be used as a framework to build those detailed profiles.

Objectives (The mapping of this phase will help...)	- perform SWOT analysis to measure the quality of creation in a given territory, identify pathways to improvement and issues - in particular regarding the preservation of IPs - identify the most wanted professions and skills - measure the contribution of this phase to qualified employment.
Scope (Who/ what to map?)	- original creators: authors, owners of the intellectual properties (IP) or of the related rights Example: owner of the original script - digital talents: all the people who use their talent to create the final product (from development to distribution) Example: director, script writer, art director, storyboard artist, animator, sound director, editor, sales and marketing executives - indirectly involved professionals (optional) Example: dubbers, other VX artists, game designers, agents.
Variables / indicators	- quantitative: the number of professionals by type of profession Example: how many directors are located in a given a territory? - qualitative: professional profiles by type of profession : gender, age, place of residence, nationality, language spoken, level of education, occupational status (from director to apprentice), type of contract, acquired and natural knowledge.
Tools provided <sup>1</sup>	- "job classification" providing a comprehensive list of professions - "professional profiles" framework to help determine the profiles of the professionals involved.

<sup>1</sup> These tools are provided in Appendix 1, Fig.1 and Fig.2 of this document.

## b. Producing an Animation Product

The “key figures” analysed in the production phase are:

- The production companies, whose role is to connect the creative and funding resources while navigating a particular regulatory environment in order to carry out an animation project,
- The animation projects, whose formats shape the production chain and influence the value chain.

Looking at the PRODUCTION phase will help decision makers answer the following specific questions with regard to their territory:

- What type and volume of business does the animation sector represent?
- What value\* do production companies deliver?
- What are the most fragile stages for production companies and of production processes?
- What are the type and volume of animation projects produced?
- What is the share of animation in the total audiovisual production?
- What are the funding sources available to companies and projects?
- What are the business models and strategies used by animation companies?

\*In this phase, special attention will be paid to the creation of IPs as profitable intangible assets that increase companies’ market value and contribute to the wealth of a territory. This analysis will provide policy makers with information on how to best support investment in new IPs and ensure their preservation in the territory.

Objectives (The mapping of this phase will help...)	- perform SWOT analysis, plan for improvement and identify issues, in particular with regard to the preservation of IPs. - perform a PESTEL analysis (Political, Economic, Sociological, Technological, Legal and Environmental) to assess the quality of the ecosystem and potential external threats.	
Scope (Who / what to map?)	Production companies	Audio-visual animation projects
Variables / indicators	- structural: name, legal status, date of creation. - quantitative: number of employees, average revenues. - qualitative: business model/ IP ownership - external/ regulatory: funding sources.	- qualitative : type of projects, language, duration and key people involved in each phase (from development to post-production). - quantitative: number of projects, total project costs and cost of each phase. - external/ regulatory: funding sources and funding sources used at each phase.
Tools provided <sup>1</sup>	- "profile of the animation company" framework - "companies sources of funding" framework to detail the various sources of funding used.	- "animation audiovisual project classification" framework to describe the type and scale of animation projects. - "audiovisual projects funding sources and tools" to detail the various funding sources used for the project. - "audiovisual animation project phases" to identify and characterize each phase of a project.

<sup>1</sup> See Appendix 1, Fig. 3 to Fig. 7.

For a complete assessment of the production ecosystem, it is recommended to use the same model to map the whole network of companies involved in the production process, including the animation studios, dubbing companies, licensing companies, game companies and editors.

### c. Distributing an Animation Product

Whatever the product, distribution is a strategic matter in the audiovisual industry since the value of this product can only be fully materialized from the moment it is "seen". In animation, the question of distribution is particularly complex given the length of the creation and production phases, and it should be addressed from early development on. The current trend is to see distributors playing different roles at all the stages of a project, and acting simultaneously as co-producers, exhibitors or even as producers.

The analysis proposed here should take into account the rapidly changing market in which public funds and broadcasters are being withdrawn and replaced - to a certain extent- with funding from streaming platforms with different business models in which they frequently own the IP rights. In this context, policies carried out should aim at promoting the European cultural diversity, especially with regard to animated content intended for children, as well as independent production and distribution.

Looking at the DISTRIBUTION of animation products will help decision makers answer the following questions:

- How does distribution contribute to economic growth and employment within the animation sector?
- How effective are public policies in supporting the distribution of independent European animated content?
- What are the fundamental business differences between theatrical and non-theatrical distribution models?
- In what ways and how much do distribution companies contribute to animated productions?

- What are the existing and potential innovative funding opportunities that distributors provide or could provide to animation production companies?

Objectives (The mapping of this phase will help...)	<ul style="list-style-type: none"> <li>- perform a SWOT analysis to identify measures for improvement, issues regarding the preservation of IPs and assess the level of protection of European content in the current distribution system.</li> <li>- perform a PESTEL analysis (Political, Economic, Sociological, Technological, Legal and Environmental) to assess and prevent potential external threats.</li> </ul>
Scope (Who / what to map?)	<ul style="list-style-type: none"> <li>- distribution companies</li> <li>- international sales agents</li> <li>- TV broadcasters</li> <li>- streaming platforms and carriers</li> </ul>
Variables / indicators	<ul style="list-style-type: none"> <li>- qualitative: type of distributor, employment metrics, employee data including inclusion metrics (age, gender, disabilities), role/ specialisation, role as a funder.</li> <li>- quantitative: number of distributors, business and employment volume.</li> </ul>
Tools provided <sup>1</sup>	"Animation distribution company profile" framework to help determine the classification, profile, activities and funding role of distribution companies in a given territory.

<sup>1</sup> See Appendix 1, Fig. 8.

#### d. Consuming an Animation Product

The consumption of an audio-visual product will give it its “final value” through direct monetisation (ticket sales, rentals, subscriptions, digital engagement) as well as indirect benefits from the sale of derivative products as well as transmedia and cross-media opportunities.

The analysis carried out should take into account the fact that consumption of audio-visual content is most likely the stage of the value chain that has changed the most over the last few years and that the COVID-19 pandemic has shifted viewing habits in favour of streaming platforms.

Examining the CONSUMPTION of animation products will help decision makers answer the following questions:

- Who is the audience?
- What are the most wanted types of animated contents?
- How and where is animation content watched?
- How can the consumption of animation content be increased?

The “key figures” analysed in the consumption phase include the viewers, the content consumed and the type of screen used to access this content. Particular importance will be attached to the technological, economic and market aspects that influence the way in which audiences watch animated content.

Objectives (The mapping of this phase will help...)	- identify audiovisual consumption trends. - understand the new viewing habits in order to facilitate access to animated content, and adapt the content, promotion and distribution strategy accordingly.		
Scope (Who / what to map?)	Viewer	Content	Screen
Variables / indicators	Quantitative (demographics): gender, age, disability, location, educational level, occupation and income.	Quantitative: format, technique/ technology, language, nationality, target audience.	- qualitative: individual vs collective, (if individual) device used, linear vs non-linear (on demand). - quantitative: average daily consumption, average annual cost for the consumer.
Tools provided <sup>1</sup>	"Audience profile" framework	"Classification of animated content consumed by audiences" framework	"Classification of the viewing platforms" framework "Offer of animation content" framework.

<sup>1</sup> See Appendix 1, Fig. 9 to Fig. 12

## 2. Mapping out Animation's Support Activities

The support activities include the activities that shape the ecosystem supporting and influencing the value chain. A favourable ecosystem is an ecosystem that creates the conditions allowing for the growth of a sustainable and competitive animation industry.

### a. Education

The mapping of the educational environment focuses on the knowledge and skills taught and the way they are taught.

A performant educational system should be able to train quality, market-ready professionals. This capacity can be assessed through key indicators of employability, and is also a factor of attractiveness and talent retention.

Mapping the EDUCATION system in the animation sector will help decision makers answer the following questions for their territory:

- What programs and educational centres for animation currently exist?
- What are the continuing education programs available for professionals?
- Are the existing education programs aligned with the needs of the market?
- Is there any active dialogue between training organisations, industry professionals and the administration? If so, how and on which communication platforms?
- What are the economic, technological and accessibility barriers to training and continuing training?

This mapping, carried out at local level, could be the basis for a wider study on education, leading to the definition of European professional standards of excellence (which is the subject of Chapter 4).

Objectives (The mapping of this phase will help...)	Perform in-depth analysis to identify measures for improvement in: - training qualified professionals fitting the market needs - offering continuing education to keep professionals' skills up-to-date - ensuring continued relevance of training to market needs - designing effective internship programmes - establishing a common European reference standard for sector skills and qualifications recognition across the continent.	
Scope (Who / what to map?)	Educational institutions	Educational programmes
Variables / indicators	- qualitative: standard feature (regulated/ non-regulated programme, type of certification obtained), accessibility, student profiles (age, gender, disability, geographical location, employment situation). - quantitative: employability rate of graduates.	Qualitative: duration, teaching methods used, mobility offered (student exchanges and internships), skills taught, specific knowledge / specialisations proposed.
Tools provided <sup>1</sup>	"Classification of educational centre" framework	"Classification of educational programmes" framework

<sup>1</sup> See Appendix 1, Fig. 13 and Fig. 14.

## b. Funding and Regulation

This study of the legal, financial and tax environment for the animation sector directly concerns the policies in place. Therefore, its results can be turned into positive actions for more supportive and appropriate measures, given specific market realities.

ALICE's mapping methodology proposes to analyse the different public aid systems, as well as the tax incentives and other public and private financial facilities available to fund animated projects. In this analysis, special attention must be paid to the regulatory constraints attached to funding and broadcasting content imposed to the actors of the value chain. As for education, the funding and regulatory environment must be seen as an important component in a territory's capacity to attract and retain talent<sup>2</sup>.

Mapping the FUNDING and REGULATION systems affecting the animation sector will help decision makers determine the best public and private support practices for the sector.

Objectives (The mapping of this phase will help...)	Perform in-depth analysis of the existing system and good practices to define European policies supporting long-term competitiveness and talent attractiveness.	
Scope (Who / what to map?)	Public funding bodies	Private funding bodies
Variables / indicators	Qualitative: type, legal mandate and territorial scope, direct funding vs. indirect funding available (including, for each, the type of support provided and accessibility criteria) + non-financial support provided. Quantitative: amounts funded (in absolute value and budgets %).	Qualitative: investment incentive; type, scope and purpose of investments provided. Quantitative: number of investors and amounts invested.
Tools provided <sup>1</sup>	"Public tools for promoting audiovisual projects" framework.	"Private funding" framework.

<sup>1</sup> See Appendix 1, Fig. 15 and Fig. 16.

<sup>2</sup> ALICE's "legal and finance" as well as "training and entrepreneurship" studies aiming in particular to address the attractiveness of the sector and talent development are presented in Chapter 3 and Chapter 4.

### c. Conservation

Although the European Convention for the Protection of the Audiovisual Heritage recognised, in 2001, that audiovisual productions should be protected as part of a territory's cultural heritage, there is still much to be done in this area. An urgent need is to acknowledge the cultural and intellectual value of animated projects and to impose obligations regarding their conservation, especially regarding the fragile material produced before the digital area.

Mapping the CONSERVATION and PRESERVATION of animated productions will help decision makers answer the following questions:

- Which public conservation strategy(-ies) should be implemented?
- How should the conservation of animated products be funded?
- Which institutions should be responsible for it?
- To what extent and in what ways should the preserved materials be made accessible to researchers, scholars and experts as well as to the public?

Objectives (The mapping of this phase will help...)	Identify good practices for the conservation of animated products and their accessibility which result from public and private initiatives and can be taken as a base for successful strategies.	
Scope (Who / what to map?)	Conservation bodies	Conservation funds
Variables / indicators	Qualitative: location and territorial scope, legal status, funding received, promotional initiatives, accessibility, type of projects preserved. Quantitative: number of bodies, number of animated projects preserved.	Qualitative: location and territorial scope, legal status, type of funding granted.
Tools provided <sup>1</sup>	"Conservation bodies" framework	"Conservation funds" framework

<sup>1</sup> See Appendix 1, Fig. 17 and Fig. 18.

### d. Network

The pandemic has significantly changed the way industry players connect with each other while forcing work-from-home arrangements as well as the cancellation and digitalization of industry meetings and festivals around the world. Whereas everyday business in the animation sector has continued to move forward, physical distancing has slowed down production processes and reduced the number of opportunities to show films, secure new business and initiate new collaborations. As the COVID-19 long-term impact on the industry is still hard to measure, these exceptional circumstances have revealed the importance of networking for the sustainability and long-term planning of animation companies.

Exploring the industry NETWORK will help policy makers answer the following specific questions:

- How do industry events contribute to the animation economy and the concerned territory's economy?
- Do they achieve their objectives in supporting the sector?
- How accessible are they?
- How could they be improved?
- How to rethink the industry network and innovate after the health crisis?

<b>Objectives</b> (The mapping of this phase will help...)	Perform an analysis of the venues and events promoting European animation and measure their positive impact on the development of animation companies and projects as well as their contribution to the economy of a territory, in order to design effective promotional and international strategies for the industry.
<b>Scope (Who / what to map?)</b>	Venues/ organising entities and related events
<b>Variables / indicators</b>	Qualitative: type entity/ event (incl. on or off-line), sources of funding, geographical scope, audiences, type of content promoted (including platform used).
<b>Tools provided<sup>1</sup></b>	"Events" framework

<sup>1</sup> See Appendix 1, Fig. 19.

### III. Going further: Reference Publication and Long-Term Objectives

Designed as a European tool, ALICE's mapping methodology is intended to be used and tested by the project partners shortly. In order to understand its importance, and the stakes of obtaining more data on animation, we invite our readers to learn about one publication in particular, which has largely inspired ALICE's approach and, more recently, influenced the outline of the 2021-2027 Creative Europe Media program. This publication is the "Animation Plan for Europe" released in 2017.

The Animation Plan for Europe is the result of a collaboration between Creative Europe, Cartoon, Animation in Europe<sup>3</sup> and Annecy Festival's MIFA<sup>4</sup>. Recognizing the universal character of animation as well as the sector's significant potential for growth and innovation, the report explores the current challenges and ways to upscale.

This publication marked the intent of the European Commission to grow the European identity in animation as a world quality within the next five years, with regard to both cinematographic and non-cinematographic productions.

It raised key questions pertaining to:

- The retention and training of talent: how to build an ecosystem that provides animation companies both business opportunities and a qualified workforce fitting their needs?
- The conservation of IPs: how to support the creation and promotion of IPs as well as the distribution of the related animated content?
- The creation and promotion of a "European Animation" brand: how to build a European identity that is recognized globally?
- The sector's access to funding: how to improve the private and public funding systems and create new ones that fit evolving audiovisual consumption habits?
- How to guarantee animation companies sustainability through short term (access to liquidity), medium term (access to credit) and long term (conservation of IP) funding resources?

<sup>3</sup>Founded in 2016 by 14 organisations from 12 European countries, Animation in Europe is the European Federation of Animation Producers' Associations. Its goal is to support the creation and distribution of original European content throughout the continent. Since its creation, the federation has maintained a regular and constructive conversation with the European authorities regarding the regulation and funding of the animation industry and helped build the necessary dialogue between its actors.

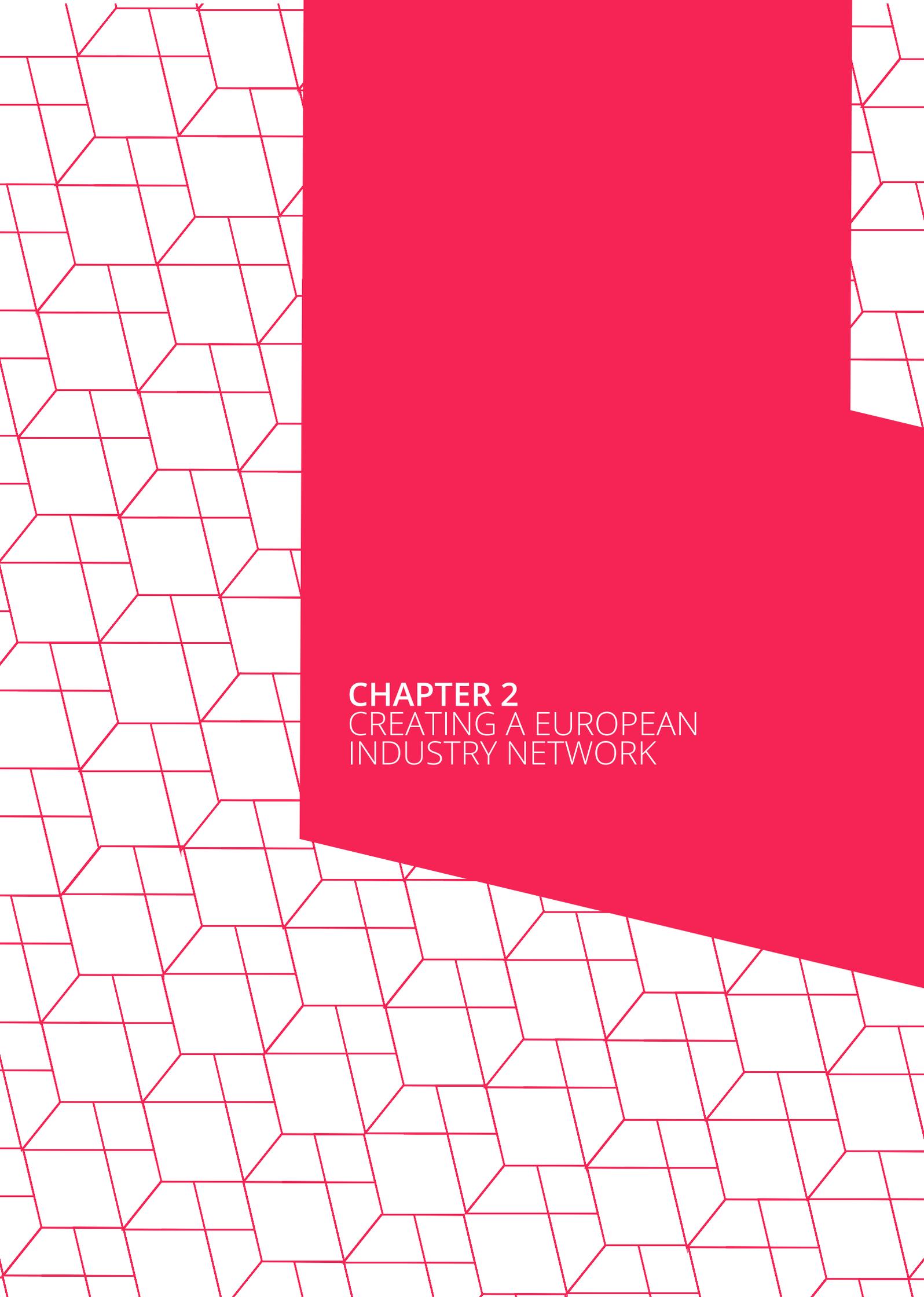
<sup>4</sup>In French, "Marché International du Film d'Animation" d'Annecy (eg. Annecy's "International Animation Film Market").

In line with these questions, the plan outlined the following long-term objectives:

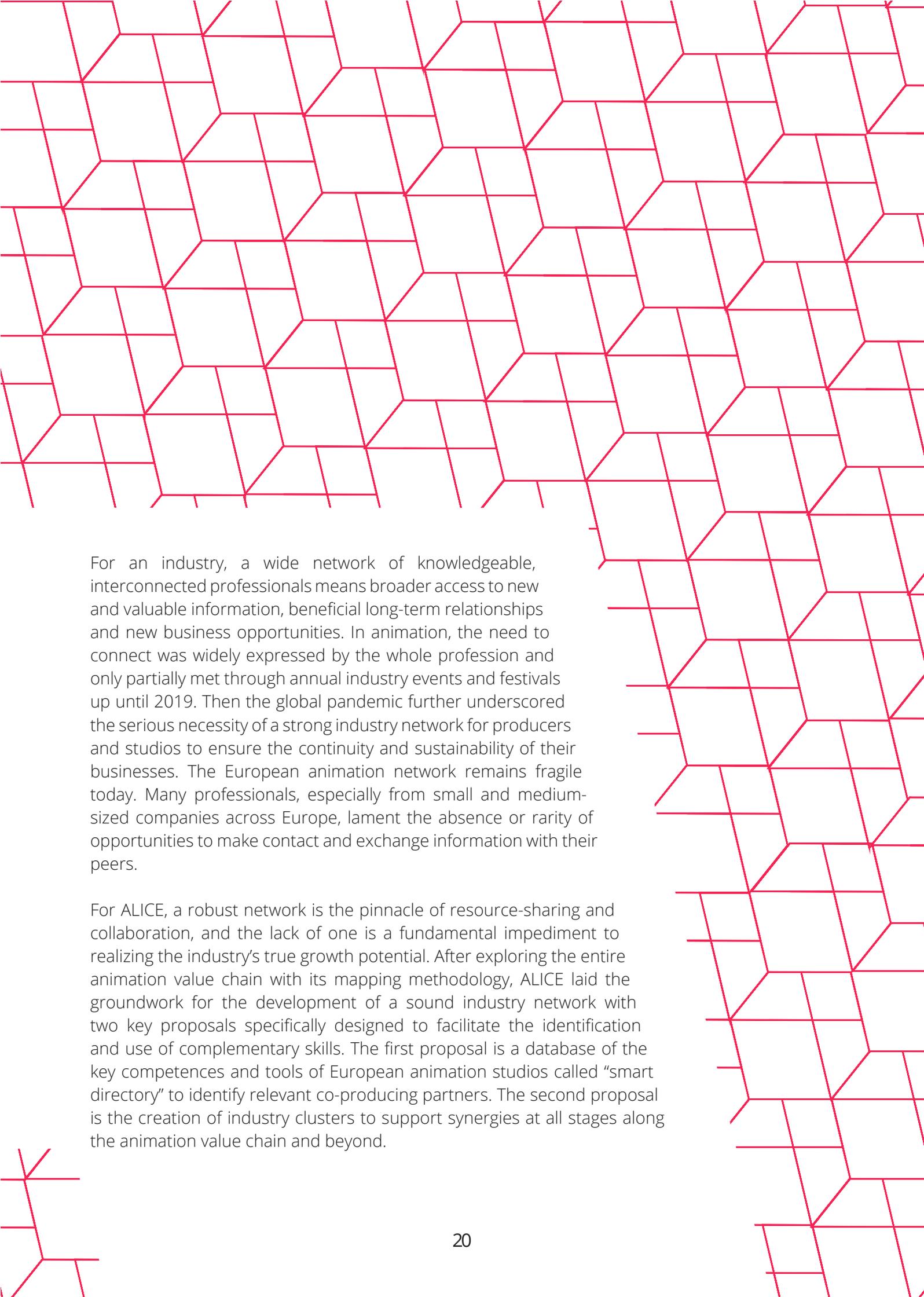
	LONG-TERM GOALS	SUB-GOALS
TALENT	Make Europe an attractive work place for European and foreign talent	<ol style="list-style-type: none"> <li>1- Cultivate the connections between training centres and industry organisations</li> <li>2- Facilitate talent mobility</li> <li>3- Ensure continuing education</li> </ol>
PROMOTION & AUDIENCES	Increase the global competitiveness of European animation	<ol style="list-style-type: none"> <li>1- Invest in promotional and marketing strategies</li> <li>2- Fund subtitling and dubbing of animated content</li> <li>3- Incentivise and facilitate co-productions</li> </ol>
FUNDING	Facilitate access to funding	<ol style="list-style-type: none"> <li>1- Develop new financial instruments</li> <li>2- Combine public and private funding</li> <li>3- Strengthen the dialogue between the financial sector and the animation industry</li> </ol>

Through its studies, ALICE wanted to respond to these challenges by implementing solutions that serve the long-term objectives set by the Plan.

One of the priorities of the project was to address the lack of knowledge and connections among the actors of the industry, which affects all the issues raised and generally hinders cross-border collaborations. Based on the identification and classification of actors done through the reflection on the mapping, ALICE's group has considered solutions to develop a European industry network, which is the subject of the next chapter.



**CHAPTER 2**  
CREATING A EUROPEAN  
INDUSTRY NETWORK

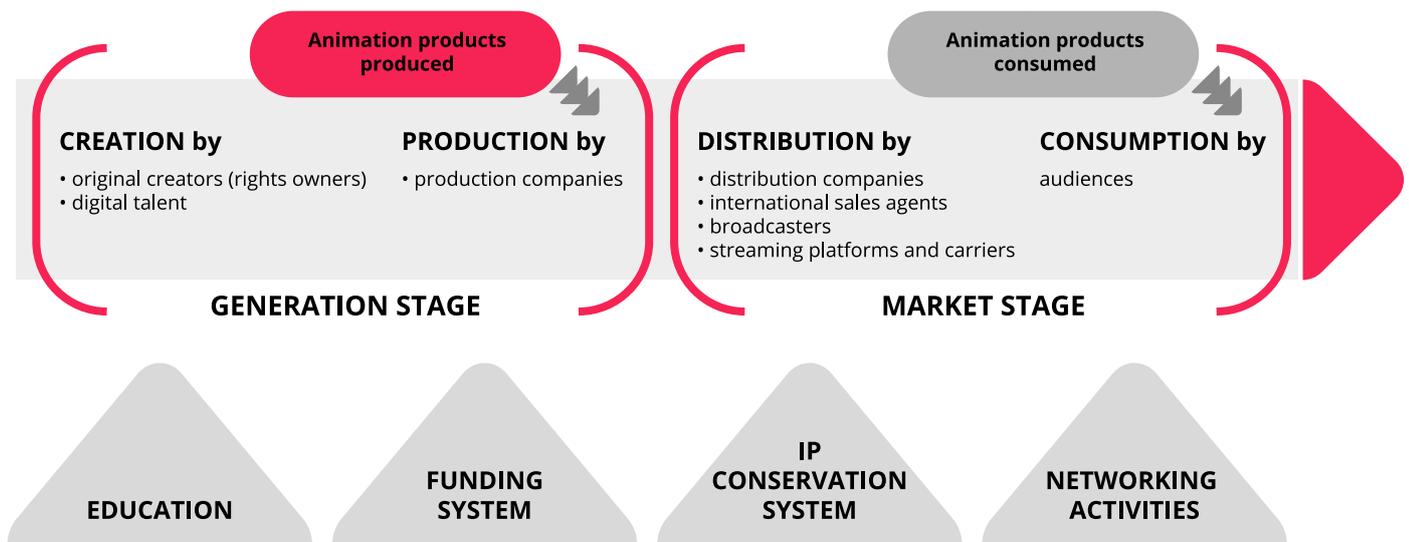


For an industry, a wide network of knowledgeable, interconnected professionals means broader access to new and valuable information, beneficial long-term relationships and new business opportunities. In animation, the need to connect was widely expressed by the whole profession and only partially met through annual industry events and festivals up until 2019. Then the global pandemic further underscored the serious necessity of a strong industry network for producers and studios to ensure the continuity and sustainability of their businesses. The European animation network remains fragile today. Many professionals, especially from small and medium-sized companies across Europe, lament the absence or rarity of opportunities to make contact and exchange information with their peers.

For ALICE, a robust network is the pinnacle of resource-sharing and collaboration, and the lack of one is a fundamental impediment to realizing the industry's true growth potential. After exploring the entire animation value chain with its mapping methodology, ALICE laid the groundwork for the development of a sound industry network with two key proposals specifically designed to facilitate the identification and use of complementary skills. The first proposal is a database of the key competences and tools of European animation studios called "smart directory" to identify relevant co-producing partners. The second proposal is the creation of industry clusters to support synergies at all stages along the animation value chain and beyond.

# I. Identifying the Necessary Connections Across and Beyond the Production Chain

Referring to the value chain outlined in the mapping reflections and repeated below, we can easily visualize the different levels of possible collaborations.



In a perfectly integrated animation industry, the most competent parties for a given project would work together during an animated project’s “generation” and “market” stage, thereby incorporating marketing strategies for the target audience from the creation phase. Cooperation should also happen between others along the chain and those who shape the four pillars of the ecosystem, namely the organisations dedicated to education, funding, conservation of IPs and networking development.

Regarding increased market competitiveness, the tools and recommendations presented in the following sections aim to facilitate exchanges between animation players of different scales, areas of expertise and territories, whether they contribute directly or indirectly to the production of content.

The creation of a European network of animation producers and regulators is a long-term objective. It requires a change of mindset towards systems of information sharing, the provision of appropriate tools and places allowing for information sharing and the political will to support industry connections and networking initiatives. To tackle this challenge and initiate a political shift and ultimately, regulatory change, ALICE partners decided to adopt a grassroots approach while focusing on encouraging practical, immediate exchanges between those who make content and those who shape the ecosystem. The result is the creation of the smart directory and an in-depth study on companies’ clusters.

More specifically, ALICE’s proposals will help industry professionals and decision-makers:

- Identify, promote and leverage skills and talent.
- Encourage connections and information sharing at all the stages of the value chain.

## II. ALICE's Proposal: Strengthening Relationships Among the Producing and Business Entities First

### 1. The "Wonderland's Smart Directory": Making European Animated Studios IDs Available Online

Cross-border collaboration in animation production begins with the identification of potential partners. In a sector where data is sorely lacking, ALICE's smart directory has been specifically designed by the project's finance and legal working group to recognize animation studios across Europe and facilitate complementary partnerships. Unlike the other existing databases, the smart directory will contain studios' detailed profiles to reflect the operational reality of the sector in a very practical and organized way. Conceived to help any user clearly identify the skills, areas of specialisation and technologies used by the studios listed, it will provide the practical information that producers need to identify the best matched co-producing partners for their projects.

Offering privileged access to exclusive information, this directory will only be accessible to the European regions that can commit to contributing, through their studios, to the directory's creation. The participating territories and animation studios will also commit to ensuring greater transparency in the sector and thus, allowing for better governance in the public policies supporting the industry. Grouped under a new label called "Wonderland", together these regions will form a specialty zone for collaboration.

### 2. Obtaining the Wonderland Label

The Wonderland label will be automatically granted upon completion of the following two-step application process.

Promoting long-term inter-regional co-productions of all types of animated content  
**APPLYING for the Wonderland label**



**Wonderland label/ Exclusive access to ALICE's smart directory**

\* The studios completing the directory form will have to record, for each skill listed at each stage of the production chain, whether or not they have this skill, and if they don't, whether or not they are interested in learning it. They will have to prove the skills they declare by listing at least one production (supported by a trailer) in which this skill has been applied. The directory is available in Appendix 2 of this document.

# III. The Development of Animation Clusters: Fostering Intra-Regional and Intra-Sectorial Connections to Bring Innovation

Creating a network between producing actors is undoubtedly an essential part of strengthening the European animation industry by activating co-productions, and cultivating creative partnerships. It can be done in a relatively short timeframe with dedicated tools like ALICE's smart directory, but the sustainability of the industry, especially in such a competitive international market, can only be ensured through continuing innovation which will serve audiences eager for original content and help producers meet new environmental requirements.

The ALICE group is convinced of the essential role that innovation will play in the future of the industry and very much aware that building an innovative European animation sector will require long-term intense collaboration, both at company and regional levels. Considering the current regulatory trends and tested good practices, the group decided to explore the possibility of developing European animation clusters.

## 1. Recognizing a Unique Development Opportunity for the Animation Sector

At the intersection of creativity and cutting-edge technologies, the animation sector is a strategic sector to invest in to facilitate innovation. Recent developments, accelerated during the COVID-19 crisis, have reaffirmed the sector's huge potential for growth as it uses IPs that can be developed across a variety of media as well as a language suiting international young and adult audiences, which has proved to be particularly powerful to tell universal stories and address current issues<sup>5</sup>. For all these reasons, the animation industry is very well placed to be at the center of regional smart specialisation<sup>6</sup> and digital strategies, supported by European investments.

As highlighted above in this chapter and in Chapter 1, the industry in Europe is marked by significant disparities between regions, it remains highly fragmented and has been weakened by the health crisis. Creating regional animation clusters would consist of concentrating actors within the value chain as well as in related industries, including companies, suppliers and service providers, government agencies, educational institutions and research and information centers.

<sup>5</sup>The 2019 edition of Anima, Brussels' international animation film festival, notably included ANOTHER DAY OF LIFE, set in the Angolan Civil War, FUNAN, set during the beginning of the Khmer Rouge revolution and THE TOWER, about an 11-year-old boy living in a refugee camp in Beirut in its line up. This trend was initiated by the two internationally acclaimed animated films PERSEPOLIS (2007) and WALTZ WITH BASHIR (2008) about the conflict in the Middle East.

<sup>6</sup>Initiated in Europe to foster sustainable, intelligent and inclusive development, smart specialisation is an innovative approach that aims to boost growth and jobs in Europe by enabling each region to identify and develop its own competitive advantages. Smart specializations are both a concept for building an innovation strategy for countries or regions, and a tool for the strategy's creation. Partly in response to the COVID-19 pandemic, the Smart Specialisation Strategies (S3) that European countries and regions have been elaborating for 2021-2027 put the emphasis on research and innovation, which will be critical to increasing the competitiveness of regional economic systems, developing new competences and promoting sustainable production models. The new EU Cohesion Policy also recognises the crucial role of international and interregional co-operation in innovation.

The concept of a cluster itself is very much in line with ALICE's philosophy and European framework:

- By definition, industry clusters are a form of effective regional collaborations which is exactly what the ALICE project proposes to promote.
- They have a demonstrated capacity to produce competitiveness and growth through innovation leading to improved product differentiation and skill development.
- Clusters are recognized, valued and encouraged by the European Union as an essential instrument for the implementation of smart specialisation strategies. Therefore, numerous funding programs are available to the regions willing to build clusters and, in particular, creative clusters<sup>7</sup>.

In this context, investing in clusters seems to be an ideal way to consolidate the sector and serve the aims of both strategic specialisation and innovation policies. With this study, ALICE's ultimate ambition is to create a larger network of entities belonging and related to the European animation sector in order to stimulate steady talent and technology development, and make the industry progress as a whole.

## 2. Identifying Current Challenges and Defining Strategic Orientations

To address the topic of clusters, ALICE's Apulian partner carried out surveys among the six partner regions during the second quarter of 2021. The study aimed specifically to provide an overview of the state of development of animation clusters in Europe, identify useful good practices and benefit from the favourable European regulatory framework, as well as identify how animation could be best integrated into regional smart specialisation strategies.

The results of the surveys, reflecting the state of the industry, highlighted significant disparities between the participating territories as well as the strong need for public support to activate a positive movement of clustering within the animation sector:

- Innovation in animation is widely considered as strategic for the regional economies in Europe. Generally associated with the development of the VFX and gaming sectors, it tends to appear on regional smart specializations' lists as well as in Regional Innovation Strategies<sup>8</sup>. However, there is a general lack of plans and funding programs strictly dedicated to animation and to the development of clusters.
- The degree of innovation maturity varies greatly from region to region, and clusters are generally more prevalent in the Western regions of Europe. Some European regions do not have creative clusters (notably, among ALICE partners, Slovakia and the Rzeszow region in Poland).

<sup>7</sup>Available European sources of funding notably include : various sub programmes of Europe Creatives' MEDIA program (with initiatives such as European Cinema Forum, Television programming of European audiovisual works, Film festivals, International cooperation funds, Networks of cinemas, Access to markets and Made in Europe); the European program Digital Europe that supports digital transformation; EURIMAGES, dedicated to independent productions including animated films; the temporary fund Next Generation EU launched in response to the pandemic and aiming to build a more responsible, digital and resilient Europe, the European Digital Innovation Hubs supporting companies' digitalisation and the INTERREG inter-territorial cooperation program, funder of the ALICE project, which funds collaborative projects between all European territories and regions.

<sup>8</sup>As an example, the Hauts-de-France region bases its regional development strategy on specialized technology and media clusters recognized at a European level. These clusters include LA PLAINE IMAGES, dedicated to the creative and audiovisual industries, EURATECHNOLOGIES, dedicated to communication and information technologies, LA SERRE NUMÉRIQUE for digital technologies, and ARENBERG CREATIVE MINE for films and research.

- Effective innovation support programs to animation, VFX and gaming companies are based on solid cooperation networks that lobby public institutions, incubators and accelerators open to international talent and projects, as well as industry venues and coworking spaces welcoming entrepreneurs.
- Clusters usually operate with registered members cooperating mostly through informal meetings and open dialogue but governance systems may vary according to the region. Different organizational forms were observed, including non-profit associations, consortiums or foundations, as well as various decision-making processes that were either local or multi-local management or led by a dedicated. General Assembly and Board.
- Regional Innovation Strategies promoting the development of clusters remain mostly implemented separately, without link to other regional smart strategies. To make a positive impact, there is a need to create a trans-sectorial and trans-regional network of innovative companies, especially involving animation studios using innovative digital technologies.
- A number of good practices can be drawn from the well-developed French cluster model as well as the cluster policy the Apulia region has been conducted during the past few years.\*

\*Through the ALICE project, the Apulia region is currently investing in the development of a creative and digital hub attracting international talent and independent workers, as well as digital and media companies. Supported by strong political commitment, the initiative involves the creation of an industry cluster as a place for networking, innovation, research, training and aid for internationalization. Significant investments have been made in new audiovisual funding programs as well as the Apulia Film House inaugurated in July 2020 and the recently launched Apulia Digital Center Network.

The survey results and complementary research helped ALICE define a list of features and tools creative clusters should have in order to be efficient:

- Governance and coordination structures that involve industry institutions (typically chambers of commerce) in decisions and strategic orientations, that develop activities aiming to create the right synergies and that focus on supporting and initiating cluster development policies.
- Physical and virtual means allowing for a large network of businesses, entrepreneurs, service centres, universities and research centres, to connect and share information.
- Inter-connected business centers and R&D laboratories to disseminate and test good practices as well as innovative technologies.
- Organised activities, workshop and consulting services to support companies' side activities in marketing, legal, internationalization and professional training.



### 3. ALICE's Conclusions: Lessons Learned and Recommendations

This research led ALICE to establish a list of recommendations for improved policies addressed to public authorities and cluster governing bodies, and centered around three major objectives.

#### a. Set up a Favorable Policy Environment for the Development of Creative Clusters

- Redefine the roles of sectorial public agencies as well as their goals with respect to sectorial clustering.
- Involve the appropriate public agencies in the definition and in the development of animation clusters within the framework of approved smart specializations strategies.
- Provide clusters with regulatory tools supporting competitive and inclusive development.
- Promote a co-competition approach to innovation, encouraging collaborations between business competitors.
- Build appropriate regulatory conditions and promote new networks and European cooperation platforms to bring actors across different supply chains into cooperation.
- Mobilize around cluster policy and cluster cooperation in EU.
- Consider the creation of special funds to finance the development of creative clusters as well as related incubators and accelerators.

#### b. Structure Cluster Governance

- Establish a governance model capable of supporting the clusters' activities through pre-defined roles and interventions.
- Take part in the definition of regional smart specializations strategies to include detailed plans for the development, operation and governance of industry clusters.
- Define strategic orientations focusing on experimentation and innovation in order to transform creative ideas into competitive assets and/ or entrepreneurial projects.
- Promote excellence and entrepreneurship in research and education while creating stronger relationships between enterprises, R&D actors and universities.
- Consult with industry stakeholders to ensure that up-to-date knowledge and technologies are used.
- Lobby national and EU institutions to promote the clusters activities and contribute to policy improvement.

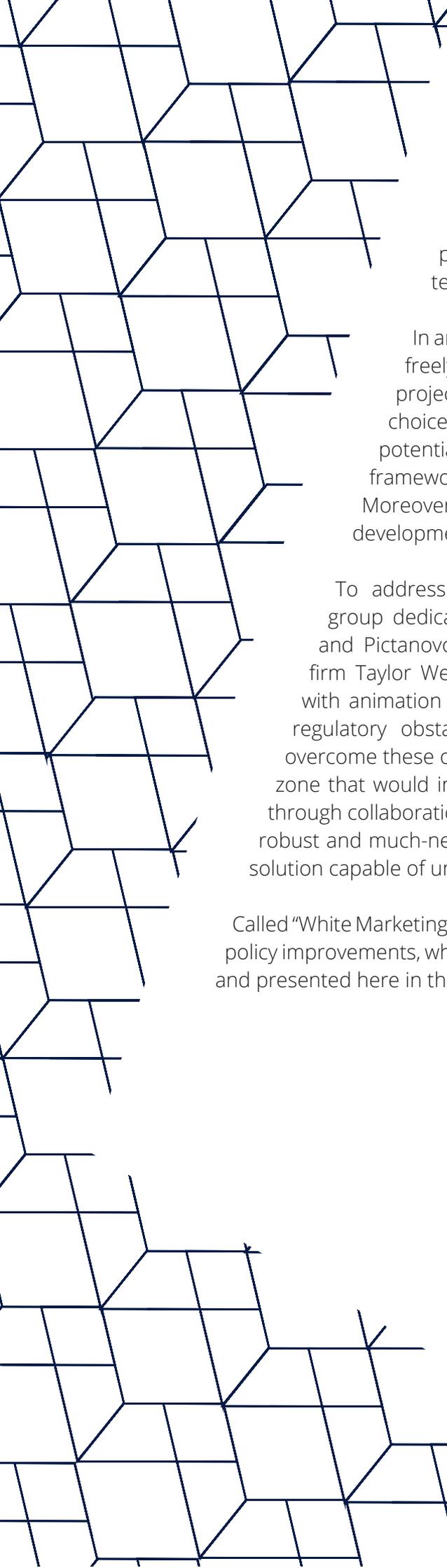
#### c. Build Network

- Assist initiatives aiming to develop trans-national and trans-sectorial connections in order to provide complementary sets of competences, directly or indirectly linked to the particular sector of animation, mixing content creators with marketing agencies, new media and technology agencies, 2D and 3D animation and VFX studios.
- Provide the necessary tools and technologies to support the development of close relationships between people and companies, be it physical or virtual and consider the creation of e-clusters.
- Organize industry and trans-industry events.

With this in mind, the next chapter will provide solutions to encourage long-term collaborations between actors within the production process.



**CHAPTER 3**  
SUPPORTING ANIMATION  
COMPANIES' LONG-TERM  
GROWTH AND DEVELOPMENT  
PLANNING



In the international context, supporting the long-term growth of European animation companies requires the development of competitive co-productions which, through the best possible combination of resources, would make possible the production of original IP-based, large-scale projects that could not otherwise be produced by an isolated territory.

In an ideal world of European animation, content producers could freely choose the most appropriate and skilled partners for their projects at the beginning of the creation process. However, the choice of potential cross-border partners is limited by the rigidity and potential incompatibility between the different regional regulatory frameworks that govern audiovisual production and co-production. Moreover, the relatively low number of programs dedicated to project development provides little space for early collaborations.

To address this broad issue, the ALICE project created a working group dedicated to finance and legal matters, jointly led by Wallimage and Pictanovo and supported by the expertise of the international law firm Taylor Wessing<sup>9</sup>. Over the past two years, the group worked closely with animation stakeholders from ALICE's six territories to identify specific regulatory obstacles to co-productions. Using the Wonderland label to overcome these obstacles, the group's goal was to create an open and flexible zone that would invite European territories to develop their animation sector through collaboration. In addition to designing the smart directory to stimulate a robust and much-needed industry network, they developed an effective funding solution capable of unlocking successful co-productions.

Called "White Marketing Rabbit", this rapid solution is also part of a longer-term plan for policy improvements, which are broadly defined through a series of recommendations and presented here in this chapter.

<sup>9</sup>Taylor Wessing LLP is a global law firm with 28 international offices and highly regarded expertise in the film industry. ALICE's group worked with the Entertainment Law team based in Paris.

# I. Recognizing the Major Regulatory Challenges to Co-productions

ALICE chose to study the current regulatory and funding environment by analysing the experiences and results of completed projects by interregional collaborators. Four case studies<sup>10</sup> were selected to help identify barriers and areas of improvement:

OBSTACLES	IMPROVEMENT OBJECTIVES
LACK OF DEVELOPMENT AND CO-DEVELOPMENT SUPPORT	 Adapt support measures to particularly long development processes.  Address the general lack of development and co-development funding available.
LOW TALENT MOBILITY	 Loosen the co-production rules constraining labor expenses by location, in particular for aid dependent on authors' and employees' tax domicile.  Address the varying labor costs and status across Europe.
LOW MOBILITY OF RIGHTS	 Harmonize regulations governing the management of audiovisual production rights.  Reflect on the attribution of nationality to European content.  Foster the creation and preservation of European IPs.

The White Marketing Rabbit provides a short-term solution to these governing challenges with the longer-term goal of advancing policy improvements. Ultimately, the White Marketing Rabbit is a flexible funding mechanism that not only supports the development of transnational animated projects, but also provides accelerated access to production funding.

By directing funds to co-productions during the initial creative phase, the White Marketing Rabbit addresses barriers to development and mobility by:

- Supporting producers across Europe in a phase that remains generally underfunded.
- Providing an incentive to test creative collaborations during a low-risk financial phase.
- Supporting employment and helping animation companies retain their creative teams and talent during periods of low activity.
- Fostering the creation of long-term partnerships at a relatively unregulated stage, and thereby partly bypassing potential incompatibilities in different regions with diverse production funding rules.

With this tool, intended to be tested in ALICE's partner regions and then widely adopted across Europe, the ALICE group hopes to initiate a positive cycle of more inter-regional co-productions.

<sup>10</sup>ALICE's case studies of animated projects include the series ABRACA, resulting from a cooperation between Hauts-de-France and Wallonia-based studios Madlab and Dreamwall; the multi-award-winning film JOSEP co-produced in France, Belgium and Spain; the film HEART OF TOWER co-produced in Slovakia, the Czech Republic and Belgium, and THE PEASANTS co-produced in Poland (BreakThru Films), Lithuania and Serbia.

## II. ALICE's "White Marketing Rabbit": Encouraging Co-Productions in Development

Intervening at the beginning of the value chain during the creation phase of an animated product, the White Marketing Rabbit has been specifically designed to activate early collaborations. Taking into account the three essential actors for effective co-productions including public authorities, producers and animation studios, it is supported by a legal framework encouraging long-term inter-regional partnerships. The initiative has been recognized by the 2021- 2027 Media program of Creative Europe as relevant, timely and essential for the future of animation in Europe.

### 1. Scope and Legal Framework

Exclusively accessible to Wonderland-labelled territories—of which most animation studios will be referenced in the smart directory—ALICE's newly created program will be freely usable by the territories willing to engage in joint funding and partnerships with other labeled territories. The White Marketing Rabbit will provide funding for the marketing stage of animated projects intended for co-production that involve pre-identified studios.

The territories willing to offer this program will collaborate under negotiated bi- or multilateral frame agreements<sup>11</sup> and launch regular calls together for animated projects in the early development stage. Under such agreements, the territories will commit to investing in the production of the selected projects.

### 2. Functioning and Purpose

The purpose of the White Marketing Rabbit program is to help producers build the necessary pitch materials for their animated short films, feature films or TV series to attract potential financing partners.

The proposed mechanism will provide funding for a minimum of 50% of the cost of an animated project's marketing presentation package, including a statement of intent, a graphic bible, a written bible, the identification of the target market and a pilot.

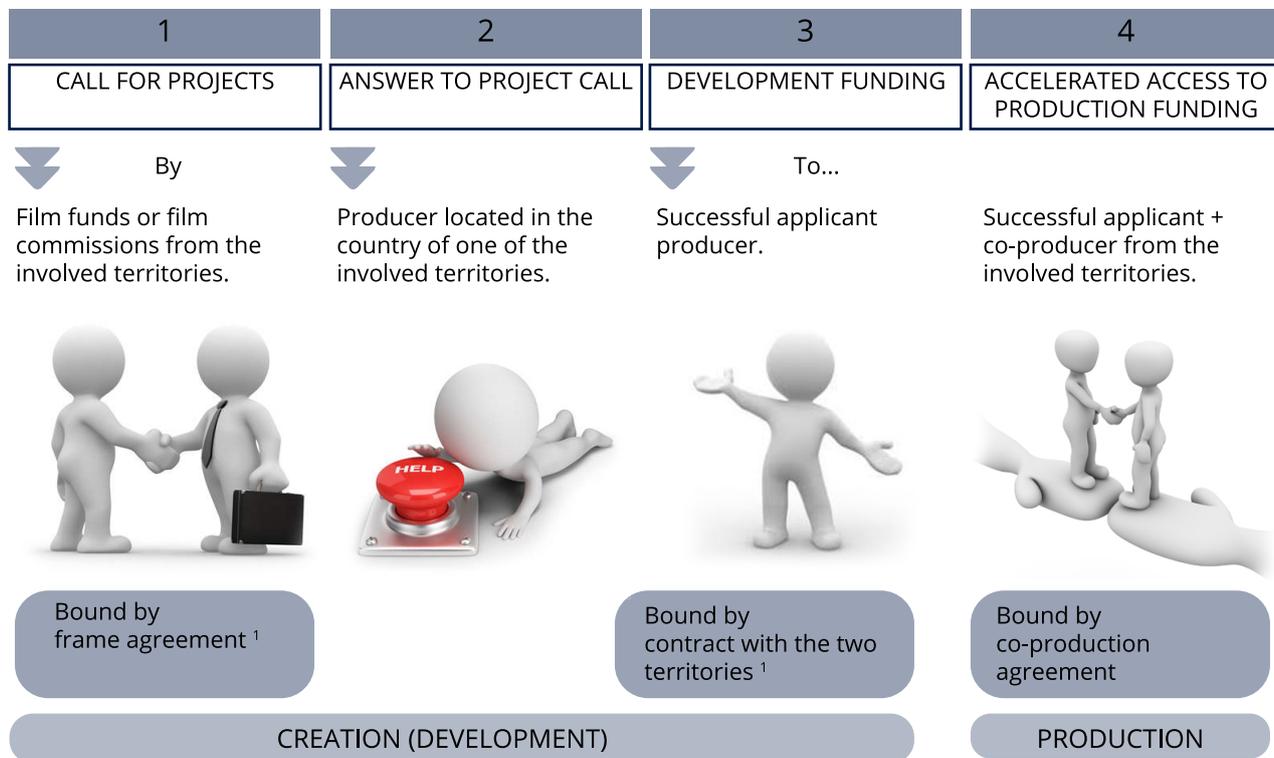
Given the early stage of intervention, applications will require the applying producer to identify the animation studios involved in the participating territories in lieu of a more traditional co-production agreement. Upon successful completion of the project's development, an approved producer in the White Rabbit Marketing program will have exclusive access to production funding for the project.

<sup>11</sup>The discussions preceding the finalization of the White Marketing Rabbit's frame agreements will include how to achieve a balance of investment and expenditure in the involved territories, as well as the amounts invested by each territory, which will be at their absolute discretion. The parties bound by such agreements will each finance 50% of the expenditures incurred in their territory and remain responsible for and in full control of their money.

The following diagram provides a more detailed outline of how the program works.

## Encouraging early collaborations between film funds, producers and animation studios The White Marketing Rabbit Mechanism

**2 WONDERLAND-LABELLED TERRITORIES, 1 ANIMATED PROJECT, 2 STUDIOS FROM THE PARTICIPATING TERRITORIES**



<sup>1</sup> The templates for those contracts are provided in Appendix 3 of this document.

Each stage of the mechanism will be governed by the following rules and requirements:

CALL FOR PROJECTS	ANSWER TO PROJECT CALL	DEVELOPMENT FUNDING	ACCELERATED ACCESS TO PRODUCTION FUNDING
<p>ELIGIBLE PROJECTS</p> <p>Feature films, short films and TV series that are</p> <ul style="list-style-type: none"> <li>- Trans-national/ - territorial</li> <li>- In early development</li> <li>- Involving pre-identified studios</li> </ul>	<p>REQUESTED DOCUMENTS</p> <ul style="list-style-type: none"> <li>- Project overview and goals</li> <li>- Cost estimate and provisional breakdown of expenditures by territory</li> <li>- Studios and creative teams profiles</li> <li>- If applicable- chain of title</li> </ul> <p>*Applications must be co-signed by the 2 studios involved in the creation of the marketing package.</p>	<p>PROMOTION OF THE PROJECT'S MARKETING PRESENTATION PACKAGE FUNDED</p> <ul style="list-style-type: none"> <li>50% for feature films</li> <li>60% for TV films</li> <li>70% for TV series</li> <li>80% for short films</li> </ul>	<p>AUTOMATIC FUNDING FOR 25% OF THE PRODUCTION BUDGET spent in the co-production territories upon:</p> <ul style="list-style-type: none"> <li>- Successful transnational collaboration at all stage of development</li> <li>- Successful completion of the development phase</li> <li>- Commitment to spend 75% of the image production budget in the studios initially involved</li> </ul>

A broad adoption of Wonderland and a wide implementation of its tools would be a momentous turning point for the entire European animation sector. However, a culture of co-productions can only be achieved through a change in current policies and collaboration at the level of decision-makers.

Two years of exchanges with industry players helped ALICE acquire a thorough understanding of and expertise in the animation regulatory environment and, to complete its proposals, formulate recommendations for the development of a sustainable and competitive industry going forward.

# III. Going further: Recommendations for a Favourable European Legal Framework

## 1. A Growing Priority for Europe

As the European Commission just celebrated thirty years of supporting European films, particularly through its Media program, Creative Europe's new investments of € 2.5 billion for the 2021- 2027 period are up 50% on the previous comparable period. With regard to the audiovisual sector, it is striking to see how much European objectives of cooperation and networking, circulation of European works and talent as well as support and preservation of a European cultural identity are aligned with those of ALICE – but applied specifically to the animation sector. The European Co-Development call launched on 9 June 2021<sup>12</sup> is a perfect example: its objective is to support the cooperation among all European production companies that are developing works with a strong international audience potential.

Over the years, the animation industry has been recognized as a strategic sector for growth due to its strong resilience—as recently demonstrated during the COVID-19 pandemic—its large job market, its tight links with high added value digital technologies and the universal language of images. These are all exceptional reasons why the sector should be given priority in public investments.

In this context, the following recommendations advocate for increased investment in animation and are addressed specifically to policy makers.

## 2. ALICE's Recommendations

As general guidelines, more funding programs strictly devoted to animation should be created in Europe<sup>13</sup> and a complete mapping of the existing systems that fund animation in Europe should be undertaken to pave the way for harmonized European funding rules<sup>14</sup>.

Emerging out of ALICE's assessments, the following recommendations complete the project's set of tools developed within the Wonderland framework. The aim is to overcome the previously identified regulatory obstacles to co-production in order to realize the animation industry's growth potential in the long term.

<sup>12</sup>Funding & tenders (europa.eu)

<sup>13</sup>Catalonia and the Apulia region set up new funding programs specifically dedicated to animation, respectively in 2017 and 2020.

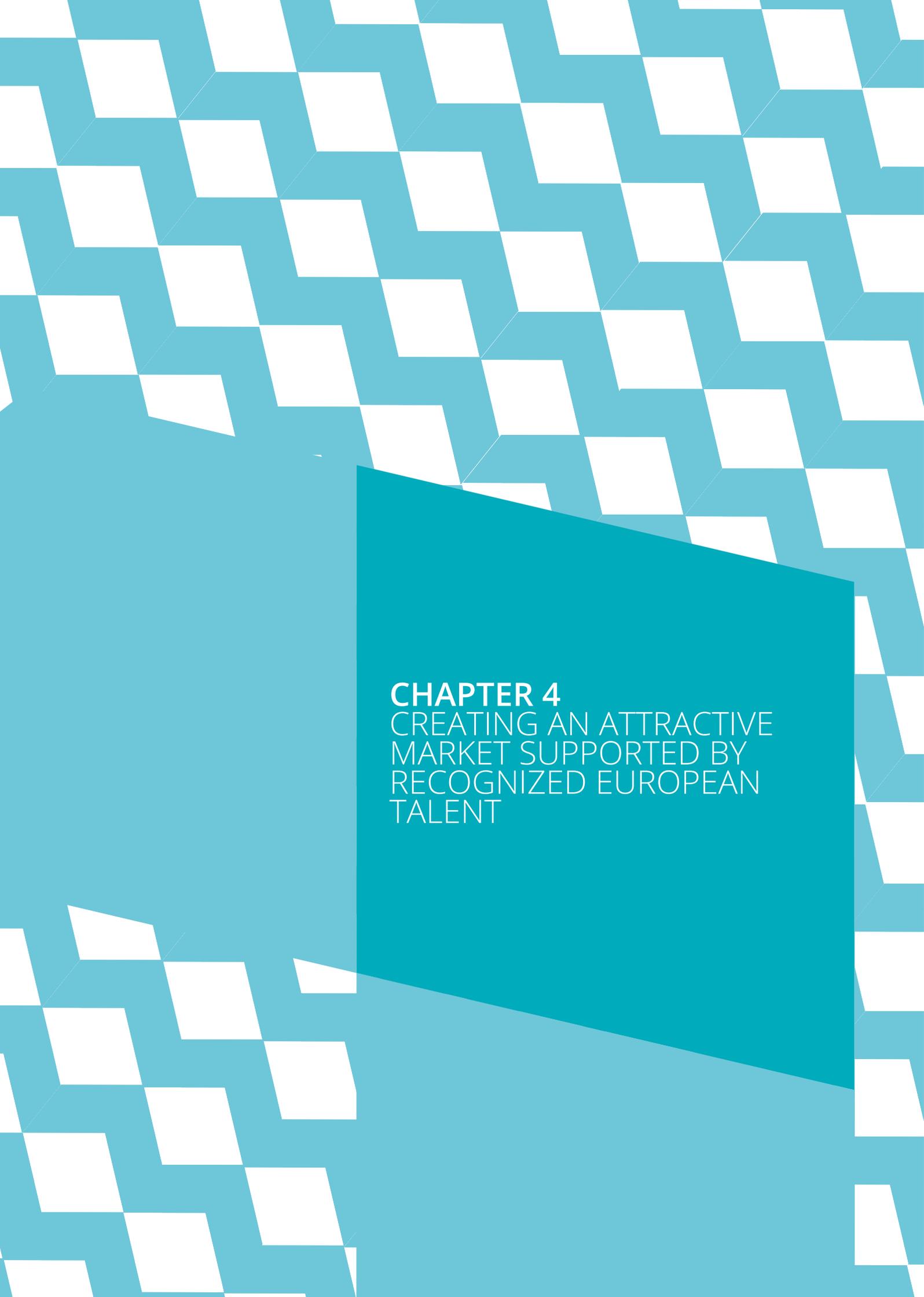
<sup>14</sup>A note that ALICE's mapping proposal presented in Chapter 1 directly addresses the regulatory issues identified in the first section of this chapter: in the perspective of long-term remodeling of the European co-production system, the new methodology notably proposes to establish a complete review of the existing funding rules and regulatory bodies in order to determine the elements on which to act to harmonize the varying systems. It is part of the same logic as the White Rabbit's of initiating long-term change and has inspired Pictanovo's action plan for the next phase of the ALICE project.

OBSTACLES	RECOMMENDATIONS	EXAMPLES & INSPIRATION
LACK OF DEVELOPMENT AND CO-DEVELOPMENT SUPPORT	<ul style="list-style-type: none"> <li>● Set up, at the regional level, development programs open to international co-production.</li> </ul>	<ul style="list-style-type: none"> <li>● Pictanovo's 'Editorial' funding program supporting the development of slates of projects. <sup>1</sup></li> </ul>
<p>LOW TALENT MOBILITY</p> <ul style="list-style-type: none"> <li>● Restrictive rules related to labor expenses by location</li> <li>● Varying labor costs in different regions</li> <li>● Lack of a European standard classification and skill-development programmes</li> </ul>	<ul style="list-style-type: none"> <li>● Facilitate bi-lateral initiatives or agreements supporting long-term partnerships and providing some leeway in the management of co-production expenses.</li> <li>● Focus on skill-based rather than financial co-production partnerships.</li> <li>● Support the development of training programmes based on a common job classification grid and benefiting from a European certification.</li> <li>● Support student exchange programmes.</li> </ul>	<ul style="list-style-type: none"> <li>● Wallimage's Walloon Gold provider label allowing companies to call on foreign talent when needed without affecting the amount of eligible funding: staff expenditures of labelled companies remain 100% eligible for funding.</li> <li>● ALICE's case study: East-Western Europe skilled-based coproduction HEART OF TOWER.<sup>2</sup></li> <li>● ALICE's education programmes proposals presented in Chapter 4.</li> </ul>
LOW MOBILITY OF RIGHTS	<ul style="list-style-type: none"> <li>● Explore ways to train and assist small and medium companies in the protection and the purchasing of copyrights.</li> <li>● Reflect on the attribution of nationality to European content.</li> </ul>	<ul style="list-style-type: none"> <li>● ALICE's case study JOSEP.<sup>2</sup></li> </ul>

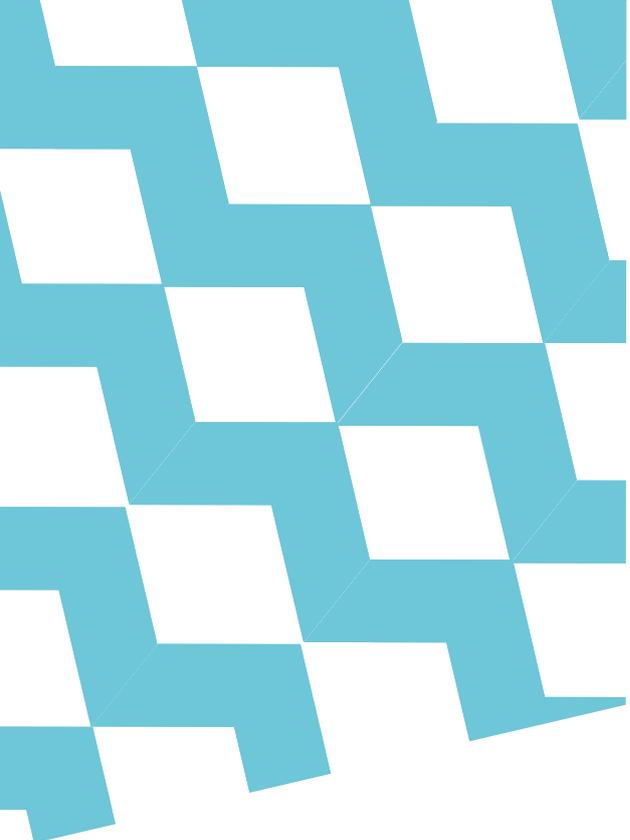
<sup>1</sup>For more information: [www.interregeurope.eu/policylearning/good-practices/item/5469/editorial-writing-and-development-program](http://www.interregeurope.eu/policylearning/good-practices/item/5469/editorial-writing-and-development-program)

<sup>2</sup>ALICE's case studies are presented in Appendix 4 of this document.

Improving the tools and the environment for the players in the audiovisual sector makes sense in a diverse continent bursting with creative talent. Nurturing talents—wherever they come from—and maintaining European creative quality are not only some of the priorities defined by the Creative Europe Media program, but are also at the heart of ALICE's priorities, and the subject of the next chapter.



**CHAPTER 4**  
CREATING AN ATTRACTIVE  
MARKET SUPPORTED BY  
RECOGNIZED EUROPEAN  
TALENT

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In a highly competitive market, European animation companies absolutely need to be able to find, attract and retain talent. Yet, along with the general lack of financial means to support competitive employment conditions, the gap between the educational programs delivered in Europe and the qualifications the market most desires has emerged as one of the most critical issues for the industry. This gap, exacerbated by the fast-changing business models and technologies, cannot be addressed through isolated actions: it takes an ecosystem that brings together European schools, studio facilities and public investment.

In this context, the ALICE project created an entrepreneurship and training working group to reflect on this matter and develop implementable solutions for improvement. The group, chaired by the Apulia region, sought to develop a solution that would help improve the development and employability of young talent as well as encourage worker exchanges and European recruitment with the aim of fostering co-production. Starting with an extensive study of the labour-market and key competency shortages, the whole process resulted in the creation of market-oriented programs of excellence able to produce European-certified professionals.

# I. Addressing the Broad Issue of European Animation Industries' Attractiveness

A European animation sector capable of generating talent and employing a competitive workforce will be more attractive, both for the companies of the sector and for the professionals themselves. While animation companies have a role to play in developing and retaining talent, their actions will only be of negligible benefit to the industry if they are not carried out in a favorable environment for skill and career development.

Increasing the general level of qualification and achieving excellence requires voluntary policies and adaptable educational systems allowing for constant dialogue between educators and industry professionals. ALICE's proposals, presented in Chapter 2, promote such dialogue through the development of a wide industry network which includes the parties who produce content and those who shape the ecosystem. The mapping methodology developed by ALICE provides a number of valuable tools decision makers can use to start a process of general improvement, including a complete list of the relevant actors to consult (both inside and outside the production chain), common classifications to establish definitions and training objectives, and the framework for an initial assessment of the state of existing educational programs in light of market needs.

The ALICE group used European classifications standards as well as an extensive survey of all the actors of the value chain to target and refine its proposal. Carefully designed with the intention of boosting the careers of young talent and improving companies' competitiveness, the delivered curricula are also an attempt to generate a positive movement of collaboration between the actors shaping and affected by the learning schemes. Overall, the programs developed by ALICE respond to the pressing needs to:

- Develop expert-level animation skills and talent.
- Deliver EU-recognized educational programs and certifications.
- Build an attractive ecosystem able to retain talent.
- Facilitate talent mobility within Europe.

Testing these new courses will be a first step towards a coherent and efficient European educational system that delivers excellence.

## II. ALICE's Market-Oriented Training Programs: Focusing on Industry Needs

### 1. Taking a Consultative Approach

With the aim of designing programs adapted to the realities of the market, the ALICE group collaborated with an expert in training to launch three tailored surveys to private companies, educational institutions and public decision makers from Italy, France, Spain, Slovakia, Poland and Belgium. This initial study confirmed that the vast majority of SMEs experience hiring difficulties especially concerning international recruitment.

Supplemented by qualitative interviews to leading schools and universities, the four-month process helped identify the following core elements that will be taken into account to build relevant education programs:

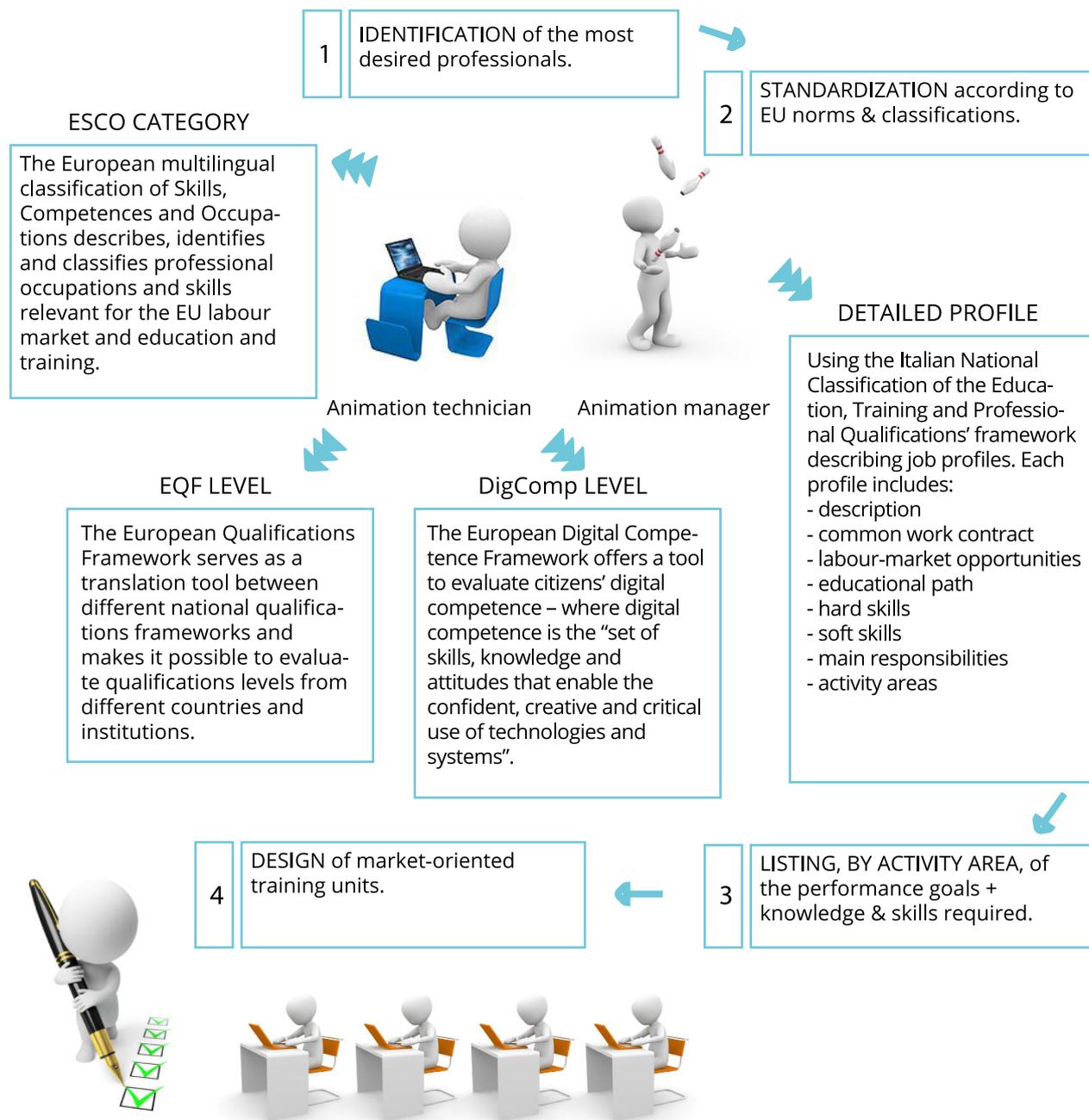
- The labor-market shortage for qualified and experienced animation technicians, as well as for animation managers and top executives.
- The key competencies, as well as hard and soft skills that education providers should focus on developing (further detailed in Section 2 of this chapter).
- The need to combine academic lectures with professional workshops and internships.
- The importance of integrating international components to educational programs.
- Including the teaching of foreign languages and negotiation skills.

Starting from there, the ALICE group designed two comprehensive course programs for European market-ready animation technicians and animation managers. Based on a common understanding of the job positions concerned and compatible with European standards, the proposals set out in parts 3- and 4- below contain complete lists of theoretical and practical courses with their duration and learning objectives. The detailed description of the content of each course as well as all the necessary practical and logistical information for implementation are provided in Appendix 5, Sections A and B of this document.

### 2. Methodology Used

A first step involved creating standardized job descriptions that fit European qualification frameworks. Using the information collected during the industry consultation phase, the working group created detailed description profiles according to the standards of the Italian National Classification and assigned each of them a suitable category within the European Skills, Competences, Qualifications and Occupations classification (ESCO), a level of qualification according to the European Qualification Framework (EQF) as well as a level of digital competence according to European Digcomp Framework.

The second step consisted of designing ideal training courses. Organised in training units, these courses were built to provide the hard and soft skills required for each position and to incorporate European standards and tools.



By following the above methodological process, ALICE's training and entrepreneurship working group was able to establish standard definitions for the positions of animation technician and animation manager. These detailed descriptions led to a very clear identification of the competencies required for each position and, thereby, of the appropriate learning content and techniques. A summary of these descriptions and programs is presented below.

### 3. Training Animation Technicians

#### a. ALICE's Standard Definition for Animation Technician

OBSTACLES	
<p>Animation technicians produce animations found in feature films, commercials, pop videos, computer games, websites and other media. Animators may work with drawings, specialist software or models and puppets, capturing separate images of each stage of a movement. When the images are viewed at speed the character appears to move.</p> <p>Tasks typically involve: creating expressive character animation portraying a wide range of emotions; recommending the best approaches to integrate 3-D components into final commercial quality products; giving and receiving constructive, creative feedback across teams; collaborating with other animators, clients, and producers; creating prototypes and mock-ups of new types of products; brainstorming and conceptualising ideas with the ability to produce concept sketches and quick concept edits; understanding and executing direction from the animation manager or customers.</p>	
ASSIGNED ESCO CATEGORY	ACTIVITY AREAS
(3) Technicians and associate professionals (34) Legal, social, cultural and related associate professionals (343) Artistic, cultural and culinary associate professionals (3435)* Other artistic and cultural associate professionals  *Sub-category created by ALICE	<ul style="list-style-type: none"> <li>&gt; Creation of storyboards</li> <li>&gt; Creation of 2D animations</li> <li>&gt; Creation of 3D animations</li> <li>&gt; Creation of stop motion animations</li> <li>&gt; Creation of lighting and special effects</li> <li>&gt; Creation of dynamic and anatomic illustrations</li> </ul>
EQF LEVEL = 5/8 <sup>1</sup>	DigCOMP LEVEL = 5/8 (advanced) <sup>2</sup>

<sup>1</sup><https://europa.eu/europass/en/description-eight-eqf-levels>

<sup>2</sup>[https://publications.jrc.ec.europa.eu/repository/bitstream/JRC106281/web-digcomp2.1pdf\\_\(online\).pdf](https://publications.jrc.ec.europa.eu/repository/bitstream/JRC106281/web-digcomp2.1pdf_(online).pdf)

#### b. Proposed Curriculum

The animation technicians' curriculum presented below intends to train professionals employable on the European market. The 600hrs intensive program includes 16 theoretical and practical training units that aim at providing students with a complete set of skills, and highly-necessary practical experience, as follows:

TRAINING UNIT 1- ANIMATION DRAWING TECHNIQUES		
Theory: 10 hours	Practice: 20 hours	Learning objectives: - use the main digital drawing tools, incl. Photoshop, Illustrator, Painter & SketchBook - draw with different techniques
2- VIRTUAL STORYTELLING TECHNIQUES		
Theory: 10 hours	Practice: 20 hours	Learning objectives: - use the main digital graphics tools - use photo and video equipment - use post-production tools and software incl. Adobe Photoshop, Adobe Premiere, Adobe Illustrator

### 3- 2D ANIMATION

Theory:  
15 hours

Practice:  
30 hours

Learning objectives:  
- use the main digital graphics tools  
- use 2D animation tools and software incl. Synfig, Blender, OpenToonz, Moho

### 4- 3D ANIMATION

Theory:  
15 hours

Practice:  
30 hours

Learning objectives:  
- use the main three-dimensional graphics tools  
- use 3D animation tools and software incl. Autodesk Maya, Blender, Cinema 4D, 3D Studio Max

### 5- STOP MOTION ANIMATION

Theory:  
15 hours

Practice:  
30 hours

Learning objectives:  
- use the main stop motion animation tools  
- identify the most suitable materials to create stop motion animations  
- use the main stop motion animation software incl. Dragonframe, Adobe Premiere

### 6- SCENPLAY FOR ANIMATION

Theory:  
10 hours

Practice:  
20 hours

Learning objectives:  
- write an original text to be used in an animated product  
- adapt literary texts to animation movies  
- use word processing programs incl. Microsoft Word, Grammarly  
- use the shooting tools

### 7- SCULPTURE TECHNIQUES WITH CLAY & SCENIC DESIGN

Theory:  
10 hours

Practice:  
20 hours

Learning objectives:  
- make subjects and objects using clay (real life copies)  
- use clay sculptures for stop motion animations  
- make new and original characters with clay

### 8- 3D SCANNING & PRINTING

Theory:  
10 hours

Practice:  
30 hours

Learning objectives:  
- create subjects and objects through 3D modelling and scanning tools  
- use 3D scans for animation products

### 9- AUGMENTED REALITY & VIRTUAL REALITY

Theory:  
10 hours

Practice:  
20 hours

Learning objectives:  
- use the main AR and VR technologies  
- use and reproduce the main AR and VR technologies in animation movies

## 10- TIME MANAGEMENT

Theory: 15 hours	Practice: 5 hours	Learning objectives: - identify strengths and weaknesses in one's own time management techniques - manage priority activities - use time management tools
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## 11- TEAM BUILDING

Theory: 10 hours	Practice: 10 hours	Learning objectives: - set goals at the team level - motivate collaborators - evaluate and develop the potential of the individual and the team - develop relationships and improve communication skills between the various team functions - maintain efficiency in times of crisis - focus attention on the team's goals
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## 12- ENGLISH IN THE ANIMATION INDUSTRY

Theory: 10 hours	Practice: 10 hours	Learning objectives: - communicate with the actors operating in the animation sector (customers, suppliers, distributors, marketing companies, etc.) at an international level - understand instructions written in English - produce original scripts written in English - communicate with team members from other countries
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## 13- WORKPLACE HEALTH & SAFETY

Theory: 10 hours	Practice: 5 hours	Learning objectives: - prevent the risks associated with the sector - comply with general (European) safety and health regulations
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## 14- PROJECT MANAGEMENT

Theory: 10 hours	Practice: 5 hours	Learning objectives: - use the main project management tools - carry out activities from an RBM (results-based management) perspective - draft a strategic action plan
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## 15- SECTOR LEGISLATION

Theory: 5 hours	Practice: 5 hours	Learning objectives: - understand the aims and principles of a new legislation - check the compliance of the company's policies with the legislation in place - know about the tools available to protect intellectual property
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## 16- INTERNSHIP

Theory: 0 hours	Practice: 180 hours	Execution of part or of the entire production cycle of an animated movie using the tools and techniques learned during the course
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TOTAL Theory: 160 hours	TOTAL Practice: 440 hours
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660 hours

## 4. Training Animation Managers

### a. ALICE's Standard Definition for Animation Manager

DESCRIPTION	
<p>The animation manager is responsible for managing the day-to-day production activities and their teams. Working closely with the producer and associate producer, the animation manager oversees the departments' schedules and deliverables to ensure the efficient completion of production. Along with the associate producer, the animation manager has the task of overseeing and monitoring the entire production schedule and being able to balance and prioritise needs across all departments, with the timely and efficient delivery of the film being the ultimate goal. As the part of a film's leadership team, the production manager sets the culture of the production, as well as the culture of the studio.</p>	
ASSIGNED ESCO CATEGORY	ACTIVITY AREAS
<p>(1) Managers            (13) Production and specialised services managers            (133) Information and communications technology service managers            (1330)* Information and communications technology service managers</p> <p>*Sub-category created by ALICE</p>	<ul style="list-style-type: none"> <li>&gt; Analysis and coordination of the creation process of animation products</li> <li>&gt; Coordination of animation products' projects</li> <li>&gt; Final check and approval of projects</li> </ul>
EQF LEVEL = 7/8	DigCOMP LEVEL = 6/8 (advanced)

### b. Proposed Curriculum

The 300hrs intensive program for animation managers includes 12 theoretical and practical training units.

TRAINING UNIT 1- THEORY & HISTORY OF ANIMATION		
Theory: 15 hours	Practice: 5 hours	Learning objectives: - analyse the historical excursus of animation cinema - recognise, distinguish and adopt different stylistic techniques in animated cinema - recognise and use the most common animation techniques
2- PRODUCTION PROCESS		
Theory: 10 hours	Practice: 20 hours	Learning objectives: - manage and coordinate the animation process - collaborate in the creation of a storyboard and in the drafting of an outline; - guide the team in the various phases of the animation process - monitor the production process - closely follow up the pre-production and post-production phases - evaluate and establish quality standards and check the compliance of the final product with these standards - use the main applications and software

### 3- STORYTELLING

Theory:  
10 hours

Practice:  
10 hours

Learning objectives:  
- experiment with the most innovative storytelling techniques  
- communicate creative and production paths through visual and writing storytelling techniques  
- use creative writing techniques

### 4- MARKETING

Theory:  
15 hours

Practice:  
10 hours

Learning objectives:  
- carry out strategic marketing campaigns for the promotion of a product  
- conduct market research  
- anticipate the needs of the market and/or the customer  
- promote a product through traditional and digital marketing tools

### 5- ENTREPRENEURSHIP & CREATIVE DEVELOPMENT

Theory:  
15 hours

Practice:  
5 hours

Learning objectives:  
- implement innovative business strategies  
- use "Lean thinking"  
- work towards goals  
- implement new strategies  
- anticipate the needs of the market

### 6- LEADERSHIP & TEAM BUILDING

Theory:  
10 hours

Practice:  
10 hours

Learning objectives:  
- lead a team in a collaborative way  
- motivate a team to achieve objectives  
- use motivational techniques  
- cultivate a culture of sharing and collaboration  
- adopt innovative solutions in activities' and team's management

### 7- TIME MANAGEMENT

Theory:  
5 hours

Practice:  
10 hours

Learning objectives:  
- identify strengths and weaknesses in one's own time management techniques  
- manage priority activities  
- use time management tools

### 8- PROJECT MANAGEMENT

Theory:  
5 hours

Practice:  
15 hours

Learning objectives:  
- use the main project management tools  
- carry out activities from an RBM (results-based management) perspective  
- work according to a logical design framework  
- draft a strategic action plan

### 9- WORKPLACE HEALTH & SAFETY

Theory:  
10 hours

Practice:  
5 hours

Learning objectives:  
- prevent the risks associated with the sector  
- comply with general (European) safety and health regulations

## 10- ENGLISH IN THE ANIMATION INDUSTRY

Theory: 10 hours	Practice: 10 hours	Learning objectives: - communicate with the actors operating in the animation sector (customers, suppliers, distributors, marketing companies, etc.) at an international level - understand instructions written in English - produce original scripts written in English - communicate with team members from other countries
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## 11- SECTOR LEGISLATION

Theory: 5 hours	Practice: 5 hours	Learning objectives: - understand the aims and principles of a new legislation - check the compliance of the company's policies with the legislation in place - know about the tools available to protect intellectual property
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## 12- INTERNSHIP

Theory: 0 hours	Practice: 90 hours	Management, monitoring, execution of part or of the entire cycle of a film or an animated movie using the tools and techniques learned during the course
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TOTAL Theory: 105 hours	TOTAL Practice: 195 hours
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300 hours

In a market marked by constant change, these courses must be thought of in a perspective of continuous learning: student and active professionals should be able to learn, at any stage of their careers, the hard and soft skills the European animation market greatly needs. Furthermore, schools and universities should be able to consult regularly with the industry to maintain up-to-date and market-oriented curricula: bridges between schools and SMEs need to be established.

In this context, the competitiveness of the industry will depend on the ability of the players and the education system to adapt and innovate. This led ALICE to develop a series of long-term recommendations, presented below.

# III. ALICE's Long-Term Recommendations to Maintain a Competitive Animation Workforce

## 1. Training Entrepreneurs

A number of key soft skills to performing well within the animation industry were identified throughout our studies, including the need for creative thinking, collaboration and a life long learning mindset. These skills are often associated with entrepreneurs. The entrepreneurial spirit is a major asset to have for anyone looking to have a career in the industry, be it within a production company or as an independent worker. It is also a major driver of growth and competitiveness at both company and macroeconomic levels, which explains why the European Commission has identified entrepreneurial skills as a key skill to develop within the European Union. In its “Entrepreneurship 2020 Action Plan”, the Commission emphasises the strategic need for improvement of education and training for entrepreneurship.

In this context, the working group developed a specific program to train entrepreneurs in the animation industry. Its goal is to provide students with all the necessary tools, knowledge and competences to develop an entrepreneurial project, create a new business model or reshape existing business models.

This program is coherent with the European “Entrepreneurship Competence Framework” (EntreComp<sup>15</sup>), and based on the following definition: “Entrepreneurship is when you act upon opportunities and ideas and transform them into value for others. The value that is created can be financial, cultural, or social (FFE-YE, 2012).”

The summary of ALICE's Entrepreneurship and Business training program is provided in Appendix 5, Section C of this document.

## 2. Improving Collaborations at All Levels

As mentioned above, an education system producing and maintaining competitive workforce can only happen with political involvement to build a favorable ecosystem supported by the necessary funding tools, resources and a solid European network of SMEs, training institutions and professionals. Here are a few tips decision makers can use to improve their policies:

Coordination and support at European level:

- In line with the Creative Europe Media program's approach, focus on continuous learning and skills development and develop intensive online courses and mentorship programs.

<sup>15</sup>The European Entrepreneurship Competence Framework (EntreComp) is a reference framework to explain what is meant by an entrepreneurial mindset. It offers a comprehensive description of the knowledge, skills and attitudes that people need to be entrepreneurial.

- Invest in European programs for students, teachers and entrepreneurial education.
- Promote the exchange of teaching/ learning good practices within Europe.
- Support exchanges of experts, “peer learning” initiatives and study visits.
- Promote entrepreneurship through campaigns and European awards for schools and companies.
- Provide and disseminate information.

To public authorities:

- Develop national training strategies, including the participation of the industry actors and educational institutions.
- Support and promote the development of Entrepreneurship training programs.
- Support innovation and young entrepreneurs through the creation of grants.
- Develop mentorship programs.

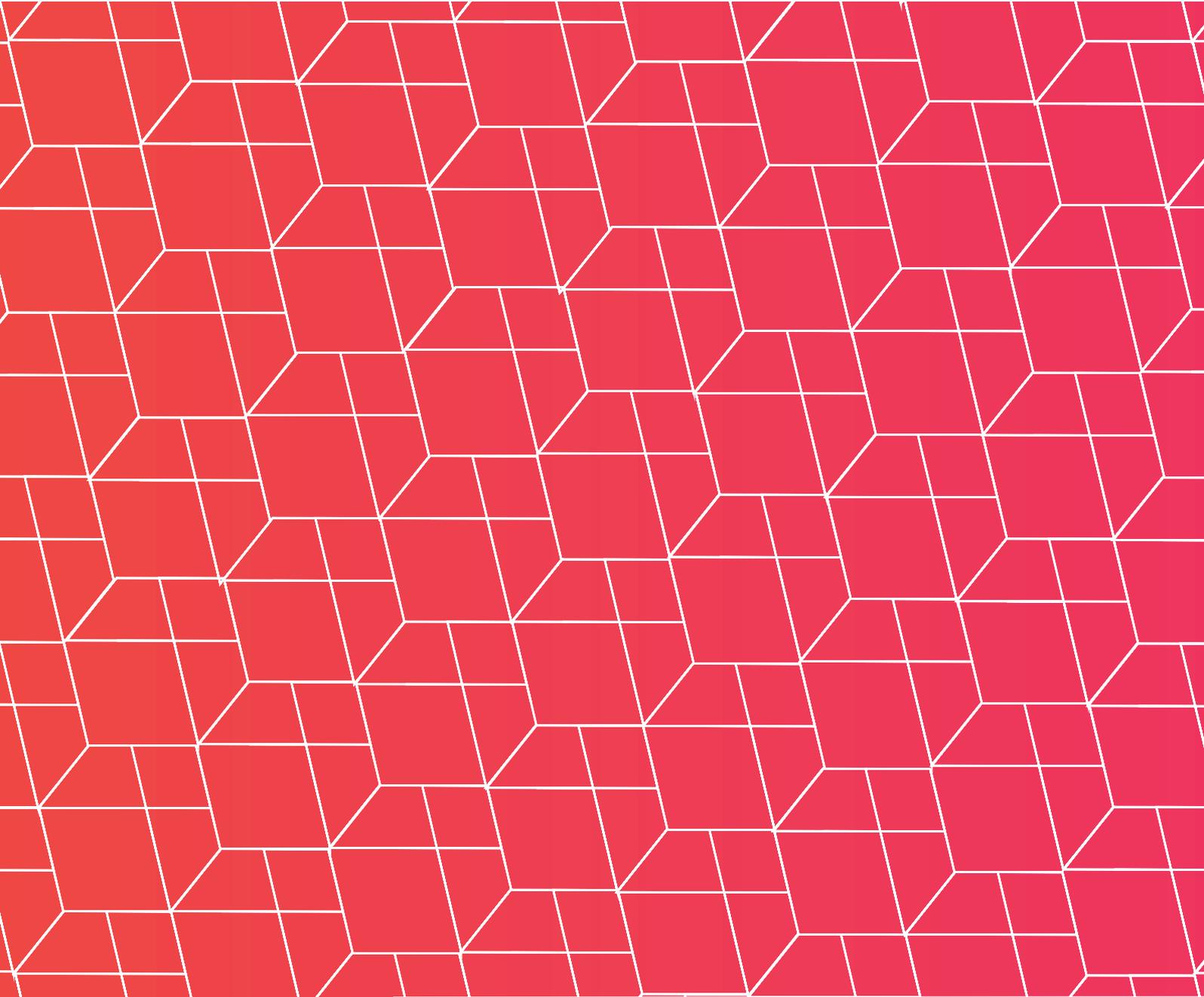
To educational/training Institutions:

- Actively cultivate relationships with private companies and align training programs with industry requirements.
- Promote practical experience and involve experienced professionals in the educational process.
- Develop partnerships and European student exchange programs.
- Promote entrepreneurship and provide support to students willing to start their own businesses.

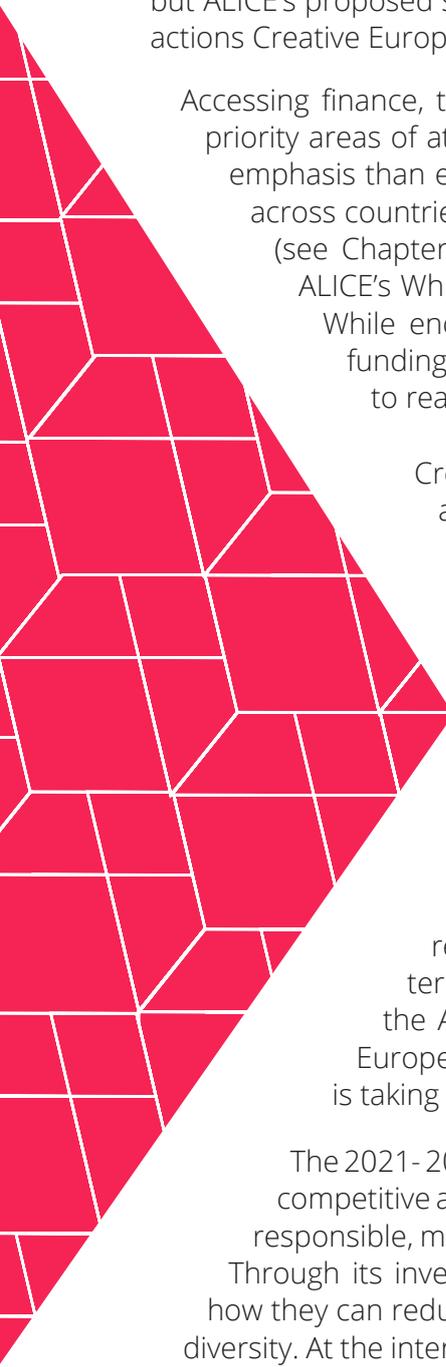
To business associations and other intermediary organisations:

- Promote school-company partnerships.
- Provide support to students looking for intern positions.
- Facilitate private-public collaborations in developing programs.
- Develop mentorship programs.

The ALICE programs proposed above are intended to be implemented, but in no way are they fixed. They must be part of a constant progression of change, improvement and development. With these tools and recommendations, ALICE is confident that Europe can produce excellent, internationally recognized professionals who are able to enrich and promote the European cultural identity. As Europe is already widely recognized for its creative strength, investing in talent is investing in an existing competitive advantage that will help European animation grow and continue to shine.



# CONCLUSION



As ALICE's exploration phase reaches the end, the project's partners are now preparing for the next phase of ALICE activity: disseminating information and implementing regional action plans. To raise awareness about the project and present its results, the partners organised a special event on 17 June 2021 at the Annecy International Film Festival's MIFA. The event included an exclusive interview of Mrs. Lucia Recalde, Head of the unit in charge of the Europe Creative Media program. Through this conversation, it became clear how relevant the ALICE project is to today's creative priorities in Europe. ALICE's goals are not only aligned with the goals of the new Media program, but ALICE's proposed solutions to various industry challenges also complement the direction and actions Creative Europe has planned for 2021-2027.

Accessing finance, talent, skills, and raising the sector's global competitiveness have all been priority areas of attention at Creative Europe over the past years. Under the new plan, more emphasis than ever is put on trans-national collaboration, both across the value chain and across countries. As the new Media program launches the European Co-Development call (see Chapter 3) focusing on trans-national content creation, Mrs. Recalde recognized ALICE's White Marketing Rabbit as exactly the type of action Europe wants to support. While encouraging the creation of partnerships at the earliest stage, ALICE's new funding program will contribute to building strong co-productions with the potential to reach audiences in Europe and beyond.

Creative Europe has been very successful in implementing training programs across Europe in the last few years and will continue to do so, but from now on will refer to "skills development" to better fit the reality of a rapidly evolving economy. One of the main priorities is to open up the audio-visual industry to young talent, which is exactly what ALICE aims to do by developing education programs to produce market-ready professionals for the animation sector.

Although the growing fragmentation of audiovisual industries and importance of the streaming platforms in Europe existed before COVID, the pandemic has accelerated these industry changes, creating long-term effects and more fragility across the entire European industry. In response to the health crisis, Creative Europe has helped the industry recover by rapidly injecting liquidity in the system and in SMEs, but its longer-term mission is to help the industry grow and transform. In the same spirit of the ALICE project and with an increased budget, new grants and investments, Europe plans to accompany the audiovisual industry in the profound transition that is taking place, while making its players connect together and with their audiences.

The 2021-2027 Media program addresses the many other challenges that remain. To stay competitive and sustainable, the audiovisual industry must become more environmentally responsible, more digital, more inclusive and must better adapt to new distribution models. Through its investments, Creative Europe will encourage the whole industry to reflect on how they can reduce CO2 emissions, foster creative and digital innovation as well as promote diversity. At the intersection of tech and creativity, the animation sector is particularly well placed to seize and benefit from the new funding opportunities offered by the plan.

In any case, these major challenges can only be taken up collectively. With ALICE's solutions and recommendations, the hope is to instill the will for change and to create conditions that are conducive to greater collaboration, transforming European animation into a single, united industry that thrives economically and creatively at a global level.

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Project Manager: Marta Colucci

Content Coordinators: Emilia de Paola, Daniel Zimmermann

**Writer: Flore de Bayser**

Graphic designer: Tiziano Vantaggiato

Publisher responsible: Philippe Reynaert

