

STRENGTHENING NORDIC CHILDREN'S ANIMATION

White Paper on the Animation Landscape in 2025



*Authored by Clara Saeten, Project Manager, Nordic Animation Association.
Outline and editorial review by the Board of Nordic Animation Association.
clara@nordicanimation.com*

Abstract

The Nordic children's animation sector stands at a critical juncture, characterized by a paradox of robust creative potential and systemic fragmentation. Despite high regional demand for animation—exceeding European averages—and a distinctive cultural identity rooted in values such as inclusion, equality, and child-centered storytelling, the industry grapples with structural barriers that impede its growth and global competitiveness.

Fragmentation manifests in inconsistent broadcaster engagement, disparate commissioning practices, and complex, underfunded co-production mechanisms. While Nordic broadcasters collectively invest billions of euros in content, children's animation remains underprioritized, with minimal budgetary contributions (e.g., €50,000 per project via Nordvision) and limited pan-Nordic collaboration. This fragmentation not only restricts production capacity but also exacerbates talent underemployment and brain drain, as skilled professionals seek stability in better-funded international markets.

Yet, the sector's challenges also reveal opportunities. The success of initiatives like DR's *FredagsTamTam*—which replaced global franchises with locally resonant content—demonstrates that Nordic animation can thrive when supported by aligned commissioning, strategic IP development, and coordinated marketing. The region's cultural values, deeply embedded in its storytelling, offer a unique competitive advantage in a global market increasingly demanding diverse, empowering children's content.

This paper argues for a paradigm shift toward greater alignment among public broadcasters, streamlined pan-Nordic collaboration, and strategic investment in talent, infrastructure, and IP development. By leveraging existing frameworks (e.g., Nordvision, B15), softening cross-territory funding restrictions, and adopting models like the UK's Terms of Trade for IP ownership, the Nordics can transform structural weaknesses into scalable opportunities. The goal is not merely to sustain but to elevate Nordic children's animation as a globally recognized force—one that reflects and nurtures the region's cultural identity while meeting the evolving demands of young audiences.

The Nordic animation industry stands at a pivotal moment. Audience demand is growing, creative capacity is strong, and production quality is world-class. Despite children's clear appetite for animation, which is especially high in the Nordics, where viewing levels exceed the European average¹, the region struggles to convert its cultural strengths into coordinated market impact. Nordic children's animation remains structurally constrained by **fragmented broadcaster engagement, inconsistent commissioning practices, and complex funding mechanisms.**

Beyond economic and industrial considerations, children's animation plays a crucial cultural role. Nordic children are increasingly exposed to global animation content, and access to locally rooted stories, languages, humor, and values is comparatively limited. Strengthening Nordic animation is therefore not only an industry concern, but a cultural responsibility.

This report argues that the industry's future competitiveness depends on a decisive shift toward **greater alignment among public broadcasters, streamlined pan-Nordic collaboration², stronger co-commissioning models, and a strategic approach to IP development and commercialization³.** Through coordinated action, the Nordic countries can unlock the full potential of their animation ecosystem and ensure that Nordic children grow up with stories that reflect their own experiences and values.

Production Figures

A recent broadcaster survey administered by Nordic Animation Association, though limited in responses of only three, provides a revealing snapshot of Nordic engagement with animated series. Activity is highly uneven: one broadcaster reports almost no pre-buys or commissions, but acquires a large volume of completed episodes, indicating a preference for bulk purchases over early-stage investment. Swedish broadcasters present a stark contrast: one broadcaster is notably active, both in acquiring animation from other Nordic countries and commissioning non-national Nordic productions, while another reports no commissioning animation activity over the past three years. This disparity underscores the fragmented nature of the Nordic market, where broadcaster strategies range from active regional collaboration to near-total reliance on completed, non-Nordic content.⁴

According to the 2019 Nordisk Film & TV Fond report, 18 production companies were working on children's animation content in the Nordic region. The study surveyed over 400 children's media professionals across the five Nordic countries, with responses from producers, game developers,

KEY TAKEAWAYS

Fragmentation is the core challenge

- **Broadcaster engagement with animation varies widely across the Nordics**
- **Some broadcasters rely almost entirely on finished acquisitions rather than commissioning**
- **Co-production experience exists, but structural barriers discourage collaboration**
- **A lack of updated industry data hampers strategic planning**

1 Council of Europe. **SVOD Usage in the European Union – 2024 Data.** Council of Europe, July 2025, rm.coe.int/svod-usage-in-the-eu-2024-data-july-2025-c-grece-j-a-tran-/1680b69b5f.

2 Nystrand, Lina. "Nordic Animation Association Evolves from a Volunteer Network to a Structured Association." Nordisk Film & TV Fond, 22 May 2025, nordiskfilmogtvfond.com/news/stories/nordic-animation-association-evolves-from-a-volunteer-network-to-a-structured-association.

3 Giraud, Kévin. "Could 2025 Be the Year That Norwegian Animation Breaks Out on the Global Scene?" Cartoon Brew, 14 Jan. 2025, cartoonbrew.com/business/could-2025-be-the-year-that-norwegian-animation-breaks-out-on-the-global-scene-244459.html.

4 Saetren, Clara. **Nordic Animation - Series Survey Broadcasters (Responses).** Unpublished raw data, 2025.

and decision-makers. The survey revealed that 43% of producers had made more than 5 co-productions, demonstrating significant experience in the field. However, the report also documented a concerning trend; producers rated Nordic co-production opportunities as challenging due to increased budgets, different funding mechanisms across countries, and administrative complexity.⁵

Since 2019, no comprehensive updated data on the number of production companies working on children's animation content, or overall industry value has been published. This six-year data gap represents a significant challenge for strategic planning and demonstrates the urgent need for regular industry mapping and analysis. Without current published data, it's difficult to measure whether the declining co-production trend identified in 2019 has continued, stabilized, or reversed, or to accurately assess the industry's capacity to meet growing demand. Of the 47 studios that are part of Nordic Animation Association (in 2025), 34 of them self-report that they work on series.⁶ Additionally there are 121 studios in the Nordics that the board of Nordic Animation was able to identify, but this data does not have a breakdown of who is working on children's content series.

Lessons from DR: Collaboration Over Competition

Insights shared by DR at The Animation Summit held September 10th, 2025, in Copenhagen, provide important context for this fragmentation. Morten Skov Hansen, Head of Children's and Youth programming at DR, emphasized that Nordic public broadcasters are not competitors: each serves its own national market. At the same time, they all face the same global competition for children's attention. Today, children have more than 6,000 series to choose from. Despite this, 6 out of 10 children in Denmark still consume more DR content than Netflix. This demonstrates that Nordic content can win when it is high-quality, culturally relevant, and delivered consistently. There is an opportunity to think of the Nordics as one market⁷, during his opening remarks at the event, Morten Skov Hansen, noted that Nordic cultures are "90% the same" and that collaboration should focus on shared strengths rather than differences. The success of DR's *FredagsTamTam*, which replaced a Disney slot and successfully drew children toward Nordic IPs, shows that children will choose local content when it resonates with them.⁸

Across the responses in the broadcaster survey, Nordic animation is perceived to have high production quality and strong storytelling, particularly with Denmark highlighted as a source of excellence. However, the region suffers from key weaknesses in the broadcasters' minds: production costs are considered high, and some markets (such as Sweden) are seen as having too few active producers, limiting capacity. Broadcasters note that to purchase more Nordic animation, they need content that is both relevant to their audiences and competitively priced.⁴

KEY TAKEAWAYS

**Nordic broadcasters are not competitors
—global platforms are**

- **Children have thousands of content choices, yet local content still performs strongly**
- **DR's success shows Nordic IP can replace global franchises**
- **Treating the Nordics as one collaborative market unlocks scale and impact**

5 "Nordic Co-Productions for Children and Youth: A Research Report about the Declining Number of Nordic Visual Media Productions for Young Audiences". Nordisk Film & TV Fond May 2019, www.nordiskfilmogtvfond.com/assets/press/Report-Nordic-Co-productions-For-Children-and-Youth.pdf

6 www.nordicanimation.com/studios-producers/

7 "Nordic Animation Studios: A Comparative Analysis with Glocal View" 5 Mar. 2024. www.medium.com/@glocalview.22/nordic-animation-studios-a-comparative-analysis-with-glocal-view-c63329babd51

8 Saetren, Clara. Nordic Animation - Minutes from The Animation Summit. 10 Sept. 2025.

The Hidden Value of Commissioning

However, this price point hides an important aspect not visible in the numbers. Often the cheaper to acquire projects have been commissioned by a broadcaster in the project's origin country at a higher proportional price. The commissioners gain more than just a show on their slate. They are involved in commissioning projects and provide early comments, resulting in projects that are more culturally relevant to their audiences and therefore more likely to resonate. These commissioned projects are more likely to be associated as the broadcasters' brands. This is because the creators are most active with ancillary activities (books, games, events) in their own countries and nearby regions.

Lastly, in many countries commissioning is recognized as a culturally significant activity that develops and maintains a healthy local creative ecosystem, benefiting both broadcasters and producers. All of this is visible in the success of *FredagsTamTam*⁹. The series featured in *FredagsTamTam* have achieved success not only domestically but also internationally, raising DR's brand visibility in the process. *Monster Loving Maniacs* has been sold to 110 countries and *Team Nuggets* has been sold in over 40 countries and territories. Both examples of concrete evidence that commissioned Nordic animation can compete effectively in global markets when properly supported.

The Nordic content landscape is ripe with strategic opportunities for children's animation. According to an analysis reported by Señal News (drawing on Ampere Analysis)¹⁰, Nordic broadcasters and streaming services spent €4.1 billion on TV content for Nordic audiences in 2023, putting the size of the Nordic TV market around that of Spain (€4.3 billion) or Italy (€4.4 billion). This level of investment signals that the region's content market is not only mature but escalating rapidly, with Nordic operators under pressure to differentiate themselves through high quality local programming and children's content can be a standout niche in that strategy.

On the production side, the Nordisk Film & TV Fond report "Nordic Co-Productions for Children and Youth" (2019)⁵ highlights concerning trends: despite the region's investment in children's media, the number of co-productions has been declining. The report, commissioned by the Financing Forum for Kids Content, identifies structural challenges such as fragmented funding, misaligned incentives, and rights issues that hinder collaboration on children-focused visual media. These obstacles limit the creation of original Nordic productions, even as demand and investment grow.

When these two trends are combined, heavy spending on content and declining local co-produced children's content, a clear strategic inflection point emerges: Nordic broadcasters have both the financial capacity and the market incentive to re-prioritize Nordic produced children's animation. By investing in co-commissioning, creating alignment across countries, and addressing the production

KEY TAKEAWAYS

Commissioning delivers value beyond the screen

- **Stronger cultural relevance and audience resonance**
- **Greater brand association for broadcasters**
- **Increased downstream IP activity (books, games, events)**
- **Long-term ecosystem benefits (Nordic / national IP ownership & local talent development)**

9 Nystrand, Lina. **How DR replaced Disney with Nordic animation and doubled the viewing.** 19 June 2025. nordiskfilmogtvfond.com/news/stories/how-dr-replaced-disney-with-nordic-animation-and-doubled-the-viewing

10 Martínez, Federico. "The Nordics: Content Spending Growth, in an Evolving Landscape." Señal News, 9 Apr. 2024, senalnews.com/en/data/the-nordics-content-spending-growth-in-an-evolving-landscape

bottlenecks documented in the Nordisk Film & TV Fond study⁵, the Nordics can meet growing consumer demand and reclaim ownership of their children's content pipeline. This presents a powerful opportunity: Nordic broadcasters can leverage their own resources and collaborate more deeply to ensure a future where Nordic children's IP is not just created but thrives and benefits both the broadcasters' offering and the creators.

Market potential

While data for TV viewing per format was unavailable, the European Audiovisual Observatory does publish an annual report on the Subscription Video on Demand (SVOD) usage in EU countries¹. The Nordic animation industry presents substantial market potential within the SVOD sector, particularly as streaming continues to reshape media consumption patterns. According to the European Audiovisual Observatory's 2024 report on SVOD usage, animation accounts for 14% of total viewing time on SVOD platforms for TV series across the EU, demonstrating a robust and expanding audience for animated content. While this trails fiction TV (83%), it far exceeds documentaries (3%). This figure for animation was only 4% in the same report from 2023¹¹, and documentaries were only 1% signalling a rapidly growing audience for animated content.

This trend is even more pronounced in the Nordic region, where Finland leads with 18% of SVOD viewing time dedicated to animation, followed by Sweden at 15% and Denmark at 11%, all matching or exceeding the European average¹. These figures highlight a significantly higher demand for animation in Nordic countries, positioning the region as a prime market for local producers.

Despite this demand, the report reveals a critical gap: only 8% of animation viewing time on SVOD platforms is dedicated to EU-produced works, with UK productions accounting for an additional 9%. The remainder is dominated by U.S. and Asian content, indicating that Nordic animation is vastly underrepresented in a market where local audiences are already engaged with the medium¹. This disparity presents a strategic opportunity for Nordic producers to develop original, culturally relevant animation that resonates with regional audiences while also appealing to global platforms.

The Animation Summit discussions highlighted why animation resonates so strongly with children. Today's children aren't just watching series. They want worlds they can immerse themselves in, across series, shorts, play, and more. Henrik Nonnemann's, formerly of LEGO, presentation on the IP Culture Model during the summit reinforced this: successful IP requires integration not only in storytelling (knowing) but also in being, doing, and having⁸. This aligns directly with consumption patterns where strong universes drive repeated viewing. In the 2024 SVOD data, it showed that few popular titles had the most streaming time, "with less than 0,1% of works accounting for about 14% of total viewing time."¹¹

Nordic children's animation is demonstrating commercial viability both domestically and internationally. Recent series are achieving success not only through broadcast but also through

KEY TAKEAWAYS

Demand is high, but Nordic animation is underrepresented

- **Animation accounts for a growing share of SVOD viewing between 2023 and 2024**
- **Nordic countries exceed the European average for animation consumption**
- **EU-produced animation represents a small fraction of viewing time**
- **A clear opportunity exists for Nordic-led content**

11 Council of Europe. **SVOD Usage in the European Union**. Council of Europe, December 2023, rm.coe.int/svod-usage-report-in-the-eu-2023-december-2023-c-grece-and-j-a-tran/1680af0850

merchandise, games, and live events. *Gigglebug*, an award-winning Finnish IP, has been sold to over 25 countries with more than one million downloads of its companion app. *Tulipop Tales*, a pre-school series from Iceland developed as a comprehensive 360-degree universe, has been broadcast in over 30 countries beyond its country of origin.

Challenges

The Nordic animation industry continues to face structural challenges in production, funding, capacity, and coordination. Both survey data and The Animation Summit case studies emphasized the same core issues. Another recent survey by Nordic Animation Association, the responders were members of the association, and all Nordic producers who work with animation¹² highlights a lack of coordination between Nordic countries, leading to inefficiencies in funding, production, and distribution. While cultural and linguistic differences exist, they are seen as minor barriers compared to the systemic funding issues. The Nordic market is small and fragmented, with each country having its own funding schemes, broadcasters, and regulatory frameworks. This lack of harmonization creates inefficiencies in production and distribution.

Case studies presented at the summit highlighted how projects fall through funding gaps: national funds often have conflicting rules about spending location, nationality, or percentage allocations. The case of *The Huggingtons* illustrated how projects can become "not Nordic enough" or "not European enough" depending on the fund, despite being culturally Nordic at their core of the IP⁸.

Nordic broadcasters contribute minimally to animation budgets, often providing as little as €50,000 per broadcaster per project through initiatives like Nordvision, the only pan-Nordic collaboration in TV funding¹³. This level of funding is insufficient to meet the €3–4 million budget typically required for a 26x11' animated series, discouraging producers from pursuing animation projects altogether. The financial barriers are so daunting that some producers, particularly in Sweden (where the Swedish Film Institute doesn't support animation series), avoid launching new series due to the overwhelming difficulty of securing adequate budgets¹².

Broadcaster involvement remains inconsistent, with only a few, such as DR in Denmark, actively commissioning national animated series. Based on our survey amongst the producers of the Nordic Animation Association, the average rating for local funding levels stands at just 2.68 out of 5, indicating widespread dissatisfaction. Co-production opportunities within the Nordics are rated even lower, at 2.26 out of 5, with most respondents giving it a score of 2. In contrast, co-production opportunities outside the Nordics are slightly better, averaging 2.95 out of 5, with a mode response of 4. This suggests that producers often find it easier to collaborate with international partners due to better funding conditions and incentives¹².

In our survey of producers, some felt that there was a shortage of talent, particularly in 2D animation. While others felt that there is an issue with underemployment. Skilled professionals are often forced to leave the sector for more stable careers in IT sales, merchandising/promo developer,

KEY TAKEAWAYS

Structural barriers, not talent, limit growth

- **Fragmented funding systems and misaligned rules**
- **Insufficient broadcaster contributions to budgets**
- **Talent underemployment leading to brain drain**
- **Children's animation remains culturally undervalued**

12 Saetren, Clara. *Nordic Animation - Series Survey (Responses)*. Unpublished raw data, 2025.

13 Nordvision Fund: Supported projects www.nordvision.org/nordvisionsfondet/stotte/

marketing illustration and app development¹². The result is a brain drain, not due to a lack of talent, but because the industry cannot consistently sustain the workforce it has. This talent gap is exacerbated by competition from better-funded international studios, leading to a brain drain of creative professionals to countries with more attractive incentives and career opportunities.

Despite children's animation being crucial to public broadcasters, summit participants noted that the genre remains undervalued. At the university level, children's content is still often treated as a stepping stone rather than a specialized, respected field⁸. Without elevating children's content culturally and institutionally, the pipeline for emerging talent remains weak.

Opportunities to expand co-productions and co-commissions

Despite significant challenges, opportunities for meaningful growth across the Nordic animation industry are substantial, showing the need for improved coordination on a pan-Nordic level. Summit discussions reaffirmed that broadcasters do not compete with each other but with global giants⁹. This makes coordinated Nordic commissioning both possible and essential to strengthen the position of both Nordic broadcasters and producers. A detailed examination of different funding and commissioning practices together with challenges faced by both broadcasters and producers when developing and producing Nordic content would help map out the current situation across the Nordics. This would ideally present not only the challenges but also help find the solutions to better coordinate and commission animation across the Nordics. By pooling resources, the commissioning becomes more cost efficient and the projects receive an anchor not just in their country but the entire Nordic region, helping the producers find the missing finance from abroad since they have a bigger foundation to build on.

Producers also overwhelmingly support a Pan-Nordic fund with aligned criteria, transparent governance, and predictable co-production pathways¹². Early collaboration between broadcasters, funders, and producers is seen as critical to making this work.

Currently, Nordvision is underutilized, with producers noting that it hardly contributes to budgets. As one Finnish producer put it, "We should be able to raise at least €1 million for one project from the Nordic broadcasters if they all join the project."¹² This sentiment reflects a broader call for better utilization for children's animation and understanding of Nordvision among producers. The B15 (formerly B14) collaboration¹⁴, Nordvision's scheme for children's content, allocates money to only very few animation projects, despite children's viewing rates of animation across the region. At the same time, much of the Nordvision Fund's support is claimed by projects produced within the public broadcasters' own production companies, rather than by independent animation studios¹⁵. In the Nordisk Film & TV Fond data from 2019, 18 producers said they work with children's animation content⁵, and 35 members of Nordic Animation Association say they are or have worked on series

KEY TAKEAWAYS

Coordination is the fastest path to impact

- **Broadcasters share incentives and audiences**
- **Pooling resources increases commissioning power**
- **Nordvision and B15 are underutilized for animation**
- **Independent producers need clearer access**

14 B14 Children's TV Co Productions. Nordvision, www.nordvision.org/samproduktioner/b14/

15 B14 / 2021 – 2023. Nordvision, Oct. 2021, www.nordvision.org/wp-content/uploads/2022/03/2021-nv-b14-katalog-01f.pdf

(all audiences)⁶, but only one outside production company received funds from B14 for animation in the 2021 and 2022 . Adapting the BBC 1 and BBC 2 model of having a quota on independent production companies content could be a welcomed addition to the B15.¹⁶ Summit discussions suggested exploring models like the New8 collaboration and softening cross-territory spending requirements to encourage co-productions.⁸

Better opportunities for co-production funding from film institutes and a specific fund for Nordic animation are frequently mentioned as potential solutions. Investing in training and mentorship is seen as essential to retaining talent and improving the quality of productions¹².

Other opportunities to increase Nordic IPs reach in the Nordics

For Nordic animation to thrive in today's fragmented media landscape, producers or creators must retain sufficient IP ownership to be incentivized to develop and expand their properties. Producers stressed that without retaining meaningful IP shares, they cannot justify the long-term work and especially the risk taking involved in building brands. In Finland, for example, YLE's policies on IP ownership vary widely, not just in the animation sector, creating uncertainty and discouraging long-term investment. A more predictable model, such as the UK Terms of Trade which sets the market expectation that producers own the IP¹⁷, would provide clarity and ensure producers have the motivation and resources to grow their IPs.

KEY TAKEAWAYS

IP ownership and continuity are essential

- Producers need predictable IP rights to invest long-term
- Strong IP requires multi-season commitment
- Broadcaster partnership is critical for visibility
- Transmedia thinking must start early

Ultimately, producers drive commercialization activities such as books, games, toys, and live events. However, the success of these efforts depends heavily on broadcaster partnership. Practices vary significantly across the region: DR, for example, actively integrates IP building into its children's strategy through coordinated efforts including live shows, Spotify playlists, books, merchandise, learning materials, and app games for properties like *Team Nugget*.⁸ This broadcaster-led visibility and prioritization is extremely difficult for producers to achieve alone.

In contrast, other Nordic broadcasters have more restrictive approaches. For example, in Finland there are strict limitations on using 'as seen on Pikku Kakkonen' branding, which can hinder IP development. The challenge is inconsistency: Nordic local IPs must compete for visibility with massive international franchises like *Bluey* and *Paw Patrol* that have vastly superior resources, yet they don't always receive comparable support from their home broadcasters in building brand presence beyond the screen.

A significant structural challenge is that building successful IP requires more than a single film or one season. IPs need continuity, development across multiple seasons, and time to build audience loyalty. However, neither national funds nor film institutes are currently structured to support this multi-year, multi-season approach to IP development. This gap leaves producers unable to plan for the long-term investment that strong IP requires, even when early seasons show promise.

16 Culture, Media and Sport Committee. BBC Charter Review. House of Commons, 10 Feb. 2016, "4 Production," publications.parliament.uk/pa/cm201516/cmselect/cmcmds/398/39807.htm

17 Strehmel, Felicia. Rights Management at the BBC in 2021. British Copyright Council, Sept. 2021. www.britishcopyright.org/wp-content/uploads/Day-7-BCC-WIPO-Manager-Rights-at-the-BBC-2021-F-Strehmel.pdf

We believe there is a strong opportunity for Nordic public broadcasters and producers to work more closely together to nurture local children's brands. By revisiting and modernising these policies in dialogue with the industry, public broadcasters could play a significant role in strengthening Nordic IPs, supporting their long-term growth across multiple platforms, and ensuring they can thrive alongside major global brands. The Animation Summit discussions emphasized the need for producers and creative teams to think about transmedia integration from the start. LEGO's IP Culture framework also reinforced that durable IP requires engagement through play, narrative, identity, and experience.⁸

Coordinated Marketing and IP Strategy

A more coordinated approach to marketing and IP strategy is essential for Nordic animation to achieve commercial visibility. Currently, fragmented marketing efforts and underdeveloped IP strategies limit the reach of even high-quality Nordic productions. Producers, broadcasters, distributors, and marketers need to collaborate from the earliest stages of development to ensure projects reach audiences effectively and maximize their commercial potential. The producer naturally serves as the central hub and coordinator for these activities, particularly when they have adequate ownership of the project to incentivize building and expanding the series' brand, creating a "growing pie" situation for everyone involved.

The Producer survey responses¹² point to the Danish Film Institute (DFI) as a model, where marketing strategies are integrated from the very first stages of development. One challenge currently with marketing efforts is that producers cannot meaningfully participate in marketing because they spend excessive time securing funding. Sharing marketing assets, coordinating release windows, and aligning strategies across borders would help Nordic animation achieve greater impact. Also, the involvement and activity of the broadcasters' marketing teams vary widely with some broadcasters, namely DR, actively supporting a series' marketing starting already in development and also between season 1 and 2, while other marketing teams have been reported to start their marketing and publicity efforts a month before the broadcast premiere of a project.

Social media content tailored to each market could also enhance localization efforts. Platforms like YouTube Kids and Roblox are key for younger audiences as this is where they spend a significant part of their time, usually more than on the public broadcaster services. At the same time Facebook, Instagram, and TikTok can engage parents. There is great potential for children's animation to extend beyond the screen. Books, games, toys, and events offer additional revenue streams but can't be tapped until after a successful series. Still, the groundwork needs to be thought about early on and developed with a series, so that they are quicker to be launched if needed. This way the same creative team can be involved in planning them.

KEY TAKEAWAYS

Visibility requires coordination, not just quality

- **Fragmented marketing limits the reach of even strong Nordic content**
- **Early collaboration across producers, broadcasters, and distributors is critical**
- **Producers function best as IP hubs when ownership incentives are clear**
- **Coordinated marketing creates shared value rather than zero-sum**

Nordic Core Values as Competitive Differentiation

Nordic animation carries distinctive cultural values that differentiate it from content produced in other regions and make it particularly resonant with Nordic audiences. These values include gender equality, inclusion, tolerance, diversity, and body positivity, and are not merely aesthetic choices but reflect fundamental differences in how Nordic culture approaches childhood and children's autonomy. As Irene Sparre of Sparre Productions noted during The Animation Summit¹⁸ and during her presentation at Fredrikstad Animation Festival 2025, New Nordic Animation seminar¹⁸, these cultural differences become immediately apparent in international co-productions. More fundamentally, the Nordic approach to children's culture is distinctive: In the Nordics we have a child-centered philosophy that permeates into Nordic animation, creating content that empowers rather than instructs, that reflects children's actual experiences rather than prescribing idealized behavior.

These core values represent a genuine competitive advantage in the global market. As audiences worldwide increasingly demand diverse, inclusive, and empowering children's content, Nordic animation's authentic integration of these values positions it as a premium offering. However, realizing this advantage requires Nordic producers to maintain creative control and Nordic broadcasters to actively champion content that reflects these regional strengths.

Regional Similarities

The children's audience loves animation, approximately 80% of children enjoy watching animated TV shows daily¹⁹, yet broadcasters, especially in Sweden and Norway, have been slow to embrace locally produced animation. A significant opportunity lies in creating a curated animated hour, daily slot, or SVOD section dedicated to Nordic animation, similar to DR's Fredagstamtam. This could be branded as a flagship platform for Nordic animation, starting with a special Christmas-themed animation hour to celebrate the season and build momentum. Such a move would not only meet audience demand but also establish a recognizable brand for Nordic animation, fostering long-term engagement and loyalty.

KEY TAKEAWAYS

Nordic values are a market advantage, not a niche

- **Child-centered storytelling differentiates Nordic animation globally**
- **Values such as inclusion, equality, and diversity are deeply embedded, not cosmetic**
- **Authentic Nordic perspectives resonate with both local and international audiences**
- **Creative control is essential to preserve this differentiation**

KEY TAKEAWAYS

Nordic audiences behave similarly and programming should reflect this

- **Children across the Nordics show strong, consistent demand for animation**
- **Local animation remains underutilized despite high audience interest**
- **Curated Nordic animation slots can build habit, brand, and loyalty**
- **Regional storytelling can balance local specificity with shared identity**

18 Aulanko, Moa. "There Is Money to Be Made in Animation' – The Nordic Industry Looks Ahead at Fredrikstad Animation Festival." Nordisk Film & TV Fond, 29 Oct. 2025, nordiskfilmogtvfond.com/news/stories/there-is-money-to-be-made-in-animation-the-nordic-industry-looks-ahead-at-fredrikstad-animation-festival

19 Bharathy S, Jaya. "A Study on the Effect of Television Cartoons on Children." Journal of Emerging Technologies and Innovative Research (JETIR), vol. 7, no. 3, Mar. 2020, pp. 1445–1452, www.jetir.org/papers/JETIR2003214.pdf

To increase the reach of Nordic IPs, producers suggest integrating Nordic values and green production as unique selling points.¹² There is also a push to make each Nordic series feel more local in every country, beyond just dubbing. For example, incorporating actors from different Nordic countries into live-action series has worked well, could a similar approach be applied to animation? Storytelling that embraces the idea of “*we are different yet the same*” such as featuring a Finnish child in a Danish school could help bridge cultural gaps.¹²

Call to Action

The Nordic animation industry is at a **decisive crossroads**. The region’s creative talent, cultural values, and audience demand are unmatched, but structural fragmentation and inconsistent support are holding back its potential. **Now is the time for coordinated action**, not just to sustain, but to transform Nordic children’s animation into a global force.

Immediate Priorities for Broadcasters

Align commissioning practices across DR, NRK, SVT, YLE, and RÚV:

- Map current commissioning workflows to identify barriers and inefficiencies.
- Standardize co-production criteria and simplify cross-border collaboration.
- Adopt DR’s successful model as a regional blueprint, scaling best practices in commissioning, marketing, and IP development.
- Increase transparency in funding and decision-making to build trust with producers.

Strengthen broadcaster commitments:

- Set clear, public commissioning priorities for children’s animation.
- Establish predictable development pipelines to reduce uncertainty for producers.
- These improvements fit within existing mandates and budgets while delivering outsized impact.

Strategic Investments for Producers and Studios

- Build capacity and infrastructure
- Lobby for dedicated funding to modernize studios (hardware, software, workflows), inspired by France’s CNC model. In France, the Centre National du Cinéma et de l’Image Animée (CNC) has successfully implemented schemes to fund the modernization of studios, covering hardware, software, and workflow upgrades²⁰.

KEY TAKEAWAYS

Alignment is the defining priority

- **Align commissioning practices across Nordic broadcasters**
- **Strengthen and clarify co-commissioning pathways**
- **Invest in producer capacity, talent, and infrastructure**
- **Champion Nordic values as a global differentiator**

²⁰ Lemerrier, Fabien. “France’s CNC Commits €10m to Technical Investment Projects.” Cineuropa, 27 Jan. 2021, cineuropa.org/en/newsdetail/396908

- Expand talent development through apprenticeships, mentorships, and cross-border exchanges.
- Integrate transmedia planning from day one—books, games, events—to maximize IP value.
- Present their content at international festivals and markets to build global visibility, and develop their IPs with transmedia potential in mind from the earliest stages.
- Partner with broadcasters to align marketing, branding, and audience engagement strategies.

Pan-Nordic Collaboration: Unlocking Scale

Leverage existing frameworks more effectively:

- Maximize Nordvision and B15 by increasing funding allocations for animation and ensuring fair access for independent producers.
- Softening cross-territory spending rules to encourage co-productions.
- Create a pan-Nordic animation fund with aligned criteria and transparent governance.

Champion Nordic values as a global differentiator:

- Highlight child-centered storytelling, inclusion, and sustainability as unique selling points.
- Curate Nordic animation slots on broadcasters and SVOD platforms to build audience habits and brand loyalty.
- Showcase Nordic animation at international festivals to elevate global visibility and attract partnerships.

Conclusion: A Unified Path Forward

The Nordic animation industry is at a crossroads, where immense creative potential meets structural constraints that limit growth and regional impact. Children's enthusiasm for animation demonstrates a clear market demand that remains underleveraged. While Nordic studios excel in quality storytelling and innovative IP, fragmented funding, inconsistent broadcaster engagement, and limited co-production mechanisms hinder the industry from realizing its full potential.

This report underscores that the path forward lies in alignment: **coordinated commissioning across public broadcasters, strengthened pan-Nordic co-production frameworks, targeted investment in talent and studio infrastructure, and strategic IP development that integrates marketing and transmedia opportunities from the outset.** By softening cross-territory spending requirements, and leveraging existing funds like Nordvision more effectively, the region can turn structural weaknesses into opportunities. Only through unified, strategic action can the Nordics transform high-quality local content into globally competitive animation, ensuring that Nordic children's stories not only resonate locally but thrive on the international stage.

Works Cited

1. Council of Europe. SVOD Usage in the European Union – 2024 Data. Council of Europe, July 2025, rm.coe.int/svod-usage-in-the-eu-2024-data-july-2025-c-grece-j-a-tran-/1680b69b5f
2. Nystrand, Lina. “Nordic Animation Association Evolves from a Volunteer Network to a Structured Association.” Nordisk Film & TV Fond, 22 May 2025, nordiskfilmogtvfond.com/news/stories/nordic-animation-association-evolves-from-a-volunteer-network-to-a-structured-association
3. Giraud, Kévin. “Could 2025 Be the Year That Norwegian Animation Breaks Out on the Global Scene?” Cartoon Brew, 14 Jan. 2025, cartoonbrew.com/business/could-2025-be-the-year-that-norwegian-animation-breaks-out-on-the-global-scene-244459.html
4. Saetren, Clara. Nordic Animation - Series Survey Broadcasters (Responses). Unpublished raw data, 2025.
5. “Nordic Co-Productions for Children and Youth: A Research Report about the Declining Number of Nordic Visual Media Productions for Young Audiences”. Nordisk Film & TV Fond May 2019, nordiskfilmogtvfond.com/assets/press/Report-Nordic-Co-productions-For-Children-and-Youth.pdf
6. www.nordicanimation.com/studios-producers
7. “Nordic Animation Studios: A Comparative Analysis with Glocal View” 5 Mar. 2024. www.medium.com/@glocalview.22/nordic-animation-studios-a-comparative-analysis-with-glocal-view-c63329babb51
8. Saetren, Clara. Nordic Animation - Minutes from The Animation Summit. 10 Sept. 2025.
9. Nystrand, Lina. How DR replaced Disney with Nordic animation and doubled the viewing. 19 June 2025. www.nordiskfilmogtvfond.com/news/stories/how-dr-replaced-disney-with-nordic-animation-and-doubled-the-viewing
10. Martínez, Federico. “The Nordics: Content Spending Growth, in an Evolving Landscape.” Señal News, 9 Apr. 2024, www.senalnews.com/en/data/the-nordics-content-spending-growth-in-an-evolving-landscape
11. Council of Europe. SVOD Usage in the European Union. Council of Europe, December 2023, rm.coe.int/svod-usage-report-in-the-eu-2023-december-2023-c-grece-and-j-a-tran/1680af0850
12. Saetren, Clara. Nordic Animation - Series Survey (Responses). Unpublished raw data, 2025.
13. Nordvision Fund: Supported projects, www.nordvision.org/nordvisionsfondet/stotte
14. B14 Children’s TV Co Productions. Nordvision, www.nordvision.org/samproduktioner/b14
15. B14 / 2021 – 2023. Nordvision, Oct. 2021, www.nordvision.org/wp-content/uploads/2022/03/2021-nv-b14-katalog-01f.pdf
16. Culture, Media and Sport Committee. BBC Charter Review. House of Commons, 10 Feb. 2016, “4 Production,” publications.parliament.uk/pa/cm201516/cmselect/cmcmds/398/39807.htm
17. Strehmel, Felicia. Rights Management at the BBC in 2021. British Copyright Council, Sept. 2021. www.britishcopyright.org/wp-content/uploads/Day-7-BCC-WIPO-Manager-Rights-at-the-BBC-2021-F-Strehmel.pdf
18. Aulanko, Moa. “‘There Is Money to Be Made in Animation’ – The Nordic Industry Looks Ahead at Fredrikstad Animation Festival.” Nordisk Film & TV Fond, 29 Oct. 2025, www.nordiskfilmogtvfond.com/news/stories/there-is-money-to-be-made-in-animation-the-nordic-industry-looks-ahead-at-fredrikstad-animation-festival
19. Bharathy S, Jaya. “A Study on the Effect of Television Cartoons on Children.” Journal of Emerging Technologies and Innovative Research (JETIR), vol. 7, no. 3, Mar. 2020, pp. 1445–1452, www.jetir.org/papers/JETIR2003214.pdf
20. Lemerrier, Fabien. “France’s CNC Commits €10m to Technical Investment Projects.” Cineuropa, 27 Jan. 2021, www.cineuropa.org/en/newsdetail/396908