

Futures Lab Special Session Brazil Conclusions Document

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Ibero-American
Animation
Quirino Awards

Premios Quirino
de la Animación
Iberoamericana

Challenges for Co-production Between Brazil and Ibero-American Countries

Cervantes Institute, São Paulo — March 5, 2026

The Lab is a collective intelligence space created to think strategically about the future of Ibero-American animation. Its arrival in São Paulo sought to bring the conversation to the heart of the Brazilian industry.

The guiding question was clear: what are the actual challenges of co-production between Brazil and the rest of the Ibero-American bloc, and how can they be overcome?

The meeting was moderated by filmmaker César Cabral (Coala Filmes) and featured Rosa Crescente (Director of Special Projects and Co-Productions at TV Cultura), Adriana Pinto (President of ABCA), Camila Nunes (President of Abranima and Director of Lanterna Mágica), Daniel Tonacci (Coordinator of International Programs at ANCINE) and Lucas Soussumi (Manager of the Brazilian Content program).

The event also involved the active participation of industry professionals, whose insights and experiences enriched the discussion.

The session began with Alessandra Meleiro, a researcher and cultural manager, presenting data from the 2nd Mapping of Animation in Brazil, which provided the empirical framework for the roundtable.



1. Diagnosis: The Current State of Co-Productions

The debate began with a striking figure: 60% of Brazilian animation companies have never engaged in an international co-production. Among those that do co-produce, the predominant partners are the United States (44%),* Canada (23%), and France (17%). Despite the shared cultural space and the existence of bilateral cooperation frameworks, the Ibero-American bloc — Argentina, Mexico, Portugal, Spain and Chile — appears only marginally.

**Note: There is no consensus on using the term ‘co-production’ for works created in collaboration with the United States, as co-productions carried out under the Audiovisual Law/Article 3A are not considered official international co-productions. For the purposes of this document, however, this definition has been adopted. Financial co-productions carried out through Brazilian tax incentive mechanisms do not constitute an official international co-production for the purposes of recognizing the work as Brazilian by the country. Although the term “co-producer” is used in contracts linked to these mechanisms, its application corresponds to a different meaning from the one used for regulatory purposes. The use of these mechanisms does not prevent a project from qualifying as an official international co-production, but they do not, in themselves, constitute a legal basis for such recognition. Recognition as an official co-production always depends on an assessment of compliance with the rules in force under the relevant treaties and agreements and, especially when dealing with a country with which Brazil has no co-production agreement, requires a detailed review of each individual case.*

The diagnosis was clear: the issue was not a lack of interest or talent, but rather a series of specific obstacles that the sector has been unable to tackle.

The following diagnosis emerged:

- **The main obstacle is financial asynchrony**

Brazilian funding schedules do not align with international negotiation timelines. This means that the Brazilian producer comes to the co-production table without knowing whether their local funds will be available, which puts them at a structural disadvantage compared to European or North American partners, who operate with fixed timelines.

- **Brazil prioritized IPs and neglected service policy**

While the country developed incentives for proprietary intellectual property, it failed to build an equivalent framework for service provision. This is precisely the most accessible entry point to international collaboration for most companies.

- **Bilateral frameworks exist but are not used**

The Ibero-American co-production agreement was ratified by Brazil, however it has not yet entered into force. The most widely used instrument is the Latin American agreement, which involves a group of countries. This agreement is supplemented by bilateral agreements between countries in the region. Despite this existing framework, it is minimally utilized. The issue is not only legal, but also a mutual lack of knowledge. Producers on both sides lack in-depth knowledge of each other's funds, processes, and requirements.

- **Participation in international markets is structurally low**

Only 30% of Brazilian companies attend international marketing forums. Between 48% and 53% of Brazilian companies have not participated in any market event in the last three years. Without a sustained presence at these forums, trust relationships necessary for co-production cannot be established.

- **Unbalanced co-productions**

The distribution of rights is another critical bottleneck. For example, agreements in which Brazil contributes talent and cedes 50% of the IP in exchange for overpriced services — such as French sound design costing five times more than in Brazil — end up being unfavorable deals disguised as co-productions. Currency devaluation exacerbates this imbalance. A weak local currency against the dollar makes foreign services more expensive and reduces the bargaining power of Brazilian producers. However, this very imbalance can be leveraged to stimulate the export of Brazilian animation services, making them more competitive in the international market. The sector needs frameworks that guarantee fairness and address both sides of this phenomenon.

- **Bureaucracy as a systemic obstacle:**

58% of the sector identifies bureaucracy as a major limiting factor, including cumbersome import/export procedures that hinder international collaboration.

- **Attraction of private investment is almost nonexistent:**

Fifty-nine percent cite access to capital as the main obstacle. The sector depends almost exclusively on public funding.

- **Dropping children's content and short films:**

the lack of specific funding for these formats weakens both audience development and technical experimentation.

- **The absence of a specific policy for animation :**

causes the sector to be regulated by the same parameters applied to live-action production. This results in timelines, production stages, and the regulation of professionals not being properly considered.

2. Strengths of the Brazilian sector for Ibero-American integration

- **Top-Tier Technical Talent:**

Brazilian projects compete with those from European production hubs in terms of quality. The skill level of Brazilian animators is on par with the global market.

- **Complete Production Chain:**

88% do not need to outsource outside Brazil, indicating an industry capable of covering all stages of the production process. However, this self-sufficiency has a dual dimension: it reflects real capacity, but it is also a response to a regulatory structure that does not allow for international co-production, compelling many studios to work in-house with constrained budgets.

- **Growing sophistication in executive management:**

the perception that a lack of commercial expertise is a limiting factor fell from 48% to 35% between 2019 and 2025.

- **Real cultural soft power:**

Brazil ranks 26th globally in cultural influence, an asset that is still underutilized in Ibero-American audiovisual diplomacy.

- **Internationally recognized narrative value:**

China is one of the main export destinations for Brazilian IPs, with the same percentage as Canada (20% each), demonstrating that domestic production is in demand in highly diverse markets.

- **Linguistic identity as a strategic advantage:**

Portuguese is not a barrier, but rather an identity marker that fosters natural connections with the Ibero-American world. “Portuñol” (a hybrid language blending Spanish and Portuguese) is a bridge, not an obstacle.

- **Active industry association ecosystem:**

ABCA, Abranima, and BRAVI are coordinating the sector with growing technical and political capacity.

- **Emerging productive decentralization:**

Successful experiences in different regions of the country demonstrate that talent is not only concentrated in the São Paulo–Rio de Janeiro area.

3. Opportunities and reference models

In addition to diagnosing obstacles, the debate identified favorable conditions and specific experiences that suggest how Ibero-American co-production can grow from Brazil.

- **The Ibero-American bloc is the closest and most underexploited partner**

Argentina and Mexico are export destinations for IPs (19% and 14%, respectively), yet they barely show as formal co-production partners. Chile is a rising case. Portugal and Spain serve as natural bridges to the European market. The shared cultural infrastructure — language, history, imaginaries — exists, but the institutional structure to activate it is missing.

- **Service provision as an entry point**

The debate was clear on this point: ‘service’ is not a minor category nor a stage to be rushed through. It is the most realistic way to generate trust, mutual knowledge, talent development, and collaboration networks that, over time, lead to fair co-productions. Treating it as such and fostering it accordingly is one of the most accessible ways to strengthen ties with the rest of the bloc. In this sense, the participation of Brazilian animation studios in goods and services export programs — such as those offered by Apex Brasil — was identified as the most effective and efficient way to move in that direction.

- **TV Cultura as a model of regional coordination**

TV Cultura was highlighted as an organization with a proven track record and significant potential: an institution with a recognized international brand, experience in co-production with Latin America, and the capacity to serve as an institutional anchor for regional projects. Its presence at the table reinforces the idea that public broadcasters can play a strategic role in Ibero-American cooperation beyond market-driven logic.

• ‘Anima TV’* as a model for an integrated approach

The Anima TV program was cited as an example worth emulating: its success stemmed not only from funding but also from combining financial support with training, mentoring, and clear production guidelines. The result was a generation of commercially sound content from the outset. Reviving this integrated approach—funding coupled with support—is one of the most specific demands emerging from the debate.

**Anima TV’ was a Brazilian program promoting animation for television, active in the 2000s, which combined public funding with training and mentorship for production teams.*

• The Mercosur–European Union Agreement*

The Brazilian Senate’s approval of the agreement was hailed as a milestone with the potential to lower tariffs on hardware and software. Implementation is scheduled to take place over the next 18 years, which requires advance planning; but for the industry, the political signal is already valuable.

**The Mercosur–European Union agreement, approved in the Brazilian Senate in 2026 after decades of negotiation, establishes a free trade zone between the two blocs that includes, among other aspects, the gradual reduction of tariffs on technological goods such as hardware and software.*

4. Specific proposals

The proposals that emerged from the discussion are organized around three main themes and involve actions at the municipal, state, and federal levels. These are not vague aspirations; they are demands identified by the sector’s stakeholders themselves based on specific obstacles.

On Institutional Predictability

- Establishing fixed schedules for opening calls for proposals that allow production companies to commit to international co-production deadlines with legal and financial certainty.
- Creating an interagency working group—comprising ANCINE, Apex Brasil, Itamaraty, and the Department of Federal Revenue—to streamline import/export procedures and coordinate the sector’s presence at international markets.
- Training development analysts in the specific processes of animation—the pipeline, rendering, and rigging—so that projects are not evaluated using live-action criteria

On Promotion Policy

- Developing specific initiatives to expand the range of services offered, viewed as a strategic step toward equitable co-production and the creation of networks of trust within the region.
- Reviving the approach of the Anima TV model: integrated support that includes training, mentorship, and production guidelines, rather than merely the transfer of funds.
- Creating specific lines of funding for short films and children’s content, recognizing them as talent incubators and tools for building new audiences.
- Designing contractual safeguards that protect fairness in the distribution of intellectual property rights in international co-productions, preventing unbalanced transfers under financial pressure

On Ibero-American integration

- Activating existing bilateral co-production frameworks through tangible actions: workshops to foster mutual understanding among national associations, reciprocal trade missions, and mapping of available funding in each country within the bloc.

- Increasing systematic participation in Ibero-American market forums—such as the Quirino Awards, MIFA, Pixelatl, and Ventana Sur—with specific institutional support for medium-sized companies and independent professionals.
- Strengthening the partnership with the Quirino Awards as a platform to elevate the profile and foster the integration of Brazilian animation across the region, through practical initiatives such as screening the award-winning films from each edition in Brazil or organizing events to showcase the creative processes behind Ibero-American animation, among other ideas

Closing

The São Paulo debate left one thing clear: the obstacles to Ibero-American co-production in Brazil are not related to talent or quality. They stem from institutional structures. The sector has the technical capacity, narrative diversity, and cultural clout to occupy a central place in the world of Ibero-American animation. What it needs is predictability, operational frameworks, and a sustained presence in the spheres where this sector is taking shape.

Brazil does not need to prove that it can be a powerhouse of Ibero-American animation: it already is. The question that the Futures Lab brought to São Paulo was another: how to build together a region where Brazil and the rest of Ibero-America will strengthen each other.

This document compiles the conclusions of that first meeting as a starting point for the work that the Quirino Futures Lab will continue to build alongside the region.

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