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The economic and artistic impact of cultural policies on the comics industry

Galina Vizer



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The Economic and Artistic Impact of Cultural Policies on the
Comics Industry

Galina Vizer

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Abstract

This research explores the economic and artistic impact of cultural policy on the development of national comics industries through a comparative case study of Japan, France, and Russia. The study investigates how different state roles shape the institutionalization, market structure, and diversity of comics as a cultural and economic sector. Japan exemplifies a market-driven model with minimal direct intervention. France represents a state-centered approach. In contrast, Russia illustrates the challenges faced by emerging markets in the absence of systemic state support, that emphasize ideological conformity over artistic autonomy. By analyzing qualitative data from policy documents and industry reports, the research highlights how cultural policy can either enable or constrain the growth of comics as a creative industry. The study concludes with strategic recommendations for emerging markets, particularly Russia, advocating for hybrid models of support that combine institutional recognition with market-driven innovation to foster sustainable and diverse comic ecosystems.

Keywords:

comics industry; cultural policy; creative industries; manga; state support.

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THE ECONOMIC AND ARTISTIC IMPACT OF CULTURAL POLICIES ON THE COMICS INDUSTRY

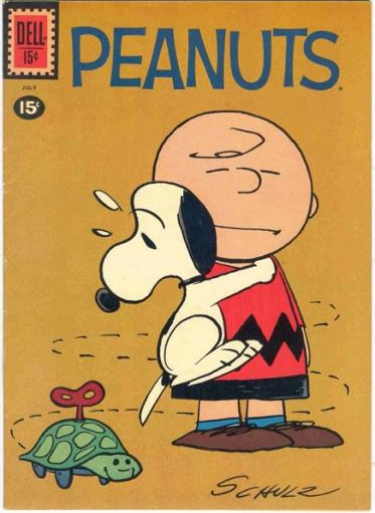
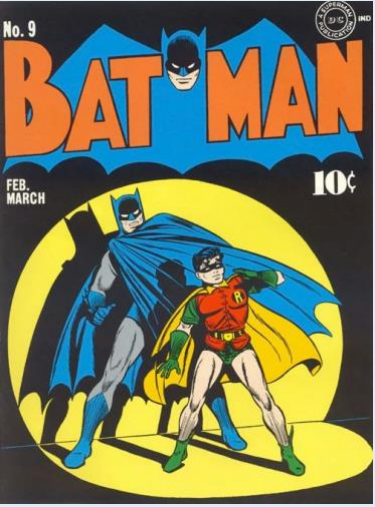
Introduction




In today's fast moving world the concept of "creative industries" (recognized as one of the key drivers of growth in the modern economy and supported by evidence that they "account for 3% of global GDP and employ more people aged 15 - 29 than any other sector")¹ has become widespread in academic literature and economic practice. One of the most popular and profitable industries today is the comics industry, which, unfortunately, is not developing successfully and evenly in all countries (Bouquillion, P., & Combès, Y., 2011).

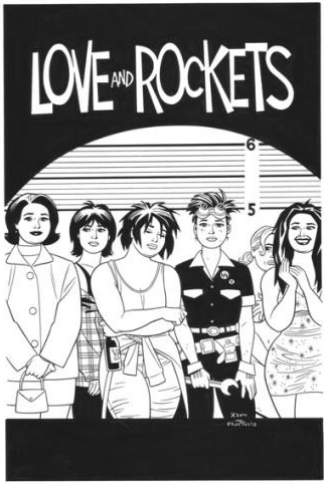
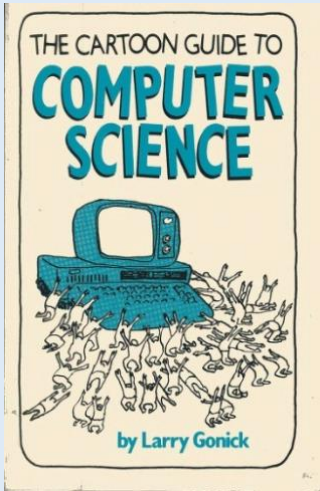
Firstly, let us start by defining a comic as a cultural phenomenon. In this research we consider a comic as a medium that uses a combination of images and text, most often in the form of sequential panels, to tell a story or convey information (Gravett, P., 2021). Comics can be fictional or non-fictional, humorous or serious, and span a wide variety of genres and styles. There are also several types of comics. Comic strips are short, serialized sequences of panels often published in newspapers or magazines. Comic books are longer publications, either stand-alone or serialized, which use sequential art to tell stories. Graphic novels are more complex and lengthy works that present a complete story with the depth and structure of a novel. Manga is a distinctive style of comic originating from Japan, usually printed in black and white and read from right to

¹ UNESCO. (2021, October 21). *Cutting edge: Culture is a launch pad for the future of work*. UNESCO, accessed March 17, 2025, <https://www.unesco.org/en/articles/cutting-edge-culture-launch-pad-future-work>

left. Webcomics are comics published online, often in serialized form and sometimes available for free or via subscription. Alternative or independent comics are created outside mainstream publishers and often explore personal or experimental themes. Finally, educational and non-fiction comics use the comic format to explain complex subjects, teach lessons, or tell real-life stories.

Type	Description	Examples
Comic Strips	Short, serialized panels in newspapers/magazines	Garfield, Peanuts 
Comic Books	Serialized stories in magazine format	Superman, Batman 
Graphic Novels	Longer, novel-length complete stories	Maus, Persepolis

		
<p>Manga</p>	<p>Japanese comics, right-to-left, distinctive art</p>	<p>One Piece, Naruto</p> 
<p>Webcomics</p>	<p>Published online, often serialized</p>	<p>xkcd, Sarah's Scribbles</p> 
<p>Alternative Comics</p>	<p>Non-mainstream, experimental themes</p>	<p>Love and Rockets</p>

		
Educational Comics	Teach, explain, or present real-life stories	March, Cartoon Guide 

In this context it is important to mention the difference between comics and cartoons. Such issue often generates confusion due to their shared use of drawn imagery, stylized expression, and humorous or satirical tones. However, the key difference lies in their narrative structure and formal presentation. Comics are primarily defined by sequential storytelling, using multiple panels arranged in a deliberate order to convey a story, idea, or progression of events. In contrast, cartoons typically refer to single, standalone images, that are designed to communicate a punchline, opinion, or concept in a compact format. This boundary, while conceptually useful, is not always rigid. Certain formats, such as comic strips, blur the distinction by combining sequential logic with the visual economy and humor of cartoons. Similarly, many comic book characters have been adapted into

animated cartoons, creating a fluid exchange between the two mediums. Despite these overlaps, the central differentiator remains the scope of narrative: comics build stories through a visual sequence, whereas cartoons often convey meaning within a single frame or short clip.

At any rate, the comic book industry has been demonstrating sustainable development for many decades, showing a high degree of flexibility and the ability to adapt to constantly changing social, economic and technological conditions. Despite periodic crises related to changes in consumer preferences, economic downturns, or the emergence of new forms of media, the comic book market remains viable, finding new ways to attract and retain an audience.

Countries with a deeply rooted culture of comic book consumption, such as, for example, Japan and France, have developed unique ecosystems, each of which demonstrates its own development model. Japanese manga covers an extremely wide range of genres and target audiences, from teenagers to adults, from fiction to slice of life, and is characterized by a serial publication model in specialized magazines such as *Shonen Jump*, followed by the release of volumes. France, where comics (*bande dessinée*) are recognized as an important part of the national cultural heritage, supports artistic diversity and high standards of artistic design, and government cultural policy promotes and exports products (Lefèvre, P., 2013).

The success of these markets is due to a combination of strategic factors: a well-thought-out publishing policy, effective marketing, active participation in international festivals, talent support, competent work with fan communities or readers as well as the introduction of digital technologies such as online platforms, mobile applications and NFT initiatives. These elements make it possible not only to maintain interest in the product,

but also to constantly expand the audience, including by going beyond the traditional paper format.

At the same time, in emerging markets such as Russia and other Eastern European countries the comics industry is facing several serious challenges. The most pressing problems include an underdeveloped distribution infrastructure, a limited number of professional publishers, weak institutional support, low awareness of the potential audience about the variety of forms and genres of comics, as well as competition from more familiar forms of leisure such as cinema, television or video games. In addition, there is often a skeptical attitude towards the comic book format itself, which is perceived as exclusively childish or frivolous reading.

However, it is precisely in these conditions that the potential for breakthrough growth arises: the lack of established standards provides space for experimentation; the ability to borrow and adapt proven solutions from more mature markets reduces the path of trial and error, and globalization opens access to new channels of distribution and interaction with the audience. In this context, it is especially important to study the experience of successful strategies of developed countries and critically reflect on how they can be applied in new cultural and economic realities.

The relevance of this work is due to the need to identify and transform the most effective elements of industrial and marketing practices in mature comic book markets for use in developing countries. Such a study allows not only to deepen understanding of the patterns of industry development in a global context, but also to form recommendations for publishers, artists, cultural managers and government agencies interested in forming a sustainable ecosystem of comics.

The purpose of the study is to analyze the key success mechanisms using the example of Japan and France, and then adapt them to the realities of developing regions, taking into account local cultural and infrastructural features. Furthermore, this research is needed because it addresses the critical gap between the potential of comics as a cultural and economic force and the underdevelopment of the comic industry in emerging markets like Russia. While established industries in Japan and France have demonstrated how strategic innovation, cultural adaptation, and technological advancements can drive growth, Russia's comic industry struggles with limited infrastructure, fragmented distribution networks, and societal perceptions that undervalue comics as a legitimate art form. Russian comic artist and publisher Artem Bizyaev² has pointed out that while there is growing interest in comics among younger audiences in Russia, the lack of state support and professional platforms hinders creators from reaching their full potential. By analyzing proven strategies from successful markets, this study aims to provide actionable insights that can be tailored to Russia's unique socio-economic and cultural context. Furthermore, fostering growth in Russia's comic industry has broader implications: it can contribute to diversifying creative economies, enhance literacy through visual storytelling, and strengthen cultural diplomacy by amplifying local narratives on a global stage. This research not only seeks to bridge theoretical knowledge with practical application but also aspires to empower emerging markets (such as Eastern European ones) to realize their untapped potential in the global comics ecosystem.

² Artem Bizyaev Interview, 2021 <https://style.rbc.ru/people/616417dd9a794734567381c0>

Relevance of the Topic

As cultural industries continue to expand in the digital era, understanding the factors that contribute to the success of comics industries is essential for both economic and artistic development. The global demand for comics and graphic novels has surged in recent years, driven by digitalization, transmedia storytelling, and international adaptations (Gravett, P., 2021). While established industries benefit from these trends, emerging markets often struggle with limited access to resources, policy support, and market visibility (Molotkov A., 2019).

The relevance of this research extends beyond comics, as it provides insights into broader cultural policy frameworks and economic strategies that influence creative industries. Examining successful models from France and Japan can inform policy recommendations for developing sustainable infrastructure in less mature markets. Additionally, as comics gain recognition as a legitimate art form, understanding the mechanisms that enable their institutionalization can benefit cultural policymakers, industry stakeholders, and creators alike (Beaty, 2007; Duncan & Smith, 2013). By addressing these issues, this study offers both theoretical contributions and practical applications for fostering the growth of the comics industry in emerging markets.

Hypothesis

Successful strategies from established comics industries can be adapted to foster growth in emerging markets. The economic, cultural, and policy-driven approaches of countries like France and Japan provide valuable insights into industry development, which can be leveraged to enhance market accessibility, support artistic innovation, and establish sustainable business models in less developed comics industries.

Objectives

This research aims to:

- Analyze the economic, cultural, and policy factors contributing to the success of the comics industries in France and Japan.
- Identify key strategies that have facilitated the growth and institutionalization of comics in these markets.
- Assess the challenges faced by emerging comics industries, with a focus on Russia as a case study.
- Explore potential adaptations of successful models to support the development of the comics industry in Russia.
- Provide policy and industry recommendations for fostering a sustainable and competitive comics market in emerging regions.

Methodology

This research employs a qualitative comparative case study approach to examine the factors contributing to the success of established comics industries and their potential application to emerging markets. The methodology consists of the following components:

1. Case Study Selection and data collection

Two established comics industries (France and Japan) are selected for analysis due to their strong market presence, distinct industry structures, and differing policy approaches. Russia serves as the primary case for adaptation, representing a less developed comics industry with growth potential.

This research adopts a multiple case study approach as the primary methodological framework to analyze the development of the comics industry in different national contexts and the role cultural policies play in fostering or hindering that development. This approach is chosen to gain a deeper understanding of how policy frameworks, market structures, and cultural recognition influence the comics industry's success across different regions. The comparative nature of the case studies allows for the identification of both common strategies and context-specific variables that contribute to sustainable industry growth.

A comprehensive literature review supports the case study analysis, incorporating academic studies, government policy documents, industry reports, and journalistic sources. Quantitative and qualitative data will be gathered from public and institutional sources such as publishers' financial data, and existing surveys on readership and market size. The methodology aligns with Creswell and Poth's (2018) model of multiple case study research, where several national contexts are analyzed to illustrate a broader issue - in this case, the relationship between state policy and comics industry development. The

selected countries represent two distinct trajectories: well-developed markets (France and Japan) and an underdeveloped or emerging market (Russia). These cases will be studied within a bounded system, framed by temporal (2000–2025) and geographical (national policy and industry developments) limits.

Each case study will be examined through the following components:

- Contextualization of the comics industry

This includes an overview of the country's comics history, cultural relevance, and the current market status. Key developments such as the recognition of comics as art, milestones in industry growth, and shifts in public perception will be traced.

- Cultural policy and legislation analysis

National legislation and policy documents related to cultural funding, intellectual property rights, artist support programs, and media promotion will be reviewed. Attention will be given to how these frameworks affect creators' opportunities, market entry, and long-term sustainability.

- Economic and institutional structures

Market size, sales data, number of publishers, availability of grants, and presence of public support institutions will be studied. Funding models, the role of festivals, educational initiatives, and public libraries will be analyzed to understand their role in industry support.

- Industry stakeholder behavior and state interaction

The analysis will explore the roles of publishers, government agencies, artists' unions, and cultural intermediaries. How the state interacts with the comics industry, whether as a regulator, a patron or a passive observer, will be evaluated.

Criteria for Case Selection

- a. **Policy contrast:** The cases selected must exhibit significant differences in the scope and intensity of cultural policy regarding comics. France represents a state-interventionist model with strong institutional support, while Japan shows a commercially driven model with minimal direct policy involvement. Russia is selected as a developing market with weak institutional structures for comics.
- b. **Cultural impact and recognition:** Countries where comics are seen as either mainstream entertainment or recognized cultural products are prioritized, as this distinction impacts policy and public funding.
- c. **Economic maturity:** Inclusion of both highly developed and emerging markets facilitates comparison and enhances the validity of cross-case generalizations.

2. Comparative Analysis

The study employs a comparative framework to identify key success factors in the French and Japanese comics industries. The analysis focuses on:

- Economic Structures: How funding, distribution, and international markets contribute to industry sustainability.
- Cultural Policies: The impact of government intervention, grants, and institutional support.
- Industry Organization: The role of publishers, digital platforms, and independent creators in market development.

3. Application to Emerging Markets

Findings from the comparative analysis will be used to propose a model for adapting successful strategies to Russia's comics industry. Recommendations will address:

- Policy interventions to support comics as a cultural and economic asset.
- Funding mechanisms and infrastructure development.
- Strategies for increasing audience engagement and market expansion.

Expected Outcomes

The comparative analysis of the three case studies will aim to develop a typology of state interaction with the comics industry, analogous to frameworks applied in cultural heritage and arts funding studies. Tentative categories may include:

- **State as Patron:** active support through funding, recognition, and infrastructure (e.g., France).
- **State as Enabler:** minimal regulation but supportive legal frameworks and export strategies (e.g., Japan).
- **State as Passive Actor:** weak or inconsistent policy presence, limited infrastructure (e.g., Russia).

The study will ultimately propose strategic recommendations to adapt elements from successful models to strengthen comics industries in emerging markets, contributing to both academic research in cultural policy and the practical field of arts and media management.

Case Studies

Building on the methodological framework outlined above, the following section presents a comparative analysis of three national case studies (Japan, France, and Russia) selected for their contrasting policy approaches, levels of industry maturity, and cultural positioning of comics. Each case study contains a table with the key findings in the end.

Case study I

Japan

At the turn of the 20th and 21st centuries, the comics industry acquired the status of a significant cultural and economic phenomenon in many countries of the world. Japan occupies a special place in this context, where manga has not only become a popular form of mass art, but has also become a powerful export product that has a significant impact on the global cultural economy. The origins of this phenomenon date back to the post-war period, when Japanese manga began to take shape as a unique phenomenon at the junction of artistic traditions and market accessibility (Eiji, O., & Kayoko, Y., 2017).

By the 1960s, manga had already established itself as the leading form of visual storytelling and entertainment in Japan. This rise was made possible by a combination of several favorable factors: a high level of literacy among the population, a rapidly developing publishing sector, as well as a relatively limited number of competing media formats. Manga offered the reader not only a variety of genres and plots, but also a convenient format for consumption, from cheap newspaper issues to paperback volumes (Ito, K., 2005).

An important stage in the development of Japanese manga was its recognition as a legitimate element of national culture. Previously, comics were perceived primarily as a product of children's or adolescent reading, but over time, attitudes towards them have changed dramatically. At the beginning of the 21st century, the opening of institutions such as the International Manga Museum in Kyoto (2006) became a symbol of the institutional recognition of manga as part of the country's cultural heritage. Researchers and critics are increasingly including manga works in discussions of modern aesthetics, visual culture, and socio-cultural dynamics in Japan (Ito, K. 2005).

In parallel with the growth of internal recognition, there was also a rapid expansion of the market. Publishers, initially focused on publishing specialized magazines and collections, have gradually mastered new formats, from digital platforms to multimedia adaptations. (Ulitina, O., 2025).

Today, manga occupies a central place in the structure of Japanese cultural exports. According to the latest data, manga accounts for about 38% of Japan's total content exports (2.1 trillion yen or \approx 13.58 billion EUR). The main foreign markets remain North America and Europe, where interest in Japanese visual culture is steadily growing (Li, J., 2023).

For the first time, D. McGray drew wide attention to the economic and political potential of the Japanese "creative industries", who in his article published in 2002 argued that Japan was "reinventing the concept of a superpower" (McGray, 2002). In the decades after World War II, the "Japanese economic miracle" led to the international association of the Land of the Rising Sun with economic power, high-quality Japanese technology and consumer products such as electronics and automobiles. Then a prolonged economic stagnation (The "lost decade" that began after the 1991-1992 crisis) deprived Japan of the status of an economic superpower. Despite this, Japan's global cultural influence has only increased, making the country a new type of superpower (McGray, 2002).

According to E. Kakiuchi, the potential of "creative industries" as a driver of the development of the modern Japanese economy, an important component of a new economic model capable of revitalizing the national economy, began to be widely discussed (Kakiuchi E., 2014).

At the state level, the strategy of using modern media and pop culture in the national interest was officially proclaimed in Japan by the government of D. Koizumi (2001-2006)

(Iwabuchi K., 2015). Addressing the country's parliament in January in 2005, Koizumi stated that the government would promote a positive perception of Japan abroad by promoting products from creative industries such as cinema, animation, and fashion.

A number of government committees have been set up to promote such products. A general term for concepts and strategies related to the promotion of Japanese cultural products, the phrase 'Cool Japan' became popular. In 2010, as part of The Ministry of Economy, Trade and Industry of Japan (METI) has established a Cool Japan office to oversee the implementation of this initiative.

Japan's Legislative and Copyright Frameworks: Enabling a Creative Economy

Japan's legal and institutional frameworks form the bedrock of the manga industry's robust and dynamic evolution. Central to this success is Japan's nuanced copyright legislation, which, unlike stricter Western counterparts, allows for the existence of doujinshi - unofficial, fan-created works. These are often distributed through niche platforms or fan conventions such as Comiket, the world's largest self-published comic market. While technically infringing on copyrights, doujinshi are widely tolerated as long as they do not commercially threaten the original works. This fosters a participatory culture that encourages emerging artists, some of whom transition into professional roles within the industry (Schroff, S., 2019).

This legal leniency has turned the doujinshi ecosystem into a valuable pipeline for talent scouting and innovation. Major publishers often monitor doujinshi trends to identify new creators and assess market interest in specific genres. This symbiosis between the formal and informal sectors stimulates creativity while maintaining legal order: a rare balance in international copyright systems.

Moreover, anti-monopoly regulations in Japan have played a vital role in stabilizing the market by enforcing standardized pricing across manga volumes. This system prevents

aggressive price wars and undercutting practices that are common in unregulated publishing industries. As a result, creators and small publishers are assured a fair share of profits, promoting long-term sustainability. Although some critics argue that this limits price innovation, the structure offers a degree of market predictability crucial for planning, especially in print-heavy industries.

In economic terms, these policies have proven effective. By 2023, the manga industry was generating over ¥ 612 billion (€ 4.25 billion) annually - a figure likely underreported due to proprietary corporate data. This success reflects not only a creative community but also an ecosystem safeguarded by forward-thinking legal norms (Li, J., 2023).

Strategic Promotion: Deep Dive into the “Cool Japan” Initiative

The “Cool Japan” initiative, launched in the early 2010s under the auspices of the Ministry of Economy, Trade, and Industry (METI), signified a turning point in the Japanese government’s approach to cultural products. What had once been viewed as niche entertainment became recognized as a strategic export with the potential to enhance national branding, boost tourism, and drive economic growth.

Between 2013 and 2020, the government allocated ¥50 billion (≈ €323.4 million EUR) toward promoting Japan’s content industries abroad. Manga, alongside anime and fashion, was central to this effort. One notable program under Cool Japan was the International Manga Awards, established by the Ministry of Foreign Affairs to recognize outstanding contributions by non-Japanese manga creators. These awards not only legitimized foreign artists but also expanded the manga community across borders, encouraging the production of manga-like content in diverse cultural contexts from Europe to Latin America.

Another impactful strategy was the Content Industry Promotion Grants, which provided critical funding to small and mid-sized publishers. These subsidies were instrumental in

helping firms digitize older manga archives, develop mobile reading platforms, and localize works into multiple languages, particularly English, French, Spanish, and Korean. The localization process often includes not just translation but also cultural adaptation to enhance reader relatability in foreign markets. This targeted funding significantly lowered entry barriers, allowing more niche genres - such as iyashikei (healing manga) or seinen (mature-themed stories) - to reach international readers (Nam, N.K., & 조규훈, 2020).

Moreover, manga became an active component of cultural diplomacy. Japanese embassies and cultural centers worldwide hosted manga-themed events, including exhibitions, drawing workshops, and academic conferences. These activities positioned manga not merely as entertainment but as a subject of aesthetic and anthropological interest, thus expanding its legitimacy and appeal.

The Cool Japan strategy was, in part, a response to the meteoric rise of Hallyu - South Korea's cultural wave. Korean dramas, pop music (K-pop), and webtoons had begun to capture global attention, prompting Japan to consolidate its own soft power assets. By harnessing manga's organic global popularity and aligning it with diplomatic goals, the Cool Japan campaign turned manga into a flagship for national branding.

Market and Economic Impact: From Print Shops to Global Conglomerates

The economic ramifications of Cool Japan's manga-focused initiatives have been both direct and multifaceted. Most visibly, Japan saw a dramatic increase in content exports, with manga comprising approximately 38% of the total ¥2.1 trillion (≈ €13.5828 billion) in content exports by 2024. This reflects both organic demand and deliberate governmental support.

The U.S. market, in particular, experienced a surge in manga consumption. Between 2019 and 2024, manga sales grew by 240%, fueled by expanded distribution networks through Amazon, Barnes & Noble, and digital services like ComiXology. This expansion

was further accelerated by co-branding partnerships with major streaming platforms such as Crunchyroll, Netflix, and HBO Max, which adapted manga into globally distributed anime, often releasing dubbed and subtitled versions within days of the Japanese broadcast (Tong, D., 2022).

Licensing revenues also soared. Adaptations of manga into live-action films, animation series, and merchandise generated ¥98 billion (≈ €637.56 million) annually by 2024. Titles like Demon Slayer, Attack on Titan, and Jujutsu Kaisen became not only cultural touchstones but commercial empires, with cross-industry synergies across gaming, publishing, and apparel (Sun, A., 2024).

The industry's economic influence extended into tourism and urban development. Manga-themed districts such as Akihabara in Tokyo and Osaka's Nipponbashi were revitalized into high-density tourist zones. In 2024 alone, Akihabara attracted 3.2 million international visitors, generating an estimated ¥120 billion (≈ €776.16 million) in economic activity. Manga cafés, themed hotels, and experience-based stores (e.g., "Shonen Jump World") contributed to this boom.

Indirect sectors also benefited. Airlines like ANA began offering manga-themed in-flight entertainment and meals. Retail outlets developed branded product lines, leading to an 18% year-on-year increase in tourist spending on manga-related merchandise. Employment within the industry has also scaled up, with over 30,000 jobs supporting artists, editors, localization specialists, tech developers, and event organizers (Tong, D., 2022).

Cultural Recognition and the Complexities of Global Visibility

Manga's elevation as a cultural symbol has come with both recognition and resistance. On one hand, it is now widely studied in academic disciplines such as cultural studies,

gender theory, and media anthropology. Universities across the globe offer courses and degrees focused on manga, and research conferences regularly explore its aesthetics and socio-political implications (Sun, A., 2024).

However, the globalization of manga has triggered significant debates. One of the most pressing issues is scanlation piracy. Despite the growth of official distribution channels, many readers still access unauthorized versions online. These pirated translations, often released within days of a manga's Japanese release, cost publishers an estimated ¥180 billion (≈ €1.16 billion) annually (Sun, A., 2024). Legal measures and international copyright enforcement have made some progress, but new platforms continue to emerge, complicating eradication efforts.

Moreover, critics argue that government and industry stakeholders have at times sacrificed artistic diversity for marketability. The prioritization of easily recognizable tropes, such as “kawaii” (cute) aesthetics, shonen battle formats, or harem narratives has led to a glut of formulaic content. While commercially successful, this trend may restrict creative innovation, especially among independent artists (Nam, N.K., & 조규훈, 2020).

The concentration of government grants under Cool Japan has also been scrutinized. Reports indicate that over 70% of public funds went to a handful of large publishers, marginalizing independent studios and alternative voices. This uneven distribution risks ossifying the industry and creating barriers to entry for younger or more experimental creators (Li, J., 2023).

Cultural authenticity is another point of contention.

Localization efforts often involve rewriting sound effects, modifying cultural references, or even redrawing certain scenes to conform to Western sensibilities. While these edits aim to increase accessibility, they raise concerns about the erosion of artistic intent and national identity in global markets.

Aspect	Details
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Cultural Policy Model	State as enabler : Indirect support through branding (<i>Cool Japan</i>), export subsidies, and soft power
Industry Maturity	Highly developed; manga is a dominant cultural form and economic sector since the 1960s
Institutional Infrastructure	Museums (e.g., Kyoto International Manga Museum), festivals, public recognition
Popular Genres/Themes	Wide thematic diversity: shonen, shojo, seinen, josei, iyashikei, fantasy, horror, slice-of-life
Export Strategy	Highly successful; manga accounts for 38% of Japan's content exports; strong global market
Fan Culture	Active otaku communities; doujinshi culture blurs line between creator and consumer
Digital Integration	Advanced digital platforms and global distribution (e.g., Webtoon, Shonen Jump+)
Legal Framework	Flexible copyright enforcement enables fan production; creators retain IP rights
Educational and Cultural Value	Increasing institutional legitimacy; manga studied in schools and universities
Challenges	Oversaturation, scanlation (piracy), labor precarity, dependence on export markets
Key Insight	Japan's manga industry thrives on balancing creator autonomy, fan participation, and global vision

Case study II France

The French comics industry, known as bande dessinée (BD), is a unique example of how government cultural policies are able to shape sustainable artistic ecosystems by effectively combining economic viability with institutional recognition and cultural significance. Unlike in many other countries, where comics have historically been perceived as a secondary form of popular culture, in France they have taken a strong place among respected artistic practices, becoming the object of state support and public interest (Reyns-Chikuma, C., 2019). This phenomenon deserves close attention as an example of the successful synergy between cultural policy, market dynamics and transnational influence.

The evolution of French comics - from the marginalized media of the 1950s to a thriving industry with an annual turnover of €870 million (as of 2023), covering 45% of comic book sales in the European Union - demonstrates how important strategic cultural planning plays. The central moment in the institutionalization of bande dessinée was the transformation of the 1980s, initiated by the Minister of Culture Jacques Lang (Pilcher, T., 2005). It was then that comics were officially recognized as part of the "cultural industry", which gave them the right to a reduced VAT rate (5.5%) and made it possible to receive subsidies through government agencies such as the Centre National du Livre (CNL). These measures not only changed the public perception of comics, but also contributed to the emergence of works that have received literary recognition - for example, the autobiographical graphic novel *Persepolis* by Marjan Satrapi has become a landmark work both in France and abroad.

One of the most notable aspects of the modern French comics market is its ability to adapt and integrate external cultural formats, primarily Japanese comics (manga).

Despite the Toubon Act (Toubon L., 1992), which sets a quota of 40% for French-language media content, manga currently accounts for about 38% of all comic book sales in the French market. This was facilitated by the emergence of so-called cross - border gatekeepers, mediators and publishers specializing in the localization of foreign works. They played a key role in adapting Japanese products to the French audience, from high-quality translation to marketing strategies that take into account the cultural context. This process not only expanded the genre and stylistic diversity of the French market, but also led to the emergence of new forms of aesthetic synthesis, in which the mannerisms of the Franco-Belgian tradition and the dynamics of the manga narrative intersect.

Cultural policy and legislative framework: an institutional analysis.

The French model of cultural policy, based on the principles of dirigisme (active government intervention in the cultural and economic sphere) is one of the most structured and consistently implemented in Europe. Its specificity lies in a combination of protectionism and institutional patronage aimed at preserving cultural sovereignty and supporting national creative industries. In the context of the comics industry, this strategy manifests itself both in the professional education system and in the mechanisms for distributing government support (Benneworth, P., 2016).

One of the key tools for embedding comics into the cultural production system was the launch of specialized educational institutions such as the National School of Games and Interactive Digital Media (ENJMIN), founded in 2005. This institution reflects a technocratic approach to the integration of art and commerce, focusing on the training of highly qualified specialists in the field of digital media, including graphic storytelling. However, such a strategy, for all its technological advantages, has contradictory consequences. A strong emphasis on technical excellence and industrial applicability

often displaces the elements of experimentation and grassroots creativity typical of independent comic scenes. Moreover, an analysis of demographic data on participants in government projects shows a persistent gender imbalance: only 32% of recipients of government support are women, indicating an institutionally reproducible asymmetry of access in the creative field (Benneworth, P., 2016).

No less revealing is the nature of the distribution of subsidies through the National Book Center (CNL), the main instrument of state support for literature and graphic culture. According to recent research, about 68% of all grant funds are allocated to projects dedicated to historical subjects or topics closely related to French national identity. This reflects the clear priority of cultural policy to promote the so called Frenchness, the concept of France's cultural exclusivity as an exported symbol. Thus, the state not only supports comics as an art form, but also actively forms a canon that helps consolidate certain historical and cultural narratives (Dauncey, H., 2012).

Meanwhile, market trends indicate a noticeable shift in the interests of the audience towards more modern, hybrid forms of storytelling, which are clearly influenced by Japanese manga. Here, the important role of cross-border gatekeepers is once again evident agents capable of refocusing consumer requests by offering localized versions of foreign products that meet current reader expectations. As a result, there is a contradiction between institutional priorities and market dynamics: while government support continues to strengthen traditional formats and themes, the commercial sector is increasingly responding to global cultural trends by creating new hybrid forms in genre and visual performance.

Economic and institutional structures: a hybrid financing model

The French comics industry is an example of a balanced symbiosis of market mechanisms and institutional intervention, where government initiatives contribute to the creation of a sustainable economic environment for creative production. This hybrid financing format, combining subsidies, tax incentives, and cultural infrastructure, allows market participants, both large publishers and independent authors, to integrate into the cultural economy at various levels. However, such a system also reproduces certain restrictions related to access to resources and symbolic capital.

One of the key manifestations of this model is the transformation of publishing strategies in the context of government support. In recent decades, there has been a trend in the French market in which large publishers have adopted the practices of *de novo* publishers focused exclusively on *bande dessinée*. As a result, there is a strategic shift from market logic (based on sales volumes and trends) to aesthetic logic, where cultural significance, critical recognition and institutional approval play an important role. A striking example here is the Gallimard publishing house, which, in an effort to gain access to CNL grants, expanded its line of graphic novels by actively investing in projects that meet the criteria for government support. Thus, publishing policy is increasingly focused not so much on direct commercial profit as on compliance with aesthetic and ideological guidelines of cultural policy (de Vries, R., 2021).

Another important element of the institutional economy of comics is the festival movement, the most important of which is the International Comic Book Festival in Angoulême (Festival International de la Bande Dessinée d'Angoulême). Since its foundation in 1974 and up to the present, it has received stable government funding, which has allowed it to become not only a central event for the professional community, but also a powerful economic actor on a regional scale. It is estimated that the annual

economic impact of the festival is about €28 million, including direct income from tourism, sales and adaptation rights. In addition, about 40% of the publishers participating in the event sign international contracts, which makes the festival an important platform for cultural diplomacy and export (Benneworth, P., 2016).

Nevertheless, the institutional structure of the festival reflects the same tension as the entire model of cultural policy: despite its role in promoting French comics abroad, the festival is often criticized for being overly focused on recognized and established authors. This limits the visibility and opportunities for independent artists, experimental projects, and new voices in the industry, who tend to remain on the fringes of the festival program or not gain access to the central venues at all. Thus, the mechanisms of institutional success can simultaneously contribute to the strengthening of comics as a cultural form and create barriers to its further democratization and renewal.

In general, the economic architecture of the French comics industry demonstrates the effectiveness of hybrid models, where the state acts not only as a sponsor, but also as a regulator of artistic values. However, persistent structural imbalances, whether in access to finance, in the educational system or in festival institutions, require further analysis, especially in the context of interaction with global trends and transnational audiences.

Stakeholder behavior and interaction with the Government: from regulation to partnership

The French comics industry operates in a unique system where the state simultaneously acts as a regulator and patron, shaping the regulatory environment and directly influencing the trajectory of the sector. This dual role contributes to the institutionalization of artistic practice, but also requires constant dialogue with key stakeholders (artists, publishers, professional associations, and multinational mediators). It is at this level, in

the process of political negotiations and cultural mediation mechanisms, that France's characteristic desire to balance the protection of national interests with openness to global cultural exchange manifests itself.

One of the illustrative examples of the institutional involvement of the creative community in the formation of the regulatory framework was the lobbying of the law "Exception Culturelle", adopted in 2016. Thanks to the efforts of professional unions of artists and copyright organizations, the legislation fixed the extension of copyright validity to 70 years after the death of the author, bringing France in line with the norms of the European Union. This step not only strengthened the legal protection of the authors, but also strengthened the economic stability of their heirs, which is especially important for franchises with a long lifecycle, such as *Les Aventures de Tintin* Hergé (Matsui, T., 2014). Thus, state regulation is not unilateral, but is formed through institutionalized channels of representation of the creative class, giving the entire system the features of cultural neo-corporatism.

At the same time, multinational players and cultural mediators demonstrate flexible strategies for adapting to French regulatory barriers, combining adherence to local laws with a focus on global trends. Thus, the Glénat publishing group, one of the largest importers of Japanese manga in France, successfully circumvented the potential restrictions imposed by the Toubon law (requiring quotas for French-language content), thanks to an initiative to launch French-Japanese co-productions (Matsui, T., 2014). These projects were not just translations, but the joint development of new narratives and artistic styles, simultaneously meeting the requirements of national legislation and meeting audience demand for manga-inspired visual and genre formats. Such a cross-border mediation strategy illustrates the ability of industrial actors to integrate the

protective mechanisms of cultural policy into the framework of globalized creative production.

Thus, the modern French model of interaction between the state and industrial entities goes beyond the traditional "market–state" dichotomy, forming a more complex system of mutual obligations and strategic partnership. In this context, the comics industry is becoming a field where cultural interests, economic calculations, and political values intersect, making it particularly revealing for analyzing cultural policy in the era of post-national media and the platform economy.

Institutional infrastructure and the role of public libraries: increased access and cultural recognition

One of the most stable and at the same time underestimated factors in the development of the French comics industry is the activity of public libraries (bibliothèques municipales), which act not only as repositories of knowledge, but also as active actors in cultural policy. Their contribution to the legitimization, popularization, and institutionalization of bande dessinée demonstrates how, through public access systems, it is possible not only to stimulate reader interest, but also to provide real support to the creative economy.

At the level of library collections, comics are now considered as a full-fledged component of the cultural fund, along with prose, poetry or scientific literature. Many libraries form specialized sections dedicated exclusively to bande dessinée, covering both canonical works and groundbreaking graphic novels. Such systematic integration contributes to the normalization of comic book consumption as a culturally significant practice and helps to expand the audience, reaching readers of all age categories and educational levels. This is especially important in the context of the national strategy to promote visual literacy and popularize reading in the context of the digital shift.

An additional impetus for the institutionalization of comics is provided through cultural mediation programs. Libraries regularly organize workshops, meetings with authors, exhibitions and reading clubs dedicated to graphic narratives. These events not only contribute to the formation of visual culture among the general public, but also provide artists and publishers with a unique opportunity for direct contact with the audience. The synchronization between local initiatives and government programs is particularly noticeable for example, within the framework of the nationwide *Année de la BD* (2020) project initiated by the Ministry of Culture, libraries have become key platforms for displaying comics as part of the national cultural heritage.

In addition, libraries play an important role in ensuring the financial sustainability of the industry. Mass purchases of publications, including products from small and independent publishers, create a stable channel of institutional demand, which often becomes critically important for young artists and small studios. For many of them, library purchases act as a kind of analogue of a guaranteed cultural contract, a form of indirect support that provides both coverage and income. Educational initiatives aimed at integrating comics into school and extracurricular programs are becoming an essential part of library activities. Together with teachers and animators, librarians organize cycles of comic book creation classes, thereby contributing to the development of creative skills among young people and the formation of a future readership. These practices work towards a strategic goal or the reproduction of cultural capital and the sustainability of the industry in the long term.

Finally, in the era of digital transformation, French libraries are actively exploring new media platforms, offering their users access to digital comics through subscription services and their own digital libraries. This expands the audience, makes reading more

accessible and allows authors to go beyond the traditional paper format, reaching new generations of readers accustomed to the screen perception of content.

Thus, public libraries in France perform not only a service function, but also a strategic one: they become mediators between cultural policy, the market and civil society, creating conditions for inclusive growth and institutional recognition of comics as an important part of the country's cultural ecosystem. Here is the summary table of this case study findings:

Aspect	Details
Cultural Policy Model	State as patron : Institutional support through subsidies, education, and heritage promotion
Industry Maturity	Long-established; BD (bande dessinée) accounts for 45% of EU comic sales; valued as national art
Institutional Infrastructure	CNLL grants, Angoulême Festival, school programs, public libraries with curated comic collections
Popular Genres/Themes	Literary, historical, philosophical themes; fusion of BD and manga aesthetics; growing diversity
Export Strategy	Focused on Francophone markets and cultural diplomacy; translated globally but less than manga
Cross-Border Dynamics	Japanese manga hybridized via CBGs like Glénat; local adaptations foster stylistic innovation
Digital Integration	Moderate but growing; digital comics supported by libraries and youth platforms
Legal Framework	Strict copyright with VAT reductions and cultural protections (Loi Toubon)
Educational and Cultural Value	Comics recognized in academia and schools; curated as part of national heritage
Challenges	Gender disparity, institutional gatekeeping, conservative funding priorities
Key Insight	France's comics model exemplifies how state-led cultural policy can professionalize and legitimize comics as high art

Case study III Russia

The comic industry in Russia has undergone a remarkable transformation over the past several decades, evolving from a marginal and ideologically constrained form of visual storytelling into a vibrant and increasingly professionalized field of cultural production. This development is particularly striking given the historical context in which comics were long suppressed or redirected toward propagandistic ends during the Soviet era. In this period, visual narratives resembling comics were limited to highly controlled children's publications and didactic illustrations, effectively stifling the emergence of a commercial or artistically autonomous comic tradition. The genre was often dismissed as a frivolous, Western, and bourgeois form of entertainment, incompatible with the ideological imperatives of the socialist state. As a result, the Soviet Union produced few comics in the conventional sense and largely excluded the medium from broader cultural discourse (Holquist, M., 2011).

However, the collapse of the Soviet Union in 1991 initiated a radical shift in the cultural landscape. The influx of foreign media, facilitated by new market mechanisms and the lifting of state censorship, allowed for the widespread introduction of Western comics, particularly American superhero franchises and Japanese manga. This period marked the beginning of a slow but steady growth in comic readership within Russia, as domestic audiences encountered a medium previously inaccessible or unfamiliar. Publishers in the 1990s and early 2000s primarily focused on translating and distributing foreign content, thus laying the groundwork for a comics-literate public. Nevertheless, during this formative stage, local production remained minimal, and the market was fragmented and commercially unstable (Holquist, M., 2011).

A significant turning point emerged in the 2010s with the rise of domestic comic creators and the establishment of Russian publishers dedicated to original content. Among the most influential of these was Bubble Comics, founded in 2011, which introduced a range of titles featuring uniquely Russian superhero figures. Works such as *Major Grom*³ and *Exlibrium*⁴ not only demonstrated a high level of artistic and narrative sophistication but also anchored themselves in Russian cultural contexts, incorporating folklore, historical motifs, and contemporary urban life. In doing so, Bubble succeeded in crafting a narrative universe distinct from its Western counterparts, thereby fostering a sense of national relevance and authenticity in the medium (Alaniz J., 2010).

This period also witnessed the proliferation of digital technologies and social media, which played a crucial role in democratizing access to the comic form. Independent artists increasingly turned to web platforms for publication and distribution, enabling direct engagement with readers and circumventing traditional publishing barriers. As a result, the Russian comics scene diversified rapidly, both in terms of genre and creator demographics. Beyond the conventional superhero paradigm, creators explored fantasy, science fiction, slice-of-life, horror, and even autobiographical storytelling, reflecting a broader range of voices and experiences (Alaniz J., 2010).

Despite these advances, the industry continues to face a number of structural challenges that hinder its full maturation. One of the most persistent obstacles is the relatively small size of the domestic market, which constrains revenue potential and limits economies of scale. Physical distribution remains concentrated in major urban centers such as Moscow and Saint Petersburg, while regional accessibility is hampered by weak logistical

³ Major Grom is a comic book series about Major Igor Grom, created by the Russian publishing house Bubble Comics and published between 2012 and 2017.

⁴ Exlibrium is a series of fantasy comics about the adventures of a young girl Lilia Romanova in the world of literary magicians, published by the Russian publishing house Bubble Comics from October 2014 to December 2018.

infrastructure. Although digital distribution is expanding, it is not yet sufficiently robust to compensate for the shortcomings of the physical retail system.

Cultural perceptions also continue to pose a significant barrier. Comics in Russia are still frequently regarded as children's entertainment or as subcultural artifacts with limited artistic value. This perception complicates efforts to integrate comics into educational, literary, or museum contexts, where institutional support remains limited. Furthermore, the problem of piracy, which affects many sectors of the Russian creative economy, is especially pronounced in the realm of digital comics. The ease of unauthorized reproduction significantly undermines the financial sustainability of both independent creators and established publishers.

Institutional and governmental support for the comic industry remains minimal, especially when compared to countries with well-developed cultural policies supporting sequential art. Nevertheless, there has been a gradual increase in public visibility and cultural legitimacy, facilitated by events such as Comic-Con Russia, regional festivals, and art exhibitions that feature comics as a legitimate artistic medium. These platforms offer essential exposure for creators and contribute to the formation of a national comics community (Saduov, R. T., 2019).

Looking ahead, several trends suggest a cautiously optimistic future for the Russian comic industry. The growth of original domestic production, supported by a new generation of talented writers and artists, signals a maturing creative ecosystem. Moreover, there is evidence of increasing international interest in Russian titles, with several works being translated and marketed abroad, thereby opening new avenues for export and cross-cultural exchange. The ongoing expansion of digital infrastructure also promises to improve both distribution and monetization, particularly for independent and niche creators. Finally, the adaptation of comic properties into other media forms such as

the film version of *Major Grom*, which received international attention demonstrates the potential for transmedia development and broader audience engagement.

Building upon the aforementioned developments, it becomes clear that the evolution of the Russian comic industry has followed a multi-phased trajectory, each stage building incrementally on the last. From near-complete suppression under Soviet cultural policies to its present state as an emerging and increasingly dynamic cultural market, the industry's growth has been shaped by both internal innovation and external influence.

Concurrently, digital technology played a transformative role in reshaping production and distribution practices. The proliferation of internet access, smartphones, and social media platforms provided new channels through which artists could connect with readers. Webcomics and online graphic novels became especially popular, allowing independent creators to circumvent traditional publishing gatekeepers and to test new formats and themes with niche audiences. This digital turn democratized comic production, opening the field to a broader range of voices and encouraging experimentation in form and genre. As a result, the thematic landscape of Russian comics expanded dramatically, encompassing not only superhero tales but also fantasy epics, science fiction adventures, autobiographical reflections, and slice-of-life narratives. Online platforms thus functioned not only as marketplaces but also as informal networks of collaboration, critique, and community-building (Markova M. V., n.d.).

The increasing visibility of Russian comics in the cultural mainstream has also been facilitated by the expansion of cross-media opportunities. Properties such as *Major Grom* have been successfully adapted into feature films and serialized screen content, signaling a new level of institutional recognition and commercial viability. These adaptations serve a dual function: they introduce comics to broader audiences and provide new revenue streams that can support further artistic development. Moreover, comic conventions, fan

festivals, and academic conferences dedicated to comics have become regular events in Russia's cultural calendar, suggesting a growing legitimacy of the medium within both popular and scholarly spheres.

Cultural policy influence on Russian comic industry

An essential dimension in understanding the development of the Russian comic industry lies in examining the role of cultural policy. While comics are not positioned at the center of Russia's state-supported cultural agenda, as is the case with more traditionally esteemed forms such as literature, cinema and theater, they are nonetheless indirectly shaped by overarching frameworks of state cultural governance. These frameworks, in turn, reflect the Russian government's broader emphasis on national identity, traditional values, and cultural sovereignty in the face of globalization (Markova, M. V., n.d.).

Russian cultural policy in recent years has been characterized by an increasingly pronounced effort to affirm and institutionalize what are often referred to as "traditional spiritual and moral values." This ideological foundation is not always explicitly directed at the comic industry, but it inevitably informs the broader creative environment in which comics are produced and consumed. State-organized round tables, public statements by cultural officials, and national strategy documents all underscore the importance of preserving a distinct Russian cultural identity, one that is resistant to perceived foreign ideological encroachment. Within this policy context, comic creators are subtly, and sometimes overtly, encouraged to explore themes aligned with national values, such as patriotism, family, heroism, historical continuity, and moral resilience.

One of the more pragmatic mechanisms through which cultural policy influences the comic sector is the policy of support for domestic production. This policy aligns with broader import-substitution strategies employed across various economic sectors in Russia. While originally designed to reduce dependence on foreign goods in industries

like agriculture or manufacturing, the logic of import substitution has increasingly been extended to the cultural field. In practice, this means that Russian publishers and content producers are incentivized, sometimes through institutional preference, market access, or symbolic capital to prioritize the development of homegrown intellectual properties over licensed foreign material. In the context of comics, this has provided an important foundation for the emergence of original Russian series that aim to both entertain and reinforce a sense of cultural specificity.

For example, the success of *Major Grom*, produced by Bubble Comics, exemplifies how domestic content can thrive within this environment. The narrative of *Major Grom* is deeply embedded in recognizable Russian settings, cultural references, and social dynamics, making it more congruent with state-endorsed visions of cultural relevance. Furthermore, by incorporating historical motifs and moral dilemmas reflective of contemporary Russian society, such works function as cultural artifacts that engage with current ideological discourses while maintaining mass appeal (Saduov, R. T., 2019).

In terms of market dynamics, the cultural emphasis on domestic content has gradually led to the formation of a more self-sustaining comic market. Rather than merely serving as a conduit for Western or Japanese comics, the Russian market now supports a growing number of local creators who produce content with an awareness of both national and global trends. This development has not only diversified the kinds of stories being told but also strengthened the professional infrastructure of the industry, from publishing houses to distribution networks and fan communities.

It is important to note, however, that direct state funding or structural support for comics remains limited. Unlike in the film industry, where state grants and co-productions play a significant role, comic artists and publishers largely operate in a market-oriented environment. Nonetheless, state-affiliated cultural platforms such as comic conventions,

exhibitions, and festivals have increasingly served as important venues for the presentation and celebration of Russian comics. These events often receive municipal or regional support and provide visibility to artists whose work aligns with national cultural priorities.

Another significant area of intersection between cultural policy and comics is the domain of cultural security. Within the official discourse, cultural security refers to the protection of national identity against external ideological influence, especially in the realm of media and popular culture. This has translated into a cautious, sometimes skeptical, approach to foreign cultural products, particularly those perceived as misaligned with Russian values. While this does not manifest in outright censorship of foreign comics, it does create a discursive climate in which domestically produced comics are more likely to be celebrated, reviewed, and institutionally acknowledged (Evdokimova, M., 2015).

As a result, the content of Russian comics frequently engages with themes that serve to preserve and reinforce cultural memory. Historical comics recounting key episodes in Russian history, stories based on Slavic mythology, and narratives exploring social issues through a local lens are increasingly common. Such works contribute not only to entertainment but also to the cultural project of defining and transmitting collective values to younger generations.

In sum, while comics may not be at the forefront of Russia's cultural policy agenda, they are nonetheless shaped by the same ideological and institutional currents that influence the broader creative landscape. Through a combination of indirect pressures, market incentives, and ideological alignment, Russian comics have been positioned as a legitimate, if still marginal, vehicle for the articulation of national identity and values. As the industry continues to mature, its relationship with cultural policy is likely to become

more complex, potentially opening new avenues for state support, academic engagement, and international recognition.

Building on the broader ideological orientation of Russian cultural policy, the comic industry often reflects a preference for narratives that reinforce national identity and unity. This tendency manifests in the predominance of stories that celebrate Russian history, culture, and achievements, frequently through the lens of heroism, resilience, and moral clarity. In such narratives, protagonists are often portrayed as defenders of traditional values or historical truth, navigating challenges that mirror the country's real or symbolic struggles. As a result, Russian comics tend to favor cohesive and affirmative storytelling rather than exploring more fragmented, experimental, or critically subversive perspectives (Saduov, R. T., 2019).

This narrative orientation is not merely a stylistic choice, but rather a structural outcome of the cultural environment in which comics are created. Within a context where state institutions and public discourse prioritize cultural consolidation and the affirmation of a shared historical legacy, comics that highlight national triumphs or reinterpret folklore through a contemporary lens are more likely to receive public attention and institutional endorsement. For example, the adaptation of historical events or mythical themes into comic form serves a dual purpose: it introduces younger audiences to culturally significant content while simultaneously reinforcing state-sanctioned interpretations of national heritage.

Importantly, this emphasis on unity and national pride has led to a relative marginalization of comics that address controversial social issues, question historical narratives, or adopt a satirical or critical stance. While such works do exist often published independently or circulated online they tend to occupy a peripheral space in the broader comic ecosystem. Independent creators working on politically or socially critical projects may face

challenges in terms of visibility, distribution, and institutional recognition. Consequently, although the Russian comic scene has grown more diverse and dynamic in recent years, its mainstream currents remain largely shaped by a cultural logic that prioritizes cohesion over dissent.

At the same time, this environment offers opportunities for creative engagement with Russian identity in ways that are innovative and resonant with contemporary audiences. Many creators have found compelling ways to work within the framework of national values while still pushing the boundaries of visual storytelling and thematic complexity. Comics exploring alternative histories, moral ambiguity, or reinterpretations of myth and legend can subtly critique or complicate dominant narratives without overtly contradicting cultural expectations. In doing so, they contribute to a more nuanced and layered cultural dialogue, even within the bounds of ideological conformity (Saduov, R. T., 2019).

Moreover, this focus on national narratives has enabled the Russian comic industry to carve out a unique position in the global comic landscape. While Western superhero comics often revolve around universalist ideals or speculative futures, and Japanese manga embraces a wide spectrum of genres and emotional tones, Russian comics are increasingly recognized for their distinctive engagement with historical memory, cultural specificity, and moral narrative arcs. This localized storytelling provides Russian comics with a recognizable identity that can resonate both domestically and, potentially, in international markets seeking diverse cultural perspectives.

Summary table of key cultural policies elements affecting comic industry:

Cultural Policy Element	Effect on Comic Themes
National identity & history	Russian heroes, folklore, history
Traditional values	Patriotism, family, moral integrity
Resistance to foreign influence	Unique, locally resonant content
Support for domestic production	Distinctly Russian themes and tone

Structural Challenges and Systemic Barriers

Despite the growing visibility and cultural significance of comics in contemporary Russia, several structural and systemic challenges continue to hinder the full maturation of the industry. These obstacles, though diverse in nature, intersect in ways that collectively restrict the expansion, professionalization, and broader societal integration of Russian comics as both a creative practice and commercial enterprise.

A central impediment remains the relatively limited size of the domestic comic market. Compared to the expansive and commercially viable industries of Japan or France, the Russian market remains constrained by its small audience base and modest consumer spending power. This diminutive scale curtails the profitability of comics as a professional field, disincentivizing investment from major publishers, media companies, or cultural institutions. As a result, many creators are compelled to operate on the periphery of the industry, relying on part-time work, crowdfunding, or self-publication, which in turn limits the stability and scalability of comic production in the country (Alaniz, J., 2010).

This challenge is further compounded by the underdevelopment of physical distribution networks. Comic book stores are relatively rare, and the availability of comics in mainstream retail outlets remains inconsistent outside of major metropolitan centers such as Moscow and Saint Petersburg. The lack of effective nationwide distribution significantly reduces market penetration, leaving large segments of the population with little to no access to domestic comic products. While online sales and digital formats offer some compensation, logistical and infrastructural limitations including underdeveloped e-commerce systems and digital payment options still pose significant barriers (Sorokina, A. A., 2019).

Cultural perceptions also play a non-negligible role in impeding industry growth. In the Russian cultural imagination, comics are often dismissed as juvenile or unserious a view that situates them as either children's literature or niche entertainment for hobbyists. Unlike literature or film, comics are rarely seen as vehicles for serious artistic or intellectual engagement. This stigma constrains the ability of comics to garner academic attention, institutional support, or critical legitimacy, further marginalizing the medium within the broader cultural field (Sorokina, A. A., 2019).

In tandem with these economic and cultural challenges, piracy remains a persistent and deeply damaging issue. The widespread availability of scanned or illegally translated comics online, both foreign and domestic, erodes potential revenue streams and undermines the financial sustainability of original creators. Without robust mechanisms for digital rights management or enforcement, many artists find it difficult to monetize their work effectively particularly in an environment where audiences are accustomed to accessing content for free.

Compounding these structural issues is the near-total absence of direct state support. While the Russian government has made investments in cinema, literature, and the

performing arts as part of its cultural strategy, comics have largely been excluded from policy initiatives and funding schemes. Although comic conventions and pop culture festivals provide important visibility, they remain isolated events rather than components of a sustained institutional infrastructure. Consequently, creators must navigate a highly competitive and under-resourced environment, often without access to grants, residencies, or professional development programs (Sorokina, A. A., 2019).

Additionally, the influence of state cultural policy and prevailing social norms has led to a climate of self-censorship among creators. Given the emphasis on national unity, traditional values, and cultural security, many artists opt to avoid topics that could be perceived as politically sensitive, controversial, or socially transgressive. While this constraint does not necessarily preclude creativity, it does narrow the thematic range of mainstream comics, potentially limiting their resonance with more diverse or critical readerships.

Furthermore, competition from foreign comics, especially those originating from the United States and Japan poses another challenge for domestic creators. Although the volume of translated imports has declined slightly in recent years, the longstanding popularity and polished production of Western superhero comics and Japanese manga continue to capture significant market share. Russian creators must not only compete with these established brands but also navigate consumer preferences that have been shaped by decades of exposure to foreign formats and storytelling conventions.

Finally, while digital platforms present promising alternatives for content dissemination, the broader digital ecosystem for comics in Russia remains insufficiently developed. Monetization tools, user-friendly interfaces, and institutionalized support for web-based publication are all in relatively early stages compared to more mature markets. For many

independent creators, the absence of reliable digital infrastructure limits their ability to earn income, cultivate an audience, or scale their work.

All in all, despite its modest size in comparison to the comic industries of Japan, or France, the Russian comic sector is now characterized by steady growth, expanding creative diversity, and increasing cultural influence. While structural limitations continue to pose challenges, the trajectory of the industry points toward gradual consolidation and professionalization. Future developments will likely depend on sustained investment, institutional support, and the ability of creators to engage both domestic and international audiences through innovative storytelling and cross-platform integration.

In this light, the Russian comic industry should not merely be understood as a derivative or peripheral field within the global comics landscape. Rather, it represents a distinct cultural formation shaped by its own historical constraints and creative strategies. The ongoing evolution of this industry offers a valuable case study in how visual storytelling adapts to new socio-political conditions, technological tools, and audience expectations.

Summary table of key aspects of Russian Comic book market:

Aspect	Details
Cultural Policy Model	State as passive actor : Minimal support; indirect ideological influence via national identity narratives
Industry Maturity	Emerging and underdeveloped; gained visibility in 2010s with rise of publishers like Bubble Comics
Institutional Infrastructure	Weak; few dedicated institutions; festivals (e.g., Comic-Con Russia) offer visibility but no structural support
Popular Genres/Themes	National identity, patriotism, mythology, history; limited space for dissent or satire
Export Strategy	Rare; a few titles (e.g., <i>Major Grom</i>) adapted to film and translated abroad

Digital Integration	Used by independent creators, but infrastructure for monetization and distribution remains fragile
Legal Framework	Underdeveloped copyright enforcement; widespread digital piracy
Educational and Cultural Value	Comics not included in official cultural education; low institutional legitimacy
Challenges	Small market, distribution gaps, low public recognition, self-censorship, piracy, lack of funding
Key Insight	Despite creative potential, Russia's comics industry is constrained by institutional neglect, weak infrastructure, and policy ambiguity

Conclusions

This comparative study on the economic and artistic impact of cultural policies on the comics industry in Japan, France, and Russia provides a robust framework for understanding how different institutional, cultural, and economic models shape the development of creative sectors. The research clearly illustrates that cultural policy plays a pivotal role in the maturation, internationalization, and professionalization of national comics industries.

1. Divergent Models of Cultural Policy and Industry Evolution

Japan and France exemplify two distinct yet effective models of cultural policy. Japan's "Cool Japan" strategy relies on minimal direct interference but fosters a participatory fan culture and internationalization through export-oriented branding. France, by contrast, demonstrates a dirigiste model, where the state actively structures the comics ecosystem through subsidies, education, festivals, and public library systems. In both cases, comics have been institutionalized as legitimate cultural forms with strong market presence and global influence.

Russia, by comparison, exhibits the traits of a "passive actor" state. While indirect ideological influence is present, there is minimal direct institutional or financial support. The Russian comics industry thus evolves in a fragmented and under-supported environment, with development driven primarily by independent creators and commercial actors like Bubble Comics.

2. Institutionalization vs. Grassroots Creativity

Institutional recognition of comics (in France's Angoulême Festival or Japan's International Manga Museum) facilitates both artistic legitimacy and public access. However, these systems also tend to favor mainstream or ideologically aligned works, often sidelining experimental, critical, or politically sensitive content. This dynamic is especially pronounced in Russia, where cultural policy prioritizes unity and traditional

values, inadvertently fostering a climate of self-censorship and narrowing the thematic scope of mainstream comics.

In contrast, digital platforms and informal networks (e.g., Japan's doujinshi scene or Russia's webcomic culture) provide essential spaces for alternative voices, showcasing the importance of decentralized creativity even in tightly managed cultural environments.

3. Market Infrastructure and Economic Sustainability

The document underscores the importance of distribution infrastructure, digital innovation, and state-supported institutional platforms in sustaining a viable comics market. Japan's success rests on its ability to export manga across media and borders, supported by a relaxed copyright regime and industry-standard pricing. France leverages cultural subsidies and public procurement (e.g., libraries) to stabilize its hybrid model. Russia, by contrast, suffers from weak distribution, piracy, and limited monetization options conditions that severely constrain the industry's growth.

Additionally, state-funded educational institutions and grants in Japan and France create pathways for professional development and long-term careers in comics. The absence of such infrastructure in Russia results in precarious labor conditions and a reliance on part-time or freelance models.

4. Cultural Policy as Soft Power Strategy

Both Japan and France use their comics industries as tools of soft power and cultural diplomacy. Manga and bande dessinée serve as national brands in international markets, embedded in government strategies for cultural export and image-making. Initiatives such as Japan's International Manga Award or France's CNL grants and global cultural centers reflect a clear understanding of culture as both symbolic capital and economic resource. Russia, while rhetorically committed to cultural sovereignty, lacks an equivalent outward-facing comics policy, thereby limiting the potential of its comics as instruments of soft power.

5. Strategic Recommendations for Russia and Other Emerging Markets

The document proposes several actionable strategies for emerging comics industries like Russia's:

Adopt hybrid models of cultural support, combining market incentives with state-backed infrastructure.

Foster institutional legitimacy for comics through inclusion in education, public libraries, and academic discourse.

Address systemic barriers by investing in digital platforms, distribution networks, and legal protections for creators.

Encourage genre diversity and narrative plurality, allowing comics to evolve beyond state-sanctioned themes and appeal to wider audiences.

Engage with global markets through localization, translation, and international collaborations, positioning national comics as culturally specific yet globally resonant.

Final Remarks

This study convincingly argues that cultural policy is not merely an administrative backdrop to the arts. It is a shaping force that determines which narratives are told, who gets to tell them, and how they reach audiences. Comics, as a medium at the intersection of art, commerce, and ideology, offer a powerful lens for examining the impact of state strategies on cultural production.

The Russian case, in particular, underscores the risks of neglecting institutional support for emerging cultural forms. Yet it also highlights the potential for bottom-up innovation and adaptation. As digital tools, global platforms, and transnational networks continue to evolve, even peripheral or marginalized comics industries can carve out sustainable niches, if they are supported by coherent policies, professional infrastructure, and creative freedom.

This comparative framework may be fruitfully applied to other creative industries and national contexts, offering a template for evaluating how cultural policies can promote inclusive, diverse, and economically viable cultural sectors in the 21st century.

Practice	Japan	France	An opportunity for Russia
Systematic support	Yes	Yes	Implementation of grants, educational programs, and museum initiatives
Integration into education	Yes	Yes	Inclusion of comics in school and university courses
Export and promotion	Yes	Yes	Development of export programs and promotion of Russian comics abroad
Market protection	No	Yes	Introduction of measures to support domestic authors and publishers
Recognition as art	Yes	Yes	Recognition of comics as an independent

			cultural phenomenon
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Research Contribution

This study contributes to the growing body of interdisciplinary research at the intersection of cultural policy, creative economies, and visual media by offering a comparative analysis of how different national policy frameworks shape the development of the comics industry. By examining the cases of France, Japan, and Russia, the research highlights not only divergent models of state involvement, but also the economic and artistic consequences of those models.

The paper advances current knowledge in several key areas:

- **Typology of State Roles:** It develops a conceptual framework for understanding the state’s role in the comics industry as either patron, enabler, or passive actor. This typology offers a transferable lens for analyzing other creative sectors and national contexts.
- **Policy Impact on Artistic Ecosystems:** The research demonstrates how cultural policy directly influences the institutionalization, thematic direction, and transmedia potential of comics. It shows that state intervention does not merely fund production, but actively shapes the symbolic and commercial value of the medium.
- **Emerging Markets Perspective:** By including Russia as a case study, the paper foregrounds the dynamics of underdeveloped or transitional comics markets or an area that has received relatively little scholarly attention. It identifies both structural barriers and latent opportunities, thus filling a critical gap in the global mapping of the comics industry.
- **Synthesis of Cultural and Economic Logics:** The study integrates cultural policy analysis with economic sustainability, illustrating how policy shapes not just output

but labor conditions, market access, and international competitiveness in the comics field.

Knowledge Transference

The insights generated by this research hold practical value beyond the academic domain, offering knowledge that can be applied by a range of stakeholders:

- For Policymakers: The findings can inform the design of targeted cultural strategies aimed at fostering sustainable comics ecosystems. Recommendations on infrastructure, funding mechanisms, and content diversity are directly relevant to ministries of culture, municipal governments, and cultural councils.
- For Cultural Institutions and Libraries: The study highlights the crucial role of public libraries, festivals, and educational programs in legitimizing comics as an art form. Institutions in emerging markets may use these findings to strengthen their acquisition, programming, and outreach strategies.
- For Creative Industry Practitioners: Publishers, artists, and cultural entrepreneurs in emerging markets such as Russia can draw on the experiences of France and Japan to better navigate funding landscapes, distribution challenges, and audience development.
- For International Organizations and NGOs: The paper offers a basis for collaborative programs that aim to support comics as tools of cultural diplomacy, youth engagement, and creative entrepreneurship in developing regions.
- For Academia: The comparative framework and findings may be used in future research and curricula in cultural policy studies, media economics, visual arts education, and international creative industries. It provides a replicable model for analyzing other sectors such as animation, gaming, or independent publishing.

By facilitating dialogue between theory and practice, this study not only expands scholarly understanding but also equips practitioners and policymakers with actionable knowledge to shape inclusive, resilient, and culturally rich comics industries across diverse socio-economic contexts.

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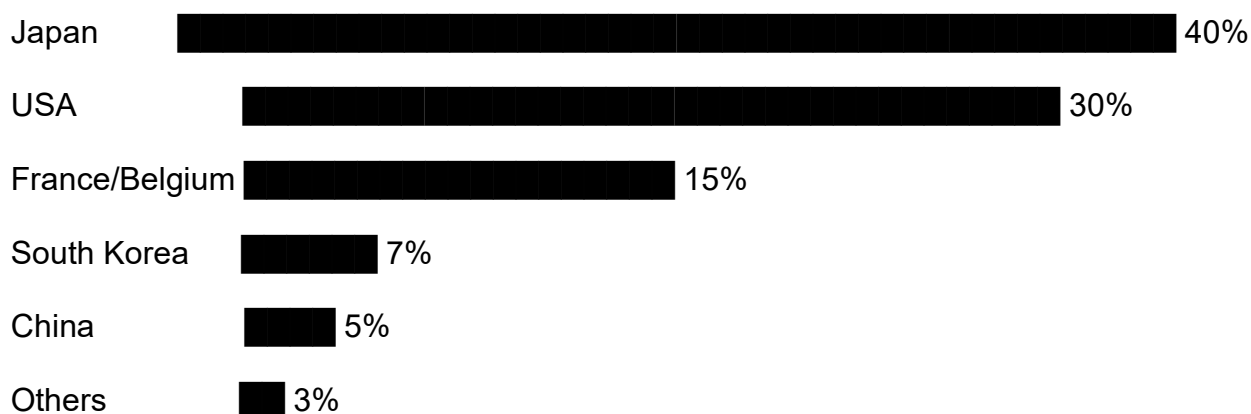
Annex

1. Summary of key findings from all case studies:

Aspect	Japan	France	Russia
Industry Maturity	Highly developed; global leader in manga production and export	Mature industry with strong domestic and European market presence	Emerging and fragmented, but growing
Cultural Policy Approach	State as enabler (e.g., <i>Cool Japan</i>); indirect support via branding, promotion, soft power	State as patron; direct subsidies, education, and institutional recognition (e.g., reduced VAT, CNLL grants)	Limited and indirect support; comics not prioritized in cultural agenda
Export Strategy	Strong international focus, cultural diplomacy via manga, localized products	Active support for export, but primarily focused on national identity and francophone markets	Very limited export; only select titles like <i>Major Grom</i> gaining attention abroad
Institutional Infrastructure	Public-private synergy; institutions like Kyoto Manga Museum; doujinshi culture as talent pipeline	Libraries, schools, festivals (e.g., Angoulême); well-integrated into national cultural infrastructure	Weak; emerging festival culture (e.g., Comic-Con Russia) and scattered institutional recognition
Legal Frameworks	Copyright system tolerates fan works (doujinshi); anti-monopoly protections	Copyright aligned with EU standards; grants tied to cultural representation	Minimal structural protection for artists; piracy widespread
Government Funding	Targeted investment in global promotion (e.g., ¥50 billion under <i>Cool Japan</i>)	Substantial subsidies for publishing and events; government-backed initiatives	Virtually no direct government funding
Industry Structure	Integrated cross-media production: print, anime, games, merchandise	Mix of de novos and de alios publishers; public support influences aesthetic and thematic choices	A few dominant players (e.g., Bubble); most creators self-publish or work independently
Popular Genres/Themes	Wide range (shonen, shojo, seinen, iyashikei,	Mix of traditional BD, manga influence, and hybrid genres; strong	Strong emphasis on national identity, mythology, history; limited

	etc.); strong genre diversity	emphasis on historical and literary themes	subversive or critical content
Educational Integration	Manga studied academically; courses and museum education initiatives	Integrated into curricula and public libraries; extensive mediation and workshops	Not yet mainstream in educational or cultural institutions
Market Challenges	Piracy (scanlation), oversaturation, pressure for mass appeal	Gender imbalance, institutional barriers for newcomers, tension between market and cultural policy	Distribution gaps, low market size, cultural stigma, piracy, lack of investment
Digital Adaptation	Strong; digital manga platforms, cross-media synergy with anime and gaming	Growing digitization of libraries and publishing; digital platforms for youth access	Expanding slowly; used mostly by independent artists but lacks monetization infrastructure
Cultural Recognition	Considered high art and soft power export	Recognized as cultural heritage; benefits from institutional validation	Growing recognition, but still seen as low art by general public

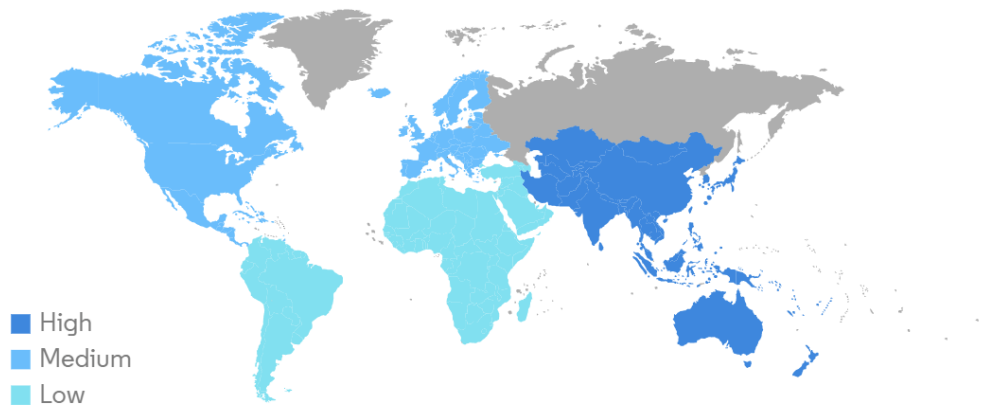
2. Representation of the leading countries by share of the global comic book market, based on industry estimates and the dominance of national industries⁵:



⁵ Mali, S. (2025). *Comic Book Market Report 2025 (Global Edition)* (8th ed., Report ID: CMR753807). [PDF, PPT, Excel, Word, BI & Consultation]. Comic Market Research, https://www.cognitivemarketresearch.com/comic-book-market-report?srsId=AfmBOooL1QO5v5bwjyxp2fZVh3dP_3C7Qtro7YYn_As61y2iJrHMkKd

3. A map of Global comic market⁶

Global Comic Book Market - Growth by Region



Source: Mordor Intelligence



⁶ Mali, S. (2025). *Comic Book Market Report 2025 (Global Edition)* (8th ed., Report ID: CMR753807). [PDF, PPT, Excel, Word, BI & Consultation]. Comic Market Research, https://www.cognitivemarketresearch.com/comic-book-market-report?srsId=AfmBOooL1QO5v5bwjyxp2fZVh3dP_3C7Qtro7YYn_As61y2iJrHMkKd