



POLICY BRIEF

Cultural Diversity on VoD Platforms

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1. Introduction

This policy brief is an addendum to DETECT Deliverable 6.3 *Diversity and Transculturality on Transnational VoD Platforms*. Drawing from that collaborative document, the following discussion addresses the promotion of cultural diversity on Video on Demand (VoD) platforms from three related angles: regional and minority languages (RMLs), dubbing and subtitling of national languages, and the role of public service media (PSM). European popular media products – especially TV series – are crucial vehicles for the dissemination of diverse representations and the generation of a transcultural ethos among audiences. We show that policy measures in the areas of RMLs and dubbing/subtitling of national languages can help increase exposure diversity, that is, the degree to which different European audiences are exposed to a diverse array of audiovisual media content from different countries and cultures. Connected to this, we deal with the broader issue of the relationship between PSM and private media in Europe. Although RMLs protection and dubbing are often seen in an antagonistic relationship, we argue that digital technology and the intervention of PSM might resolve this tension.

Although Netflix, Amazon, Disney+, and other large companies have the potential to shape the forms and contents of a shared European popular culture, leaving such an endowment only to the market is definitely not an ideal solution. The interests of large corporations are not necessarily aligned with the interests of European citizens. At the same time, and not unlike what is experienced with broadcasting services, pan-European VoD strategies appear to be very strongly inhibited by cultural barriers, copyright law and the structural fragmentation of the European media industries. To a large extent, this industrial sector comprises relatively small companies, including VoD firms, that can hardly compete with multinational corporations. Although the new Audiovisual Media Service Directive

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(AVMSD) has its merits, according to most researchers its impact on national media systems will likely not be revolutionary, as it can be interpreted by member states with high discretion and be embedded into national legislation in very different ways. The structural problems of the EU media industry are therefore likely to persist in the foreseeable future. However, in contrast to their limited agency over the European private market and globally operating platforms, national governments have considerable agency in shaping PSM remits and thereby also priorities for achieving goals like minority language protection and the wider circulation of European works in national languages. The EU, we argue, can help PSM to achieve this crucial objective.

2. Evidence and analysis

2.1 Methodology

For Deliverable 6.3 we have specifically researched TV crime series, but this study has produced observations that stand more generally for the sphere of audiovisual fiction as a whole. Overall, content diversity and exposure diversity are today mainly determined by the combined effects of national policies and the industrial choices of media multinationals. To approach this complex scenario, we relied on three main sources: (i) we carried out textual analysis of RMLs TV series; (ii) we considered online and printed media outlets with local, national and international reach; and finally (iii) we carried out policy document analysis on European policies on audio-visual production, scholarly literature and industry reports. To offer a European angle on the issues, we relied on documents released by both national and EU institutions.

2.2 Regional and minority languages

For this strand of research, we have studied the impact of VoD platforms on RMLs. Three major findings from this research that have implications for policymakers are the following:

- **THERE IS STRONG EVIDENCE THAT VOD PLATFORMS ARE SUPPORTING AND FOSTERING THE CREATION AND DISSEMINATION OF ORIGINAL RMLs PRODUCTIONS.** This content now travels beyond regional and national boundaries. Indeed, our research has shown that there is a growing number of crime TV series locally produced in RMLs that are currently offered across Europe on VoD platforms.
- **CURRENT DISCUSSIONS IN MATTERS OF RMLs TEND TO DISREGARD THE POTENTIAL OF ONLINE DISTRIBUTION.** New distribution channels are de facto not fully recognised as strategic to promote and make these diverse European idioms more visible at local, national, European, and international levels.
- **THE STUDY OF RMLs AUDIOVISUAL PRODUCTIONS REVEALS MAJOR KNOWLEDGE GAPS IN RESEARCH ABOUT RMLs AUDIENCES.** Both the research and the political discourse around RMLs media typically tends to focus on three major questions: (i) how dominant culture benefits from the exposure to RMLs productions; (ii) how RMLs cultural products can reach broader audiences; and (iii) how subtitling and dubbing in RMLs can contribute to the expansion of RMLs media. More research is needed to assess the preferences of RMLs audiences in relation to the specific complexities of each RMLs. These audiences are linguistically diverse and often multilingual groups; in addition, some RMLs are typically not written, which may put the utility of RMLs subtitling into question in these cases and may highlight a higher need of RMLs original media.

2.3 Dubbing and subtitling national languages

Broader issues related to the private sector industrial practices and commercial preferences are also relevant in shaping the circulation of European national languages both within and outside the EU. Among VoD services, Netflix plays a key role in this respect. Our research has revealed the following evidence:

- **THE DUBBING MARKET IS EXPANDING DUE TO BOTH INCREASED DEMAND LEVELS IN ASIA AND NETFLIX'S INVESTMENTS IN ADAPTING FOREIGN CONTENT FOR NORTH AMERICAN AUDIENCES.** We can therefore expect more European TV (crime) drama dubbed in English to be able to circulate worldwide and to be consumed by increasingly larger transnational audiences in the near future. Data from the film industry shows that the dubbing market will grow by 5.6% over the next six years, and insider's views on the prospects of the postproduction industry are confirming this tendency. Recently, Chris Carey, managing director of one of the industry's leading players, BTI Studios, provided data on the economic growth of its company: 'BTI Studios told TBI that dubbing made up a mere 3% of its revenue in 2010 and has since jumped to 61%, with subtitling making less than 40% in revenue.'¹
- **DATA FROM LARGE STUDIES CARRIED OUT BY MULTINATIONAL CORPORATIONS SHOWS THAT IT IS IDEAL TO OFFER FOREIGN LANGUAGE FILMS IN BOTH SUBTITLED AND DUBBED VERSIONS.** Research from translation studies and linguistics helps frame certain ambivalences found in the audience's preferences for either subtitled or dubbed content. In countries where dubbing is a common practice, the proportion of the audience that prefers to watch content in the original language is indeed not negligible. In France, for example, data from Statista confirms that, while a majority of people prefers to watch dubbed films, around 22% of people aged between 34 and 65 (and older) declare a preference for subtitling over dubbing, and this percentage rises to 46% among younger audiences. Symmetrically, in subtitling countries, those who prefer dubbed content are also a significant share. These complexities may explain 'why Netflix is now streaming dubbed versions of shows by default, while still letting users switch to the original with subtitle at any time.'²
- **MEDIA PRODUCTS AVAILABLE IN BOTH DUBBED AND SUBTITLED VERSIONS CAN CREATE SOCIOCULTURAL BENEFITS.** Different social groups in different countries might choose subtitling over dubbing according to both their preferences and the specific characteristics of media products. VoD technology and interfaces allow an easy switch from one version to the other, so that audiences can choose according to their preferences and non-national products can be enjoyed by a larger and more diverse range of audiences. This is not only increasing the potential for diverse products to circulate but is also positively affecting the degree of exposure to diversity among disadvantaged groups, such as disabled people, the elderly, or citizens with lower education, who may prefer dubbing over subtitling, providing them de facto with a much wider range of choices than they used to have, prior to the advent of VoD services.

¹ Bylykbashi K. 2019. The big business of dubbing. *Television Business International*. Available at: <https://tbivision.com/2019/04/04/the-big-business-of-dubbing/> (last accessed 25/11/2021).

² Nguyen H. 2018. Netflix: Here's Why the Dubbed Version of Foreign Shows Like 'Dark' and '3%' Is the Default Setting. *Indie Wire*. Available at: <https://www.indiewire.com/2018/03/netflix-dubbed-tv-shows-default-subtitles-1201937425/> (last accessed 25/11/2021)

3. Policy implications and recommendations

3.1 RLMs media on VoD platforms

In light of the findings exposed in 2.2, as far as RMLs are concerned, we recommend that the EU undertakes the following initiatives:

- **AN UPDATE OF THE [EUROPEAN CHARTER FOR REGIONAL OR MINORITY LANGUAGES](#) THAT REFLECTS THE DIGITAL LANDSCAPE.** Although audiovisual media is recognized as a key arena for the implementation of the measures envisioned in the Council of Europe's 1992 Charter for RMLs, the document does not account for the drastic changes that digital technologies have caused in the ways in which RMLs media is today produced, consumed, and promoted. We suggest that the Council lists VoD platforms in the Charter as a major site for RMLs protection and promotion. Given that VoD platforms do not follow the linear formats described in the Charter, an updated version of the document could concentrate on the following: (i) adapting its formulations to on-demand formats; and (ii) introducing recommendations to national and local public bodies to pursue distribution agreements between local RMLs audiovisual productions and VoD platforms, similar to what the Charter does with broadcasters.
- **DEEPENING THE UNDERSTANDING OF RMLs AUDIENCES AND THEIR RELATION TO RMLs MEDIA.** Despite the Council of Europe's engagement with the preservation and promotion of RMLs, the study of RML-based media, and especially of RMLs audiences' preferences, remains limited. It is suggested that upcoming national reports from the Committee of Experts on the Charter include more substantial studies on the RMLs audiences' reception of VoD content and interfaces. Indeed, current scholarship on the presence of RMLs media on VoD platforms tends to focus on how they enrich the broader national language markets and how RMLs support policies promotes subtitling, as well as the recent rise of mainstream interest in subtitled series, but it largely disregards the ways in which RMLs audiences use these platforms, how strongly they may wish to incorporate RMLs in their viewing experience, as well as the role that VoD platforms currently play in the protection of RMLs.

3.2 Dubbing and subtitling national languages

Language barriers are unanimously seen as a key obstacle towards achieving higher levels of circulation and consumption of non-national European television, on a scale that clearly exceeds the RMLs dimension. The difficulty here is to find a balance between the promotion of linguistic diversity in national cultures and the practice of content localization through dubbing to circumnavigate language barriers. The digital environment can help to partially resolve such tension. We believe that the following initiatives to support dubbing and subtitling might help deal with the consequences of Europe's linguistic diversity in productive ways:

- **STRENGTHENING FUNDING FOR BOTH DUBBING AND SUBTITLING IN EACH OF THE PROGRAMMES DEVOTED TO SUPPORTING EU AUDIOVISUAL PRODUCTION AND DISTRIBUTION.** Measures could include the institution of grants to support works addressed to the younger generations (animation and youth programmes), or to produce multilingual 'packages' with versions of the same programme. Initiatives such as [the](#)

[Lux Audience Award](#) in the MEDIA programme or calls such as the [2017 Action on Subtitling](#) are welcome, but largely insufficient to increase the diversity of what gets funded. European funding programmes should appraise dubbing as a culturally valuable strategy to foster dissemination of a diverse range of EU productions for a diverse range of audiences, one that can increase access equality in terms of the content options available to both linguistic minorities and disadvantaged groups.

- **THROUGH INSTRUMENTS SUCH AS RECOMMENDATIONS AND OPTIONS, THE EU SHOULD FURTHER ENCOURAGE MEMBER STATES TO BECOME MORE ACTIVE IN THIS MATTER.** Following the example of the [regional government of Catalonia](#), national governments should put specific funding schemes in place to help small companies and encourage bigger ones to circulate their products on VoD platforms in both subtitled and dubbed versions. This could also include automatic mechanisms to provide prominence to programmes which have received MEDIA support for subtitling and dubbing.
- **PROMOTING DEBATE AND BUILDING LANGUAGE MEDIA POLICIES THAT GO BEYOND THE CHALLENGES RELATED TO THE DOMINANCE OF ENGLISH LANGUAGE.** We encourage the adoption of policy measures that foment transcultural dialogues among the various national media industries in the EU, especially within the emerging digital public sphere. Mediated communication can enable the exposure of diverse audiences to Europe's linguistic plurality and encourage reflections on the role of languages in the generation of a shared European identity.

3.3 The role of PSM

PSM is made of very important players that can make the difference in building transcultural cohesion across the EU. They are key commissioners and distributors of both popular and high-end television products that circulate widely on VoD platforms, and they give crucial support to the creation of content in national and minority languages. Therefore, in the short/medium term, media policy should regard PSM as pivotal actors in the process of European cultural integration. In Deliverable 6.3 we have described a few best practices and challenges, and some suggestions, to strengthen PSM at European level. Here, we want to focus on the EU's role in managing the competition between public and private media. Based on the principles of the [Amsterdam Protocol \(1997\)](#), the EU's competency regarding public service media is limited to the specific but significant area of competition law. Particularly since PSM have begun to extend their services online, state-aid complaints by the private media against PSM online activities have been a major concern at EU level. Regarding matters of fair competition between public service and private media in Europe, we believe that PSM can successfully complement transnational activities of private media without unduly competing with them. Therefore, we suggest:

- **REVISING THE [EUROPEAN COMMUNICATION ON BROADCASTING](#) (LAST REVISED 2009) IN LIGHT OF THE CHANGED POWER BALANCE INTRODUCED BY THE ADVENT OF GLOBAL STREAMING SERVICES.** The revised formulation should emphasize more strongly the benefits brought by PSM to European societies as an outcome that justifies state-aid. Concretely, transnational networking activities, both among PSM and between public and private actors, should be recognized not as

adverse factors on fair competition in trade, but in light of its potential in terms of incentivizing new, or intensifying existing cross-border trade of AV products (such as, but not limited to, RMLs media), that can bring beneficial effects to transcultural understanding. The competency of Member States (MS) over PSM remits should remain unchanged, but a revised Communication should explicitly recognise the specific value of PSM ‘in terms of serving the social, democratic and cultural needs of society’ (this is of specific relevance to the diversification of public broadcasting services, currently Section 6.7 of the document). This open recognition may realistically incentivize a stronger presence of European dimensions in national public service remits as well as in new online initiatives by PSM, which MS test for their public value in accordance with the Communication (paragraph 88), and serve to pre-empt as much as possible later conflicts about the legitimacy of state-aid. A new round of public consultation leading up to the revision will ensure that the concerns of private media in this matter are adequately considered.

- **NATIONAL GOVERNMENTS AND THE EU SHOULD RECOGNIZE THE SOCIOCULTURAL VALUE OF PSM BEYOND ITS NATIONAL DIMENSIONS AND REAFFIRM ITS ROLE IN THE PROMOTION OF TRANSCULTURAL UNDERSTANDING, ENCOURAGING RISK-TAKING AND THE PROPOSAL OF NEW IDEAS TO REDESIGN PSM AS ‘FORUMS FOR DIVERSITY’.** National policy and EU-level policy support efforts should encourage the expansion of existing networks among PSM beyond established pathways of cultural proximity, routines, or economic instrumentalism. Both the Broadcasting Communication and seed funding for new initiatives through a strengthened Creative Europe programme are relevant policy levers here.

PROJECT NAME	DETECT - Detecting Transcultural Identities in European Popular Crime Narratives
COORDINATOR	Monica Dall'Asta, University of Bologna, Bologna, Italy, monica.dallasta@unibo.it
CONSORTIUM	Alma Studiorum - Università di Bologna - UNIBO - Bologna, Italy Aalborg Universitet - AAU - Aalborg, Denmark Aarhus Universitet - AU - Aarhus, Denmark Bibliocité - [none] - Paris, France Debreceni Egyetem - UNIDEB - Debrecen, Hungary Deutsche Film- und Fernsehakademie Berlin GMBH DFFB - Berlin, Germany Fonden VisitAarhus - [none] - Aarhus, Denmark Freie Universitaet Berlin - FUB - Berlin, Germany Katholieke Universiteit Leuven - KU Leuven - Leuven, Belgium Link Campus University di Roma - LCU - Rome, Italy Miso Film Aps - [none] - Copenhagen, Denmark Panepistimio Ioanninon - Uoi - Ioannina, Greece Umeå Universitet - UmU - Umeå, Sweden Universitatea din Bucuresti - UB - Bucharest, Romania Université de Limoges - UNILIM - Limoges, France Université Paris Nanterre - UPN - Paris, France The Queens University of Belfast - QUB - Belfast, Northern Ireland TV 2 Denmark A/S - TV 2 - Odense, Denmark
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WEBSITE	http://www.detect-project.eu/
CONTACTS	Luca Antoniazzi (luca.antoniazzi3@unibo.it) and Luca Barra (luca.barra@unibo.it).
FURTHER READING	<ul style="list-style-type: none"> ▪ Antoniazzi L., Barra L. (eds.) (2021) <i>Transcultural Diversity on Transnational VoD Platforms</i>. Research report for DETECT (Deliverable 6.3). ▪ Bengesser, C., Hansen, K.T., and Gemzøe L.S. (eds.), (2020). <i>Location marketing and cultural tourism</i>. Research report for DETECT (deliverable 4.1). Available at: http://www.detect-project.eu/wp-

[content/uploads/2020/12/COMPLETE_d4.1_final3.pdf](#) .

- Gemzøe, L.S. and Hansen, K.T. (eds.) (2020). *Researching transcultural identity: production perspectives*. Research report for DETECT (deliverable 4.2). Confidential.
- Pagello, F. and Schleich, M. (eds.), (2020). *European Creative Audiences*. Research report for DETECT (deliverable 5.1). Confidential.



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