Monitoring
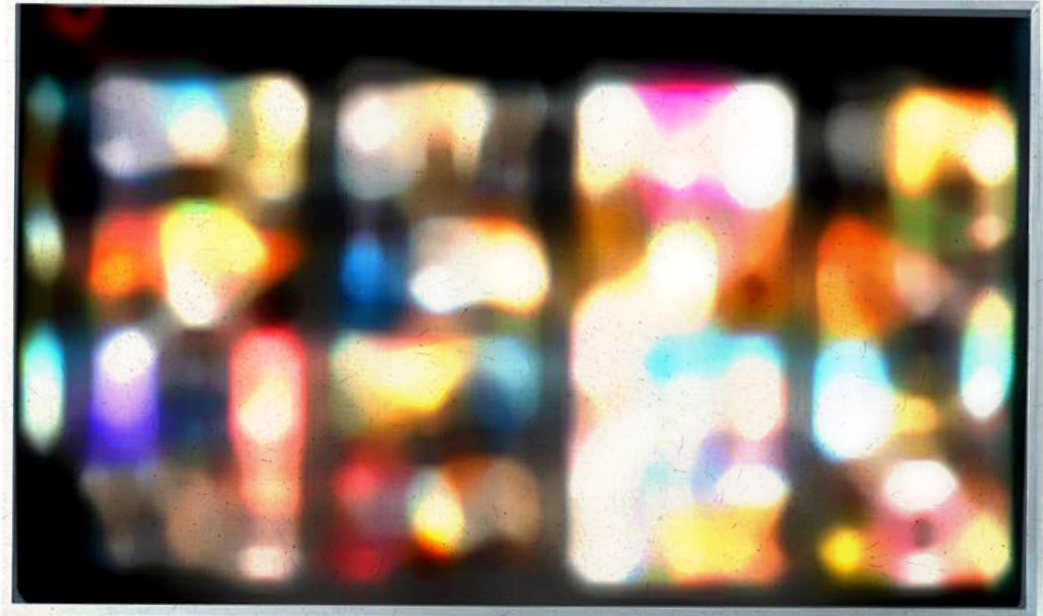# **language diversity and accessibility of streaming platforms**
in Europe

THEGREENS/EFA
in the **European Parliament**

Authors and acknowledgments

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Table of contents

1.
Introduction

This report has been produced at the request of The Greens/EFA from the European Parliament.

The rapid rise that video streaming platforms are gaining around the world is dramatically transforming the way television is watched. The importance of this medium has always attracted the attention of European institutions, which began to develop directives to regulate this field in the 1980s, upon the realization that audiovisual content could be an instrument both for promoting European identity and cultural diversity, as well as its opposite.

Following that policy, the Council of Europe created the European Audiovisual Observatory in 1992, to collect information on the audiovisual industry in the continent. This information is crucial both for designing and evaluating European audiovisual policies.

The irruption, just over a decade ago, of streaming video platforms is causing significant changes in the consumption of audiovisual media. Just in the case of Subscription Video On Demand platforms (SVOD), the number of subscriptions within the EU raised from 0.3 million in 2010 to 140 million in 2020 (Greece, 2021). This represents 41% of European households, according to data from Ampere Analysis (cfr. European Audiovisual Observatory, 2021).

The transition from the use of traditional television to the use of VOD platforms means, on the one hand, a transformation of the available content supply. And on the other hand, the reinforcement of global audiovisual production and distribution platforms, to the detriment of the hitherto hegemonic national (public or private) television systems. This makes it more difficult to implement policies that promote European identities or cultural diversity.

It was in this context that the European Audiovisual Observatory launched, in 2019, the Lumière VOD database, to collect and offer information, among other things, on the origin of the content of TVOD, SVOD and FOD platforms offering services in Europe[1]. This information is undoubtedly relevant, but unfortunately it does not provide data on the languages in which the content is offered. This represents an obvious limitation when evaluating the way in which the changes that are operating in audiovisual consumption can affect diversity and identity.

This report is therefore a first approach to the issue of languages in the panorama of SVOD platforms in Europe. A more systematic and precise monitoring of the linguistic panorama of these platforms is required, in order to be able to design and evaluate European policies that promote diversity and the preservation of cultural and identity heritage. This report is intended, in response to the request of The Greens/EFA, to take a step in that direction.

1– TVOD (Transaction Video On Demand):services where consumers can rent or purchase a work on a title–per–title basis. SVOD (Subscription Video On Demand):services which propose for a monthly fee a catalogue of works available on demand. FOD (Free Video on Demand): services which are mostly ad–supported and free to view for viewers; this includes AVOD services and broadcaster replay services (Greece, 2022).

FOUR APPROACHES TO THE QUESTION OF LANGUAGE

The report addresses the issue of linguistic diversity of SVOD platforms from four complementary perspectives:

A. The issue of the so-called minority or minoritized languages. It is about observing the presence on the platforms of those languages with weak or null official status in the European Union but are the first language of over 40 million inhabitants.

B. The issue of audiovisual accessibility for people with sensory disabilities. It is estimated that 80 million people have some degree of sensory disability in Europe, which makes access to audiovisual content difficult or impossible. Such accessibility could be facilitated by means of different resources (mainly sign languages, audio description and subtitling).

C. The issue of the imbalance between the great presence of English and other official languages in Europe, which affects both the main languages of some countries and the promotion of mutual knowledge between European societies through the linguistic richness of the continent.

D. The issue of the presence of languages without any recognition in Europe, not even by the European Charter of Minority and Regional Languages. These languages are traditionally considered languages of immigration, although they are increasingly common languages of many millions of people in Europe, and they are becoming part of the linguistic panorama of the continent.

2.
Methodology

Methodology: sample

Platforms analysed:
Netflix, Amazon Prime and Disney+.

Countries:

Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovak Republic, Slovenia, Spain, Sweden, United Kingdom.
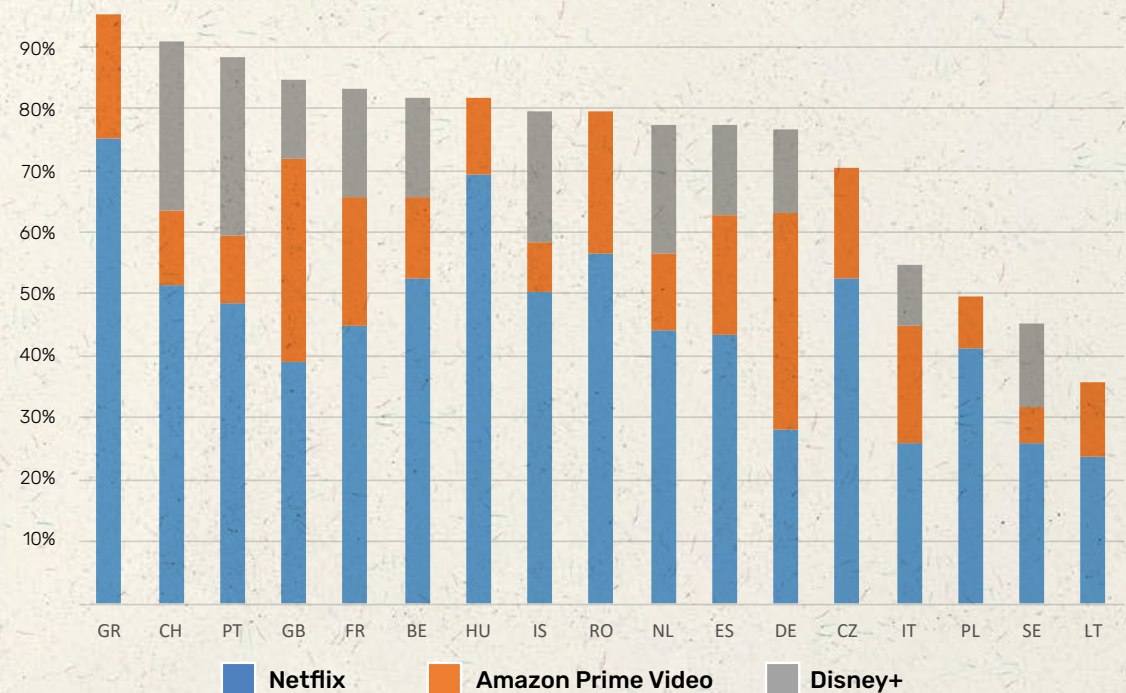
Data collection:

for Netflix and Disney+, UNOGS platform (UNOGS n.d.). For Amazon Prime, own collection from the online catalogues.

Date of collection:
October 2023.

CHART 2:
Share of the SVOD market by platform, 2021

Netflix   Amazon Prime Video   Disney+

Source: European Audiovisual Observatory (Ampere Analysis)

The three platforms analysed make a high percentage of the SVOD market in most of the sample's countries

Methodology: glossary

Title:
film, TV content or series season.
In the case of Netflix and Disney+ each of them
is identified by a single original title. In the case of
Amazon Prime the same work may appear several
times if the title is displayed translated into different
languages.

Offer:
indicates the total of times titles are offered,
considering the catalogue in each country. One single
title might appear in 17 offers, one per each country.

Audio track:
dialogues' audio track in each language. The same title
might be offered with different audio tracks supply in
different countries.

Audio description track:
audio description track in each language. The same
title might be offered with different audio description
tracks supply in different countries.

Subtitle track:
subtitles' track in each language. The same title might
be offered with different subtitles tracks supply in
different countries.

About the data:
Unless otherwise indicated, the data are analysed
based on numbers of tracks. They reflect the figures
and percentages over the offer in each language for
each title in each work.

Moving averages:
for some purposes individual yearly data have been
grouped on moving averages: average of figures in
periods of five years. This allows trends to be identified
more clearly, beyond annual fluctuations.

Methodology: languages

Language offer in Netflix:
It is worth to note that in the case of Netflix, not all the languages available for each title in each country appear on all devices' menus. On TVs and devices connected to a TV, Netflix displays five to seven languages, depending on the location and the language set by the user. On iPhones, iPads, Android phones and tablets, as well as web browsers, all the languages available for each title are displayed. In the case of downloads Netflix shows the two most relevant languages. **In this study we have considered the offer for TVs and devices connected to TVs. This means that the real offer is bigger, and that probably languages not so widely spoken in Europe have a greater presence than the figures in the study. However it must be taken into account that over half of the consumption of SVOD content happens on TV devices.**

Language varieties:
when appearing (e.g. Latin-American Spanish different from Spanish from Spain), they have been grouped under the general category as defined in the database Ethnologue.

Principal language:
Principal language of each country, according to the database Ethnologue (in most of the cases, same to official language).

Groups of languages:
for some purposes, apart from the most spoken ones in Europe, the rest of languages have been grouped as follows:

- **Other European (sample):** principal or official language of countries included in the sample. Czech, Dutch, Flemish, Greek, Hungarian, Icelandic, Lithuanian, Portuguese, Romanian and Swedish.

- **European Minoritized:** languages recognized by the European Charter of Regional and Minority Languages. Basque, Catalan, Galician, Luxembourgish and Welsh.

- **Other European (not sample):** principal or official language of European countries not included in the sample. Albanian, Belarusian, Bosnian, Bulgarian, Croatian, Danish, Estonian, Finnish, Georgian, Latvian, Macedonian, Norwegian, Russian, Serbian, Slovak, Slovenian and Ukrainian.

- **Non-European recognition:** languages with no official recognition in Europe. Afrikaans, Amharic, Arabic, Assamese, Bahasa Indonesia, Bahasa Melayu, Bangla, Cantonese, Dzongkha, Filipino, Gujarati, Hausa, Hebrew, Hindi, Japanese, Javanese, Kannada, Khmer, Konkani, Korean, Malayalam, Mandarin, Marathi, Mongolian, Nepali, Pashto, Persian, Punjabi, Southern Sotho, Swahili, Tagalog, Tamil, Telugu, Thai, Turkish, Urdu, Vietnamese, Wolof, Xhosa, Yoruba and Zulu.

The general panorama

CHART 2:
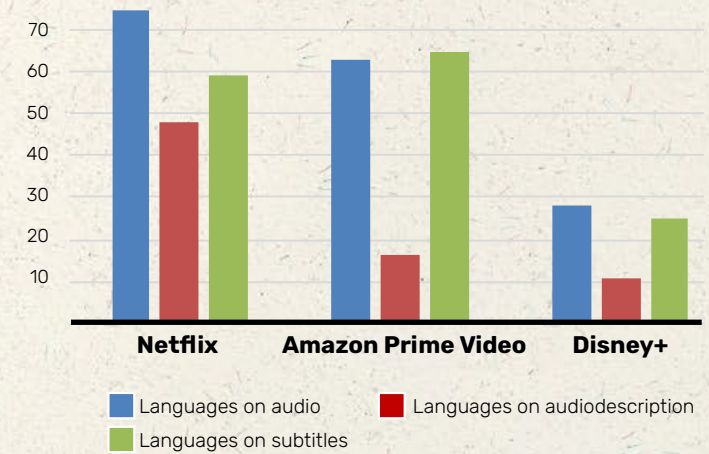## Total number of languages available by platform

- Languages on audio
- Languages on audiodescription
- Languages on subtitles

TABLE 1:
Total of items analyzed

	NETFLIX	AMAZON PRIME[1]	DISNEY+	TOTAL
TOTAL TITLES	11.596	32.794	3.801	–
TOTAL OFFER (TITLES X COUNTRY)	120.662	65.535	39.224	225.421
TOTAL AUDIO TRACKS	338.148	173.538	405.134	916.820
AVERAGE AUDIO TRACKS PER OFFER	2,8	2,6	10,3	4,1
TOTAL AUDIO DESCRIPTION TRACKS	69.247	12.759	25.241	107.247
AVERAGE AUDIO DESCRIPTION TRACKS PER OFFER	0,6	0,2	0,6	0,5
TOTAL SUBTITLE TRACKS	594.929	416.004	657.399	1.668.332
AVERAGE SUBTITLE TRACKS PER OFFER	4,9	6,3	16,8	7,4

1-   t must be considered that many films or TV shows in Amazon Prime appear with titles in different languages, so in this case number of titles does not mean number of films or TV shows.

3.
State of the question
European policy on languages and accessibility, in the field of streaming platforms

THE COUNCIL OF EUROPE

Legal tools with which to address the guarantee of accessibility, removal of barriers for people with disabilities, and linguistic rights.

- European Convention on Human Rights (1950), in its article 14, prohibits discrimination based on language, in the exercise of the right of expression, not only in the informational environment, but also in the creative environment.

- European Social Charter (1961, revised 1996), establishes as a fundamental right non-discrimination for reasons of language or association with a national minority.

- European Charter for Regional or Minority Languages (1992), the only legally binding international convention dedicated exclusively to the protection and promotion of regional and minority, non-territorial and less widespread official languages. It establishes specific measures aimed at promoting its use in public life; specifically covering the media. The Charter provides for a supervision mechanism to evaluate its application in the States and make recommendations for improvement.

- Framework Convention for the Protection of National Minorities (1994), establishes guaranteeing principles with respect to national minorities in the public sphere, such as the right of access and use of the media, linguistic and educational freedoms, with the objective of promote a diverse media space with broadcasts in minority languages, and even minority media. It provides for the submission of reports by the signatory States as a mechanism for monitoring compliance.

- Recommendation Rec (2006)5 of the Committee of Ministers to member states on the Council of Europe Action: Plan on promoting the rights and full participation of people with disabilities in society: enhancing the quality of life of people with disabilities in Europe 2006- 2015, encourages broadcasters and creative industries to ensure that people with disabilities can access television programs and films, in accessible formats such as subtitles, audio description and sign language

THE EUROPEAN UNION

It has its own legal and operational tools.

- Council Directive 2000/43/EC of 29 June 2000 implementing the principle of equal treatment between persons irrespective of racial or ethnic origin (2000), undertakes linguistic protection against discrimination, if it is linked to race or ethnic origin.

- Directive (EU) 2016/2102 of the European Parliament and of the Council of 26 October 2016 on the accessibility of the websites and mobile applications of public sector bodies (2016), guarantees the full and democratic participation of all citizens in the information society.

- Directive (EU) 2018/1808 of the European Parliament and of the Council of 14 November 2018 amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive) in view of changing market realities (2018), includes the guarantee of access to audiovisual content, which is in turn framed in the commitments assumed in response to the United Nations Convention on the rights of people with disabilities (2006). It includes an explicit reference to the linguistic issue, so that, when evaluating whether an on-demand audiovisual communication service established in another Member State, addresses an audience located in its territory - under conditions of linguistic guarantee - the State in question must refer to indicators such as the main language of the service.

European policy on languages and accessibility, in the field of streaming platforms

THE EUROPEAN UNION

It has its own legal and operational tools.

- Directive (EU) 2019/882 of the European Parliament and of the Council of 17 April 2019 on the accessibility requirements for products and services (2019), includes an updated concept of accessibility, defining it as universal, user-focused, and proactive. Therefore, the creation of environments and the use of accessible tools must allow all people, regardless of their abilities, to have access to audiovisual and digital content for their personal development and independence.

- Digital Agenda for Europe (2020-2030), serves as a model for the introduction of general political strategies, while at the same time it has incorporated concrete actions to guarantee access to ICT for people with disabilities.

- European Parliament resolution of 20 October 2021 on Europe's Media in the Digital Decade: an Action Plan to Support Recovery and Transformation (2021/2017(INI), states that minority media cannot compete, in general mechanisms, with majority media, requesting States to provide support to produce content in regional and minority languages, and its widespread dissemination on different platforms. It states that, although databases such as LUMIÈRE VOD and others managed by the European Observatory of Audiovisual, collect abundant information on the origin of the content of the video on demand platforms, there is no data available on the presence of subtitles, sign languages or other languages used in the media field. If this data does not exist, the resolution will not be able to serve as a basis for the design and monitoring of community audiovisual policies, as well as to promote the accessibility of people with sensory diversity to the video on demand sector. It highlights the importance of the availability of information and access to media for all EU citizens in their respective languages.

CONCLUSIONS

- The Council of Europe has focused on the formulation of general patterns of preservation of minority languages that, being part of the European cultural heritage, require greater care. These patterns affect the media field and the creative industries. We will have to wait for the non-binding 2006 recommendation for this institution to bring together aspects related to language, accessibility, people with disabilities and cultural and creative industries.

- The European Union, in its Audiovisual Communication Services Directive, does not expressly combine languages and accessibility in the field of streaming platforms. The Directive also does not specify the sub quotas that a Member State must apply for productions in its official languages. It only mentions 30% of European productions without specifying nationality or specific language. Thus, it leaves it in the hands of the Member States to make the connection between this issue, the linguistic one, and accessibility for any community with specificities.

- It is possible that the legal and documentary dispersion of the community does not contribute to clarifying which is the hierarchically most relevant legal source in order to guide the activity.

4.
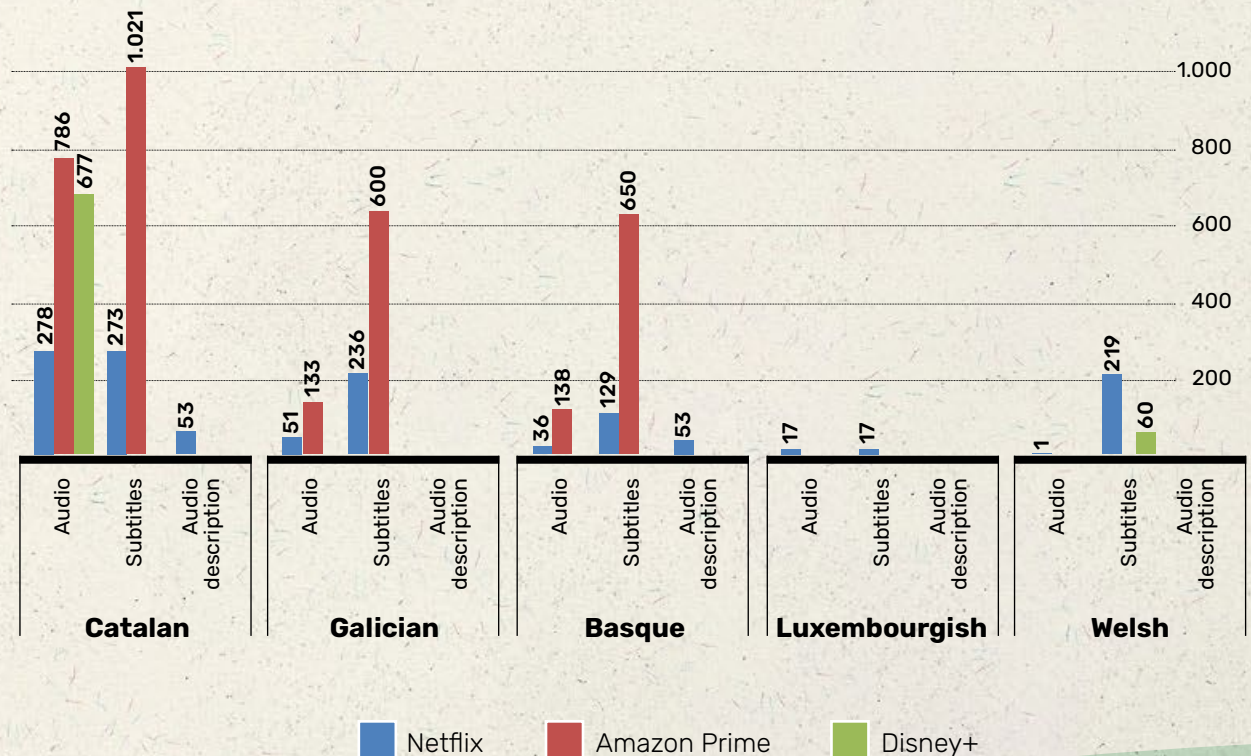# SVOD platforms and minoritized languages

Just five minoritized languages recognized by ECRML have accessed the major platforms

The offer of minoritized languages protected by the European Charter of Regional and Minority Languages (ECRML) on SVOD platforms is very scarce and unequal, with the offer in Catalan standing out. Only five out from dozens of languages have accessed this space. Being scarce in all formats (audio, subtitling and audio description), the greater offer of subtitling in minority languages stands out with respect to audio options in the same languages in almost all the platforms.

It's noteworthy the extremely scarce offer in audio description in all analyzed platforms and minoritized languages.

CHART 3:

Presence of minoritized languages in the platforms

| | Netflix | Amazon Prime | Disney+ |

Catalan — Audio: 278, 786, 677; Subtitles: 273, 1.021; Audio description: 53

Galician — Audio: 51, 133; Subtitles: 236, 600; Audio description: —

Basque — Audio: 36, 138; Subtitles: 129, 650; Audio description: 53

Luxembourgish — Audio: 17, 17

Welsh — Audio: 1; Subtitles: 219, 60

The importance of political borders.

The offer in languages recognized by the ECRML is state biased.

Items offered in one territory in minoritized languages are not offered in other territories where the language is also used. This is the case of Basque and Catalan whose linguistic communities cross Spain–France political borders. This restriction affects not only translated versions (dubbed or subtitled), but even original films produced in such languages and not available in one of the two states.

CHART 4:
Items in Catalan according to country and platform
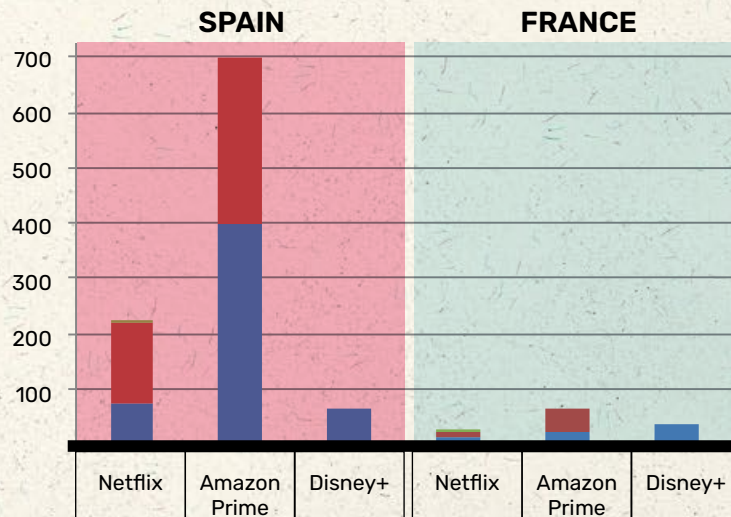
CHART 5:
Items in Basque according to country and platform
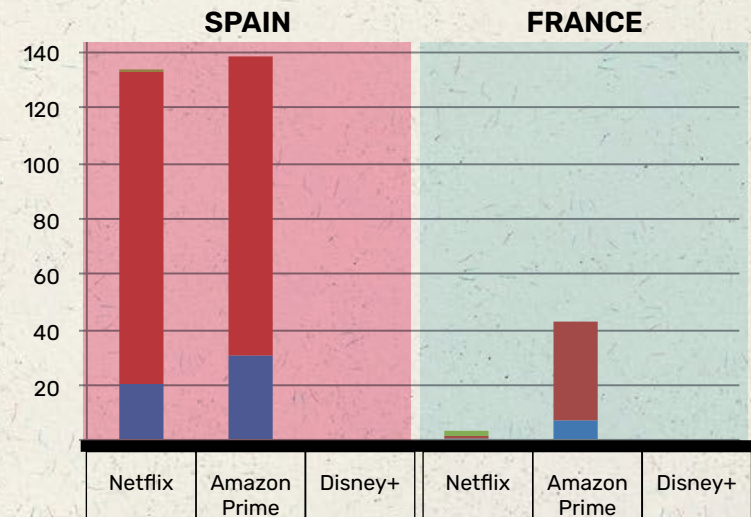
| Audio description | Subtitles | Audio |

5.
Accessibility

The use of subtitling

English is the most used language on subtitles. In the case of Netflix and Amazon Prime, almost 100% of the offer has English subtitles (that is to say, almost all the titles in all the countries). Indeed, in many cases the supply of English subtitles is over the supply of subtitles in the country's principal language.

On the other hand, there are remarkable differences between the platforms regarding the presence of subtitles.

This may affect the real accessibility to audiovisual which is limited to certain languages.

CHART 6:
Netflix:
Percentage of offer subtitled
(10 most subtiltled languages)
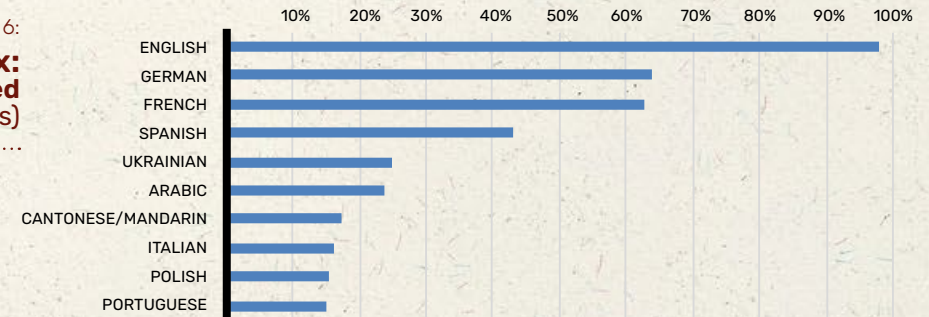
CHART 7:
Amazon Prime:
Percentage of offer subtitled
(10 most subtiltled languages)
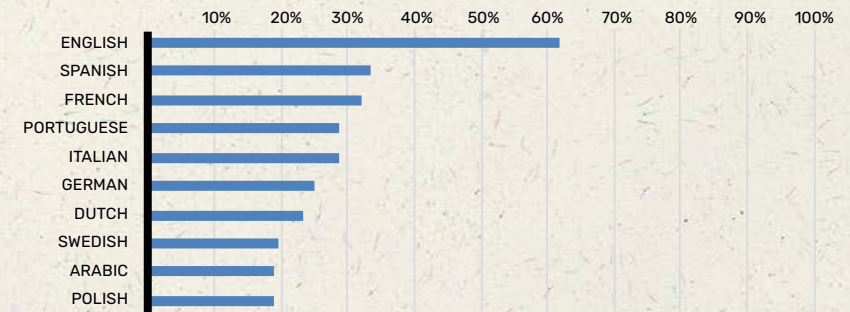
CHART 8:
Disney+:
Percentage of offer subtitled
(10 most subtiltled languages)
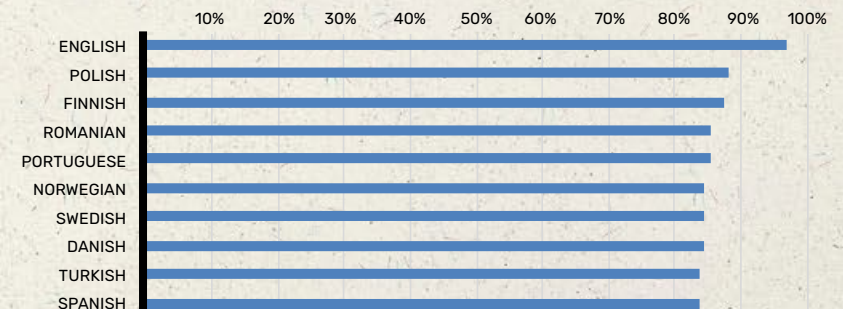
Audio description

Audio description is an accessibility service primarily aimed at persons who are blind or have low vision. It involves the translation of visual content (pictures) into verbal content (words). Typically, audio description units are inserted in gaps without dialogue in the source audiovisual content. On present platforms, audio description is delivered by means of a pre-recorded audio track inserted in audiovisual products.

Overall, the project's results show that the audio described content is scarce today. Only 12 % of the total content is audio described

This situation poses a serious accessibility issue, hindering access to culturally mainstream audiovisual content. It may thus be interpreted as a discriminating factor with direct consequences on persons with vision impairments' right to partake in cultural life with equal opportunities.
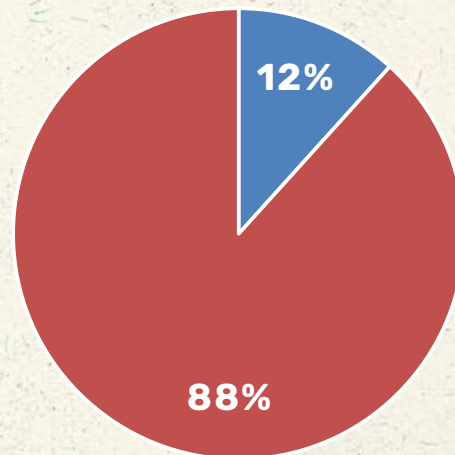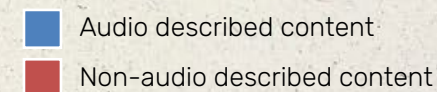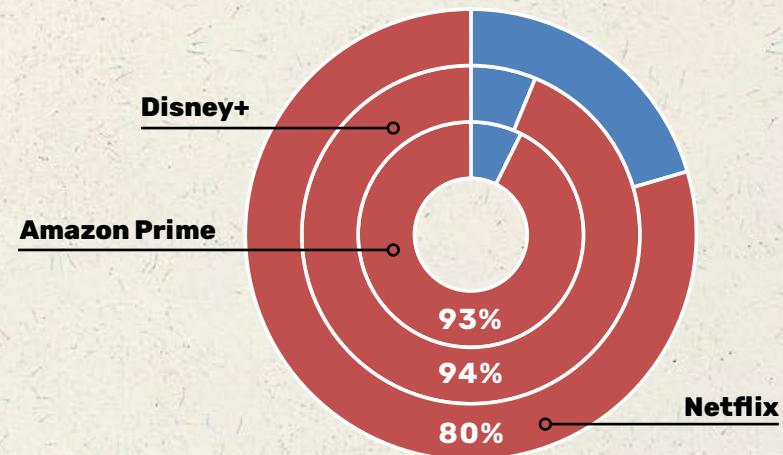
CHART 9:
Audio described content
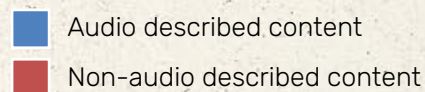
CHART 10:
Audio described content by platform

Legend:
■ Audio described content
■ Non-audio described content

Audio description

The landscape is especially worrying for languages other than English.

Netflix offers 69,247 audio described items in total, out of which 37,455 offer audio descriptions in English (54 %). The second language with a largest presence is Spanish, with

8,091 audio descriptions (12 %). The platform offers audio described content in 48 languages in total; however, in over a half of them (26) the number of audio described titles is below 100, with twelve language showing fewer than 20 audio

described titles. The languages below this threshold include some among the most spoken worldwide, such as Russian (90 titles), Marathi (68 titles) or Telugu (17 titles).

CHART 11:

Netflix: Audio described items by language.
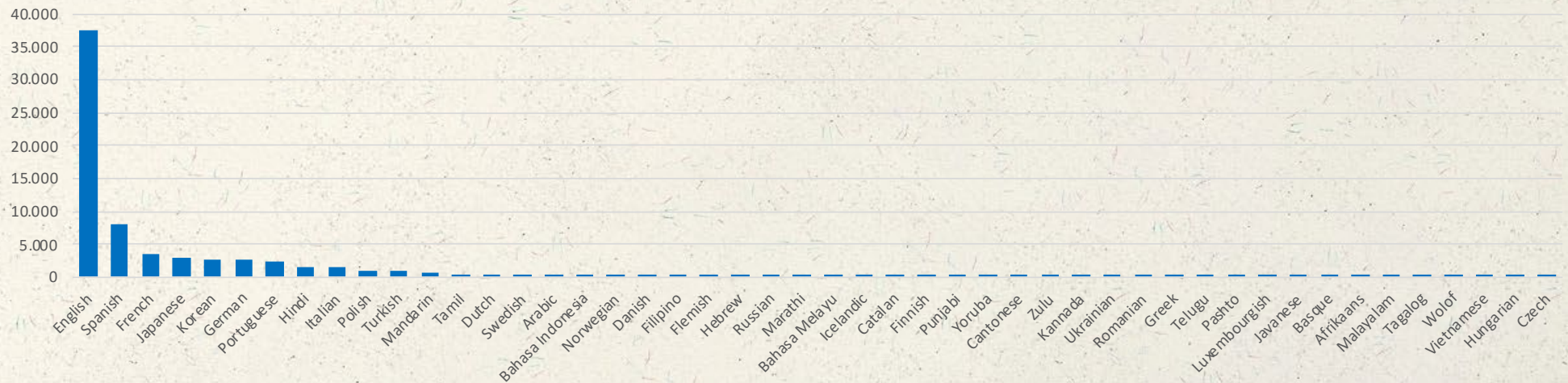
6.
English versus Principal Languages in each country

# Few exceptions to the hegemony of English in each country

Data show that English is the main language on the three SVOD players both in audio and subtitled content.

Only countries with multiple and strong principal languages -Belgium and Switzerland- can surpass the English language content when combining the different languages of the country -for example, French and Dutch in Belgium.

The only exception lies in the Amazon Prime offer, since the biggest markets in Europe -Germany, Spain, France and Italy- are offered content in their principal languages -German, Spanish, French and Italian– in a number that surpasses the English content offer, both in audio and subtitling.

CHART 12:
**Offer that surpasses English.
Prime Video in Germany, France, Spain, and Italy.**

	Principal Language audio	Principal Language subtitle
	English audio	English subtitle
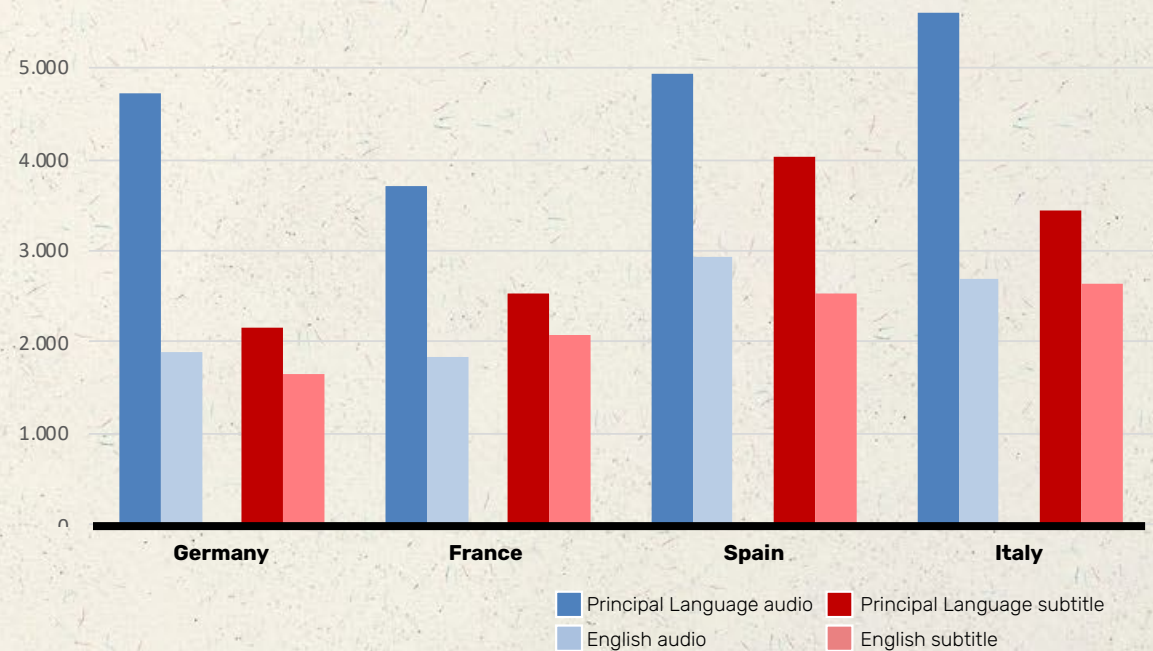
The use of subtitling

Some countries show an alarming lack of content in their language. The most extreme case is Disney+ in Lithuania. The platform does not offer any content in Lithuanian, neither in audio nor in subtitle.

CHART 13:

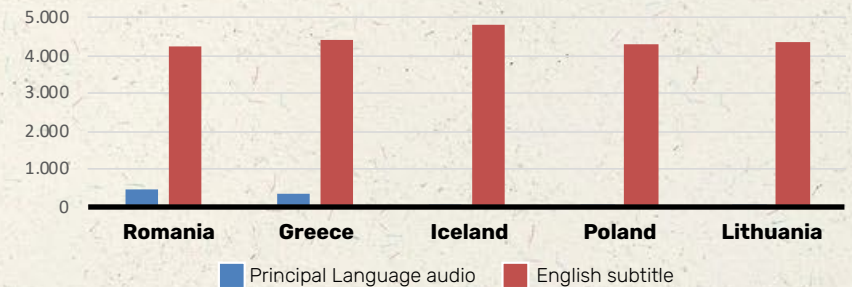**Netflix audio: Country's Principal Languages versus English.**

CHART 14:

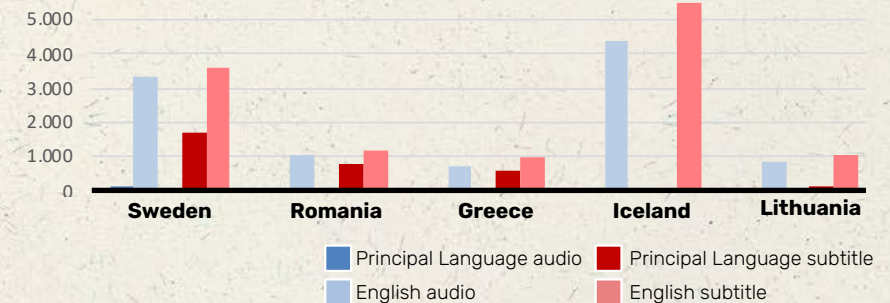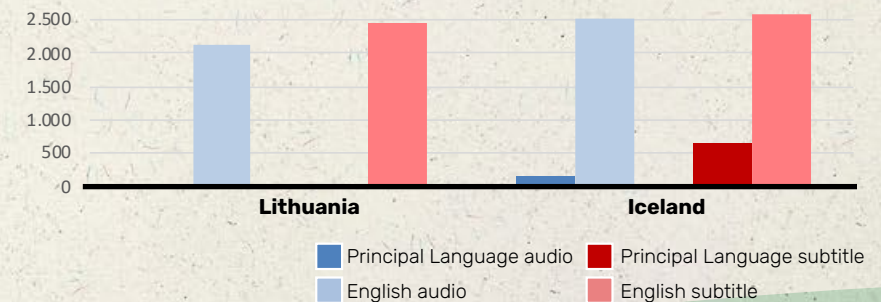**Amazon Prime audio and subtitles: Country's Principal Language versus English.**

CHART 15:

Disney+ audio and subtitles: Country's Principal Language versus English.

7.
Languages from countries not included in the sample

Languages with no European recognition have also a remarkable presence on the catalogue

These languages are spoken by millions of Europeans, even if they have not any official recognition. The presence of some of them is remarkable, as it is the case of Arabic, Turkish, Cantonese, Mandarin[1] and some languages from India.

The supply of these languages is very different from one platform to other. Arabic for instance has a great supply –both on audio and subtitles– in Netflix and Amazon Prime, and nothing at all in Disney+

1- Notice that Cantonese and Mandarin appear as a single language on subtitles since, for the most part, they share common writings

CHART 19:
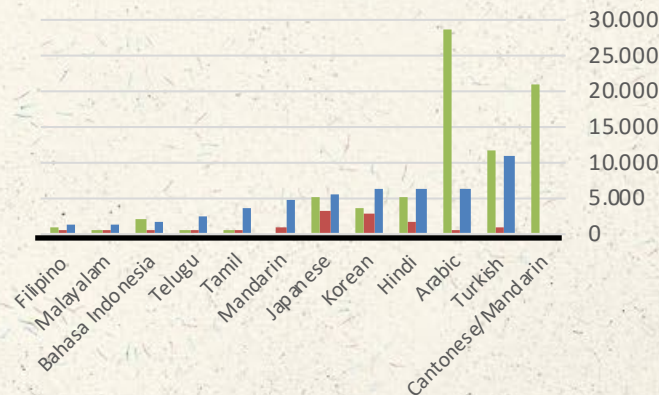**Languages with no European recognition most included on Netflix**

CHART 19:
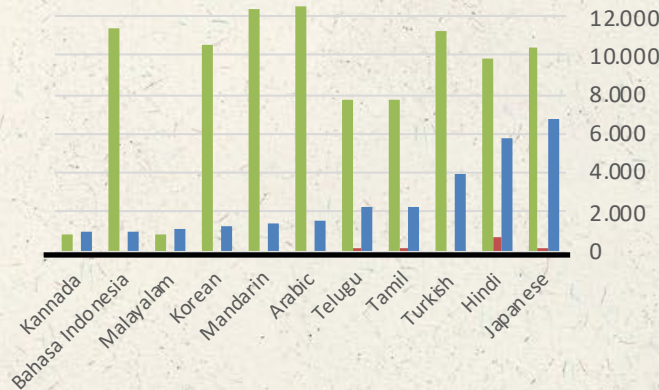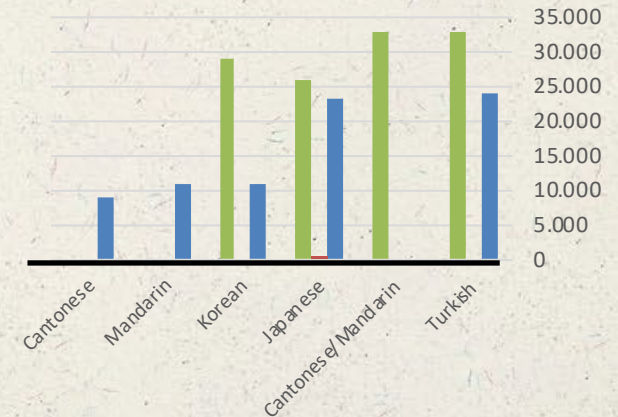**Languages with no European recognition most included on Netflix**

CHART 19:
Languages with no European recognition most included on Netflix

🟦 Audio   🟥 Audio description   🟩 Subtitles

Some languages from European countries not included in the sample are widely offered on the platforms

Most of the languages from European countries not included in the sample appear on subtitles rather than on audio channels. The supply of those languages on audio description is very low.

Also, the languages offered vary from one platform to other. However in general terms some Scandinavian languages (Norwegian, Finnish and Danish) have a significant presence in the three platforms, both on audio and on subtitles.

CHART 16:
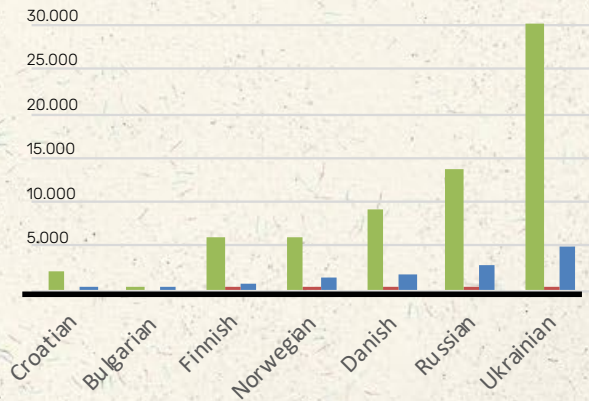**Languages from European countries not included in the sample most included on Netflix**

CHART 17:
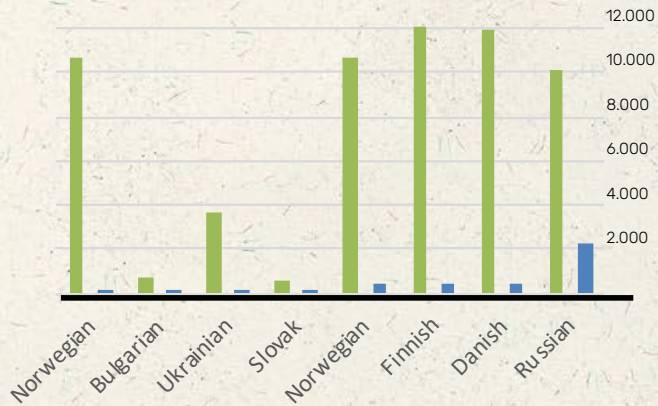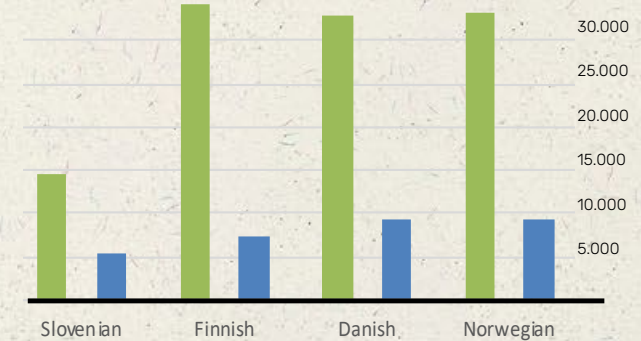**Languages from European countries not included in the sample most included on Amazon Prime**

CHART 18:
Languages from European countries not included in the sample most included on Disney+

■ Audio   ■ Audio description   ■ Subtitles

8.
Trends

New contents, which are the majority of Netflix's catalogue, are offered in more language audios than older contents.[1]

The newer the content on Netflix, the more languages appear in the audio tracks of the films.

However, that has not threatened the hegemony of English, which is available in over 70% of the offer of contents produced in 2023.

French, German and Spanish are also more frequent in the newest productions, with a peak around 40% of the offer.

Last years' productions bring also an increase of the offer in languages not recognized as European.

1– Only Netflix has been considered for this analysis, due to the lack of data for Amazon Prime and the smaller market quota of Disney+.

CHART 22:
Presence of audio tracks by year of production, Netflix (Moving averages n=5)
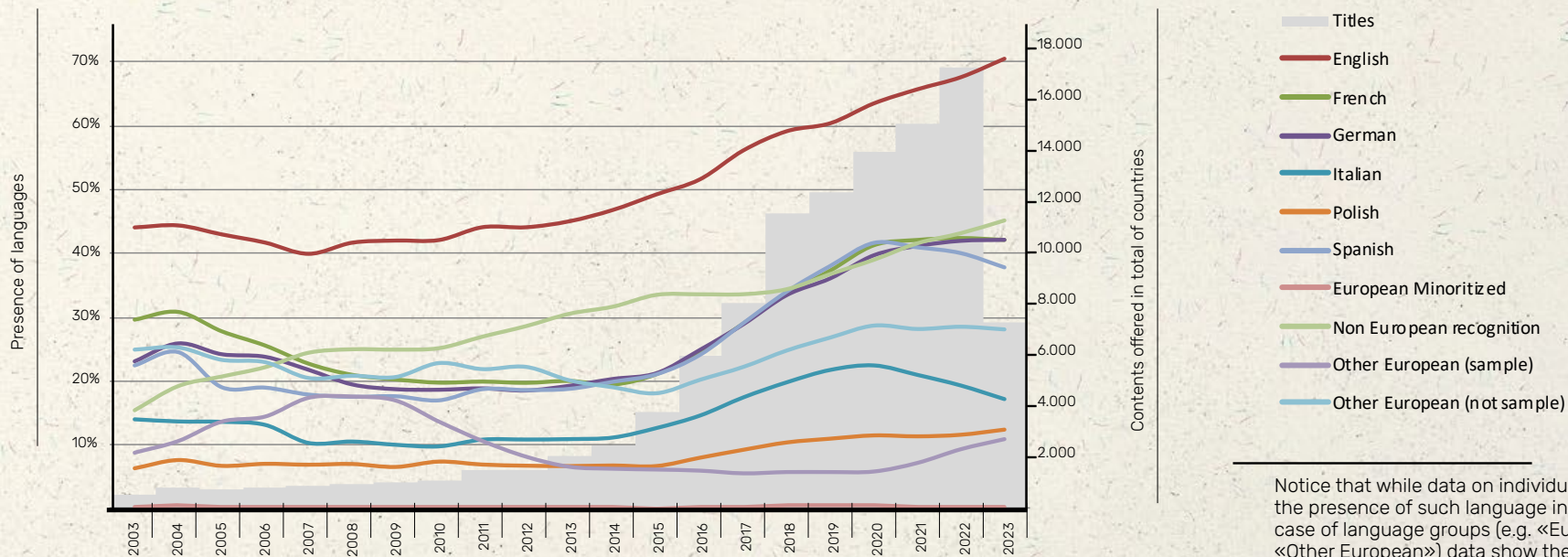
Notice that while data on individual languages indicate the presence of such language in the contents, in the case of language groups (e.g. «European Minoritized» or «Other European») data show the presence of at least one language of the group.

English subtitles are available in most of the countries and most of the contents, whatever the year of production is.
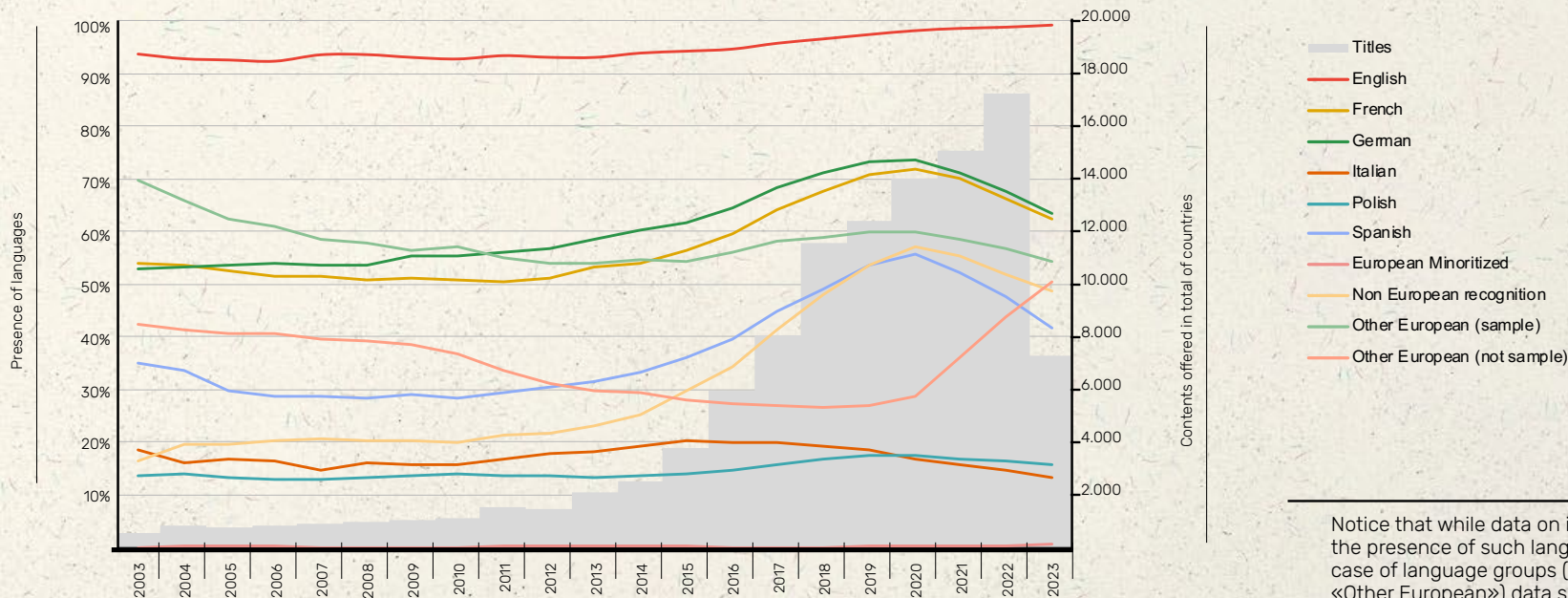
Subtitles in other languages are limited to certain countries or certain contents, and their presence varies according the age of production.

Subtitles in German, French and Spanish are more frequent in newest contents. The same applies specially to languages not recognized as European.

As it happens with audio tracks, trends suggest that English subtitles appear from the very first moment while subtitles in many other languages might be incorporated later.

CHART 23:
Presence of subtitles by year of production, Netflix (Moving averages n=5)

Legend:
- Titles
- English
- French
- German
- Italian
- Polish
- Spanish
- European Minoritized
- Non European recognition
- Other European (sample)
- Other European (not sample)

Notice that while data on individual languages indicate the presence of such language in the contents, in the case of language groups (e.g. «European Minoritized» or «Other European») data show the presence of at least one language of the group.

9.
Conclusions

CONCLUSIONS

- The lack of accurate and systematic data does not allow having a more complete vision of what is happening, in the field of language, with the offer of content on SVOD platforms; and therefore with cultural diversity and the right to access audiovisual content. However, this study permits a first approach.

- The analysis shows a panorama of great inequalities and raises questions about cultural diversity in this space. In the same way that audiovisual of Anglo-Saxon origin maintain their hegemony over the production from Europe and other parts of the world, English clearly predominates in the linguistic offer of these platforms. This happens despite the fact that, unlike what happens with the origin of productions, the number of languages in which a product can be offered is not immutable, and has no limit other than the global number of languages.

- Legal dispersion hinders EU action to guarantee accessibility and language diversity. The general patterns established by the Council of Europe leaves in the hands of each member state the steps to secure linguistic accessibility and accessibility for any community with specificities.

- Just five out from dozens of minoritized languages protected by the European Charter of Regional and Minority Languages have accessed the SOVD space: Catalan, Basque, Galician, Luxembourgish and Welsh. This access is, on the other hand, very scarce and unequal, with the offer in three minoritized languages of Spain standing out —specially Catalan. This does not hide, however, that they are languages with millions of speakers and that they have a very unbalanced presence in the available offer.

- The importance of regulation and political action can be observed in the Spanish case. Not only are minoritized languages from that single state the ones that have the most—and almost exclusive—presence on SVOD platforms; very few of the contents accessible in Catalan and Basque in Spanish territory are accessible in French territory, even though there are also linguistic communities of those languages.

CONCLUSIONS

- European sign languages, all of which are minoritized languages, are not included in this study due to the absence of offer on the VOD platforms analyzed.

- Audio description is scarce in all languages, but especially in languages other than English. The lack of audio description hinders access to cultural products to people with visual impairments and may thus be interpreted as discriminatory in nature.

- The supply in English is, in almost all the countries analyzed, usually higher than the supply in the local principal languages. This is true both in audio as in subtitle and audio description. The only exception found is Amazon Prime when it comes to the strongest languages: German, Spanish, Italian and French.

- In some cases, the low presence of the country's principal languages is very striking, both in audio, subtitles and audio description.

- Some languages are spoken by millions of Europeans but lack official recognition due to their consideration of "non-European". However, the presence of some of them is remarkable, as it is the case of Arabic, Turkish, Cantonese, Mandarin and some languages from India.

- In recent years, it seems that new content is increasing linguistic diversity: the newer the content on Netflix, the more languages appear in the audio tracks and subtitles of the movies. Strong languages such as French, German and Spanish are more frequently available in productions in recent years, along with languages not recognized in Europe. Other languages are also more frequent, but to a lesser extent. The availability of minoritized languages has also increased, but its scale is really minimal.

- However, increasing diversity does not challenge the hegemony of English. At the same time that the offer in other languages increases, the offer in English also increases, keeping intact the advantage it has over the rest of the languages.

10.
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of streaming platforms**
in Europe

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