

IN FOCUS: Global Netflix

Imagining Global Video: The Challenge of Netflix

by RAMON LOBATO and AMANDA D. LOTZ, editors

Netflix has evolved swiftly and significantly over its two-decade history. The service that established itself distributing films on DVD by mail in the United States is now most aptly categorized as a global video service. Yet Netflix's often-claimed "global" status is always a matter of dispute, for film and media scholars as much as for audiences.

Because of Netflix's policy of reporting subscriber numbers only in the categories of US or "international" subscribers, it is often difficult to have a sense of how pervasive the service is anywhere other than the United States. Netflix's catalog, cultural status, brand recognition, and market power also vary enormously from country to country. For media scholars, these conditions present empirical and conceptual challenges related to the general problem of how to study a video service that is experienced differently in each country. They also open up possibilities for comparative research grounded in specific contexts to better understand Netflix in its diverse geographic manifestations. This In Focus dossier is the result of one such research experiment.

Critically locating Netflix in a global context requires holding two contradictory realities in balance: Netflix is a single company that has direct-to-consumer subscription relationships with 150 million customers worldwide. This makes it arguably more global than any previous screen producer and distributor. But to make any claim about Netflix requires locating it in a particular place—in a country-specific catalog; in a nation-state with particular technological infrastructure, competing and complementary services, and regulatory regimes; and in markets characterized by different audience expectations, preferences, and cultural norms.

Netflix imagines and constructs itself as “global” in a manner different from previous video services. To paraphrase Graeme Turner and Jinna Tay’s oft-quoted aphorism that “the answer to the question ‘What is television?’ very much depends on where you are,” the answer to the question “What is Netflix?” clearly also depends on where you are. Given this variation, perhaps the key question to wrestle with is, “What is at stake in imagining Netflix as global?”¹

Of course, Netflix was not always global, and Netflix was not always a streaming video service. In the United States it was first a DVD-by-mail service that was far more connected to film than to television. That first version of Netflix is credited with the bankruptcy of Blockbuster Video and the general demise of video rental in the United States. This simple contextual variation often leads to very different assumptions of Netflix among those in the United States compared with those for whom it has been only a streaming service.

Even within the emergent sector of internet-distributed video, Netflix has engaged multiple strategies. These steady pivots—from by-mail film rental, to domestic, second-window television distributor, to multinational commissioner of original series and films—feed confused perceptions of the company and its consequence for other video distributors. Netflix is a fascinating object of study because it uses a new distribution technology and a previously uncommon business model, and is disrupting established norms of international video distribution based on temporal and spatial windowing. The trajectory of Netflix is also a most unusual story.² In an industry reliant on the vertical integration of production and distribution, it established a foothold despite owning no library of content. Recently launched services such as Disney+ are widely regarded as competitors or potential “Netflix killers,” but we assert these services are quite different in aim and strategy and are building services to leverage an existing library of intellectual property. Though announcing intentions of “global” availability, plans by others to produce content outside the United States have been limited.

Notably, we do not advocate for “Netflix studies” and agree with those critical of the amount of attention paid to this service when so many others exist unexplored. Nothing about Netflix should be accepted as a norm or standard. All the same, Netflix—as a site of analysis—serves as a useful example of some of the affordances of internet-distributed video more recognizable to an international field than any national service. The case of Netflix also provides an opportunity to connect traditional screen studies knowledge with wider debates about digital distribution, platforms, and algorithmic culture—debates that play out in distinct ways across national and disciplinary boundaries.³ The task for scholars, then, is to locate analysis of Netflix (or

1 Graeme Turner and Jinna Tay, eds., *Television Studies After TV: Understanding Television in the Post-Broadcast Era* (London: Routledge, 2009).

2 Research about Netflix includes Gina Keating, *Netflixed: The Epic Battle for America's Eyeballs* (New York: Portfolio, 2014); Charles Tryon, *On-Demand Culture: Digital Delivery and the Future of Movies* (New Brunswick, NJ: Rutgers University Press, 2013); Ramon Lobato, *Netflix Nations: The Geography of Digital Distribution* (New York: New York University Press, 2019); Amanda D. Lotz, Ramon Lobato, and Julian Thomas, “Internet-Distributed Television Research: A Provocation,” *Media Industries* 5, no. 2 (2018): 35–47.

3 Exemplary studies from across the spectrum of media, communication, and cultural studies include Tom Evens and Karen Donders, *Platform Power and Policy in Transforming Television Markets* (Basingstoke, UK: Palgrave, 2018); Ed Finn, *What Algorithms Want* (Cambridge, MA: MIT Press, 2018); Catherine Johnson, *Online TV*

other services) within the wider cultural and industrial dynamics of internet-distributed video, subscriber funding, and established and emerging practices of multinational video distribution.

To understand the local specificity of Netflix's international expansion, in 2016 we came together with a small group of screen scholars from around the world to form the Global Internet Television Consortium, a research network dedicated to sharing information on Netflix's global rollout. The initial purpose of the consortium was to bring grounded and specific knowledge to the complicated growth of Netflix in the wake of its global expansion. We used a foreign-correspondent model, in which one or two local experts represented each country. Consortium members wrote dossiers describing the impact of Netflix in their home country and how local audiences, regulators, and media incumbents received it. Following a review process, the dossiers were then published on the consortium's website.⁴

Our first batch of dossiers were completed in 2016 and 2017 and covered Netflix in Australia, Brazil, Canada, Germany, Greece, India, Israel, Japan, Mexico, Spain, Sweden, Taiwan, and the United States. As membership of the consortium grew, we added new members and new dossiers on Argentina, Belgium, Italy, the Gulf States, the Philippines, South Africa, and the United Kingdom (with more to come at the time of writing). Our focus also expanded beyond Netflix to examine other services such as Hulu in the United States and Hotstar in India. Consortium activities have included conference panels, journal issues, and research collaborations among the members.

The purpose of the consortium, as with any comparative research project, was to track the interplay of similarity and difference. We were influenced by the comparative tradition of international broadcasting and video research, which often examined viewing practices and industry transformations across multiple countries.⁵ Within this tradition, Netflix becomes a useful lens for studying a wider set of cultural, commercial, and political responses to the entry of a foreign service into national media environments. Consortium dossiers frequently describe how existing audiovisual distributors—especially national television networks and pay-TV operators—feel threatened by the entry of Netflix into their markets. This has resulted in the reconsideration of various policies designed for broadcasters and debates about which regulations and production incentives should apply to internet-distributed services based elsewhere. Most countries also now have their own domestic internet-distributed video services that are redefining the market of audiovisual provision. The complex interplay of these national services and the global streamers has become a feature of the audiovisual landscape in many countries, with implications for each service's programming,

(London: Routledge, 2019); Derek Johnson, ed., *From Networks to Netflix: A Guide to Changing Channels* (London: Routledge, 2018); Amanda D. Lotz, *Portals: A Treatise on Internet-Distributed Television* (Ann Arbor: University of Michigan Press, 2017).

4 "Global Internet TV Consortium Website," Global Internet TV Consortium, <http://global-internet-tv.com>.

5 Elihu Katz and George Wedell, *Broadcasting in the Third World: Promise and Performance* (Cambridge, MA: Harvard University Press, 1978); Gladys D. Ganley and Oswald H. Ganley, *Global Political Fallout: The VCR's First Decade* (Cambridge, MA: Harvard University Center for Information Policy Research, 1985); James Lull, ed., *World Families Watch Television* (Newbury Park, CA: Sage, 1988).

marketing, and original production strategy.⁶ The dossiers revealed enormous variation in national responses. Many countries' media environments have been profoundly transformed by Netflix, while others are far less affected. Much depends on current norms and availability. In Germany, the service is valued for its access to unedited, undubbed, and commercial-free US programs. In many others, including Australia, the relative lack of locally acquired or produced content inspires a key criticism. This is a common complaint from screen producers and industry associations in smaller nations, where locally produced Netflix originals are scarce. We also observed a number of contentious issues being debated across many countries where Netflix is present—including concern about Netflix's US content bias, expectations of it upholding censorship standards (including in India, where regulatory disparity between broadcast and streaming television is a major policy issue), and accusations of unfair competition for existing broadcast and pay-TV operators.

The insights apparent from placing the different dossiers in conversation are fascinating in their own right. Just as important are the methodological and conceptual questions that the consortium experiment raises—questions about research practices, the “spectre of comparisons,” and how to conceptualize the relationship between the global and the national.⁷ Is Netflix a global service with local versions, or a collection of national services tied together into a global platform? By what yardstick do we judge its global penetration (e.g., reach, popularity, brand-recognition, or revenue)? Is cross-national comparison the best way to study Netflix in a “postnational” age? Might other geographic units of analysis, such as regions or geo-linguistic markets, provide different answers? What new insight does Netflix's expansion of original series production outside the United States suggest about whether its strategy may be multinational, rather than global, but also more complicated than that of a conventional US hegemon? These are a few of the questions that have animated our research with the consortium and that we continue to ponder individually and collectively. Our findings, and the questions themselves, are constantly changing as the multilayered global landscape of video services grows more complex.

This In Focus section comprises four essays from consortium scholars. Our contributors recount the dilemmas of Netflix's complicated global and national juxtaposition and their consequences for particular aspects of screen and media theory. The contributors ask questions about what is happening in specific places and with what consequences, providing rich insight into the broader topic of global video distribution. Their cases provide building blocks of knowledge about a nascent distribution technology and early-stage competitive field. Although what is happening in Brazil may tell us little about Taiwan, in time such analysis of grounded practices will provide the basis for deriving broader theory.

Juan Llamas-Rodriguez explores Mexico, a vital strategic market for Netflix. He offers a case study of the Netflix series *Luis Miguel: La serie* (2018), a dramatized biography

6 Sofia Rios and Alexa Scarlata, “Locating SVOD in Australia and Mexico: Stan and Blim Contend with Netflix,” *Critical Studies in Television* 13, no. 4 (2018): 475–490.

7 Benedict Anderson, *The Spectre of Comparisons: Nationalism, Southeast Asia and the World* (London: Verso, 1998).

of the famous Mexican pop star. Llamas-Rodríguez shows how *Luis Miguel* became a bellwether for Andrés Manuel López Obrador's election. He offers an argument about how the meaning of Netflix in Mexico needs to be understood in relation to the hegemonic status of the Mexican broadcaster Televisa. This imbues the series with cultural relevance that would be obscured to the outsider, and shows "Netflix" to mean something quite different in Mexico from what it means in other markets.

Yu-Kei Tse focuses on the politics of Netflix's entry into two East Asian markets: Japan and Taiwan. Tse analyzes the Japanese discourse of *kurofune* as it applied to Netflix and contrasts this with the quite different *kurofune* discourse that prevails in Taiwan. *Kurofune*, which means "black ship," refers to the forcible opening up of Japanese markets by US Navy Commodore Matthew C. Perry in the 1850s. Today, the term has a wider currency in debates about foreign media imports and national competitiveness. Tse's nuanced account of the cultural politics of streaming in East Asia shows how this term has been differently imagined in two geographically proximate but culturally and linguistically distinct markets.

Michael Wayne explores the branding of Netflix by focusing on its promotional practices in Israel, where it has relied on partnerships with local television providers. Wayne adds complexity to efforts to assert a particular "Netflix brand" in any market and argues that evidence from the Israeli market suggests streaming services blend a variety of promotion practices. Netflix promotion isn't based on establishing a brand for the service—in the manner common for US cable channels in the 1990s and 2000s—but linked to promotion of partner telecommunication services or as a significant source of global television content.

In the final essay, Deborah Castro and Concepción Cascajosa consider how streaming services have affected television production in Spain. Broadening to consider the Movistar+ service as well as Netflix, Castro and Cascajosa offer a look at the complex negotiation taking place within national production systems in response to the different circulation norms characteristic of domestic and multinational streaming services. In addition to expanding the opportunities for fictional series production for Spanish producers, the norms of these services have encouraged the linear Spanish industry to adjust its episode length, which has created new opportunities for international distribution.

In just a few pages, then, these authors reveal the variation in Netflix's cultural meaning to viewers, the politics of its entry, its promotional practices, and impact on the production sector across four markedly different geographic regions. These essays provide just a hint of the wide-ranging questions that remain to be answered and the scope of reconsideration of existing understandings of video distribution warranted by the adoption of multi-national internet-distributed video services. *

Luis Miguel: La serie, Class-Based Collective Memory, and Streaming Television in Mexico

by JUAN LLAMAS-RODRIGUEZ

Netflix's first Spanish-language original series, *Club de cuervos* (2015–2019), was also its first original series for the Mexican market. Four years later, Netflix original content from Mexico includes multiple seasons of this acclaimed comedy along with insipid reality TV, middlebrow thrillers, and the Oscar-winning film *Roma* (Alfonso Cuarón, 2018). In February 2019, chief content officer Ted Sarandos announced that Netflix Mexico would produce fifty television shows and films over the following two years, making it the platform's international territory with the most targeted productions.¹ Given its standing in the Netflix ecosystem, what does this territory reveal about how a foreign subscription video-on-demand service interacts with a country's industries, politics, and cultural trends?

To answer this question, we must look at the first half of 2018, when one Netflix series captivated the cultural conversation in the country. *Luis Miguel: La serie* was an authorized, fictionalized depiction of the life of Mexican pop superstar Luis Miguel. It premiered on April 22 with a new episode every Sunday until July 15, paralleling the weekly schedule followed by coproducer Telemundo in the United States. The show received wide acclaim from critics and fans, bolstered the star image of its lead actor, Diego Boneta, and revitalized the public perception of the singer, who had fallen out of favor following numerous personal scandals and canceled tours. Yet it also proved a bellwether for another major national event: the election of Andrés Manuel López Obrador (AMLO) as president and the overwhelming defeat of Mexico's longtime de facto ruling party, the Partido Revolucionario Institucional (PRI).

The audience engagement during the show's run and the connections between that engagement and the political significance of AMLO's victory reveal an emergent class self-reflection in and through new media. For the middle- and upper-middle-class Mexicans who watched the show in its initial run, the weekly ritual of watching and commenting on social media tackled not only the content of the

1 John Hecht, "Netflix to Produce 50 Projects in Mexico," *Hollywood Reporter*, February 12, 2019, <https://www.hollywoodreporter.com/news/netflix-produce-50-projects-mexico-1185950>.

episodes but also viewers' recollection of the events therein, namely the move toward a neoliberal economy in the late 1980s in Mexico.² Such discussions foregrounded a dissatisfaction with the long history of power brokerage in Mexico and thus were akin to the rhetoric surrounding the presidential elections. These responses to *Luis Miguel: La serie* provide a sketch of the broader structure of feeling against the country's political and media elites emerging in the lead-up to the national elections. I do not mean to imply a causal relationship between the release of the Netflix series and the election of AMLO in July 2018. Rather, particular aspects of the reception of the show prefigure the reasons for supporting the eventual president and offer a window into how middle- and upper-middle-class Mexicans saw themselves, their recent past, and their future at this juncture in 2018.

Class is central to understanding the connection between the reception of the show and the emergent political landscape. Netflix is not yet widely available across Mexico. Access to high-speed internet service remains heavily stratified, with 85 percent access for households in the top 15 percent by income bracket and around 25 percent access for those in the lower 45 percent by income bracket.³ Netflix consumers thus tend to live in urban areas and earn above the country's median income. Likewise, the perception of Netflix's content in Mexico stands in opposition to that of national broadcasting giant Televisa, known for its traditional telenovelas and their negative class connotations. Although we cannot assume that it was watched by all sectors of the Mexican population, the case of *Luis Miguel: La serie* does help illustrate the reception implications of Netflix's class-stratified audiences, the enduring appeal of melodramatic genres in television, the political implications of viewer responses on social media, and how audiences may reflect on their positionality when encountering content from foreign streaming services.

Netflix operates within a class-stratified media ecology in a number of ways. Differential access to high-speed internet separates a population into hierarchical levels of online connectivity. Hardware costs further differentiate audiences into exclusively mobile and cross-platform segments, which are set up for various kinds of content. Critical engagement with television has also divided the medium into distinct patterns of taste. Commentary on the widely viewed traditional telenovelas has historically been, and continues to be, the purview of gossip rags. The television criticism found in more "serious" venues, such as the literary magazine *Letras libres* or business journal *El financiero*, skews toward foreign fare, particularly US dramas available in Mexico on

2 The notion of middle class used here borrows from Dennis Gilbert's conception, which spans "salaried professionals, managers, teachers, technicians, bureaucrats, and merchants . . . with household incomes at least 50 percent higher than the median household income" (13). Gilbert admits that this is a relative category, and one that fluctuates historically, but for the purposes of this argument it overlaps with the categories of people that would have access to Netflix. See Dennis Gilbert, *Mexico's Middle Class in the Neoliberal Era* (Tucson: University of Arizona Press, 2007).

3 Asociación de Internet en México, "Estudio de infraestructura y adopción de las TIC's por la Población en México," November 28, 2016, <https://www.asociaciondeinternet.mx/es/component/remository/func-startdown/28/lang-es-es/>. For an extended discussion on the correlation of income and pay-TV adoption in Mexico and Brazil, see Joseph D. Straubhaar, Vinicio Sinta, Jeremiah Spence, and Vanessa de Macedo Higgins Joyce, "Changing Class Formations and Changing Television Viewing: The New Middle Class, Television and Pay Television in Brazil and Mexico, 2003–2013," *Les enjeux de l'information et de la communication* 17, no. 2 (2016): 207–223.

cable or streaming platforms. The politics of taste evidenced by such coverage further stratifies television content across class markers of social and cultural capital. None of these distinctions is determinantal, in the strict sense, but rather tends toward specific types of publics associated with streaming platforms. Netflix's image has played into these differential class connotations in the past, when the platform sought to differentiate itself from Televisa's streaming platform Blim.⁴ While discussions around *Luis Miguel: La serie* in print and social media did not address class in such explicit ways, viewers routinely referred to Televisa's status as the hegemonic power in national television and its role in maintaining social stratification.

The first season of *Luis Miguel: La serie* covers the artist's rise to fame in the late 1980s and the familial drama of his younger years, focusing heavily on the singer's troubled relationship with his father. Each episode includes a musical number where lead actor Diego Boneta performs one of Luis Miguel's hits. At first glance, there was nothing unique about this biographical drama. It falls within a rapidly expanding roster of Latin American biographical series created for Spanish-language audiences, such as Telemundo's *José José: El príncipe de la canción* (2018) and *Jenni Rivera: Mariposa de barrio* (2017); RCN Television's *Celia* (2015); and TNT Latin America's *Hasta que te conocí* (2016), which recounts the early years of Mexican superstar Juan Gabriel.

Because of Netflix's distribution agreement with Telemundo, Mexican audiences can also watch some of these other series on its platform. The generic similarities across these shows may have contributed to audience expectations for the Luis Miguel series. Being tied to a foreign streaming service rather than a legacy broadcast network also enhanced the presumed expectation of quality for the series. The show also carried with it aspects of Luis Miguel's persona, particularly the popular resignification of his music and personal style in recent decades with the subculture of *mirreyes*, a term associated with the offspring of the country's affluent elite who indulge in conspicuous consumption and tout their wealth on social media.⁵ The release later that summer of *Made in Mexico* (2018), Netflix's reality series about wealthy urban youth, suggests that the streaming service envisions at least part of its audience precisely within this demographic. These series allude to specific class dynamics within their narratives and in their assumed audiences.

The media and cultural studies scholar Jesús Martín-Barbero has long argued for the social function of television in Latin America and the medium's increased importance in an era of accelerated globalization. Understood as industry, technology, and narrative form, television encapsulates the contradictions of globalization and Latin American modernity. "The disproportionate amount of social space which the medium occupies," he argues, "is nevertheless proportional to the lack of political

4 For an extended explanation of this trend, including how Netflix's rebranding of foreign content as "original series" aided its distinction from Blim, see Juan Llamas-Rodríguez, "'Blim and Chill': Telenovelas and Class Ideologies in the Online Streaming Wars," *Flow: A Critical Forum on Media and Culture* 23, no. 2 (November 28, 2016), <http://www.flowjournal.org/2016/11/blim-and-chill-telenovelas-and-class-ideologies-in-the-online-streaming-wars-juan-llamas-rodriguez-university-of-california-santa-barbara/>.

5 For an overview on *mirreyes* in English, see David Agren, "The Brattiest Pack in Mexico," *Macleans*, April 3, 2015, <https://www.macleans.ca/society/life/the-brattiest-pack-in-mexico/>.

spaces for the expression and negotiation of social conflict.”⁶ Telenovelas are exemplary in this regard. Historically, the genre has been instrumental in the construction of national and regional identity in line with late-capital reorganizations of markets and communication networks. The power of television in general, and telenovelas in particular, lies in how the repetitive structure of the series mirrors the ritualistic dimensions of everyday life. In this repetitive structure, audiences become acculturated into particular habits and forms of belonging.⁷

Martín-Barbero’s insights find new relevance to the viewing practices and textual engagements of Netflix’s audiences in Mexico. During its thirteen-week run, the audience for *Luis Miguel: La serie* responded fervently on social media. Fans reacted positively to the series’ careful world building, particularly its introduction of household celebrities and notable public figures that defined the Mexican neoliberal era of the late 1980s and early 1990s. Online conversations about the show focused on behind-the-fiction content: tweets, blog posts, videos, and memes that shared excerpts from the real-life counterparts to whatever was depicted on that week’s episode. Twitter users also turned to the platform for longer, more incisive examinations of the political and social content depicted on the show. For instance, journalist Verónica Calderón tweeted that the fictionalization of the life of Luis Miguel, someone who was at the epicenter of many media and political power plays, provides a “veiled testimony” of Mexican life under the PRI’s rule.⁸ These critiques implicitly suggest that, by existing outside of the media establishment, the series offered a more incisive look at this recent history than if it had not been released on a foreign platform. The release of the series in 2018 allowed for a moment of recognition not only of the abuses of power in the past but also of the repressive strategies and silences that allowed those abuses to remain unchecked.

Twitter discussions around *Luis Miguel: La serie* alluded to how the elites’ complacency helped perpetuate the decades-long reign of the PRI. It is significant that those allusions came from those of the middle and upper middle class, because AMLO’s victory after three failed presidential runs relied on the support from the upper classes previously attached to the PRI and its conservative rival, the Partido Acción Nacional (PAN). Despite AMLO’s appeals to representing “the people” and despite his opposition’s including members of the country’s business and intelligentsia leaders, the election results revealed wide support for his candidacy from people in the top 15 percent income bracket.⁹ Understanding this turnout against the heated responses to the Netflix series reveals the class self-reckoning emerging for middle- and upper-middle-class Mexicans in the summer of 2018.

6 Jesus Martín-Barbero, “Narratives of Identity and Media Genres,” in *Latin American Popular Culture: Politics, Media, Affect*, ed. Geoffrey Kantaris and Rory O’Byrne (Suffolk, UK: Boydell & Brewer, 2013), 157.

7 Martín-Barbero, 159.

8 Verónica Calderón (@veronicacalderon), “Entonces por eso #LuisMiguelLaSerie no es solo una ‘telenovela’: es un testimonio quizá velado (digo, finalmente él estuvo en el epicentro de muchas de estas cosas). Y si se fijan, entre más viejos son los mexicanos, más miedo hay de hablar de ESOS TIEMPOS,” Twitter, May 23, 2018, 1:40 a.m., <https://twitter.com/veronicacalderon/status/999163248393031686>.

9 Ana Francisca Vega, “¿Quién votó por AMLO?,” *El Universal*, July 3, 2018, <https://www.eluniversal.com.mx/columna/ana-francisca-vega/nacion/quien-voto-por-amlo>.

Nowhere was this mix of episode commentary and political resonance better evidenced than in the account of @HilosPurpura. Created in April 2018 by a lawyer from Sinaloa who uses the pseudonym “Luisa Purpura,” the account amassed more than fourteen thousand followers during the show’s initial run.¹⁰ Every week, @HilosPurpura became a hub for weekly Twitter threads (*hilos* in Spanish) about the mysteries left unanswered by the series narrative, contentious dates in the historical record, and further background on the famous political and media figures appearing on the show. Luisa Purpura did not always offer sources to support her claims, but her followers accepted these as more than mere gossip, partly because her authority on such matters had already been established in previous threads.¹¹ Still, even the unattributed assertions by @HilosPurpura function as exemplars of how power operated under PRI rule. In the absence of official records, truth emerged from collective consciousness and the oral histories derived from it. The fact that strong collusion between state agencies and media companies has long been a feature of the PRI years means that no “official” record needs to be provided for claims about the time. Like the airing of widely known, carefully guarded secrets following an authoritarian regime, the social media post mobilizes viewers’ responses to the series as a truth-reckoning moment. These instances illustrate how watching *Luis Miguel: La serie* on Netflix functioned as a catalyst for collective self-reflection among the middle and upper classes.

The show’s first season occasioned a weekly nationwide, albeit class-stratified, moment of reckoning and deliberation. Its narrative was not full of “everyday” stories, as the telenovelas that Martín-Barbero studies are, but it was the nation’s recent history encapsulated in the life of one of its most notorious public figures. Every week, thousands of Mexicans gathered to watch a new episode in the life of Luis Miguel and then discussed the happenings as a reflection of the status of Mexican social life. As @HilosPurpura states, these posts functioned as the equivalent of “getting together to watch [our] telenovela and chit-chat [*echar el chal*].”¹² The importance of these online conversations evidences the cultural relevance of a structured ritual of weekly watching at a national level. So while Netflix is known for piloting the release of the entire season of a show at once, older practices of televisual consumption continue to hold the potential for productive cultural impacts.

The novelty and outsider status of Netflix within Mexico’s national media scene contributed to the impact of the show. The talent attached to the series allowed the press to fuel the discourse of “quality” by comparing it with similar US dramas.¹³

10 Melissa Sánchez, “Desde Culiacán, Hilos Púrpura desentraña la verdad de El Sol,” *Noroeste*, July 14, 2018, <https://www.noroeste.com.mx/publicaciones/view/desde-culiacan-hilos-purpura-desentra-na-la-verdad-de-el-sol-1135578>.

11 Her credibility also stems from the fact that she was endorsed by #VerificadoMX, a consortium of journalists committed to fact-checking the statements of the presidential candidates in the run-up to the election. For more on #VerificadoMX, see Andrea Rodríguez, “Verificado 2018: Using Collaborative Journalism to Fight Fake News in Mexico,” *World News Publishing Focus* (blog), *WAN-IFRA Americas*, April 3, 2018, <https://blog.wan-ifra.org/2018/04/03/verificado-2018-using-collaborative-journalism-to-fight-fake-news-in-mexico>.

12 Hilos Purpura (@HilosPurpura), “Hilos con millones de datos inútiles para que tengamos el equivalente a ver juntos nuestra novela del domingo y echar el chal,” Twitter, May 10, 2018, 10:57 a.m., <https://twitter.com/HilosPurpura/status/994592256140238848>.

13 Javier Merino and Marysabel E. Huston-Crespo, “¿Fue esta la clave del éxito de ‘Luis Miguel: La serie’?,” *CNN Español*, July 22, 2018, <https://cnnespanol.cnn.com/2018/07/22/fue-esta-la-clave-del-exito-de-luis-miguel-la-serie/>.

Likewise, that the series was produced by and streamed on a platform independent of the country's television duopoly lent credence to its reception as quality TV. I would argue that this status also allowed the show to become a runaway hit and, in turn, a text for collective reflection. Had it been produced or aired on Televisa, its reception would have been marred by the cultural association of the media powerhouse with the country's elite. That audiences perceive Televisa as a stand-in for national hegemonic power no doubt benefits the counter- or subversive appeal of any offering that is not attached to it.

The emergence of a new player in the national television arena as instigator of socially engaged content is not new or exclusive to Netflix. Two decades earlier, TVAzteca made its mark by counterprogramming Televisa with "the new telenovela," which was more politically relevant and offered higher production values.¹⁴ In this regard, *Luis Miguel: La serie* was in itself a fairly traditional content offering. Still, the series' success lay at the intersection of a number of factors: its association with a foreign platform, its release during a charged moment in the country's political climate, and the weekly viewing practice and social media discussions at a national level. The convergence of these factors created an opening for incisive social critique to emerge from the audience interactions.

It would be a mistake to overstate the impact of one Netflix show in a country where only a minority of the population has access to high-speed internet. At the same time, the cultural sensation and timing of *Luis Miguel: La serie* make it difficult to ignore. Popular media in this case is not *mass* media but media about "a people"—those of a specific socioeconomic class in one nation—and their cultural practices. The show's timeliness and its implication in the growing dissatisfaction with the ruling elite reveals the instances where the local emerges as streaming television content spreads across the globe. Indeed, sorting out what a Netflix show means requires asking questions about the intersection of textual features, audience demographics, and technological access in a particular place at a given time. Such situated analysis remains crucial when considering the local reception of transnational coproductions; the impact and relevance of *Luis Miguel* for US audiences watching concurrently on Telemundo, for instance, would not necessarily have tied watching the show to revisiting the old wounds under the PRI's rule.

Netflix's incursion into each of the almost two hundred countries it now operates in has been met with various policy oppositions, infrastructural blocks, and social negotiations. Mapping these across various national and local settings illustrates the variegated online streaming sphere. In this case study, the convergence of content, platform, and context reveals as much about the animus in Mexico in the summer of 2018 as it does about the fluidity of identity markers for analysis of contemporary television. As Anna Cristina Pertierra and Graeme Turner argue, "The platforms used have changed, and the structure and viability of the nation state has changed, but there

14 Guillermo Orozco, "Entre espectáculo, mercado y política," in *Telenovelas en México: Nuestras íntimas extrañas* (Mexico City: Delphi, 2011), 211. See also John Sinclair and Joseph Straubhaar, *Latin American Television Industries* (London: Palgrave Macmillan, 2013), 52.

remains a strong, if altered, relationship between television and national identity.”¹⁵ Studying streaming television in a transnational context requires contending with this changing relationship to national identity as well as the differential development of digital media across the world. The transnational articulations of streaming television provide an opportunity to rethink how infrastructures, texts, and stratified audiences intermingle at multiple scales. *

15 Anna Cristina Pertierra and Graeme Turner, *Locating Television: Zones of Consumption* (New York: Routledge, 2013), 53.

Black Ships? Locating Netflix in Taiwan and Japan

by YU-KEI TSE

This article compares the discourses around Netflix’s expansion in two East Asian markets, Japan and Taiwan. Specifically, it looks at how the term “black ship” (*kurofune* in Japanese)—a historical reference to the Perry expedition to Japan in the 1850s—is frequently used as rhetoric by both Japanese and Taiwanese media critics to discuss Netflix’s possible impact on their respective domestic markets. It explains how and why, although media critics in both Japan and Taiwan used a common rubric (i.e., black ship) to discuss the introduction of Netflix, the ways Netflix is situated in each country are substantially different.

As a video-streaming platform operating simultaneously in more than 190 countries, Netflix persistently proclaims itself as a service capable of deterritorializing our television experience by offering content that comes from around the world to audiences across the globe.¹ The future of online television, in Netflix’s vision, seems to be both borderless and postnational. In practice, however, Netflix continues to abide by national and regional regulations, as other transnational television systems do. Its role as a business and a cultural form varies significantly across the globe. Such variations, nevertheless,

1 CES, “Reed Hastings, Netflix Keynote 2016,” YouTube video, 42:39, January 6, 2016, <https://www.youtube.com/watch?v=I5R3E6jsICA>.

are often overlooked in journalistic and scholarly discussions of Netflix. This tendency limits scholars' account of Netflix and the ecology of internet-distributed television in diverse global contexts. It is imperative to examine Netflix's specific cultural role comparatively across different national contexts, in the understanding that Netflix, similar to television, is a set of cultural practices, technologies, and markets that "can only be studied as located."² By contextualizing the black-ship discourses in Japan and Taiwan, this article not only accounts for the introduction of Netflix in these two East Asian markets but also shows the importance of a comparative approach for studying internet-distributed television in increasingly transnational contexts.

Originally, *kurofune* referred to US Navy Commodore Matthew Perry's gunboat diplomacy and military expedition, which forced Japan to open its borders to foreign trade in the 1850s, after two centuries of isolation. In contemporary Japanese contexts, the term is often used by the public to describe the launch of a Western (usually American) product, service, or enterprise, as well as its impact on the domestic market. Depending on the intentions of the people employing the term, *kurofune* may imply a wary or defensive tone of uncertainty about the unpredictable impact, or it may be used in a descriptive sense.

To examine the *kurofune* discourses around Netflix, it is important to consider how the arrival of transnational satellite broadcasting was understood in Japan during the 1990s. Transnational satellite broadcasting was one of the first media phenomena analogized as *kurofune* by Japanese media. According to Koichi Iwabuchi, the *kurofune* discourse on Japanese media suggests that, with the rise of transnational satellite broadcasting, the Japanese industry "can no longer enjoy a self-contained domestic market, but rather is now under threat of being forced to open its doors to the world."³ However, different from the Perry Expedition, in which the foreign forces had profound influence on Japanese society, Iwabuchi points out that in practice, the presence of foreign television in Japan did not seem to pose a real threat to the domestic market, as audiences strongly preferred domestic content. By comparison, he argues that in Japan in the 1990s, there were doubts over the ability of the famously inward-looking Japanese producers to create content that would be appealing to international markets, where they faced considerable competition. For Iwabuchi, concerning the impact of transnational broadcasting on the domestic industry, "what is at stake this time is less a foreign invasion of Japan than a Japanese advance into global media markets."⁴

How, then, can we understand the resurgence of *kurofune* discourses when Netflix Japan launched in September 2015, the company's first venture into East Asia? While Japanese media critics tended to employ *kurofune* to describe, quite defensively, the arrival of transnational satellite television as a threat to the domestic industry in the 1990s, they have tended to use the term in a looser and more ambiguous manner when it is applied to Netflix. Such usage can be roughly classified into three types of rhetoric.

2 Anna Cristina Pertierra and Graeme Turner, *Locating Television: Zones of Consumption* (New York: Routledge, 2013), 5.

3 Koichi Iwabuchi, *Recentering Globalization: Popular Culture and Japanese Transnationalism* (Durham, NC: Duke University Press, 2002), 4.

4 Iwabuchi, 4.

First, some public discourses have regarded Netflix not as a *kurofune* conquering the local industry but as a force that brings positive changes, such as enhancing the quality of domestic content with stronger global appeal and providing new opportunities for collaboration between a range of local businesses. Such rhetoric was deployed at Netflix's press conference on the launch of its Japanese service. The Japanese comedian Ryota Yamasato, one of the hosts of *Terrace House* (2015–present), a reality television series coproduced by Netflix and Fuji TV under the Netflix Original label, worked as the master of ceremonies for the conference. He excitedly and jokingly analogized Netflix as a *kurofune* and its arrival as the dawn of a new and upgraded entertainment era to the world.⁵ (In the context of his speech, the “world” refers mainly to Japan.)

This celebratory rhetoric, however, is not the only understanding of Netflix's *kurofune* status, which brings us to the second use of *kurofune*, in which the term is still used by Japanese media with a slightly wary tone to consider how Netflix may threaten the current practices of the local media industry. Japanese markets had already been packed with numerous local digital media services, including telecom providers and consumer electronic companies, before Netflix Japan launched. These local players were well established nationally, if not internationally, but Japanese audiences had not widely adopted the internet-based subscription video-on-demand model before Netflix's arrival. As a result, rather than considering the local enterprises and industry as weak players in danger, the media discourses tended to focus instead on how Japanese services and enterprises (sometimes dubbed as “giants”) could fight against the *kurofune* of Netflix in the war of internet-distributed television.⁶

Speaking after Yamasato at the press conference, Netflix's CEO Reed Hastings first emphasized how Netflix has built strong content partnerships with companies all over the world, including local Japanese producers “believing in Netflix” and “the possibility of creating global franchises for new content.”⁷ He then argued jestingly that his company, therefore, was not “what critics say (a Black Ship)” but instead “the Orange Ship of great hope”—a reference to the platform's original series *Orange Is the New Black* (2013–2019). The way in which Hastings claimed that Netflix was *not* a black ship seemed to indicate his intention to distance his company from the complexity and negativity surrounding *kurofune* as a metaphor in Japan. Hastings's rhetoric, in fact, is not fundamentally different from Yamasato's *kurofune* analogy in the sense that both emphasized Netflix's potential to bring positive changes from which the local industry would benefit. However, Hastings's statement still prompted Yamasato, who must also have known the negative implications concerning *kurofune*, to “apologize” playfully to Hastings for calling his company *kurofune*. The dialogues between Hastings and Yamasato demonstrate how the general public would interpret the rhetoric of Netflix as a *kurofune*, contradictorily, as both a foreign threat and “hope” for the local Japanese industry.

5 “Netflix Suddenly Launched Its Service in Japan—‘A Historical Moment,’ Nankyan's Yamasato Excited,” *Livedoor News*, September 1, 2015, <https://news.livedoor.com/article/detail/10539800/>.

6 Munechika Nishida, *The Age of Netflix: Distribution and Smart Phone Are Changing Television* (Tokyo: Kodansha, 2015).

7 MAiDIGITV, “Netflix CEO ‘We Are Not a Black Ship but the Orange Ship with Great Hope,’ Netflix Japan Launch Event 2,” YouTube video, 5:39, September 1, 2015, <https://www.youtube.com/watch?v=0Avsh-sdw9g>.

Third, the Japanese media also frequently use *kurofune* as a term to underline Netflix as the leading, US-based player in the global streaming industry, without carrying a clear positive or negative attitude. In such cases, the platform's impact on the Japanese industry is often considered as not particularly profound. As in the 1990s, the Japanese media market in the 2010s remains a prosperous market where domestic content is favored over foreign content. In practice, upon its launch, Netflix had in stock a significantly higher percentage of local content for its Japanese audiences than it did in many other markets, with some Netflix Originals being coproduced with local partners like Fuji TV.⁸ However, most media critics in Japan still considered the quantity of local content insufficient to appeal to Japanese audiences. They often regarded Netflix's high quality and large quantity of Western content as a selling point, but not a threat to audiences' preference for domestic content. In such contexts, the *kurofune* reference emphasizes how, despite being a US giant, Netflix has failed to expand its market or challenge the persistently inward-looking and well-established Japanese industry as much as it has in other parts of the world.⁹

Although this essay categorizes three types of *kurofune* discourses around Netflix, it is worth noting that, in many cases, the various, sometimes contradictory implications of *kurofune* may coexist in a single news article, indicating that the term is often used ambiguously and that Netflix's impact on Japan is understood in a multivalent manner. While *kurofune* is less likely to be used as a metaphor in the discourses around Netflix now than when the platform was first introduced to Japan, the *kurofune* discourses represents the way Netflix was imagined in its initial years of operation in Japan.

By contrast, in Taiwan, "black ship," or *hei-chuan* in Mandarin Chinese, is mainly used under two circumstances: when reporting on the Japanese discourse of *kurofune* (usually accompanied by a brief introduction to the Perry expedition), or alternatively, when referring to the arrival in Taiwan of well-established Western products, services, or enterprises.¹⁰ In both circumstances, *hei-chuan* might carry a slightly wary tone, or it might also be descriptive. When it came to Netflix, the media followed closely the platform's expansion to Japan in September 2015. Some journalists discussed how and why Japanese media dubbed Netflix's possible impact as a *kurofune*. After Netflix Taiwan launched in January 2016, the Taiwanese media understandably turned the focus from the platform's Japanese expansion to its implications for the domestic media landscape. This changed *hei-chuan* from a reference exclusive to Netflix Japan to a phrase that described the challenges the Taiwanese television industry was facing. Some reporters characterized Netflix Taiwan's premier as "the arrival of *hei-chuan*" without referring to Netflix Japan or the Perry expedition. Some also debated whether Netflix would make audiences lose their interest in cable and network TV, and thereby contribute to the decline in TV ratings. Not all reporters

8 Ramon Lobato, *Netflix Nations: The Geography of Digital Distribution* (New York: New York University Press, 2019), 127.

9 Kyoko Shimizu, "3 Years after Its Arrival . . . the Market Barriers Faced by the 'Kurofune of Video Services,' Netflix," *Biz Spa!*, August 14, 2018, <https://bizspa.jp/post-52342/>.

10 The Chinese characters of *hei-chuan* (黑船) are very similar to *kurofune* (黒船) in Japanese Kanji.

described Netflix as *hei-chuan*, but they used terms such as “giant” or “king” (e.g., “the streaming giant” or “the king of global streaming”) to emphasize how Netflix as a foreign player might bring unpredictable impacts on the local industry—rhetoric that closely resembles *hei-chuan*.

When Netflix Taiwan launched, the ecology of internet-distributed television on the island was marked by a significant lack of established legal services—a substantial difference from the industrial conditions in Japan. Most broadcast networks and cable television providers in Taiwan did not have online TV portals; even when they did, the portals were often underdeveloped, with little content and a poor user interface. Local over-the-top (OTT) and video-on-demand (VOD) services were hard to find. While transactional video-on-demand (TVOD) services such as iTunes existed, they were not popular. The ecology largely consisted of illegal streaming apps and websites and the unlicensed sharing of content on YouTube and similar sites. Moreover, the general public has long criticized the local television industry for the low quality of self-produced content and endless reruns of outdated programs. It was not until after Netflix’s arrival as a *hei-chuan* that additional local and foreign streaming platforms emerged as legal businesses, a transition often noted by commentators as “the beginning of a new era—the era of OTT.”¹¹

In this regard, Netflix’s niche in Taiwan’s internet-distributed television market is determined by not only its Western, English-language-focused content but also its status as a legal, well-established internet-distributed television model in the formal media economy. In the media discourse, while some journalists considered Netflix as a possible threat to local businesses (in terms of the quality of content and the infrastructure of distribution), it is more common to find critics holding a positive view on Netflix’s arrival. The critics with the latter perspective considered that the US platform had helped launch a new age of television, one in which Taiwanese audiences have more choices of legal online platforms and high-quality content. Meanwhile, Netflix remains the only platform available in Taiwan that does not feature local and East Asian content, which in general enjoys wider popularity than American and Western content. This condition has been commonly cited by major local competitors as the reason Netflix, despite being the pioneer that led Taiwan to the dawn of formal internet-distributed television, does not threaten their businesses as latecomers.¹²

For this reason and others, in the Taiwanese media discourse, Netflix has not been considered a *hei-chuan* threatening the local market but celebrated as the best vehicle through which Taiwanese content could be circulated across the world, which was rarely possible before Netflix emerged. It is worth pointing out that the small amount of local content Netflix has coproduced with Taiwanese production teams so far—such as *A Taiwanese Tale of Two Cities* (2018–2019)—was licensed exclusively abroad. However, in Taiwan, such coproduction is exempted from license exclusivity on Netflix—it is available on Netflix as well as on other platforms and local television

11 Jing-lin Hung, “The Age of OTT Has Arrived: Lots of Content at the Touch of a Button,” *Business Today*, June 10, 2016, <http://www.businesstoday.com.tw/article-content-80394-155596-OTT>.

12 “LiTV Not Frightened by Netflix’s Arrival,” *Storm Media*, January 12, 2016, <https://www.storm.mg/article/78182>.

channels. The local media industry usually regards such content as more valuable for making Taiwanese productions seen overseas than for attracting local audiences.¹³

This essay has located and compared the “black ship” discourses surrounding Netflix in the geo-linguistic, cultural contexts of both Japan and Taiwan. As a case study, the article has also demonstrated the importance of a comparative approach for studying internet-distributed television in increasingly transnational contexts. It is through a comparative approach that it can explain how Netflix has functioned differently as a foreign, niche service in the two markets—even if Japanese and Taiwanese media critics both dubbed Netflix as a black ship in regard to their respective domestic markets. Netflix has only been operating in Taiwan and Japan for around five years, which is rather short compared to its history in North America, Latin America, and Western Europe. It remains too early to predict the long-term effects of Netflix in Japan, Taiwan, or other markets Netflix entered following its global switch-on. To account for Netflix’s long-term effects in the future, the primary task for media studies scholars will be to document its prompt development and some seemingly short-term effects across different markets through cross-cultural and transnational collaboration.

With the growth of internet-distributed television and the emergence of Netflix in particular, streaming television seems to be increasingly understood or expected to be territorially free. However, the way Netflix has operated and functioned across the world is by no means deterritorialized or postnational, despite its being the most globalized internet television network. Netflix, as Ramon Lobato rightly argues, should be better conceptualized as “a collection of national media services tied together in one platform rather than as a uniform global service.”¹⁴ The more Netflix endeavors to emphasize its potential to be a universal service worldwide, the more important it is for media studies scholars to investigate carefully the cultural and industrial structures of each location. It is only through collaboration and dialogue with researchers across countries and cultural contexts that we can understand what Netflix has to tell us about the ongoing reconfiguration of global television. *

13 Yi-qing Liu, “Taiwanese Dramas on the Global Stage! *A Taiwanese Tale of Two Cities* released in 30 Languages,” *TVBS News*, January 7, 2018, <https://news.tvbs.com.tw/entertainment/848523>.

14 Lobato, *Netflix Nations*, 184.

Global Portals in National Markets: Branding Netflix in Israel

by MICHAEL L. WAYNE

Branding has been described as the defining industrial practice of television's recent past.¹ As the frames that manage the interactions among viewers, content, and producers, television brands operate at multiple levels. For example, channels with well-defined brand identities are better able to establish strong relationships with loyal viewers; executives, industry observers, and academics see these relationships as central to commercial success in the increasingly competitive television market.² Beginning in the mid-1980s, demographic network branding—reflected in Lifetime's slogan "Television for Women," for example—became a common industry response to increasingly fragmented audiences.³ In this context, heavily marketed flagship programming reflects the brand identity that network executives are attempting to cultivate. The best-known example of a signature series embodying a channel's brand identity is the case of HBO's *The Sopranos* (1999–2007) and the network's slogan "It's Not TV. It's HBO."⁴

Despite the television industry's conventional wisdom regarding the necessity for strong channel brand identities and flagship series, the most popular subscription video on-demand (SVOD) services have not used original content targeting specific audience demographics to construct distinctive brand identities. Instead, services like Netflix, Amazon Prime Video, and Hulu present themselves as "portals" that act as generalized viewing platforms for subscribers.⁵ Although the appeal of a given streaming service certainly depends on the quality and variety of available content, the brand identities of these services are

- 1 Catherine Johnson, "Tele-Branding in TVIII: The Network as Brand and the Programme as Brand," *New Review of Film and Television Studies* 5, no. 1 (2007): 5–24.
- 2 Barbara Selznick, "Branding the Future: Syfy in the Post-Network Era," *Science Fiction Film & Television* 2, no. 2 (2009): 177–204.
- 3 Heather Hundley, "The Evolution of Gendercasting: The Lifetime Television Network 'Television for Women,'" *Journal of Popular Film and Television* 29, no. 4 (2002): 174–181.
- 4 Gary R. Edgerton, "A Brief History of HBO," in *The Essential HBO Reader*, ed. Gary R. Edgerton and Jeffrey P. Jones (Lexington: University Press of Kentucky, 2008), 9.
- 5 Amanda D. Lotz, *Portals: A Treatise on Internet-Distributed Television* (Ann Arbor, MI: Maize Books, 2017).

largely defined by the experiences that the portal offers viewers: a personalized television viewing experience made possible through internet distribution.

Netflix, which competes directly with cable television networks and aggressively positions itself as a replacement for linear television, employs a “portal-as-brand” strategy in the US domestic market that seeks to make the service itself the audience’s primary point of identification.⁶ The company frequently and strategically emphasizes streaming television’s distance from and superiority to linear television. During his keynote address at the 2016 Consumer Electronic Show, for example, CEO Reed Hastings described on-demand video as “a revolutionary shift from corporate to consumer control.”⁷ Netflix’s marketing materials consistently present binge viewing as a mode of audience behavior that improves on traditional television’s liveness and linear scheduling.⁸

Not surprisingly, executives at Netflix use the same strategic discourses to define the company’s brand identity. When asked about the service’s programming choices, chief content officer Ted Sarandos explains, “There’s no such thing as a ‘Netflix show.’ That as a mind-set gets people narrowed. Our brand is personalization.”⁹ Cindy Holland, vice president for original content, similarly asserts, “Our brand is as broad as the tastes of our members.”¹⁰ By defining the brand in terms of personalization or the preferences of the service’s 130 million subscribers, Netflix simultaneously separates its brand from those of the most successful cable networks and denigrates those same networks as “narrow” for providing loyal audiences with on-brand content. Yet the claim that there is a clear distinction between Netflix’s portal brand structured around a particular television viewing experience and a linear channel’s content-based brand becomes less tenable in transnational contexts.¹¹

To illustrate some of the ways in which portal brands like Netflix can become content-based television brands in international markets, this article draws on examples from the pay-television industry in Israel. In contrast to its US strategy, Netflix has not marketed itself to Israeli consumers as a replacement for linear television. Instead, nearly all the company’s advertising efforts result from partnerships with two local television providers: Partner TV, the country’s second-largest “over-the-top” (OTT) television service, and Hot, the country’s largest cable television provider. Given the symbiotic brand relationships between Netflix and Israeli multichannel providers, I argue that streaming television services in some national contexts appear as both personalized portal brands and traditional content-based brands. After describing these

6 Michael L. Wayne, “Netflix, Amazon, and Branded Television Content in Subscription Video On-Demand Portals,” *Media, Culture & Society* 40, no. 5 (2018): 725–41, <https://doi.org/10.1177/0163443717736118>.

7 Variety Staff, “Netflix CEO Reed Hastings’ Keynote Speech at CES,” *Live Blog* (blog), *Variety*, January 6, 2016, <https://variety.com/2016/digital/news/netflix-ceo-reed-hastings-keynote-speech-at-ces-live-blog-1201672930/>.

8 Netflix, “Netflix & Binge: New Binge Scale Reveals TV Series We Devour and Those We Savor” (press release, June 8, 2016), <https://media.netflix.com/en/press-releases/netflix-binge-new-binge-scale-reveals-tv-series-we-devour-and-those-we-savor-1>.

9 Josef Adalian, “Inside Netflix’s TV-Swallowing, Market-Dominating Binge Factory,” *Vulture*, June 10, 2018, <https://www.vulture.com/2018/06/how-netflix-swallowed-tv-industry.html>.

10 Jessica Steinberg, “Netflix Exec Tells Jerusalem Gathering: Foreign Shows Are ‘Essential,’” *Times of Israel*, March 12, 2019, <https://www.timesofisrael.com/netflix-exec-tells-jerusalem-gathering-foreign-shows-are-essential/>.

11 Timothy Havens, “Netflix: Streaming Channel Brands as Global Meaning Systems,” in *From Networks to Netflix: A Guide to Changing Channels*, ed. Derek Johnson (New York: Routledge, 2018), 321–331.

relationships and Netflix's very limited local independent marketing efforts, this article concludes by suggesting a new term, "portal-as-content," that reflects how the identities of global streaming services blend established and emerging branding strategies in national markets.

Since Netflix officially entered the Israeli market in early 2016 as part of its expansion into 130 new territories, the majority of Netflix's local marketing has been connected to collaboration with Partner Communications, one of Israel's largest mobile phone operators.¹² Partner's OTT platform Partner TV was the first multichannel television service to offer Netflix through its set-top box and provide "all the conveniences of a Netflix button on Partner's remote control."¹³ In a press release titled "Netflix Is Now Truly Israeli," the service describes Partner as its "first local partner" in Israel, explaining that the firm would "run a consumer promotion and will allow members to sign-up and pay for Netflix through their Partner TV bill."¹⁴ This collaboration obliges Partner to heavily promote its association with Netflix and manage the global SVOD's local billing. In September 2017, Partner TV began offering new subscribers six months of "free Netflix," and Netflix branding continues to be featured throughout the OTT's marketing materials. Yet in the context of this cooperative brand relationship, Partner markets Netflix as a source of popular international content, not as a personalized television-viewing experience.

A typical commercial for Partner TV features the service's well-known spokesperson appearing to interact with characters from some of Netflix's most popular series, including *Narcos* (2015–2017) and *Stranger Things* (2016–present). In 2018, Partner TV introduced a new campaign featuring Netta Barzilai, a recent winner of *Eurovision Song Contest* (Kan, 2018).¹⁵ In one commercial, the singer, known for vocally incorporating sound effects into her songs, mimics gunshots during a bank robbery in *La casa de papel* (*Money Heist*, 2017–present), appears to perform for the king and queen in *The Crown* (2016–present), and dances with characters from *Orange Is the New Black* (2013–2019). Although these ads include close-ups of the Netflix button on Partner TV remote controls, there is little in them to connect Netflix to the features often associated with internet-distributed television. The viewer does not see Netflix's user interface, nor do the ads mention the variety of content available in Netflix's library. Instead, the use of Netflix's branding is limited to its logo and clips from a small number of original series. As such, Partner TV's marketing presents Netflix as a well-known content-based television brand.

12 Before 2016, the only way for Israeli viewers to access Netflix was through the use of a virtual private network (VPN), which made them appear as if they were watching from another country. In December 2015, one local television executive claimed that before its official launch, the service already had fifty or sixty thousand Israeli subscribers posing as Americans through VPNs. Amitai Ziv, "Netflix Revolution: About 100,000 Customers in Israel—and How Does HOT Plan to Respond to the Threat?," *The Marker*, January 15, 2018, <https://www.themarket.com/technation/1.5727466>.

13 Partner Communications, "Partner Communications Announces Netflix and Partner Communications Collaborate in Israel," press release, May 29, 2017, https://www.partner.co.il/globalassets/global/PR_Netflix_isa.pdf.

14 Netflix, "Netflix Is Now Truly Israeli," press release, July 26, 2017, <https://media.netflix.com/en/press-releases/netflix-is-now-truly-israeli-1>.

15 Anat Bein-Leibovitz, "Netta Barzilai to Present Partner TV Ad Campaign," *Globes*, June 27, 2018, <https://en.globes.co.il/en/article-netta-barzilai-to-front-partner-tv-ad-campaign-1001243446>.

Netflix also has a cooperative brand relationship with the cable provider Hot, Israel's largest multichannel service and one of the largest producers of local content. In June 2017, Hot's parent company, Altice, signed a global partnership with Netflix covering France, Portugal, Israel, and the Dominican Republic.¹⁶ According to the multiyear deal, Netflix content was to be made available on all "eligible" Altice device platforms in those markets. Following several delays, in March 2018, Hot announced that it would begin offering customers a new set-top box with Netflix integration. Nearly a year later, Hot introduced a marketing campaign to promote their association with the global service. This campaign's first television commercial begins with a montage of clips from several of Hot's most popular series, before the company's spokesperson introduces the collaboration with Netflix. The commercial then cuts to a montage of Netflix original series with the series' titles appearing in Hebrew in the bottom left corner of the screen and Netflix's logo in the bottom right corner. The ad concludes with the tagline "Netflix is joining Hot." Like Partner TV's marketing, Hot's promotional materials present Netflix original series as somehow separate from the portal that distributes them.

Even though most of Netflix's Israeli marketing arise from the company's relationships with multichannel providers and resembles content-based television brands, the company has independently produced a limited amount of promotional materials that emphasize the viewing experiences associated with its service. In July 2018, for example, Netflix posted a sixty-second commercial to its Israeli social media accounts. The ad features a young couple fighting over "Netflix cheating," as the young woman berates her male partner for betraying her by watching episodes of Netflix series by himself. This notion of "cheating" was not developed for the Israeli market. It was first introduced in 2017, when the company humorously explained in a press release that such viewing behavior was becoming increasingly common and was the inevitable result of the ability to binge-watch Netflix's inherently appealing original series.¹⁷ However, this Israeli commercial was not part of a larger marketing campaign, and there have been no additional efforts to implement elements of the portal-as-brand strategy used in the United States.

In Israel, Netflix's brand is almost exclusively articulated through the marketing efforts of local television providers with their own brand identities. Yet it seems that scholars lack the vocabulary to make sense of portal branding in contexts where global streaming platforms are collaborating with players from national television industries. As such, Netflix's Israeli branding reveals how streaming services are appearing as content-based forms of television in national markets. Although Netflix's brand collaborations with Israeli multichannel providers differ in that Partner runs a "free" access promotion and Hot does not, both relationships represent what can be called a "portal-as-content" brand strategy.¹⁸

16 Nancy Tartaglione, "Altice, Netflix Ink Multi-Year Partnership for France, Israel and More," *Deadline*, June 12, 2017, <https://deadline.com/2017/06/altice-netflix-content-deal-france-israel-portugal-dominican-republic-1202111551/>.

17 Netflix, "Netflix Cheating Is on the Rise Globally and Shows No Signs of Stopping" (press release, February 13, 2017), <https://media.netflix.com/en/press-releases/netflix-cheating-is-on-the-rise-globally-and-shows-no-signs-of-stopping>.

18 Given its policy of refusing to release subscriber numbers for all non-US territories, the benefits of portal-as-content branding for Netflix remain unknown. Nonetheless, collaborating with Netflix has clearly benefited one

By allowing local multichannel providers to use its brand and by requiring them to heavily promote these collaborations, Netflix has largely avoided the cost of developing and maintaining an independent marketing campaign in the Israeli market. In this case, local providers market their association to Netflix by featuring the original and exclusive series distributed by the portal. As a result, Netflix appears as a significant source of international television content rather than as a global internet-based service offering customizable television-viewing experiences. Given this emphasis on content, there seems to be some obvious overlap between this particular portal branding strategy and content-based branding practices associated with linear cable channels. Furthermore, by allowing local multichannel providers to use its brand in such ways, it seems unlikely that Netflix is positioning itself to become the Israeli audience's primary point of identification as it has sought to do in other national markets.

Of course, branding practices that construct Netflix in ways that resemble content-based television brands do not exist in isolation from branding practices that construct Netflix as a personalized television-viewing experience. Even without an independent marketing campaign, a local financial newspaper ranked Netflix as the country's "top" brand in 2019.¹⁹ Nonetheless, Netflix's heavy reliance on brand partnerships and the company's very limited independent marketing efforts in Israel raise some important issues about global SVOD branding practices in national contexts. In this small national market, Netflix has not attempted to replace traditional television but rather formed relationships with existing providers that have resulted in the emergence of a new portal branding practice.

In one sense, these relationships and the brand practices associated with them highlight the variety of ways in which global SVODs can engage national television industries. Although Netflix executives claim to be leading "a revolution in global television," the realities of operating in so many national markets may necessitate a shift away from the antagonism that has characterized Netflix's portal-as-brand strategy in the United States.²⁰ In a broader sense, the existence of portal-as-content branding confirms what media scholars have long claimed about transitions between old and new media. New media forms do not replace old ones; the interplay of old and new is an ongoing negotiation between established and emerging practices. Moving forward, it seems that scholars' ability to understand branding as television's defining industrial practice will require greater attention to the collaborations between global streaming services and national industries as a means to develop more nuanced models of transnational portal brands. *

local provider. Since the start of their six months of "free" Netflix offer that coincided with the launch of Partner TV, the OTT service signed up nearly 120,000 subscribers, accounting for 7 percent of the total pay-TV market. Anat Bein-Leibovitz, "Partner TV to Market Personalized Ads," *Globes*, January 20, 2018, <https://en.globes.co.il/en/article-partner-tv-to-market-personalized-ads-1001269689>.

19 Yonatan Kitain, "'Globes' Ranks Netflix as Israel's Top 2019 Brand," *Globes*, July 24, 2019, <https://en.globes.co.il/en/article-globes-ranks-netflix-as-israels-top-brand-in-2019-1001294809>.

20 John Hopewell and Jamie Lang, "Netflix's Erik Barmack on Ramping Up International Production, Creating Global TV," *Variety*, October 11, 2018, <https://variety.com/2018/tv/global/netflix-erik-barmack-international-production-global-tv-1202976698/>.

From Netflix to Movistar+: How Subscription Video-on-Demand Services Have Transformed Spanish TV Production

by DEBORAH CASTRO and CONCEPCIÓN CASCAJOSA

Subscription video-on-demand (SVOD) services are in a growth phase in Europe. A variety of different platforms are increasing their market penetration while boosting their in-house production to retain subscribers and conform to new European audiovisual regulations. In this essay, we compare the impact of two services—Netflix and its Spanish competitor Movistar+—on Spanish television’s local production culture. Spain is a particularly important context to track and analyze because it is becoming a popular production hub for transnational operators. Notably, Netflix opened its first European production hub in Madrid in 2019.

Spain’s television fiction industry is highly developed. Since liberalization in the 1990s, its production market has become one of the most competitive in Europe.¹ Despite the significant presence of foreign shows on broadcast television in Spain (mostly programs imported from the United States and dubbed into Spanish), local audiences still prefer the domestic productions that are commonly shown in prime time. Consequently, Spanish producers focus on creating content suited for this time slot.² Yet the emergence of free and subscriber-funded internet-distributed television services in Spain has significantly increased the amount of television production in the country while also changing the dynamics of Spanish television production more generally.³

1 Mario García de Castro, *La ficción televisiva popular: Una evolución de las series de televisión en España* (Barcelona: Gedisa, 2002).

2 Pricewaterhouse Coopers (PWC), “La oportunidad de los contenidos de ficción en España: Análisis de oportunidad,” 2018, <https://www.audiovisual451.com/wp-content/uploads/2019/03/La-oportunidad-de-los-contenidos-de-ficcion-en-Espa%C3%B1a.pdf>.

3 Data from PWC (2018) indicate that Spanish productions increased from thirty-eight series in 2015 (which contributed approximately 429 million to gross domestic product) to fifty-eight series in 2018 (which contributed approximately 655 million to GDP).

The two most popular subscriber-funded television services in Spain are Netflix and Movistar+.⁴ Accessed by 2.2 million households and reaching around 13 percent of national households, Movistar+ was launched in July 2015 by the telecommunication company Telefónica. The service was formed through a merger between the pay-television channel Canal+ (distributed via satellite) and Movistar TV (originally distributed via broadband connection). Movistar+ thus became the video-on-demand service within Telefónica's customer offering. Netflix arrived in Spain in October 2015 and became the first foreign SVOD platform available in the country.⁵ As of 2018, there are an estimated 2 million Netflix households in Spain, reaching around 12.5 percent of Spanish households.⁶

As these figures suggest, both services have achieved a similar level of market penetration, though with quite different pricing structures. The basic Netflix package costs eight euros per month. In contrast, Movistar+ was originally bundled with other Movistar telephony and internet services, costing sixty-five euros per month. Recently, Movistar changed its strategy and announced that Movistar+ will also be available as a stand-alone over-the-top (OTT) service called Movistar+ Lite, also costing eight euros per month. This new, more competitively priced Movistar+ stand-alone service was launched in June 2019.

Compared to the traditional pay-TV services that had operated in Spain, Netflix's rapid penetration demonstrated that there was a window of opportunity for an on-demand service at a reduced cost. The flexibility in the sign-up process, the personalization, and the simple use of its interface contributed to Netflix's appeal for the Spanish consumer. Moreover, the changes introduced by Movistar+ in its model reflect Netflix's influence on, for example, the price and the content offered, particularly when it comes to the production of exclusive programs. There are also other similarities between the two services. For example, both Movistar+ and Netflix release all the episodes of their in-house productions at once; some programs are available to download and view offline; and users can stream content on multiple devices.

Interestingly, in December 2018, the two companies opted to establish an alliance rather than to compete directly for customers. Movistar announced it would offer an integrated Movistar+ and Netflix bundle, priced slightly cheaper than two separate subscriptions.⁷ For Movistar+, this pact facilitates access to internationally acclaimed

4 It is worth noting that the study conducted by Comisión Nacional de los Mercados y la Competencia (CNMC) allows for multiple responses per respondent, meaning that the study considers a degree of overlap between the number of Netflix and Movistar+ subscribers, but it does not offer specific data. Barlovento, "Análisis televisivo 2018," <https://www.barloventocomunicacion.es/wp-content/uploads/2018/12/analisis-televisivo-2018-Barlovento-Comunicacion.pdf>

5 This was followed by HBO-España in November 2016, Amazon Prime Video in December 2016, and FoxNow in December 2018, among others. These platforms add to a wide array of free and pay SVOD services that Spanish TV channels have launched since 2004, when the Catalan TV channel TV3 made several of its shows available on the internet. All these services have been created either to prolong the life of their broadcast programs (e.g., RTVE.es, Mitele.es) or to offer exclusive content to their viewers (e.g., Flooxer, Playz).

6 CNMC in Barlovento, "Análisis televisivo 2018."

7 In April 2019, the cheapest package from Movistar+ that includes access to Netflix cost around 105 per month, and it came with more than eighty TV channels (including Movistar+ series), a Netflix standard subscription, three cell-phone lines, one landline, and internet at home.

Netflix series (e.g., *Stranger Things*, 2016–) for its subscribers and strengthens its already rich audiovisual catalog. This happens in a context in which Movistar+ has lost access to the catalog of programs from operators such as HBO and Starz, which launched their own video-on-demand services. For Netflix, this partnership helps expand its penetration in Europe and in Spanish-speaking markets, where Movistar+ is popular.

The growth of Movistar+ and Netflix, and to a lesser extent Amazon Prime Video, has significantly boosted television series production in Spain. In 2017–2018, the three platforms together offered their subscribers a total of twenty new seasons, or 147 episodes, of Spanish-made fiction series. Movistar+ led the way with fourteen seasons of twelve series, followed by Netflix, with five seasons of three series. Amazon Prime Video, however, had only one new Spanish program. Table 1 illustrates the importance of this development. Remarkably, in 2018 the SVOD platforms offered almost the same number of seasons as Spain's broadcast channels—fifteen programs for the SVODs, compared with sixteen for the broadcasters—although with fewer episodes (103 versus 202) and shorter length.

With second seasons and new releases, Movistar+ will meet its goal of twelve annual fiction series in the 2018–2019 season. In the case of Netflix, a more gradual rhythm was established: *Las chicas del cable* (*Cable Girls*, 2017–present), whose first two seasons premiered in 2017, was the only Netflix original series until 2018, although the number of series under development and ordered later increased significantly.⁸ Amazon Prime Video and HBO-España joined this trend more modestly with, respectively, a single 2018 premiere—*Pequeñas coincidencias* (*Small Coincidences*, 2018–present)—and several series in development for 2020.

These platforms have reached out to talented creatives with a considerable record in cinema and/or television. Especially significant is the inclusion of film professionals in their production teams, including Alberto Rodríguez (*La isla mínima*; *Marshlands*, 2014), Cesc Gay (*Truman*, 2015), Enrique Urbizu (*No habrá paz para los malvados*; *No Rest for the Wicked*, 2011), Isabel Coixet (*The Bookshop*, 2017), Nacho Vigalondo (*Colossal*, 2016), and Álex de la Iglesia (*The Oxford Murders*, 2008). In a movie industry characterized by insecurity and precarity, the projects launched by SVOD platforms constitute an attractive option for filmmakers and represent a transformation in the production of Spanish TV fiction, as the broadcast channels did not offer the same budgets.

One of the key changes associated with the entry of SVOD services into Spain has been alterations to episode and season length. Traditional Spanish programming uses an average of thirteen 70-minute episodes per season. This standard was introduced after the successful premiere of fiction series on commercial channels to include an additional advertising break with the intent to maximize profits. However, producers for Netflix and Movistar+ offer Spanish creators considerable flexibility in relation to these episodes and season lengths (30 minutes in comedy and 60 minutes in drama). Sixty-minute episodes for drama and 30-minute episodes for comedy, with an average

8 On February 6, 2019, five new series were announced in the same press release. John Hopewell and Jamie Lang, "Netflix Unveils Five New Spanish Original Series," *Variety*, February 6, 2019, <https://variety.com/2019/tv/news/netflix-five-new-spanish-original-series-1203129805/>.

TABLE 1. Production of TV Fiction in Spain (2018–2016)

Number of seasons	2016	2017	2018
Broadcast channels	19	18	16
Subscription video-on-demand platforms	0	5	15
Free and ad-supported video-on-demand platforms	2	2	3
Pay-TV channels	1	1	2
<i>Total</i>	22	26	36

Note: Number of seasons refers to seasons of four or more episodes, each of which averages more than twenty minutes. Broadcast channels are Televisión Española, Antena 3, and Telecinco. SVOD includes Netflix, Movistar+, and Amazon. Free and ad-supported includes Flooxer and Playz. Pay TV refers to #0, Comedy Central, and Fox.

of eight episodes per season, has been, up to now, the most used formula, which gives evidence of the adoption of an international TV format.

On this front, it is worth reflecting on the effect of *La casa de papel* (*Money Heist*, 2017–present), the most watched non-English-language series in the history of Netflix (as of April 2018).⁹ The series was originally created for the linear service Antena 3 by Vancouver Media and Atresmedia, which consisted of one fifteen-episode season of seventy-minute episodes, divided into two parts (nine episodes in part 1, and six episodes in part 2). After *La casa de papel* aired on free-to-air television, Netflix bought the international distribution rights for the fifteen episodes and subsequently reedited them into twenty-two episodes of forty to fifty minutes each, bringing them closer to the international norm of episode length. Reediting episodes for international distribution was, however, a standard practice for some production companies, such as Bambú. Nonetheless, the subsequent success of *La casa de papel*, which has opened up new markets for other Spanish TV series, reinforces the idea that overly long episodes could have been a significant handicap for the internationalization of serialized TV fiction made in Spain and that adjustments may be needed to meet international audience expectations.

Consequently, in 2018 both the commercial broadcast channel Antena 3 and the public broadcaster Televisión Española (TVE) announced that they were going to cut the episode lengths for their series from seventy minutes to fifty and sixty minutes, respectively.¹⁰ The reasons for this format change are related not only to new consumption patterns but also to the search for international markets—a discussion that had been initiated by local Spanish producers a few years before the advent of international

9 Yoni Heisler, “*La casa de papel* (aka *Money Heist*) Becomes Netflix’s Most-Watched Foreign Original Series Ever,” *Decider*, April 16, 2018.

10 Helena Cortés, “TVE se acerca al mundo: Sus nuevas series serán de 60 minutos,” ABC, December 12, 2018, https://www.abc.es/play/series/noticias/abci-acerca-mundo-nuevas-series-seran-60-minutos-201812121023_noticia.html.

SVOD platforms as a reaction to the economic crisis that began in 2008. With these changes, Spanish producers hope to become more competitive in an increasingly saturated global marketplace.

One of the main innovations of SVOD services in the Spanish context has been the redefinition of the traditional structures of production, opening the system to more complex collaboration formulas and new operators. The model established by Spanish commercial television in the early 1990s—in which broadcast channels commission and finance television series exclusively from independent producers—coexists today with new production alliances between public and commercial channels, and with emerging as well as established production companies. In one relevant example, TV fiction was, for many years, pivotal to the branding strategy of Antena 3, a channel owned by Atresmedia. After the international success of *La casa de papel*, the company created the division Atresmedia Studios to produce for other operators, including Movistar+ and Amazon Video. This illustrates that video-on-demand services became an opportunity to grow for well-established Spanish companies.

Despite their status as digital disruptors, Netflix and Movistar+ are increasingly integrated into this production landscape. Both services have coproduced series with Atresmedia or Mediaset, the two dominant private media groups in the country. In the case of Movistar+, its first television fiction series was *Velvet Colección* (*The Velvet Collection*; 2017–2018), the sequel of the nationally successful drama *Velvet* (Antena 3, 2014–2016). This distribution change—that is, from the broadcast channel to a SVOD service—was part of a nonpublic agreement and positively affected the international distribution rights of the series because it extended the life of the show in an environment where it was protected from traditional broadcast ratings. At the time of writing these words, *Velvet Colección* is the only Movistar+ series to be part of the Netflix catalog outside Spain.

Netflix's initial strategy in Spain was to coproduce existing projects with broadcast and pay-TV partners in exchange for exclusive rights in the international marketplace. For example, Netflix coproduced the third season of *The Ministry of Time* (*El ministerio del tiempo*; TVE, 2015–2017), the critically lauded time-travel series produced by TVE. In some other cases, Netflix became the second window of programs that have been previously broadcast to channels that have their own video-on-demand online platforms, such as the drug-trafficking drama *Unauthorized Living* (*Vivir sin permiso*; Mediaset, 2018–present). With these exclusive deals, the broadcast channels prioritized internationalization strategies over the development of their own platforms.

Netflix also employs what can be described as a “rescue strategy” by picking up cancelled shows from other channels or services. Two examples are *Paquita Salas* (2016–), which premiered on the video-on-demand platform Atresmedia, and *El ministerio del tiempo*, which faced cancellation after its second season because of a lack of funding from Spanish public broadcaster TVE. By adopting *El ministerio del tiempo*, Netflix became the first international SVOD service to partner with TVE in the production of serialized fiction. Similarly, Netflix joined the adaptation of the international best seller *La catedral del mar* (*The Cathedral of the Sea*; 2018) for the screen after Diagonal TV made it in 2013. Diagonal TV made unsuccessful attempts to find coproducers until Netflix came on board, and shooting began in the summer

of 2016.¹¹ This strategy of picking up half-finished or ailing projects that have been developed by national networks is characteristic of how Netflix operates in Spain, and indeed across Europe. Moreover, it has enhanced Netflix's relations with local operators as well as accelerated its presence in the market. The fact that the SVOD service is a minority investor but appears prominently in advertising strategies makes it a cheap and relatively risk-free way to solidify the Netflix brand.

Movistar+, for its part, has also actively courted projects by acclaimed Spanish filmmakers and screenwriters (e.g., Alberto Rodríguez and Rafael Cobos, director and screenwriter of the Goya winner *La isla mínima*). In doing so, Movistar+ has sought to build a brand associated with a cinematographic visual style, often subverting conventional television storytelling. For example, the period comedy *Arde Madrid* (Madrid on Fire, 2018–present) was shot in black and white to reflect the oppressive national Catholic dictatorship during 1960s Spain. Before the arrival of SVOD, such stylistic experimentation was rare, but it is now trendy, as it allows some programs to target the high-end drama marketplace. For example, *El embarcadero* (The Pier, 2019–), an Atresmedia Studios production for Movistar+, was selected for a gala premier at MIPCOM 2018, while *Arde Madrid* launched internationally at the Berlin Drama Days 2019. Beta Film is distributing both series on an exclusivity basis.

Despite these exceptional cases, most series produced in Spain by SVOD services in 2017 and 2018 are aesthetically quite similar to those series produced for broadcast television. Even though the popular press has linked Netflix original productions to the idea of narrative innovation and creative freedom, creators suggest that the levels of freedom are in fact quite similar to those offered by Spanish broadcasters: “With Netflix, we had a similar creative freedom to the one we had with broadcasters like Antena 3. And that is “quite a lot,” says Darío Madrona, cocreator of *Élite* (*Elite*, 2018–).¹²

The first two projects produced by Netflix in Spain, *Cable Girls* and *Elite*, follow the local storytelling norms. For example, *Cable Girls* tells the story of four young women who start working for a telephone company in 1928. It follows many genre conventions that Spanish broadcasters use to attract young female viewers, such as love triangles and family problems. What makes *Cable Girls* somewhat different is its emphasis on gender equality and gender politics, as its story features female protagonists and incorporates bisexual and transgender characters. However, this narrative component is not particularly characteristic of Netflix; rather, it expands on and continues the work done by its producer, Bambú Producciones, in targeting female audiences when they started their activities in the country.

The original productions offered by both international and local SVOD platforms fit well with Spanish viewers' tastes, shaped for decades by Spanish broadcasters. Most have been dramas, thrillers, and comedies, with some examples of adventure (*The Ministry of Time*, coproduced by Netflix) and animation (*Virtual Hero*, Movistar+)—all genres that broadcast and cable channels have been offering. In 2019, the list of productions for SVOD platforms will broaden with a period-mystery series (*Alta mar, High Seas*, Netflix) and even an anime program (*Memorias de Idhún; The Idhún's Memory*,

11 Personal interview with Rodolf Sirera, 2019.

12 Personal interview with Darío Madrona, 2019.

Netflix). The adaptation of Spanish novels and graphic novels seems to be an emerging trend that future research should explore.

By comparing the trajectories of Netflix and Movistar+ in the Spanish market, this essay has shown how both transnational and local SVOD services are expanding and transforming local production cultures. From this, the following conclusions can be drawn. First, SVOD platforms have contributed to the internationalization of Spanish television fiction, not only by facilitating its consumption outside of the country and the Latin American region (on transnational services such as Netflix) but also by challenging its well-established format characteristics to make it more attractive to buyers outside Spain (e.g., by reducing the number of episodes per season). A remarkable consequence of this was the recent decision by Antena 3 and TVE to reduce the episode durations for its serialized fiction. Second, the SVOD services have reinforced the need for developing metrics other than audience size in the Spanish TV context, because of its subscriber-funding model. This business plan enables the company to continue the production of series that did not achieve audiences large enough to satisfy ad-funded services. Both *The Ministry of Time* and *Paquita Salas* were ratings-challenged but critically lauded, with a noteworthy cult following. Third, Netflix originals produced in Spain in the period from April 2017 to December 2018 follow the local style of narrating stories, despite the company's promotional discourse of linking its originals to the concept of narrative innovation. This may be related to the fact that Netflix has partnered with production companies that specialize mostly in television fiction. Conversely, the local Movistar+ platform works with production companies that do not always specialize in the television fiction genre. Instead, Movistar+ has sought to build a brand associated with a cinematographic visual style, often subverting the conventions of television storytelling.

In conclusion, this essay illustrates how the new opportunities that internet-distributed video has provided, together with the success of innovative international actors, to foster local producers and aid efforts to reinvent some of the well-established models of production without abandoning elements that work well. SVOD services have also allowed a substantial increase in the number of series in production, with the result that Spain has become a noticeable player in the international marketplace with fiction made on affordable budgets and with good production values. Whether this expansion of production leads to a larger renaissance of European TV fiction remains to be seen. *

Contributors

Concepción Cascajosa is senior lecturer at Carlos III University of Madrid, where she is a member of the research group TECMERIN and director of the MFA in Film and Television Screenwriting. She has written or edited nine books and more than fifty papers about television fiction and media history, including articles in *Studies in Hispanic Cinemas*, *Journal of Spanish Cultural Studies*, *Catalan Journal of Communication & Cultural Studies*, and *Television and New Media*.

Deborah Castro is a lecturer in the Department of Media and Communication at Erasmus University Rotterdam and a research fellow at ITI-LARsYs. She has been a postdoctoral researcher at the Madeira Interactive Technologies Institute and a visiting assistant professor at the University of Madeira. Castro's main research interests lie in the fields of audience and television studies. Her research has been published in peer-reviewed journals such as *Convergence: The International Journal of Research into New Media Technologies*, *International Journal of Communication*, and *Critical Studies in Television*.

Juan Llamas-Rodriguez is an assistant professor of transnational media in the School of Arts, Technology, and Emerging Communication at the University of Texas at Dallas. His work mobilizes media theories to critically analyze social phenomena on a global scale. His areas of specialization include media theory, digital labor, border studies, and Latin American film and television.

Ramon Lobato is senior research fellow at the Digital Ethnography Research Centre, RMIT University, Melbourne. Ramon is a scholar of media and cultural industries, with a particular interest in video distribution. He has published widely on piracy, digital distribution, and informal media markets. His most recent book is *Netflix Nations* (New York University Press, 2019). With Amanda Lotz, Ramon convenes the Global Internet TV Consortium.

Amanda D. Lotz is a professor of media studies at the Digital Media Research Centre at Queensland University of Technology and a fellow at the Peabody Media Center. She is the author, coauthor, or editor of eight books that explore television and media industries, including *We Now Disrupt This Broadcast: How Cable Transformed Television and the Internet Revolutionized It All*, *The Television Will Be Revolutionized*, and *Portals: A Treatise on Internet-Distributed Television*.

Yu-Kei Tse is an assistant professor in the Department of Society, Culture and Media at International Christian University, Japan. Her research adopts a critical, cross-cultural, and ethnographic approach to transnational media and cultural flows, media change related to digitalization and convergence, and media consumption. Her latest research project, funded by Grants-in-Aid for Scientific Research, Japan, examines the industry of subscription video-on-demand services in East Asia. Her work has been published in *New Media & Society*.

Michael L. Wayne is a lecturer in the Department of Media and Communication at Erasmus University Rotterdam. Previously, he was a Kreitman Postdoctoral Research Fellow in the Department of Communication Studies at Ben-Gurion University of the Negev in Israel. Michael's research uses qualitative methods to address television industries, audiences, and texts from a critical perspective. His work has been published in *Media, Culture & Society*, *Journal of Popular Culture*, and *Journal of Popular Television*.