

Netflix and the transnationalization of the audiovisual industry in the Ibero-American space

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During the last fifteen years, audiovisual industries across the world have undergone profound transformations (Birkinbine et al., 2017; Hesmondhalgh, 2018; Miège, 2016). More specifically, the creation and international expansion of audiovisual services in the digital arena by US-based companies has taken place. Their global aims have boosted transnational market penetration strategies that have taken advantage of the global architecture of the World Wide Web. With the exception of China, which prohibits their entry and has developed its own services, the rest of the world has seen how US-based transnational operators have begun to act in their markets attracting clients.

Subscription video on demand (SVOD) audiovisual services currently lead this process. According to Statista (2021), there were 642 million subscribers to this type of service in 2019 –compared to the 508.44 million registered the previous year– and it is expected that they will surpass 1 100 million by 2025. Within this context, Netflix has become the main transnational company providing SVOD services,

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present worldwide (with the exception of China, Crimea, North Korea and Syria), with 207.4 million subscribers by the end of the first quarter of 2021. This subscriber base has increased due to the company's international expansion initiated a decade ago—in 2019 non-US markets represented approximately 90 percent of Netflix's growth—.

AUDIOVISUAL TRANSNATIONALIZATION

Most business decisions are made in Los Gatos and Los Angeles, California, where Netflix has its headquarters. Nevertheless, managers have gradually decided to incorporate personnel in foreign markets where audiovisual productions are developed, and to establish relationships with local companies. For instance, Netflix announced in early 2020 that its office for Latin America would be located in Mexico City. Offices have also been opened in London, Paris, Singapore, Amsterdam or Tokyo, as well as a production hub was set up in Madrid.

Netflix, as a flagship of transnational companies providing SVoD, is one of the most interesting audiovisual agents to study nowadays, as existing literature suggests (Barker & Wiatrowski, 2017; Bouquillion, 2019; Jenner, 2018; Keating, 2012; Lobato, 2019; Lobato & Lotz, 2020; McDonald & Smith-Rowsey, 2018), not only because it condenses debates with a long tradition in the field of television studies (e.g. cultural imperialism, policies of protection and promotion of the local audiovisual sector, audiovisual flows, defense of diversity or global-local relationships, for example), but also because it is a disruptive agent in the markets it joins (in relation to the management of algorithms, personalization of its offerings, extreme commodification of audiences or new intellectual property rights negotiations).

During the last years, the company has been establishing agreements with local actors in those markets where the service was launched, while using different strategies to get exclusive content (“Netflix Originals”) like films, serialized fiction, animation, documentaries, etc. Its presence has led to an increase in the audiovisual works available and has been well received by broad sectors of the population. Nevertheless, it has also evolved into fierce competition between operators to get the attention, data and budget allocated to leisure activities of potential

audiences, as well as into deep-seated tensions within international media policies (Lobato, 2019). Different debates and reactions can be detected both at the political-regulatory and the business levels (Evens & Donders, 2018; Moore & Tambini, 2018).

Some of the most critical questions regarding the presence of these agents are related to the lack of transparency of their recommending systems (Ranaivoson, 2020) and their impact on prominence and discoverability (García Leiva, 2020); the relative scarcity of local works compared to the abundance of programming originating in the United States (Albornoz & García Leiva, 2021); the unequal conditions in which traditional local companies must face competition from transnational service operators, or non-compliance with obligations in most countries where they have their clients –weather these are fiscal or promotional of indigenous works (Albornoz & García Leiva, 2019; García Leiva & Albornoz, 2020)–.

The company can therefore be considered as an object of study from many points of view: its disruptive distribution model, the uses of big data and artificial intelligence to make decisions, its new releases, the budget invested in new productions, the deals made with internationally prestigious creators, or the different relationships that establishes in local markets. Additionally, its innovation, scale and global reach justify a special section like the one this presentation introduces and has been titled “Netflix and the transnationalization of the audiovisual industry”. Focused on Netflix, outpost of transnational SVOD services, it aims to complement research carried out since the mid-2010s on the expansion of this company in Ibero-America.

NETFLIX IN IBERO-AMERICA

Ibero-America should be understood as the group of countries and audiovisual markets that make up both the Iberian Peninsula –Spain, Portugal, and Andorra– and the 20 countries that make up Latin America. It is undoubtedly a heterogeneous group, characterized by shared historical ties and by being linguistically structured by the presence of two hegemonic languages (Spanish and Portuguese); in this sense, Sinclair (1999) characterized it as a geo-linguistic space.

However, it should be noted that the concept of Ibero-America points not so much to a common identity, distinguishable by the existence of two main languages and a certain cultural proximity, but to a shared space under construction. As García Canclini and Martinell (2009) point out, there is no biological basis or single common tradition that allows for a definition of “being Ibero-American”. On the contrary, there is a history of convergence and conflict that makes it more convenient to refer to a shared space –a cultural, political and socio-economic scenario that brings together many identities, languages and practices–. From this perspective, the Ibero-American audiovisual sector is part of an enormously diverse common space, but with shared cultural traits.

It should be noted that the emergence of Netflix in the Latin American (September, 2011) and the Iberian Peninsula (October, 2015) markets is taking place in a terrain already fertilized by the strong presence of audiovisual works made in the USA, both in cinemas and on generalist (free-to-air) and thematic (pay) television channels. In this sense, it can be argued that Ibero-American audiences, to a greater or lesser extent depending on the particular markets, had already been accustomed to consuming US audiovisual productions for decades.

In its first quarter 2021 results presentation, Netflix reported a total of 37.89 million subscribers in Latin America, with Brazil and Mexico being its leading markets and ranking third and fourth globally, respectively (Moody, 2020). In a context marked by the pandemic and mobility restrictions decreed by the governments of different countries, Netflix added 3.57 million subscribers in the region between April, 2020 and March, 2021. On the other hand, in the absence of official data, it is estimated that in the Iberian Peninsula the US company has around 7 million subscribers, divided between Spain, with 4.5 million subscribers (Romera, 2021), and Portugal, with 2.3 million (Grupo Marktest, 2020).

The number of subscribers is directly related to the revenues obtained by the company in a given region or market (other variables to consider are the price of the service in each country and fluctuations in the value of local currencies). Thus, for example, the aforementioned growth in the number of customers in the Latin American region was reflected in the company’s accounts: from generating 793 million dollars in the

first quarter of 2020 to 837 million dollars in the first quarter of 2021 –well below the revenues reported by the sum of the US and Canadian markets for the same period: 3 171 million dollars–.

However, the number of subscribers only gives an idea of the take-up of the service in a given region or market, since to know its true penetration, it is necessary to consider the number of people who actually use the service regularly. In this regard, it is worth noting that a widespread practice among subscription holders is that subscriptions are shared with family members and relatives, so that the number of actual users of the service ends up being significantly higher than the number of subscribers. For 2019, for example, the consultancy eMarketer (Ceurvels, 2019) calculated that in Brazil the series and films offered by Netflix had the highest number of viewers in the region (28.7 million people), followed by Mexico (19.3 million), and Argentina (5.9 million).

At the beginning of the third decade of the 21st century, the great popularity enjoyed by the Californian company among Latin American audiences is unquestionable. A study released in 2021 by the British consultancy firm Business Financing revealed that Netflix is currently the “most popular” brand in all of Latin America and Andorra, ahead of giants such as Google and Amazon (Business Financing, 2021). Meanwhile, the consultancy firm Digital TV Research (2020) predicts that Netflix will continue to lead the Latin American market for over-the-top audiovisual services in 2025, when it will reach 100.35 million subscriptions. This leadership will be based on markets such as Brazil, which will continue to lead the regional market by volume of subscriptions, with 36 million accounts expected by the middle of this decade, and Mexico, which is expected to have 28 million subscriptions. In the same vein, it is important to underline that, while the Latin American market still has growth potential, over the same time frame, the global market for SVOD services will slow down as it approaches saturation and maturity (PwC, 2020).

What is certain is that Netflix will have to consolidate and maintain its leadership in an increasingly competitive arena, in which the political, economic, business, technological and cultural particularities of each market weigh heavily. A scenario in which traditional

audiovisual operators with attractive audiovisual content portfolios and prominent positions in their respective markets (such as Grupo Globo in Brazil, Televisa/Univision in Mexico and US Latino market, or Televisión Española in Spain) are competing, telecommunications operators that are entering the pay audiovisual segment or intensifying the existing offer (such as Telefónica in Spain through its Movistar+ Lite and Movistar+ services, or Claro-Video in Latin America), or other powerful US companies (such as Disney or Amazon through its Disney+ and Amazon Prime Video services, respectively).

In its process of international expansion, Netflix has undergone a substantive change from being a company limited to distributing third-party audiovisual content to end consumers, to also being a producer of a (growing) part of the content it offers. This process of vertical integration of production and distribution is supported by agreements signed with production companies both in the US and in other parts of the world, including companies located in Latin American countries. The fiction series *Club de Cuervos* (2015-2019), for example, was the first exclusive Spanish-language production for Netflix with the participation of an Ibero-American production company: Mexico's Alazraki Entertainment.

Thus, commissions to local production companies and Netflix's participation in co-productions with local companies –concentrated so far in Spain, Mexico, Brazil, and Argentina, but also reaching countries such as Colombia, Peru, and Portugal– have contributed to the internationalization of the segment of titles known as “Netflix Originals”.

In markets such as Spain, Netflix's landing in the production segment has meant an injection of capital into the audiovisual sector, giving rise to international successes such as the serialized fiction *La Casa de Papel* (aka *Money Heist*, 2017-), by Bambú Producciones. It is worth noting that since its arrival in Spain, Netflix has released more than 50 titles in this market, which generated more than 7 500 jobs for both cast and crew, as well as 41 000 days of work for extras in productions developed throughout the country. For productions already underway in 2021, production companies are expected to hire more than 1 500 professionals and generate more than 21 000 days of work

for extras (Netflix, 2021).

Following the global production shutdown caused by the pandemic in 2020, Netflix has confirmed it is backing and producing safely in all major markets, with the exception of Brazil and India. And, aiming to ramp up production of exclusive content, it announced a commitment to invest 17.3 billion dollars in the creation of series and movies during 2021, similar to 2020 and up from 15 billion in 2019 and 12 billion in 2018. This includes the investment of nearly 300 million dollars in more than 50 original productions, local or global, filmed in Mexico –a figure that is higher than the 200 million dollars earmarked in 2020–. Moreover, towards the end of April, 2021, the company declared its intention to reinforce its commitment to Spanish audiovisual fiction by announcing the expansion of its production centre in Tres Cantos (Madrid), opened in April, 2019.

That said, it is important to note that these large investments in production and distribution of quality audiovisual content have generated significant inflation. According to PwC (2020), the production of premium content increased in cost by 30 percent between 2018 and 2019. Similarly, the fight for exclusive broadcast rights to hit series has reached record numbers. For example, Netflix lost the rights to *Friends* (1994-2004), as HBO Max paid 425 million dollars for its five-year broadcast rights.

In the heat of these investments, in recent years Netflix has begun to deploy an incipient network of subsidiaries in the vast Ibero-American geography: it currently has subsidiaries on one side (Mexico and Brazil) and the other (Spain) of the Atlantic Ocean. It was in August, 2018 that two companies were established in Madrid. One dedicated to audiovisual production and the other to marketing: respectively, Los Gatos Entretenimiento España, whose partner is Netflix Worldwide Productions (USA), and Los Gatos Servicios de Transmisión España, whose parent company is Netflix International BV (Netherlands). And it was at the end of 2019 that it announced the move of its Latin American base from São Paulo (Brazil), which today remains as a regional office, to Mexico City. It is estimated that by the end of 2021 this Latin American office will have more than a hundred employees, including programming, marketing and advertising specialists.

In addition, since January, 2021, the subsidiary Netflix Mexico, which operates as a local distributor of access to the service for Mexican subscribers, has been operational. Finally, it is worth noting that in April, 2021 Netflix announced the opening of a subsidiary in Bogotá, indicating that, between 2021 and 2022, it will produce up to 30 new titles in Colombia, financed by the more than 175 million dollars that the company has invested since 2014 in this country.

NETFLIX AS AN OBJECT OF STUDY IN IBERO-AMERICA

In view of Netflix's expansion in the region, this section aims to offer a sort of state of the art of research on its presence in Ibero-America, citing some of the most outstanding works published to date. This is by no means an exhaustive account, but rather a panoramic approach that can offer an idea of the type of reflections that have attracted the attention of researchers from different universities in Ibero-America and beyond.

In general terms, it could be said that research devoted to the study of Netflix in Ibero-America is characterized by the predominance of work by individual researchers, although there are, of course, networks and groups that have been systematically reflecting on the actions of the US-based company. In this respect, the work carried out over the last five years by the Global Internet Television Consortium⁴ and by the research teams "Diversidad Audiovisual",⁵ of the University Carlos III of Madrid (UC3M), and "Televisión: historia, producción, contenidos audiovisuales y recepción",⁶ of the University of Guadalajara, should be highlighted.

The Global Internet Television Consortium, whose motto is "a network for research on Netflix and other internet-distributed TV services", is a collective initiative led by Amanda Lotz (Queensland University of Technology) and Ramon Lobato (RMIT University

⁴ See <https://global-internet-tv.com>

⁵ See <https://diversidadaudiovisual.org>

⁶ See www.cucsh.udg.mx/cuerpos_academicos/television-historia-produccion-y-recepcion

in Melbourne). The first dossiers of this international network of researchers were released during the 2016-2017 biennium, addressing Netflix's performance in 13 countries. This first batch of reports included Brazil, written by Courtney Brannon Donoghue (Oakland University in Rochester); Mexico, by Juan Llamas-Rodríguez (University of Texas at Dallas); and Spain, by Deborah Castro (Madeira Interactive Technologies Institute). Subsequently, in August, 2018, a report on Argentina by Joaquín Serpe (Concordia University) was added.

Lobato and Lotz (2020) coordinated the special issue "Imagining Global Video: The Challenge of Netflix", for the *Journal of Cinema and Media Studies*, which includes two papers that address the Californian company's performance in Latin American countries. In "Luis Miguel: la serie, Class-Based Collective Memory, and Streaming Television in Mexico", Juan Llamas-Rodríguez presents a study of a Mexican series that is part of the Netflix Originals. In "From Netflix to Movistar+: How Subscription Video-on-Demand Services Have Transformed Spanish TV", Deborah Castro and Concepción Cascajosa (UC3M) analyze how streaming services have affected television production in Spain. That same year, 2020, Castro, in collaboration with Michael L. Wayne (Erasmus University Rotterdam), published "SVOD Global Expansion in Cross-National Comparative Perspective: Netflix in Israel and Spain", in *Television & New Media*.

For its part, the Diversidad Audiovisual research group, dedicated to the study of the problem of diversity in the functioning of cultural industries, carried out during the 2018-2020 triennium the project "Audiovisual Diversity and Online Platforms: the Netflix case" (ref. CSO2017-83539-R), with the support of the European Regional Development Fund (ERDF), and the Spanish Ministry of Science, Innovation and Universities. As a result of the work carried out by this team, which brings together researchers from Spain, Argentina, Brazil, and Mexico, the international seminars *Communication and Cultural Digital Platforms*, and *Platforms and Diversity: Netflix under debate* were held in 2019 at the UC3M. Also, in the framework of the aforementioned project, the book *Audiovisual Industries and Diversity: Economics and Policies in the Digital Era* (Albornoz & García Leiva, 2019) and the article "Netflix Originals in Spain: challenging diversity" (Albornoz & García Leiva, 2021), were published.

In Mexico, coordinated by Guillermo Orozco Gómez, the research group “Televisión: historia, producción, contenidos audiovisuales y recepción” published the book *Televisión en tiempos de Netflix: una nueva oferta mediática* (Orozco, 2020), which breaks down the contributions of the Californian company to the Mexican television diet and genres, emphasising the role of television fiction as a builder of imaginaries and the modification of audiences through their new patterns of audiovisual consumption. Likewise, through his participation in the *Observatorio Iberoamericano de la Ficción Televisiva* (Obitel), Orozco, together with Gabriela Gómez and Darwin Franco have analyzed in “México. El melodrama en Netflix: ¿transformación o evolución?” (Orozco et al., 2020) how Netflix exploits melodrama from the Mexican context.

Another collective work produced in Mexico is the book coordinated by Efraín Ascencio Cedillo, María Teresa Garzón Martínez, Martín de la Cruz López Moya (Universidad de Ciencias y Artes de Chiapas), titled *Netflix. Una pantalla que te saca de aquí* (Cedillo et al., 2021). This volume, made up of 15 essays, explores the transnational company from the point of view of consumption, thought of as a situated experience; in other words, it explores the ways in which people experience the service offered by Netflix.

At the individual level, the figure of Joseph D. Straubhaar (University of Texas at Austin) stands out. Straubhaar opened the aforementioned seminar *Communication and Cultural Digital Platforms*, with an inaugural lecture titled “Netflix in Latin America: A New Cultural Imperialism, Increased Regional Generation and Class Stratification, or a New, Regional Hybrid Television?” That same year, together with Deborah Castro, Luiz Guilherme Duarte and Jeremiah Spence, Straubhaar (2019) published “Class, pay TV access and Netflix in Latin America: Transformation within a digital divide”, in the journal *Critical Studies in Television*. Subsequently, together with Tomaz Affonso Penner (University of São Paulo), he published “Títulos originais e licenciados com exclusividade no catálogo brasileiro da Netflix: um mapeamento dos países produtores” (Straubhaar & Penner, 2020), in the journal *MATRIZES*. Finally, in the coming months, Straubhaar, Melissa Santillana (University of Texas at Austin), Vanessa de Macedo Higgins Joyce (Texas State University) and Luiz Guilherme Duarte (University of Central Florida) will publish the volume *From Telenovelas to Netflix:*

Transnational, Transverse Television in Latin America (Straubhaar et al., 2021).

On the other hand, it is worth mentioning the publication of a six articles-dossier of the *Journal of Latin American Communication Research*, which addresses the role of Netflix in the construction of Latin American and Latino identities (Colón Zayas, 2019). In “Producción de series de televisión latinoamericanas en la plataforma de streaming de Netflix: *Club de Cuervos* y *La Casa de las Flores*”, María José Higuera Ruiz (University of Granada) studies the peculiarities of Netflix’s original content within the production of its Latin American projects in order to determine the characteristics of these works and their repercussion for the industry and the Latin American community. In “Netflix’s Leap: From Political Economy of Distribution to Symbolic Production, The Río Grande Way”, Eliseo R. Colón Zayas (University of Puerto Rico) explores some of the mechanisms employed by Netflix in the symbolic cultural construction of a global, transnational, Latin American discourse. In “*Ingovernable*: melodramatic serialisation and mythographies of destiny in Netflix’s Latin American algorithm”, Silvia Álvarez Curbelo (University of Puerto Rico) analyses the series *Ingovernable* (2017-2018) based on the concept of melodramatic serialization. In “Soraya’s Wail: Netflix’s Melodramatic Algorithm and the Reappearance of the Volatile Latina Body”, Danny Méndez (Michigan State University) addresses the juxtapositions between the Mexican telenovela *María, la del barrio* (1995, Televisa) and the series *Orange Is the New Black* (2013-2019). Manuel G. Avilés-Santiago (Arizona State University) presents, in “‘This is it!’ [Is it?]: The Marketing of Nostalgia on Netflix’s *One Day at a Time*”, how Netflix capitalizes on a vision of the 1970s as a marketing tactic to attract Latino audiences by reviving an old show. Finally, in “Are we or we not? Traits of Mexican identity from *Roma*”, Gabriel Domínguez Partida (Texas Tech University) presents a qualitative study on young Mexicans’ perceptions of Mexicanness in Alfonso Cuarón’s feature film *Roma* (2018).

In Mexico, Elia Margarita Cornelio-Marí (University Juárez Autónoma de Tabasco) published the chapter “Digital Delivery in Mexico: A Global Newcomer Stirs the Local Giants”, in the volume *The Age of Netflix: Critical Essays on Streaming Media, Digital Delivery*

and *Instant Access* (Barker & Wiatrowski, 2017). Months later, in this same journal –*Comunicación y Sociedad*–, she published “Mexican Melodrama in the Age of Netflix: Algorithms for Cultural Proximity” (2020).

In Spain, the journal *El profesional de la información* has published “El nuevo negocio mediático liderado por Netflix: estudio del modelo y proyección en el mercado español” (2015), by Jessica Izquierdo (University Jaume I of Castellón); “La estrategia de engagement de Netflix España en Twitter” (2018), by Erika Fernández-Gómez and Juan Martín-Quevedo (International University of La Rioja); and, “Nuevas dimensiones de audiencia en las plataformas de streaming: la segunda vida de *La Casa de Papel* en Netflix como caso de estudio” (Neira et al., 2021), by Elena Neira, Judith Clares-Gavilán and Jordi Sánchez-Navarro (Universitat Oberta de Catalunya).

As far as the Portuguese-speaking Ibero-American sphere is concerned, Melina Meimaridis, Daniela Mazur and Daniel Rios have contributed to “A empreitada global da Netflix: uma análise das estratégias da empresa em mercados periféricos” (2020), in *Revista GEMInIS*, which considers the strategies used by the transnational company in Mexico, Brazil, and South Korea; and, by the same authors, “The Streaming Wars in the Global Periphery: A Glimpse from Brazil” (2020), in *Series-International Journal of TV Serial Narratives*. In addition, Alan Oliveira (Instituto Federal de Goiás), Ana Azevedo (Instituto Politécnico do Porto) and Selma Maria da Silva (Instituto Federal de Goiás), authors of “Streaming Services Consumer Behaviour: A Netflix User Case Study in Brazil and Portugal”, published in *Scitepress.org*; and Alexandre Freitas, Ana Rita Félix, Daniela Ferreira and Júlia Alves (Universidade Porto), who published “Estratégias de Comunicação da Netflix Portugal no Twitter” (Freitas et al., 2020) on *Prisma.com*.

A PIONEERING, BILINGUAL THEMATIC SECTION

This thematic section of *Comunicación y Sociedad* seeks to continue the path initiated by the research that has as its protagonist the transnational company Netflix in its expansion in Latin America. In a process initiated in mid-2020, in the midst of the pandemic, around

40 texts were received by December 31st and submitted to a rigorous peer review process. Thirty-four colleagues from twenty-five different universities, located in up to ten different countries on the European and American continents, participated in the process. To all of them, thank you.

The six articles in this section aim to reflect on Netflix's performance in different Ibero-American markets by referring to issues such as: the international expansion and integration in local markets, the characteristics of the content offered, the relationship with international audiences, the strategies of promotion and exploitation of content, and the industrial dynamics of production and distribution.

This thematic section first offers an analysis by Guillermo Mastrini (University of Quilmes) and Fernando Krakowiak (University of Buenos Aires) on the strategies and industrial dynamics that Netflix has developed in Argentina since its arrival until 2020. The article, titled "Netflix in Argentina: accelerated expansion and scarce local production", analyzes Netflix Argentina's content catalogue, highlighting that the US-based company, unlike in other countries in the region, such as Mexico and Brazil, has not invested significantly in local production. In addition, among their main findings, the authors point out that Latin American content occupies a marginal place within the offer and, in general, they are low-budget stand-ups.

In the same line of industrial analysis of Netflix strategies and their impact on national markets, Melina Meimaridis, Daniel Mazur and Daniel Rios (Federal Fluminense University) present in "From São Paulo to Seoul: Netflix strategies in peripheral markets' a comparative study between Brazil and South Korea"; with the idea of contrasting two emerging markets from different regions, with strong audiovisual industries, the authors warn in their conclusions that the US company must be deconstructed as a mediator of narratives to and from the rest of the world.

In contrast to the two previous articles, Javier A. Rodríguez-Camacho, Andrés Laguna-Tapia, Jens Bürger and Vania Landívar-Freire (Universidad Privada Boliviana, KU Leuven), in "Characterization of Latin American film productions on Netflix: perspectives from Bolivia", address one of the smallest and least prolific markets and industries in South American content production, emphasizing film

flows between Bolivia and Latin America with the idea of exploring the under-representation of Bolivia in Netflix's offer. Its results warn of the homogenizing effect that the US Company is having on local audiovisual production.

In the case of the paper by J. Ignacio Gallego and Asier Aranzubia (University Carlos III of Madrid), titled "Spanish cinema in the Netflix catalogue: an approach from the perspective of diversity", the authors focus their analysis on the weight of Spanish cinema in the Netflix catalogue and its impact on local production in the European country, as well as comparing the catalogue of Spanish cinema on Netflix with that of other SVOD services.

For their part, Francisco-José García-Ramos, Francisco A. Zurian and Lucía Gloria Vázquez-Rodríguez (Complutense University of Madrid), in "The transnational dissemination of discourses on non-normative sexualities via Netflix: the case of *Sex Education*", study this British Netflix original series to establish how discourses on non-normative sexuality, equality and LGBTIQ+ diversity are disseminated transnationally.

Finally, María J. Vilaplana-Aparicio, Julián Boix-Romero and María J. Ortiz (University of Alicante), in "Product placement analysis in three Netflix original series", focus on the study of the use of product placement to understand how brands are promoted within the Netflix business model and its original series. The study analyses the content of three of the company's successful series: *House of Cards* (2013-2018), *Orange is the New Black* (2013-2019), and *Jessica Jones* (2015-2019).

Therefore, this thematic section devoted to Netflix presents six articles that provide different clues to think critically about the transnational character of Netflix and the new forms of audiovisual circulation in the Ibero-American space. Of course, there are many edges yet to be explored, such as the role played by Netflix's production headquarters outside the US, the relationships that are woven with local creators and companies (including traditional audiovisual operators), or Netflix's actions in the context of the COVID-19 pandemic. We hope that the collective effort of this monograph will make a genuine contribution to studies that seek a better understanding of the contemporary audiovisual sector.

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