

Netflix originals and exclusively licensed titles in Brazilian catalog: a mapping producing countries^a

Títulos originais e licenciados com exclusividade no catálogo brasileiro da Netflix: um mapeamento dos países produtores

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ABSTRACT

The main goal of this study is to map the countries that produce the original and exclusive titles for the Netflix Brazilian catalog and to evaluate Latin America's participation in this archive. The results indicate that Netflix is investing in the diversification of the producing countries, although this is not enough to contain the trend of the maintenance of Latin America's *cultural dependence* in relation to the advance of the United States' cultural productions. The transnational standard adopted by Netflix brings debates regarding the *associated-dependent development*, in which Latin American productions have grown, but associated with a mechanism that also benefits big American media companies.

Keywords: Netflix, streaming, cultural dependence, Latin America

RESUMO

O objetivo do trabalho é mapear os países produtores de títulos originais e exclusivos do catálogo brasileiro da Netflix e verificar qual a participação da América Latina nesta constituição. Os resultados apontam para o investimento da Netflix na diversificação dos países produtores, apesar de ainda não ser suficiente para conter uma tendência à manutenção da *dependência cultural* da América Latina em relação ao avanço de conteúdos dos Estados Unidos. O caráter transnacional adotado pela Netflix levanta discussões sobre um *desenvolvimento dependente-associado*, em que produções da América Latina ganham espaço no fluxo global de televisão, mas submetidas a um mecanismo que beneficia também grandes companhias de mídia estadunidenses.

Palavras-chave: Netflix, *streaming*, dependência cultural, América Latina

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MATRIZES

INTRODUCTION

IN ADDITION TO the recognition of the traditional media, especially television, as a cultural phenomenon in Brazil and Latin America (Martín-Barbero, 2001) that are relevant for understanding local mediations, it is important to consider that it is a force as “a model of production, distribution, and reception – a model that changes over time to a version that is more mobile in relation to the dominant norm¹” (Miller, 2014, p. 93). To understand how it configures the transformations that focus on audiovisual products today, we propose an analysis of Netflix (<http://netflix.com>) as a representative of the production and distribution systems for streaming content on-demand, which have established themselves as a worldwide trend in audiovisual production and consumption. In the streaming content of production, distribution, and consumption model adopted by Netflix, national products are offered in other countries, such as Netflix’s original Brazilian series *3%*, which became successful in the United States (Ferraz, 2019). Despite this potential spread, national television productions have to compete with a new wave of imported products from the United States, Asia, and Europe, which hampers the production, distribution and consumption systems available from streaming technologies. Therefore, it is possible to understand that “depending on the democratization of internet access, Netflix may, in a short time, be responsible for a complete paradigm shift in the way the audience consumes TV²” (Lima, Moreira, & Calazans, 2015, p. 255).

¹In original: “um modelo de produção, distribuição e recepção – um modelo que muda ao longo do tempo para uma versão mais móvel em relação à norma dominante”. This and other translation of the author.

²In original: “a depender da democratização do acesso à internet, a Netflix poderá, em pouco tempo, ser a responsável por uma completa mudança de paradigma na forma como a audiência consome TV”.

This scenario shifts a significant part of the audience to individualized reception formats (Machado & Vélez, 2014), which is possible mainly due to online digital devices, guided by artificial intelligence and big data, whose producers have emerged in different ways over the media concentration of the traditional Brazilian and Latin American television model.

To understand these changes that are occurring rapidly not only in Brazil, but also on a global scale, this article analyzes the original and exclusively licensed productions from Netflix available on the Brazilian version of the platform until May 11, 2018, to map the origins of the titles that compose this part of the catalog and verify the participation of Latin American producers in the offered products. The results point to a certain investment by Netflix in the diversification of the producing countries, although it is not solid enough to contain a tendency of maintaining a *cultural dependence* (Fox, 1992; Straubhaar, 1991) by Latin America in relation to the advance of content from the United States and other English-speaking countries. Despite this, the transnational feature that has been adopted by Netflix, both in relation to the distribution and consumption of content, as well as its production, also raises questions about

associated-dependent development (Cardoso, 1973; Straubhaar, 2007), in which Latin American producers gain space in the global television stream, but subject to a mechanism that also benefits large American media companies.

NETFLIX

To understand the dimension that the on-demand streaming distribution phenomenon has taken today, it is noteworthy that Netflix released a report pointing out that in the last quarter of 2019, the number of its subscribers reached more than 67 million in the United States and Canada, 47.4 million in Europe, the Middle East and Asia and 29.4 million in Latin America (Solsman, 2019). Data collected while this article was in the review stage for publication indicate that the total number of Netflix subscribers in the world in March 2020 reached more than 167 million (Lee, 2020). In Brazil, it is estimated that there were between eight and ten million subscribers at the end of 2018, although Netflix does not release official figures (Carvalho, 2018). Hence, the corporation quickly became one of the most popular on-demand streaming video operators and, by investing in original programming, the largest series producer in the world – as shown in Table 2.

Founded in 1997 by the North Americans Reed Hastings and Marc Randolph, Netflix started as a movie rental service, via delivery and return of the titles through the United States postal system, upon internet requests. After that, in 1999, the company launched a monthly subscription service, which gave customers unlimited DVD rentals.

This innovative precursor model of the system we know today was a success, which led to an attempt to sell Netflix to its largest competitor at the time, the Blockbuster film rental chain, in the 2000s. Since it did not believe in the business model proposed by the young company, Blockbuster did not accept the deal, and ironically, the former video rental services giant filed for bankruptcy in the United States ten years later (Kleina, 2017).

In 2002, Netflix already had 600,000 subscribers to its home DVD delivery system, and had more than 11,500 titles (Netflix, 2018). At that time, the company's shares began to be traded on Nasdaq. The real business boom, however, came in 2007, when the streaming service was launched. Regarding this change, we present the considerations of Ladeira (2018):

Streaming gives the platform a capability that is not to be underestimated: to observe the actions of its users, which are nothing than the actions of their bodies. The intention of monitoring inscribed in the nature of digital services makes this

evaluation of the body essential. Streaming makes available the materials handled in the most distinct ways. This type of transmission establishes an instant experience of unrestricted access to files that, without any difficulty, can be watched or discarded. The rental of content presupposed an extensive set of limitations. There was a physical distance to overcome, as well as a limit of products that could be used in a certain period³. (p. 8)

³In original: “O *streaming* concede à plataforma uma habilidade em nada desprezível: a de observar os atos de seus usuários, nada menos que as ações de seus corpos. A pretensão pelo monitoramento inscrita na natureza do digital faz com que este acompanhamento do corpo se torne essencial. O streaming torna disponível materiais manuseados das formas mais distintas. Este tipo de transmissão instaura uma experiência instantânea para o acesso irrestrito a arquivos que, sem qualquer dificuldade, assiste-se ou descarta-se.

O aluguel de conteúdo pressupunha um extenso conjunto de limitações. Havia uma distância física a vencer, assim como um limite de produtos que se podia usufruir num certo espaço de tempo”.

As time went by, Netflix also became more and more dedicated to establishing partnerships with electronic products manufacturers, which allowed the videos to be distributed by various devices, such as video games, smartphones, tablets, and digital television sets.

Even using innovative strategies, until 2010 Netflix operated exclusively in the United States. After that year, an expansion process began, starting in Canada. Then it moved first to countries in Latin America, then Europe, Oceania, and Asia, which entered the reach of the company. The company started offering content to the Brazilian public in 2011. The map below shows the company’s reach in the third quarter of 2019.

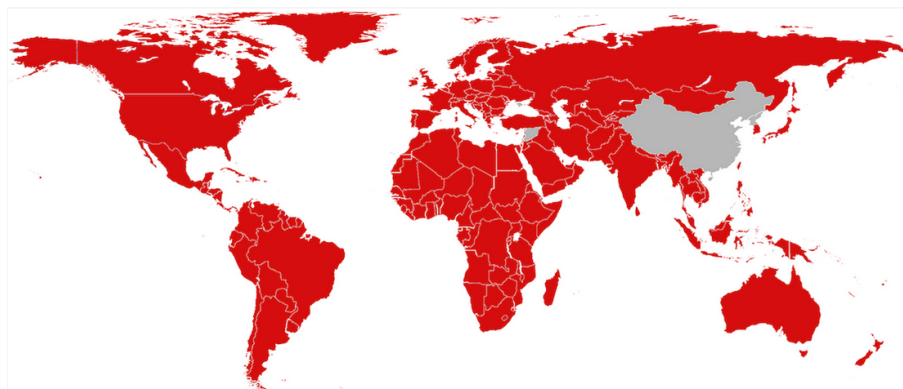


Figure 1. Global Reach of Netflix in 2019.

Source: Netflix (<https://bit.ly/2XehfDc>).

According to data from Netflix (2020), the company currently reaches more than 190 countries. The content offerings vary from place to place and may be different in each one of them (Lobato, 2018). According to Ladeira (2018), “it is certain that Netflix is a diffusion platform whose main objective lies in building an effective global audiovisual territory⁴” (p. 8). Specifics about the catalog will be covered below. For now, it is important to note that Netflix does not have activities in China, North Korea, Crimea and Syria, due to their domestic

⁴In original: “certo que a Netflix se constitui como uma plataforma de difusão cujo principal objetivo reside em construir um território audiovisual efetivamente global”.

legislative and political issues, since the governments of these territories limit the provision of services by American companies.

Despite the quasi-omnipresence of Netflix in the world, the actual offering of titles varies greatly from region to region. According to information from the Unofficial Netflix Online Global Search (<http://unogs.com>), which has a segmented database on the distribution of Netflix content, the company's global catalog in May 2018, the period of data collection for this research, had a total of 14,996 works among films, series, documentaries, reality shows, variety shows, musicals and other formats. However, the supply specifically targeted at individual countries was much smaller. In Brazil, for instance, only 3,953 titles were available for consumption in this period, placing the country in the tenth position among the countries with the highest content offer, as shown in Table 1:

Table 1

Titles available per country

Country	Total	Movies	Series	New	Expiring
1. Japan	6008	4676	1332	83	41
2. United States	5634	3966	1668	113	30
3. Canada	5460	3964	1496	87	27
4. United Kingdom	5183	3638	1545	115	24
5. Australia	4854	3363	1491	132	18
6. India	4843	3418	1425	125	7
7. Slovakia	3985	2731	1254	110	10
8. Czech Republic	3984	2733	1251	110	10
9. Hungary	3974	2721	1253	109	6
10. Brazil	3953	2946	1007	79	27

Source: *Unofficial Netflix Online Global Search* (<http://unogs.com>).

The first place in the list of total available items changed in the first half of 2018, when Japan overtook the historically leading United States. Since the beginning of the internationalization process by Netflix, the USA has always led the amount of content offered (Nembhard, 2018). Thus, the change of positions was an important indicator of the great value that the Asian market assumed for the company. Just below the USA there are three English-speaking territories (Canada, United Kingdom, and Australia), showing the centrality of the English-speaking market to the corporation.

Recently Disney, Warner, NBC and other major producers removed most of their titles from the Netflix catalog to boost their new own streaming services that have already been launched or are part of their plans (McBride, 2019). In several cases, however, this policy is only established in the United States



market, and Netflix is still allowed to license and make the titles available in other countries so that the production companies themselves can benefit from the streaming giant's global distribution apparatus (Dixon, 2019).

Another interesting point for analysis in the table relates to the last two columns, *New* and *Expiring*, which record, respectively, productions included in the catalogs of each country just listed in the last seven days and titles that are in the process of being withdrawn. These data reveal the great volatility of the content, with constant insertion and expiration of titles and consequent recurring changes in the offering of videos. This occurs not only due to Netflix's strategic adaptations to each of its markets, but also due to the expiration and termination of licensing agreements, which have certain limited validity periods. And much of the difficulty in signing new exhibition agreements or renewing existing ones is precisely the company's success. To understand this dynamic, it is enough to verify that the corporation, with its notable recent growth, is becoming a threat to large groups of media and content distribution. Because of the potential hegemony of Netflix in the streaming market, major producers have retreated in the negotiations, causing the withdrawal of films and series from the catalog and some difficulty for the renewal of content, as some of its largest suppliers have now started their own streaming services.

This phenomenon has led Netflix to make massive growth in investments in original content. In 2018, the company invested around eight billion dollars in the production of titles, producing eight hundred films and seven hundred episodes of series (Jankavski, 2018). In 2019, investments in the company's originals reached US\$ 15.3 billion (Scarpa, 2020).

All this investment serves to change a curve that has been bothering the directors of Netflix, pointing out the public's preference for content purchased by the company, and not produced by it. This scenario is pertinently defined by a recent study by 7Park Data, an American business consultant, released by Variety magazine (Spangler, 2018). The data points to the preference of the American public for the licensed content made available by Netflix. According to research information, about 80% of access to Netflix in the United States is directed to videos purchased in the media market. Also, around 42% of subscribers watch almost entirely non-original content, spending around 95% of their time on the website with this category of the catalog. According to the study, only 18% of users spend more than half of their time on the platform with original content.

As mentioned earlier, the listing and renewal of licensed products in the catalog depends on negotiations with other media corporations, which can often hamper Netflix's offering to the public. The original contents, on the other hand,

are a guarantee of lifetime ownership and exclusive display, and are currently the main focus of the company. In an interview, Ted Sarandos, Netflix's content director, says that:

Ultimately we want to produce original content, because it's time we have more control over the shows that matter most to our costumers. We've really come to appreciate the value serialized shows provide. So many people watch them and love them. Our data supports the trend, and that's why you see such an explicit investment in television on Netflix. We've been able to grow the audience for serialized content by recognizing their behavior and securing more and more highly serialized, well-produced, one-hour dramas. (Curtin, Holt, & Sanson 2014, p. 141)

The company's goal with the investments made in 2018 and 2019 was ambitious, aiming to direct at least half of the subscribers to their original content in the long term. In doing so, the US company manages to resolve two important points: 1) To make the catalogs of different countries more similar. With different licensing agreements in each region of the world, the content offer tends not to be unified. The titles available in each country are diverse, but with the increase in originals, this problem decreases; 2) With more original content, the platform is less susceptible to fluctuations in the prices of licensed content and even to market strategies that harm Netflix, such as Disney's recent withdrawal of its productions from Netflix to create its own platform streaming distribution (Marafon, 2018). For now, however, what is noticeable is that Netflix's high ratings are concentrated in established series made by traditional TV stations and with distribution rights purchased by the company, mainly drama and comedy. *Breaking bad* (AMC), *Grey's anatomy* (ABC), *How I met your mother* (CBS) and *The office* (NBC) were the most watched shows according to a 7Park Data study (from September 2016 to September 2017). Original products, however, are also gaining more and more visibility, with access leaders being *Stranger things*, *Orange is the new black* and *House of cards*. The recent success of these titles produced by Netflix leverages the targeting of funds to continue this achievement.

In 2016, Netflix ended the year with 43 series, which placed it in the first place worldwide in the production of the format. Thus, in just three years after the original serial fiction production (the first was *House of Cards*, in 2013), the company became the market leader. Table 2 shows data from The Hollywood



Reporter (Goldberg, 2017), pointing out the fifteen largest world producers of series in 2016.

Table 2
Main global producers of series in 2016

#	Producer	Series
1	Netflix	43
2	CBS	32
3	ABC	32
4	FOX	25
5	NBC	23
6	The CW	16
7	HBO	15
8	Amazon	14
9	Syfy	14
10	Adult Swim	13
11	PBS	13
12	Hulu	12
13	FX	11
14	BBC America	10
15	Comedy Central	10

Note. The Hollywood Reporter (<https://bit.ly/2XcMC0A>).

The production of Netflix’s original serial fiction content began in 2013, with the debut of *House of Cards*. In the same year the company launched two other series: *Hemlock grove* and *Orange is the new black*. In the year of its release, *House of cards* won an Emmy for Best Direction in a Drama Series, becoming a milestone in the production of content for the internet. For the first time, a series that was not shown on linear television took the United States’ most important award for television achievement, setting an important precedent for new audiovisual production, distribution and consumption systems.

From 2013 until now, Netflix has traced a successful trajectory, considering the awards of the media and entertainment industry. At the 2017 Emmy Awards, the streaming company led the nominations for the best drama series, with *House of cards*, *The crown* and *Stranger things*. In addition, *The white helmets*, a Netflix original short documentary, was awarded an Oscar in the same year, competing alongside two other original Netflix productions: *Extremis*, in the same category, and the feature film, *The 13th Amendment*.

After presenting an overview of the trajectory of Netflix and the growth of its businesses around the world, we can move forward by focusing more on what matters most for this research: the Brazilian catalog of the streaming distribution website. It is important to note that Netflix's successful experience in the last twenty years was only possible due to a series of partnerships established that ended up also generating the emergence of several competitors. The pioneering spirit of the American company, which was the first to offer a consolidated audiovisual catalog of series, films, documentaries and shows in exchange for the monthly payment for a subscription, does not guarantee permanent leadership in the market. The lucrative business established from the distribution and consumption of streaming audiovisual products opened the door for other agents to offer similar services (Lobato, 2019).

LOCAL VERSUS GLOBAL: WHERE IS THE PRODUCTION OF NETFLIX?

In today's streaming and distribution market, one of the most powerful aspects is exclusivity. Netflix's own achievements help the company to rely less on film studios and production companies, which often see it as a competitor and hinder, prevent or terminate licensing agreements with it. Original content can remain in the catalog indefinitely and it is also possible to launch it simultaneously in all markets reached by Netflix. In an interview with The New York Times (Steel, 2015), the company's co-founder and CEO, Reed Hastings, stated that the goal for 2018 was to end the year with half of the collection consisting of its own content. And much of the production is being directed outside the United States.

From Europe, for example, comes one of Netflix's biggest original hits, the British series *The crown*. But the company has been trying to diversify its production beyond the Anglophone universe, as seen with the launch of *Dark*, a German science fiction series. In 2017, the second serial fiction title in the country, the crime series *Dogs of Berlin*, was recorded, which premiered in 2018. *The rain* series, Netflix's first production in Denmark, started to circulate in 2018, which addresses the plot of a post-apocalyptic future. In the Iberian universe, there is the Spanish *Cable girls*, which has the "support" of fellow Spanish series *Élite*, already quite popular. In France, Netflix has already made *Marseille*, the first original production from there, and debuted *Osmosis* in 2019, a series about app-driven love relationships.

In the Latin American region in 2018, the first series of the streaming service was launched in Argentina, *Edha*, by Daniel Burma, the same director of the award-winning *Abraços partidos* (2009). In 2018, *Diablero*, Netflix's third Mexican native series, debuted after *Ingovernable* and *Club de Cuervos*. In Brazil,



the streaming distributor's first original series was 3%, which won international criticism, with the non-English serial fiction being seen mostly in the United States until 2018 – having been widely seen outside Brazil (Padiglione, 2017). Still in 2018, two new national series premiered: *The mechanism*, by José Padilha and *Samantha!*, directed by Felipe Braga. In 2019, *Coisa mais linda* was launched, which is about the world of *bossa nova* during the 1950s and 1960s. Growth was also expected for original Colombian productions. The series *Distrito Selvagem* debuted in 2018, followed by the launch of several other works (in various formats) carried out in Colombia (de la Fuente, 2018) for the Netflix catalog.

Japan, South Korea and Australia have also entered the map of original Netflix productions, in addition to several other countries. The big gap is in Africa, following the traditional map of the geographical division of the cultural industry in the world. A large part of these investments made outside the United States is due to a key fact: in the third quarter of 2017, for the first time, the number of Netflix subscribers outside the United States surpassed American users – 52.03 million outside the USA against 51.92 million in the country (Szalai, 2017). This scenario points to a trend towards both globalization and decentralization. If one of the company's key characteristics is its reach more than 190 countries, it seems logical to also operate in a way that more territories are elevated to the category of producers and not just consumers of content.

Thus, Netflix's efforts to invest in regional productions, often addressing global themes (such as science fiction in 3% or *Dark*, and *The rain*, the latter also representing the ascending subgenre of Scandinavian criminal series), are easy to assimilate in virtually any country in the world. However, Netflix also intends to produce about local themes, focused on the particularities of a particular place, as is the case of *The mechanism*, a series inspired by *Lava Jato Operation*⁵ and *Samantha!*, which portrays a very peculiar Brazilian type, a sub-celebrity of the 1980s that was ostracized and seeks to reposition itself in the media. Thus, there is a tendency for Netflix to produce series, films and other formats that are successful with local audiences, but also have potential for gaining popularity with foreign audiences.

This point is interesting both in terms of Netflix's strategy as a global company and in theoretical terms about global television streaming. Sarandos and other executives have announced that the company aims to convince the North American audience to watch series from other countries in the genres that interest them (Bylykbashi, 2019). As an example of the seriousness of their intent, they are increasingly investing in dubbing quality and also in English subtitles for potentially successful series like the Spanish series *Money Heist* – with seasons available since 2017 (Goldsmith, 2019). Theoretically, the

⁵ Set of investigations conducted by the Brazilian Federal Police since 2014, which investigates money laundering and corruption schemes in the country.

potential for success of this strategy is enormous. UNESCO discussions held in the 1970s already identified a major problem for global flows of culture and information, which were imbalanced in a one-way flow, in which the United States exports a lot and imports little. This lack of equity in flows is one of the empirical origins of the concept of media imperialism (Boyd-Barrett, 1977). If Netflix succeeds in creating a notable audience for imported culture within the United States, it will have the potential to be part of the complex process of change and diversification of producing countries underway to change this paradigm, alongside other members of the large media industry.

Despite all the differences between licensed works, exclusively licensed and original productions, the Netflix catalog presents in the same tab all titles whose exhibition rights are exclusive to the company along with those which it produced. In other words, this means that there is no differentiation, in the website navigation, between series, films, documentaries, reality shows, variety shows and stand-up comedy that have been produced by Netflix and those licensed for exclusive exhibition through the platform. Also included in this category of the website's menu are continuations of series previously made by other television channels that Netflix has acquired and continued to make (for example, the *Black Mirror* series, whose first two seasons are from the British broadcaster Channel 4, and the last two seasons, as of May 2018, that were produced by Netflix).

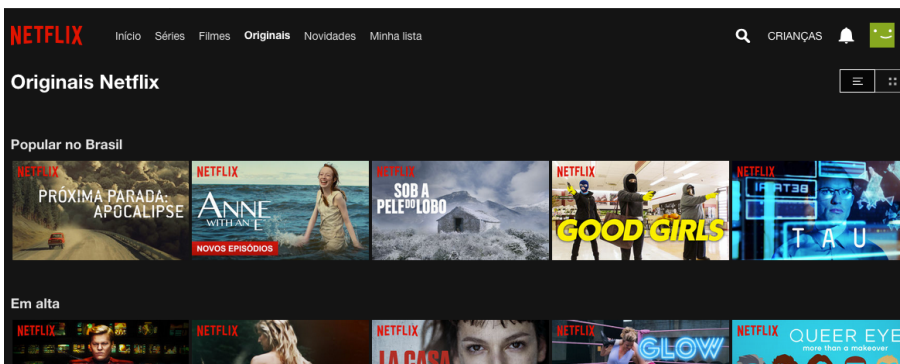


Figure 2. Netflix Menu, captured on the Netflix screen by the authors.

Thus, it is quite difficult to differentiate and, therefore, to count how many titles available in the Originals tab of the Netflix menu are actually original productions, and do not work with exclusive display contracts. The company's strategy can be seen as a measure to “inflate” the number of titles, seasons, episodes, or hours of content understood as “original production”, since Netflix



consolidated in recent years as the largest audiovisual producer in the world. Therefore, it looks like a marketing strategy to give the impression that all the works presented there are produced by the American company. In reality, most of them could appear on a tab as “exclusive productions”, since they were not made by Netflix, but had their viewing rights purchased by the entertainment corporation to distribute them in a restricted manner. For this research, we consider both categories: both the original titles and those with exclusive exhibition rights.

THE BRAZILIAN CATALOG OF NETFLIX

The catalog offered by Netflix to the Brazilian public, as previously mentioned, has almost four thousand titles in various formats. Among them, 627 original productions or licensed exclusively for national distribution were identified. The survey was carried out until May 11, 2018. Table 3 shows the origins of the program, according to the country.

Table 3
Producing countries of the original and exclusively licensed titles for Netflix in Brazil

Country	Titles	Percentage Participation
1. United States	412	57.95%
2. United Kingdom	59	8.30%
3. Canada	45	6.33%
4. Japan	40	5.63%
5. France	20	2.81%
6. South Korea	16	2.25%
7. Australia	13	1.83%
8. Spain	13	1.83%
9. Germany	9	1.27%
10. Brazil	9	1.27%
11. Denmark	8	1.13%
12. Colombia	6	0.84%
13. Mexico	6	0.84%
14. Argentina	5	0.70%
15. India	5	0.70%
16. Italy	5	0.70%
17. Ireland	4	0.56%
18. Belgium	3	0.42%

Continued...

Tabela 3
Continuation

Country	Titles	Percentage Participation
19. China	3	0.42%
20. Norway	3	0.42%
21. Georgia	2	0.28%
22. Holland	2	0.28%
23. New Zealand	2	0.28%
24. Sweden	2	0.28%
25. Switzerland	2	0.28%
26. South Africa	1	0.14%
27. Albania	1	0.14%
28. Austria	1	0.14%
29. Bermuda	1	0.14%
30. Cambodia	1	0.14%
31. Qatar	1	0.14%
32. Chile	1	0.14%
33. Congo	1	0.14%
34. United Arab Emirates	1	0.14%
35. Ecuador	1	0.14%
36. Israel	1	0.14%
37. Jordan	1	0.14%
38. Poland	1	0.14%
39. Portugal	1	0.14%
40. Czech Republic	1	0.14%
41. Singapore	1	0.14%
42. Ukraine	1	0.14%
Total	711 ⁶	100%

Source: Tabulated by the authors.

Among the original or exclusively licensed titles by Netflix available in the Brazilian catalog, there are programs from 42 countries, which points to the diversity of the productions offered. There are works from Latin America, North America, Africa, Asia, Europe and Oceania. Despite this breadth of origins, a closer look reveals the uneven distribution of titles between countries. The United States alone accounts for almost 58% of the exclusive content available. If productions from other English-speaking countries (England, Ireland, Canada,

⁶The total number of original and exclusively licensed titles in the Brazilian Netflix catalog until May 11, 2018 was 627. The number shown as total in the table is higher (711) due to the sum of co-productions. As the origin of co-productions is simultaneously from two or more countries, a title, in this case, generates multiple outputs in the “country” column. For example, the documentary *The Square*, shown exclusively by Netflix in Brazil, is a co-production between Sweden, Germany, France and Denmark. Thus, in the table, the same title counts for all the respective countries involved in its realization. In total, among the 627 original and licensed titles exclusively on the Brazilian Netflix catalog until May 11, 2018, there are 50 co-productions between 2 countries, 11 co-productions between 3 countries and 4 co-productions between 4 countries.



Australia and New Zealand) are added, the total amounts to more than 75% of everything originally or exclusively licensed offered in the Brazilian catalog.

African countries, on the other hand, in addition to having few productions (only South Africa and Congo are included in the list), represent only 0.28% of the original or exclusively licensed titles in the Brazilian Netflix catalog. There are only two works from this continent, both co-productions: the film *Jadotville* (South Africa and Ireland) and the documentary *Virunga* (Congo and England).

Among Latin Americans, the scenario is somewhat different, despite the wide disadvantage in relation to the number of North American, European and Asian titles. There are productions from Brazil, Colombia, Mexico, Argentina, Chile and Ecuador (28 titles in total). Brazil is the country best positioned in relation to the overall quantity of works available, with nine productions. Then come Colombia and Mexico, with six each, and Argentina, with five. Chile and Ecuador appear last, with one title each. In total, the six countries in Latin America have 3.92% of the total original or exclusively licensed titles available in the Brazilian Netflix catalog.

If we consider the production of all Spanish-speaking countries for the catalog of originals and licensees exclusively from Netflix, we have a total of 32 titles, or 4.48% of the total. In Portuguese, adding the productions of Brazil and Portugal, the amount is ten titles, or 1.4%. With this panorama, it is possible to totalize Ibero-American production (which covers the two countries of the Iberian Peninsula, Portugal and Spain, plus the set of countries colonized by these nations – that is, Latin America almost in its entirety), which yields 42 titles, or 5.88% of the total original or exclusively licensed titles in the Brazilian Netflix catalog.

THE PARTICIPATION OF LATIN AMERICA AND THE CULTURAL DEPENDENCE PARADIGM

The media industry in Latin America, especially related to audiovisual productions, has historically been marked by North American hegemony. American film distributors have always concentrated a lot of power in the circulation of this type of content, since the silent cinema. Even after the arrival of sound in films, the US continued to dominate the film market. In 1935, 76.6% of the films shown in Argentina and 80% of the films shown in Mexico were from the United States (Schnitman, 1984).

During the Cold War, the ideological and cultural race for influence and profit made the so-called Third World countries a deliberate target for American exports. Even countries linked to the Soviet Union, the so-called Second World, in Eastern Europe, became a market for American cultural products, rather than an alternative to them. There was in the 1970s an attempt of restructuring the world information system, called *New International Information Order* (Fox 1992).

Despite this attempt at a new order, American cultural commodities (especially TV programs) gained strength and started to occupy a large part of the local television programming grids in the international market. In Latin America, with the support of the United States for military dictatorships spread across the continent, some governments encouraged the circulation of American content, while in others, like Brazil and Mexico, strong national networks and national content grew in cooperation with governments. In this context, TV assumes a crucial role, which was reinforced in the 1990s with the popularization of satellite systems. They pushed for the construction of a world with open borders, free trade and, more importantly, minds receptive to American cultural productions (Fox, 1992). It is a natural path traced by capitalism in world systems (Fox, 1992), in which it is necessary to dominate more and more nations to expand their reproduction on a global scale.

After the national re-democratization processes, strong media groups in Latin America (such as Televisa and Globo) expanded with the deregulation and opening of markets, becoming major exporters. Today, these groups are fighting to survive in the streaming era, with a new wave of foreign content becoming popular in the region. TV, which is no longer only a national model, but explicitly transnational, struggles to preserve local industries.

Despite these redesigned media scenarios in Mexico and Brazil, elevating them to the position of content exporters, Schiller (1991) stated that imperialism was still a reality in transnational media processes in the 1990s. There are African, Latin American and Asian countries who continue to live under economic, financial and even military domination of the United States and countries of Europe. Bringing the debate to the present day, there is cultural domination of media super-companies. Based on a few countries, they are profit-driven and concentrate a lot of power in the production and distribution of content over the internet, such as Google, Facebook and Netflix. The media-cultural arena, therefore, is a field in which the domination of the United States (and Anglophone countries in general) resists, if not intact, at least very considerably.



Figure 3 shows a graph that reflects this situation in the distribution of original or licensed content exclusively on Netflix Brazil.

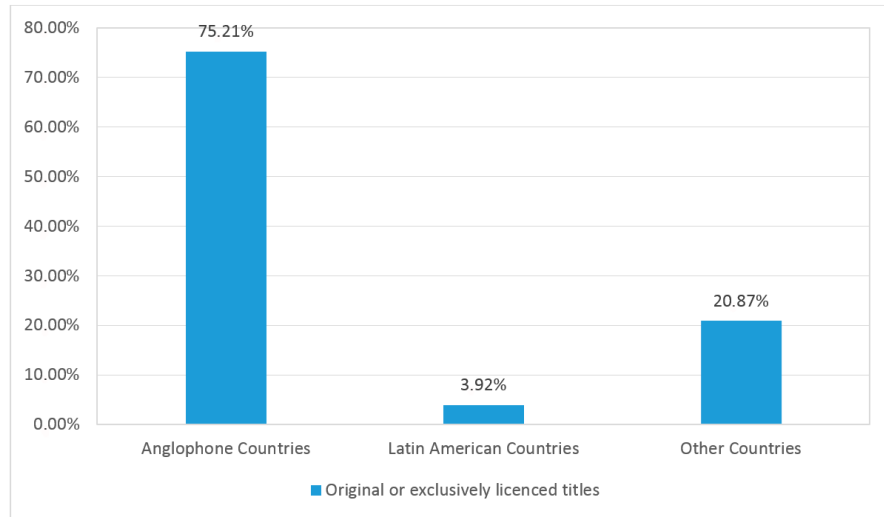


Figure 3. Original or exclusively licensed titles.

Source: Elaborated by the authors.

All this very specific development of the media industry in Latin America has generated a “division of labor” in regional production. Mexico and Brazil are traditional exporters, Argentina, Colombia, and Venezuela are new exporters and Chile, Peru and other nations are traditionally importers of audiovisual content (Sinclair & Straubhaar, 2013). It is not by chance that Brazil and Mexico are the countries in Latin America with the most original or exclusive titles in the Netflix Brazil catalog. Then it is followed by Colombia and Argentina, pointing out that the production for streaming platforms, for the time being, does not inaugurate new “divisions of labor” on a cultural scale in the continent, but obeys rules that have been established historically (the exception is Colombia, which has been gaining space in the television production market). The pre-existing structure for audiovisual production is therefore very important. Countries with this consolidated production structure have more potential to include content in new distribution and consumption systems. National communication systems may develop beyond that predicted by the *dependency theory* (Fox, 1992), but they are always tied to the overall economic limits of their countries, which limits them (such as Brazil and Mexico, for example). It takes capital and wealth to produce media content, especially audiovisual. Developing countries and even

small developed countries (like Holland and Belgium, just for example) end up at a disadvantage in this dynamic.

Table 4 shows the original and exclusively licensed titles from Latin America available in the Brazilian catalog of Netflix. In order to enrich the analyses, besides the titles, origins and years of release, genres and formats of the productions were included.

Table 4
Latin American original or exclusively licensed titles on Netflix Brazil

Title	Format	Genre	Producing Countries	Year
1. 3%	Series	Science Fiction	Brazil	2016 and 2018
2. <i>The 4th company</i>	Movie	Action	Mexico and Spain	2016
3. <i>The Girl</i>	Series	Crime	Colombia	2016
4. <i>Legend quest</i>	Animated Series	Children's	Mexico	2017
5. <i>Agustín</i>	Stand-up comedy	Comedy	Argentina	2018
<i>Aristarán: soy rada</i>				
6. <i>Club de cuervos</i>	Series	Comedy	Mexico	2015 and 2017
7. <i>Edha</i>	Series	Drama	Argentina	2018
8. <i>Edmilson Filho: notas, comedy about relationships</i>	Stand-up comedy	Comedy	Brazil	2017
9. <i>El Chapo</i>	Series	Crime	Colombia, USA and Mexico	2017
10. <i>El marginal</i>	Series	Crime	Argentina	2016
11. <i>Especial de ano todo com Clarice Falcão</i>	Stand-up comedy	Comedy	Brazil	2017
12. <i>Estocolmo</i>	Series	Crime	Argentina	2016
13. <i>Fabrizio Copano: solo pienso en mí</i>	Stand-up comedy	Comedy	Chile	2017
14. <i>The lighthouse of the orcas</i>	Movie	Drama	Argentina and Spain	2016
15. <i>Fearless</i>	Documentary Series	Factual	Brazil and USA	2016
16. <i>Felipe Neto: my life makes no sense</i>	Stand-up comedy	Comedy	Brazil	2017
17. <i>Ingobernable</i>	Series	Crime	Mexico	2017
18. <i>Juana Inés</i>	Series	Drama	Mexico	2016
19. <i>Laerte-se</i>	Documentary	Factual	Brazil	2017

Continued...

Tabela 4
Continuation

Title	Format	Genre	Producing Countries	Year
20. <i>Marco Luque: tamo junto</i>	Stand-up comedy	Comedy	Brazil	2017
21. <i>Mission Blue</i>	Documentary	Factual	Bermuda, Ecuador and USA	2014
22. <i>Narcos</i>	Series	Crime	Colombia and USA	2015, 2016 and 2017
23. <i>The killer</i>	Movie	Action	Brazil	2017
24. <i>The mechanism</i>	Series	Criminal	Brazil	2018
25. <i>Orbiter 9</i>	Movie	Science Fiction	Colombia and Spain	2017
26. <i>Pickpockets</i>	Movie	Drama	Colombia	2017
27. <i>Surviving Escobar, alias JJ</i>	Series	Crime	Colombia	2017
28. <i>Ultimate beastmaster Brazil</i>	Reality show	Game Show	Brazil and USA	2017

Note. Elaborated by the authors. Titles distributed in alphabetical order.

Some titles are in Portuguese or Spanish because not all of them have English distribution versions.

The small number of Latin American productions in the Netflix original or licensed catalog in Brazil indicates the existence of the perpetuation of a scenario that Straubhaar (1991) calls the *one-way flow of television*, the unilateral flow of television content from the United States and a few other developed countries to the rest of the world. The United States' success in cultural production and distribution is due to factors such as a large domestic market, investment capital, a multicultural environment and frequent innovation of genres and formats. In addition, the country has historically relied on the establishment of international distribution monopolies and political power, using institutions such as the Motion Picture Export Association of America, which has headquarters in all Latin American countries, for example.

Despite this, we can see in Table 4 not only consistency in the number of original or exclusively licensed titles produced in Latin America in the Brazilian Netflix catalog, but also a growth in this (still timid) catalog. The mapping, as previously mentioned, was delimited until May 11, 2018. However, during the following years new productions from the region were launched, such as *La casa de las flores* [*The house of flowers*] (Mexico), *Wilderness* (Colombia), *The Secret Law* (Colombia) and *La Reina del Flow* [*The queen of the flow*] (Colombia), among others.

There is also a trend in Latin America towards serial production, which better meets Netflix's own tendencies, with more than half of the listed titles framed in the series format (most of them are fictional series, but there is also a series of children's and youth animation, and documentary series). In addition, some gender biases in the mesoregion are also evident, whose titles are mostly comedies or criminal narratives. Also notable is the popularization of drug-trafficking series, genuinely Latin American creations that portray the particularities of this region.

After this brief explanation about the audiovisual production of Latin America for Netflix, it is necessary to update the *cultural dependence paradigm*, understanding that there is no hegemony without *cultural circulation* (Martín-Barbero, 2001). There is no imposition that comes "from above" that does not incorporate to a certain extent what comes "from below." Straubhaar (1991) launched the concept of *asymmetrical interdependence*, defining several relationships in which countries are in unequal positions of power and political, economic and cultural initiative.

It is a look at the cultural dependence paradigm that takes into account the resistance of other cultures and subcultures. It is necessary to understand that audiences actively make choices between watching international, national or regional programs. When national and regional content is available, it tends to be popular, due to *cultural proximity* (Straubhaar, 1991). This encourages local production and also the import of programs from culturally similar regions in terms of culture and language. Perhaps targeting the Latin American market is the reason that there are at least some titles in the region available on Netflix, in addition to a visible investment in expanding this production – although it is still somewhat low compared to other countries in the global economic north. Investment growth in Asian productions can also be seen, pointing out that Japan and South Korea, for example, are the most evident focuses of expansion.

The importance of this phenomenon is tremendous when one considers that we live in a scenario historically marked by cultural homogenization, despite all the local resistance movements. Since the 1940s, there has been a concern with licensing of American programming, followed more recently by concerns related to the growth of US cable TV, and satellite channels, which resulted in a major expansion of American TV in the 1980s and 1990s. Today, however, the largest global media flows occur over the internet, with the popularization of platforms such as YouTube, Facebook and Netflix. Titles produced by cable channels and streaming distribution platforms, make up what has been called the *New Golden Age of American TV* (Straubhaar, Castro, Duarte, & Spence, 2019) – series



not only produced and distributed by traditional television channels, but also by Netflix, Amazon Prime Video, and Hulu.

Lotz (2007) points out three eras of television: 1) the network era, with a few channels reaching many people. This period is perpetuated to some extent in Latin America, where open TV is still the most popular media; 2) the multi-channel era, in which cable TV became popular, with the expansion of channels and greater control by the audience over which programming to consume. That arrived later and with less impact in Latin America – until 2010, only for the middle class and elites; and 3) the post-network era, marked by the innovation of scripts for non-linear distribution, and the spreading of television content by the internet. It has been rapidly becoming popular in Latin America, after investments in streaming distribution, such as the ones made by Netflix.

It is noteworthy that in all these eras, audiences in Latin America are divided by social class and the possibility of access to infrastructure, unlike what happens in the United States and in the global economic north, where this access is somewhat more democratized. In Brazil especially, technologies that depend not only on the internet, but also on broadband to spread tend to have a slower entry. It is worth mentioning that more than 60 million people in the country have no access to the internet and a large part of the population connected to the world wide web uses exclusively mobile devices, often with limited data plans and low speed (Gomes, 2018). This peculiar technological and social format determines how Netflix establishes itself in Latin America.

TENSION WITHIN *CULTURAL DEPENDENCE* AND CONSIDERATIONS

There is evidence to indicate that Netflix's impact in Latin America would be more widely and strongly perceived among elites and the upper-middle class, which have broadband and internet volume and speed compatible with streaming (Straubhaar et al., 2019). In addition, there are indications that interest in North American and European culture is concentrated in the same classes (elites and upper-middle), for reasons also related to the cultural capital they possess (Straubhaar et al., 2019). Research with data on television preferences conducted in eight Latin American countries indicates that national television is more popular among the middle and lower classes, while North American culture is the second preference in general, after national culture, and often the first preference of the A and B classes, which concentrate greater cultural capital in terms of education and language ability (Straubhaar, Sinta, Spence, de Macedo, & Joyce, 2015a; Straubhaar, Sinta,

Spence, de Macedo, & Joyce, 2015b; Straubhaar, Spence, Joyce, & Duarte, 2016). Therefore, we may conclude that local TV and cinema industries developed by challenging two central notions of cultural imperialism: that the USA and other countries would dominate flows and that their productions would dominate less developed countries. In a way, elements of this domination exist, but one must consider movements that contest it. Despite being numerically superior on Netflix, North American achievements are not absolute and share space with an increasing amount of Latin American titles. The latter reflects consolidated media industries in countries, like Brazil, Mexico and, more recently, Colombia that have become accustomed to producing their own local television programming (and even exporting content).

Relationships between different categories in the context of *cultural dependent development* generally involve state companies from developing countries, multinational corporations that invest and/or do business in these countries and local companies, which are generally associated with one of the groups mentioned above, or even with two. *Cultural dependence* is also often revealed through the domination of content, financing and investments in advertising spaces in the domestic media by foreigners, especially American companies (Fox, 1992).

The contact between two cultures does not mean only the annihilation of one of them, no matter how much there is a context of domination (Fox, 1992; Martín-Barbero, 2001; Straubhaar, 1991). There are possible gaps that allow the “dominated” culture to invent symbolic systems and to reposition their role in the dynamics of oppression. The possible syncretism from this tension of understanding cultural dependence gave rise to cultural manifestations of contestation to hegemony – such as, for the sake of illustration only, *Umbanda*, which managed to mix elements of the tradition of the African *orixás*, the indigenous spirits and the European Christianity in a context of colonization.

In the contemporary Latin American case, there is an association between the multinational corporation Netflix and local producers and professionals to expand the company’s original production. This scenario reveals a facet of cultural dependence that Straubhaar (2007), building on Cardoso (1973), calls *associated-dependent development*. Basically, this facet of the cultural dependence paradigm describes the possibility of parallel, albeit asymmetric, growth between the media industries of countries at a disadvantage on the world stage and of countries that dominate this sector of the market. In the specific case that is being addressed, the theory of *associated-dependent development* allows us to note that Latin American audiovisual businesses may expand as Netflix’s American and English-speaking production expands and makes the corporation stronger,



more competitive and able to invest outside its historically delimited production center, as in Latin America and Southeast Asia for example.

This whole process is evidently part of Netflix's global expansion strategies, which consider public perceptions linked to the cultural and linguistic similarities and differences of the productions, thinking of countries not only as consumers, but also, hopefully, content producers. In other words, the cultural dependence scenario with a dependent-associated development bias remains in the streaming era, with strong domination processes in the United States and other developed countries. However, as in other times, this movement is also contested, creating possibilities for transformation from the local content production industries, constituting large audiences linked by language, habits and/or cultural proximity. ■

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