Local Production for Global Streamers:
How Netflix Shapes European Production Cultures

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This article examines how Netflix's increased production of local streaming content affects European television production practices. This inquiry is developed in critical dialogue with current research, primarily focused on the United States, which suggests that Netflix's production practices largely correspond with legacy practices in the television industry. The question is whether this observation also applies to Europe. Addressing this, 14 semi-structured interviews were conducted with television and film industry workers based in the Netherlands, Belgium, Germany, Denmark, and Spain. Emerging themes demonstrate that Netflix *is* reshaping production practices in these countries by importing a U.S. production model and influencing storytelling practices.

Keywords: Netflix, television production, European production cultures, streaming, global television, data, nonlinearity

Since Netflix's inception, it has been hailed as a frontrunner and disruptor, operating at the crux of media and technology. Netflix's public relations and the trade press further contributed to the mythology of data-driven television production and the simultaneous presentation of the streamer as a site for creative freedom, unrestricted by the constraints of linear television (Burroughs, 2019).

Current research has largely demystified these claims, with scholars arguing that changes in production practices are better explained by a shift from ad to subscription revenue (Lotz, 2017). The assumed disruptive practices of Netflix seemingly align with notions of quality/complex TV dating back to HBO in the early 2000s (Burroughs, 2019; Wayne & Uribe Sandoval, 2023). The perceived links between data, television production, and creative freedom have also been questioned (Navar-Gill, 2020; van Es, 2022). American screenwriters found that "there was minimal difference between the day-to-day experience of working in a writers' room for a traditional network and working in one for a streaming service" (Navar-Gill, 2020, p. 7).

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These studies, however, primarily focus on the U.S. television industry. The question is whether these observations on continuity also apply to other parts of the world. The transnationalism (Jenner, 2018) of Netflix's content and its aim to appeal to global audiences (Asmar, Raats, & Van Audenhove, 2023) make its local productions a rich site for analysis. Emerging research from Spain (Castro & Cascajosa, 2020), Korea (Kim, 2022), Australia (Cunningham & Scarlata, 2020), and the Arab world (Haddad & Dhoest, 2021) has illuminated ways in which Netflix is shaping local production. Recent work by Lotz and Lobato (2023) brings together international scholars investigating how streaming services are expanding norms of storytelling. These findings underscore the need for continued research in specific cultural contexts to map Netflix's impact on production practices around the globe.

An examination of the European context is timely, given the European Union's (EU) recent updates to its regulatory framework for cultural diversity, targeting streaming services (Afilipoaie, Iordache, & Raats, 2021; Idiz, Irion, Ebbers, & Vliegenthart, 2021; Lobato, 2019). Though studies have traced Netflix's European investment strategies (Afilipoaie et al., 2021; Iordache, Raats, & Afilipoaie, 2022), research on how Netflix shapes *the creative practices of production* in Europe, traditionally driven by public broadcasters and transnational coproductions, is still in its infancy. This article contributes findings from 14 semi-structured interviews with television and film production workers who have worked with Netflix in the Netherlands, Belgium, Germany, Denmark, and Spain—thus including large and (often overlooked) smaller media markets. Pursuing this inquiry, it builds on Caldwell's (2008) framework of production culture. As Caldwell (2008) writes, "To more fully understand 'film's production of culture' today means looking more closely at 'the culture of film production'" (p. 7). Production culture is defined as "the cultural practices and belief systems of film/video production workers" (Caldwell, 2008, p. 1). Accordingly, this article examines the practices and beliefs of producers, screenwriters, and showrunners making Netflix content in five European countries. Through these interviews, it shows that Netflix is shaping not only the work of production but also the storytelling practices in these countries.

Streaming Lore, Continuities, and the Need for Global Perspectives

Netflix's foray into original content sparked "streaming lore" (Burroughs, 2019), that is, discourses around the transformative effects of its technological specificities. Research has demonstrated how data play into distribution, through personalization, algorithms, genre categorization, and audience segmentation (Lobato, 2019, p. 41; Smith & Telang, 2016). However, empirical evidence of how Netflix uses data in production is lacking. In 2015, Chief Content Officer Ted Sarandos claimed that data took precedence over gut feel but later claimed the opposite (van Es, 2022). Netflix has been presented simultaneously as using data to influence development (Baron, 2018) and as a site of creative freedom (Sims, 2018).

As early as 2013, Netflix fed into the revolutionary potential of nonlinearity, describing how it was bringing about "the future of television" (Netflix, 2013, p. 6). It is true that "almost all the conventions of television [. . .] derive from practices developed to cope with the necessity of the linear schedule" (Lotz, 2017, p. 15). In theory, nonlinearity could eliminate the need for cliff-hangers, recaps, narratives built around commercial breaks, and fixed episode times (Navar-Gill, 2020, pp. 6–7; Smith & Telang, 2016, pp. 6–7).

These narratives, perpetuated by the trade press and Netflix itself, have in large part been demystified or contextualized. Scholars have demonstrated that many of the shifting conventions of production credited to Netflix are more accurately explained in continuity with preceding changes in the United States television industry (Burroughs, 2019; Lotz, 2017; Wayne & Uribe Sandoval, 2023). Lotz (2017) and Lotz, Eklund, and Soroka (2022) explain Netflix's production strategy through its need to serve a diverse range of subscribers niche content. In other words, where there are effects on production, these are primarily explained by the logics of the subscription model—which is not unique to Netflix. This analysis has been echoed by others who stress the importance of contextualizing Netflix in continuity with HBO, which switched to subscriber funding and spearheaded the notions of quality/complex TV in the early 2000s (Burroughs, 2019; Wayne & Uribe Sandoval, 2023). Burroughs (2019) provides a framework for critically understanding that "streaming lore is a re-articulation of industry lore" (p. 4), intentionally built on a preexisting model of quality branding. Delving deeper, Wayne and Uribe Sandoval (2023) demonstrate how Netflix replicated HBO's construction of its brand identity by invoking the creative freedom given to its series, foregrounding its "showrunner-auteurs" (pp. 3–4), and emphasizing its differences from television.

van Es (2022) explores how Netflix also actively fueled the "myth of big data" (p. 4) promoting the role of data in the production of Netflix Originals through public-facing materials, blogs, and the trade press. Similarly, Navar-Gill (2020) demonstrates how streaming services built a conceptual link between "data" and "creative freedom," which is not representative of the actual experiences of screenwriters. Her study suggests that U.S. screenwriters do not experience working for Netflix as significantly different from traditional networks (Navar-Gill, 2020); however, these results do not account for Netflix's impact outside of the United States.

What happens when Netflix commissions and produces content in other parts of the world? How does Netflix affect local production cultures, each with its unique industrial histories, cultural traditions, and regulatory frameworks? Scholars have raised concerns regarding Netflix's effects on transnational flows of content, particularly related to cultural imperialism and asymmetries that maintain a U.S. hegemony (Arriaza Ibarra & Navarro, 2022; Davis, 2021; Lotz et al., 2022). From a cultural policy perspective, Netflix's local catalogs and content have come under scrutiny (Idiz et al., 2021; Lobato, 2019; Lotz & Potter, 2022). Raising questions around the cultural power yielded by Netflix is especially relevant in the European context with its strong local production traditions, its fragmented market, and the EU's regulatory framework for cultural diversity (Afilipoaie et al., 2021; Idiz et al., 2021; Lobato, 2019). The latter establishes a content quota of European works for video-on-demand (VOD) services and allows member states to implement financial obligations for these services, including direct investment into European productions (Idiz et al., 2021). While transnational TV flows and cultural policy are both crucial lenses through which to examine Netflix's cultural power, equally integral to consider is *how, what,* and *where* content is being produced by Netflix.

Perspectives from different parts of the world are needed to assess Netflix's effects on production cultures. Nascent research suggests that Netflix's global presence has implications for cultural production (Lotz & Lobato, 2023). Global streamers have been credited with altering the traditional format of television in Spain to match international standards (Castro & Cascajosa, 2020). A study on Korean production culture echoes the early narratives around U.S. Netflix productions: Bigger budgets and potential creative

experimentation (Kim, 2022). Simultaneously, challenges have emerged around intellectual property (IP) rights and fears of standardized media production (Kim, 2022). Australian producers perceive Netflix as both an opportunity for funding and a threat due to power and data asymmetries (Cunningham & Scarlata, 2020). Screenwriters of Arabic Netflix Originals described how working with nonlocal executives led to cultural disconnects while simultaneously associating Netflix with higher quality and more creative freedom (Haddad & Dhoest, 2021). These studies suggest that Netflix shapes cultural production in overarching and specific ways in different regions.

The orientation of Netflix's local content is particularly complex. Regarding its appeal to global audiences, Jenner (2018) identifies how Netflix's content features a "grammar of transnationalism" (p. 220), allowing it to travel. Jenner (2018) notes two strategies that give Netflix productions transnational appeal: Genre association with "quality TV" and an appeal to global progressive values. Building on this, Asmar and colleagues (2023) identify how a branding "diversity strategy" (p. 2) is central to Netflix's expansion. They argue that "by appealing to discourses of global citizenship and diversity, Netflix brands itself as translator across cultures able to speak to everyone" (Asmar et al., 2023, p. 13). Thus, Netflix employs what Jenner (2018) labels "the transnational value system" (p. 230), appealing to "global culture" (Asmar et al., 2023, p. 3) over cultural specificity. In looking at Netflix's European investment strategies, Iordache and colleagues (2022) find that "it is likely that Netflix mitigates risks by producing genres that have proven attractive to transnational audiences, such as high-concept series, particularly drama" (p. 248). These studies underscore the need for further research, particularly within the EU where the demand for local content is embedded within cultural traditions, legal frameworks, and Netflix's strategy.

Netflix launched in Europe in 2012 and had the first-mover advantage (Bondebjerg et al., 2017), establishing itself as a major producer of European content. Though research on how Netflix shapes production practices in Europe remains limited, some notable contributions include Rasmussen's (2022) examination of European screen workers' interactions with streamers and production case studies of particular European countries including Spain (Castro & Cascajosa, 2020, 2023), Italy (Barra, 2023), and Norway (Sundet, 2021). These studies suggest different levels of creative involvement by Netflix in different countries and based on different production models. For instance, in researching the coproduction *Lilyhammer* (Bjørnstad & Skodvin, 2012–2014) between Norwegian broadcaster NRK and Netflix, Sundet (2021) found that Netflix was a relatively hands-off partner, allowing NRK to retain the editorial control and rarely giving notes. However, in the case of full Netflix Originals, research shows that Netflix was involved in the shaping of creative processes (Barra, 2023; Castro & Cascajosa, 2023; Rasmussen, 2022).

This article contributes to the aforementioned scholarship by focusing specifically on how Netflix shapes the creative practices of production workers in five European countries (the Netherlands, Belgium, Germany, Denmark, and Spain). In doing so, it draws from research on European production cultures. A major difference from the United States is that European TV has historically been driven by public service broadcasters (PSBs) and European transnational coproductions (Afilipoaie et al., 2021; Szczepanik & Vonderau, 2013). National PSBs still commission most European productions, employing a traditional in-house production model, and these series are primarily intended for domestic consumption (Barra & Scaglioni, 2021; Bondebjerg et al., 2017). Transnational European coproductions have been on the rise since the 2000s, with PSBs as the main commissioners (Bondebjerg et al., 2017). Transnational productions

are not without their logistical and cultural challenges—with complications arising even in coproductions among countries with as many cultural and linguistic similarities as Sweden and Denmark (Bondebjerg et al., 2017). Commercial broadcasters as well as national/regional streamers such as Viaplay and Videoland also play an important role in European audiovisual production (Gubbins, 2022).

The spectrum of European TV drama, conceptualized by Bondebjerg, Redvall, and Higson (2015), has "national" content on one end (developed and produced by one nation) and "transnational" content on the other (transnationally cofinanced, coproduced, and widely distributed). The latter category, they argue, aims to appeal to a more international audience (Bondebjerg et al., 2015). For instance, the Nordic/German coproduction *Forbydelsen* [*The Killing*] (Sveistrup, 2007–2012) "is clearly a series saturated with Danish cultural and social references, but they are inserted in a relatively universal, generic framework" (Bondebjerg et al., 2015, pp. 227–228).

The U.S. production model has also played a role in shaping European production cultures. While showrunners and writers' rooms date back to the beginnings of U.S. television broadcasting, they are not traditional in Europe (Redvall, 2013). Nevertheless, they have influenced European TV industries, particularly in Denmark (Redvall, 2013). DR, the Danish PSB, was seen as an exemplar of European integration of U.S. practices, especially due to the concept of "one vision" introduced in the 1990s, which— like the American showrunner model—promoted a head writer to a decision-making role with oversight over episode writers and the production of a series (Bondebjerg et al., 2015; Redvall, 2013). An important difference between the U.S. and Danish models is that DR's "one vision" operates within a public service mandate (Redvall, 2013). Since the last decade, U.S. production frameworks and the showrunner model have been growing in Europe (Barra & Scaglioni, 2021). Still, Nordic countries remain the paradigm (Barra & Scaglioni, 2021), and examples of the practice in smaller European markets are uncommon.

Historically, film and television production in Europe takes place in distinct contexts. European film relies on coproduction/cofinancing among European countries, as well as support from national and pan-European public funding (Hammett-Jamart, Mitric, & Redvall, 2018). Streamers have challenged this model, raising concerns around public funds going toward European films, where the IP is owned by U.S.-based streamers (Gubbins, 2022; Koljonen, 2022), and release windows (Doyle, 2016; Gubbins, 2022; Johnson, 2019). Yet there is increasing convergence of film and television production/distribution, especially in the streaming context. For instance, recent industry reports state that "the 'film industry' [. . .] is rapidly merging with the broader audiovisual sector" (Koljonen, 2021, p. 63), that many production companies produce both series and films, and that there is increasing crossover at the individual creative level (Gubbins, 2022). Thus, while this article focuses primarily on the production context of TV dramas, some interviewees had also worked on Netflix films, and these experiences were considered in the analysis.

Methodology

To understand Netflix's impacts in the Netherlands, Belgium, Germany, Denmark, and Spain, 14 semi-structured interviews (lasting approximately one hour) were conducted over Zoom in 2021 and 2022. The first four were with a Netflix policy representative and heads of producer and film organizations to gain a high-level understanding of Netflix's interventions in local production cultures. The following 10 were with

producers (two); screenwriters (two); and showrunners/series creators (six) who had worked on European Netflix series and films, to gain more granular insights into changes in production processes. In total, the latter 10 had worked on 14 series and films for Netflix, produced between 2018 and 2022 or were still in development at the time of the interviews (some on the same productions in different roles). Per Afilipoaie and colleagues' (2021) model for categorizing types of Netflix Originals, 12 of these series and films were *full* Netflix Originals, and two were *coproduced* with broadcasters (for a breakdown of content worked on by interviewees, see Table 1).[2]

Table 1. Content Worked on by Interviewees.

Content Type	Country of Origin	Type of Production
Series	The Netherlands	Full Netflix Original
Series	The Netherlands	Full Netflix Original
Film	The Netherlands	Full Netflix Original
Film	The Netherlands	Full Netflix Original
Film (in development)	The Netherlands	Full Netflix Original
Film	The Netherlands	Coproduction with Dutch and Belgian broadcasters
Series	Belgium	Coproduction with Belgian broadcaster
Series	Belgium	Full Netflix Original
Film	Belgium	Full Netflix Original
Series	Denmark	Full Netflix Original
Series	Denmark	Full Netflix Original
Series	Denmark	Full Netflix Original
Series	Germany	Full Netflix Original
Series	Spain	Full Netflix Original

To access these interviewees, a list of European full Netflix Originals and coproductions was compiled—for reference, it was estimated that in 2021, Netflix produced content in 15 European countries (Gubbins, 2022). Individuals who had worked on such content and whose contact information was accessible through IMDbPro, LinkedIn, and company websites were short-listed. Emphasis was placed on directors, producers, and screenwriters who would have a high-level understanding of the content creation process, had worked on multiple series or films for global streamers, and were from different European countries. Of approximately 50 individuals contacted, 14 agreed to be anonymously interviewed. These interviewees were based in five European countries, including larger media markets (Germany and Spain) and smaller ones (Belgium, the Netherlands, and Denmark). The number of countries analyzed was limited by a combination of research design (including countries that differed in market size/consumer base), accessibility of interviewees, and feasibility/scope of research. Although the interviewees and content worked on skewed toward the Netherlands, Belgium, and Denmark, this has not impacted the qualitative analysis of this study, which contributes valuable empirical data on under-researched countries.

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[2] For sake of anonymity, it has not been disclosed which interviewees worked on which productions.

The interviews were semi-structured in nature, to account for the different experiences of the interviewees, with a questionnaire following the stages of content creation.[3] The scope of this research focused primarily on scripted drama production, however, flexibility to discuss film production was included to account for the increasing convergence between the two industries. Acknowledging that each series/film has a unique trajectory, I have combined two conceptualizations of the stages of production to establish the research framework (see Table 2). The first is Bignell's (2012) stages of television production, which include development, preproduction, production, and postproduction. The second is content creation as conceptualized by Netflix Machine Learning data scientists (Kumar et al., 2018), which considers the following additional stages: Creative pitch, business negotiations, localization, and launch. Kumar and colleagues' (2018) last two stages, although not traditionally included in production, nevertheless affect production culture. Neither Bignell (2012) nor Netflix's data scientists (Kumar et al., 2018) address the circularity of content creation, that is, how performance data feed back into future investments and development. The research framework accounts for this crucial aspect through its final stage "release and feedback."

Table 2. Content Creation Framework.

Bignell (2012)	Kumar et al. (2018)	Research Framework
Development	Creative pitch	Development, pitch, and green light
	Business negotiations	
Preproduction	Preproduction	Preproduction
Production	Production	Production
Postproduction	Postproduction	Postproduction
—	Localization	Localization
—	Launch	Release and feedback

The interviews were recorded, transcribed, and analyzed through close reading and inductive development of themes. The findings from these interviews were analyzed alongside research from other scholarly studies; European industry reports (Film i Väst Analysis and Nostradamus Reports); trade press articles; and information from Netflix websites, press releases, and letters to investors.

As a case study of five countries, this research is not representative of the (complex and fragmented) European region. Rather, it gathers data on collaborations with Netflix from a production culture perspective in specific nations, contributing to the still limited scholarship in this field. The following analysis presents findings under two overarching themes: How Netflix (1) impacts production work[4] and (2) influences storytelling practices.

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[3]　See:　https://www.dropbox.com/scl/fi/l3w05lqg5alxr6ohnbizs/Netflix-European-Production_Interview-Questions-Template.pdf?rlkey=8ep7xzze2aw54wmdv8gq63d7e&dl=0

[4] Distinguished from the second theme as all aspects of production that do not directly relate to creative storytelling practices.

Shaping Production Work

Overall, interviewees felt that working with Netflix was not significantly different from working with European broadcasters or other streamers. However, a closer examination of the interviews reveals noteworthy shifts. This section demonstrates changes to work and working conditions at specific stages of production.

Early Green Light and a Hands-On, High-Speed Production

Nearly every Netflix production worked on by this study's participants was characterized by an early green light, based on pitches ranging from just an idea to a short bible. As one interviewee put it, "they green-lit it from nothing" (Interviewee 14). This was seen as highly unusual for Europe: No interviewees had experienced this green-lighting model before. Some noted that they felt Netflix executives had significantly more freedom to green-light projects than local broadcasters, which they saw as a benefit (Interviewees 10 and 11). However, two interviewees stressed that Netflix no longer green-lights straight to production and has thus returned to a more traditional model of commissioning in stages, comparable with their prior experiences with PSBs (Interviewees 5 and 10). This could signal that Netflix has made a strategic shift toward a more risk-averse model of green-lighting in parts of Europe—possibly in response to increasing competition from other streamers or the shrinking drama market (Koljonen, 2023).

Interviewees agreed that Netflix's involvement in their productions also contrasted with European broadcasters and streamers. Those who had worked on coproductions between Netflix and local broadcasters used the words "trust," "confidence," and "freedom" repeatedly to describe the production process with the streamer. However, Netflix's hands-off approach to these productions is likely because they were coproductions in which Netflix had taken on a cofinancing role, allowing the broadcasters to drive the production processes, similar to the aforementioned case of *Lilyhammer* (Bjørnstad & Skodvin, 2012–2014) researched by Sundet (2021). Haddad and Dhoest (2021) and Navar-Gill (2020), respectively, trace how Arabic and American screenwriters initially thought they had more creative freedom with Netflix before realizing the reality was more nuanced. Where these studies suggest a pattern of perceived creative freedom, which is complicated by new challenges, the interviewees of this study who worked on full Netflix Originals found Netflix to be relatively hands-on from the beginning. One compared Netflix with a Hollywood studio, with large teams micromanaging every aspect of the shoot: "You basically come on board, and you do everything that the studio wants, how they want it" (Interviewee 12). Another quipped, "they [Netflix] called it a 'light touch production' and we [the crew] always joked 'if this is a light touch production, God knows what a heavy touch production is'" (Interviewee 5). It is worth emphasizing that many factors—including the Netflix executives in charge, size/type of production, local crew experience, target region, and size of the market—could explain Netflix's differing levels of involvement in different productions, with further research required to draw broader conclusions.

Corroborating Rasmussen's (2022) findings on European screen workers, the interviewees underscored the intense speed of production as a difference from European practices. Pressure was put on

creatives to produce content within a much tighter deadline than what they were accustomed to (Interviewees 5 and 12). Compounding this was the fact that rewrites and reshoots were common occurrences. Multiple interviewees noted how unusual it was to redo so much, including days of reshooting and rerecording (Interviewees 9 and 12). Some saw this as a positive opportunity—"they were very willing to spend more money, which was amazing" (Interviewee 9)—whereas others felt the constant changes and compressed timeline exhausted the crew (Interviewee 12).

Cultural Disconnects, Power Asymmetries, and an Upside for Screenwriters

As a U.S.-based and globally distributed streamer, Netflix's interactions with the European production workers interviewed were characterized by instances of cultural disconnects and asymmetrical power dynamics. In what Lobato (2019) coined as "long-distance localization" (p. 114), Netflix's executives were still largely U.S.-based when entering the European market. Interviewees who had worked on some of Netflix's earliest productions in their countries had experienced this while working with U.S.-based Netflix executives who had a different (i.e., American) work style and little knowledge of their country's culture or media industry. While it is important to contextualize this with the knowledge that European transnational coproductions also lead to logistical and cultural complications (Bondebjerg et al., 2017), interviewees believed that Netflix executives were even more removed from them culturally. For instance, one stated, "[Netflix] had no sense of the production environment or the production traditions in [country]" (Interviewee 9). These collaborations were described as challenging, with time differences and language barriers, scripts translated for every round of feedback, and broader difficulties navigating the "American way" (Interviewees 10 and 13) of working. One example cited was the way American executives gave notes (in the form of questions), which European creatives initially struggled with (Interviewees 8 and 14). Similarly, Rasmussen's (2022) participants reference the "American standards" of global streamers while Haddad and Dhoest's (2021) describe "how working with people from another professional culture can be challenging, down to missing nuances of basic communication as well as production cultures and routines" (p. 272). Noting that Netflix has gradually been hiring European executives to replace American ones, an interviewee described what they perceived as the starkly contrasting cultural outlooks on work:

> In my experience, when you work with Americans, they don't understand the idea of free time. They don't understand holidays, they don't understand weekends, it's such a different mindset. They just work all the time. And they assume that so does everyone else. But when we started working with European executives, I mean, we are way into our work-life balance, and they understand that. (Interviewee 14)

Interviewees also referenced the uneven and precarious power dynamics at Netflix as something they had not experienced before. Some witnessed this only secondhand, dealing with heavy staff turnover on their Netflix projects and receiving new feedback from each executive. Netflix's company culture illustrates this precarity:

> We model ourselves on being a professional sports team, not a family. A family is about unconditional love. A dream team is about pushing yourself to be the best possible

teammate, caring intensely about your team, and knowing that you may not be on the
team forever. (Netflix Jobs, n.d., para. 18)

One interviewee felt concerned about being fired should they push back too much on notes (Interviewee
12). This contrasted with their previous work where they felt they could speak freely and disagree with
national broadcasters/streamers without jeopardizing their role.

Related to these uneven power dynamics are the limited IP rights and residuals received by the
European production workers creating content for Netflix. The fact that Netflix has exclusive rights to its original
content and that interviewees did not receive residuals, regardless of how successful or widely distributed their
content was, was cited as a major concern (Interviewees 1, 2, 9, and 10). One explained, "If they want to make
a show out of a side character, it's theirs" (Interviewee 13). There are industry-level concerns that an inadvertent
effect of the EU quota is "moving IP value out of Europe and into the coffers of multinational companies"
(Koljonen, 2022, p. 29), undermining the industry's long-term sustainability (Gubbins, 2022). The lack of IP and
adequate remuneration are pressing issues, which European screenwriters' unions and directives aim to rectify
(Idiz et al., 2021). In Denmark, Netflix suspended all local productions for 11 months following clashes with
Danish creative workers unions before finally reaching an agreement around "success-based remuneration"
(Pham, 2022, para. 1). This could signal a shift for European creatives though those in countries without
Denmark's strong legacy in TV drama may have less bargaining power.

A final challenge for European producers and screenwriters working with Netflix is performance
data asymmetries. Where interviewees stressed that PSB viewership numbers were public and local
streamers were more forthcoming with data, they had a range of experiences with Netflix sharing
performance data. Some received nothing; others received informal calls with general feedback; very few
were given actual numbers. This is likely due to Netflix not having an overarching data-sharing policy at the
time. Potentially indicating a shift, those who had worked with Netflix most recently all received the same
performance data: The numbers for local and international *starters* (those who watch more than two minutes
of the content) and *completers* (those who watch 90% of it), on the 10th and 28th day after release
(Interviewees 7, 8, 11, and 12). The 28th-day numbers, particularly local performance, were a deciding
factor for canceling some of the series. This was a source of frustration for certain creators who felt their
series had received positive reviews and performed well internationally but were canceled due to unrealistic
expectations regarding local numbers. For instance, an interviewee from a smaller market stated that Netflix
compared their series' performance with *Squid Game* (Hwang, 2021–), Netflix's most watched series of all
time (Interviewee 10). An interviewee from a larger media market noted that the local viewing numbers of
their series were quite low compared with the numbers of hit shows by local private and public broadcasters,
feeling that this may be why Netflix strategically did not release them (Interviewee 12). In both cases, there
was a sense that Netflix's scale for measuring a series' success was out of touch. It has been argued that
Netflix's focus on viewership within the first 28 days sets series up for failure as they must have immediate
success to avoid cancellation and are pitted against other recent releases vying for the most hours viewed
(Vito Oddo, 2023). Beyond these numbers, additional data (e.g., color-coded maps tracking performance)
were shared on a seemingly ad hoc basis, dependent on the relationship between Netflix and the
interviewee. Interviewees did not see this as particularly useful.

A silver lining noted by screenwriters in two different countries was that, in importing the American production style to Europe, Netflix empowers screenwriters. While the American showrunner model has been gradually taking hold in European TV industries, particularly in Nordic countries, Netflix and other global streamers have accelerated this transition in certain countries (Gubbins, 2022; Rasmussen, 2022). Interviewees from the Netherlands and Spain argued that Netflix's employment of the showrunner model has had a tangible effect on their position in the industry. One traced how:

> The arrival of Netflix and then other streaming platforms in [country] kind of changed the narrative for writers in terms of how much power they could hold. In [country] right now, it's much more common to see writers who are showrunners, who own production companies, and who have the last word in almost every creative decision in the show, but before, that wasn't the case. (Interviewee 8)

The other similarly stated that Netflix had directly influenced the level of control given to writers in their country (Interviewee 13).

Shaping Storytelling Practices

Having described instances of Netflix impacting the work of production, this section shows how Netflix also shapes storytelling practices through an apparent data-informed commissioning strategy and the note-giving practices of Netflix executives.

Data-Informed Commissioning: What Stories Get Told?

While Netflix collects considerable data on its subscribers' consumption patterns, little is known about how these are analyzed and fed back into production. Several interviewees felt that Netflix knows what performs well locally and targets specific audience segments. Some saw this as a data-informed decision, for instance, "I'm pretty sure that they use data to decide what kind of shows to make. They were clear they wanted to make a [genre] show and they wanted to cover specific ground" (Interviewee 8).

Netflix seems to aim for a diversified development slate: "It's a balance thing, like marketing, to serve the whole spectrum" (Interviewee 6), and the streamer looks to screenwriters to "fill that gap" (Interviewee 11). One type of gap identified was genres that were less common in specific countries or missing in Netflix's slate, for example, young adult and crime (Interviewees 8, 11, and 14). Another was defined by a target audience, for example, female/male and rural/urban oriented (Interviewees 6, 9, and 11). Barra (2023) similarly describes how Netflix strategically produced teen dramas in Italy as they were an underrepresented genre. On the logic of Netflix's commissions, the Netflix representative stated, "It's really part of our business model coming from a global to local media service and seeing what members want" (Interviewee 4). They emphasized the importance of working with "great talents" (Interviewee 4), denying that Netflix had specific editorial criteria when commissioning in Europe. Interviewees found that Netflix had more precise (likely data-informed) commissioning requirements and a more granular understanding of their audience segments than public and private broadcasters or local streamers. As noted in an industry report, "Serving audiences with the content they want, or believe they want, is a decisive

shift [. . . and] a contrast to the European cultural aim of building diversity by giving people what they do not know they want" (Gubbins, 2022, p. 12).

Story-Shaping in Action: Insights From Netflix's Notes

"Notes" refer to feedback creatives receive from executives during content development/production. The examples of notes given by Netflix executives to the interviewees proved to be revelatory of Netflix's priorities and collaboration style. Netflix's Ted Sarandos has claimed, "We don't use data to influence creative at all" (Smith & Telang, 2016, p. 148). Most interviewees who had received notes from Netflix confirmed that they did not feel particularly data-driven but rather "normal" and as originating from the gut feel of the executives. One outlier stated, "There are definitely notes that when you think about it, you could see it in that light [i.e., coming from data]" (Interviewee 14). Digging deeper into the types of notes received during a series' development and production suggests that viewer and performance data, along with other factors such as Netflix's global Internet distribution, contribute to how its series are shaped. Notes perceived as specific to Netflix and unlike those customarily received from European broadcasters/streamers were identified and thematically grouped into four types: Locality notes, transnational notes, pilot notes, and "second-screen" notes.

Locality notes encompass feedback interviewees received from Netflix regarding the cultural specificity and target audience of their content, stemming from Netflix's complex identity as a global distributor with national iterations. Many interviewees said Netflix explicitly wanted to make shows for local audiences and was not aiming for global success (Interviewees 5, 9, 11, 12, 13, and 14). In one instance, Netflix asked that screenwriters tailor their storylines to characters of the target nationality (Interviewee 7). This policy is corroborated by industry reports (Koljonen, 2023) and the Netflix representative, who stated, "At this moment, we are producing local for local" (Interviewee 4). "At this moment" underlines the ever-evolving nature of Netflix's content strategy, which also differs across regions. For example, where this study indicates Netflix's European policy is shifting toward more local specificity, Haddad and Dhoest (2021) find that Netflix's Arabic content strategy prioritizes content that travels, discovering that "some series were originally pitched to be set in one Arab country, only to be moved to another country later in the development process" (p. 269).

Lotz and Potter (2022) have argued that despite producing locally oriented content, Netflix is unlikely to produce stories that are very culturally specific. Local producers may play a role in this, as some interviewees noted that working for Netflix meant inevitably taking on a more "international ambition" than they would have with a European broadcaster (Interviewees 5, 6, and 8). The "local for local" policy was also criticized by one interviewee, who felt Netflix had shifted from taking risks on content that was not already being made in a country to trying to replicate genres with proven success, to the detriment of innovation (Interviewee 12). This echoes concerns that a growing dependence on Netflix could lead to a standardization of Korean content production by putting pressure on creators to match Netflix's "taste" (Kim, 2022, p. 1516). On an industry-wide level, this aligns with an overall decrease in drama productions, which is likely to result in "safer" content (Koljonen, 2023).

Transnational notes refer to feedback related to Netflix's employment of a "grammar of transnationalism" (Jenner, 2018) and branding diversity strategy (Asmar et al., 2023). Multiple interviewees

stressed that Netflix was excessively concerned about avoiding backlashes over potentially triggering content (Interviewees 8, 10, and 13), with one playfully suggesting that Netflix had a committee to oversee that its content would not offend anyone (Interviewee 13). Rasmussen's (2022) participants similarly reference the "political correctness" of streamers. As highlighted by the following quote, these types of notes were also given for content that was perceived as being too culturally specific and were sometimes contradictory with the premise that Netflix was prioritizing local for local content:

> [Netflix] said, "We're not interested in international success." It's nice if it happens, but that's not the goal, the goal is to make something exclusively [local nationality]. This sometimes contradicted with notes that they gave that a certain joke, for instance, would be so [nationality] that people abroad wouldn't understand it. [. . .] I feel like that was done for an international audience and not for the local audience. (Interviewee 13)

European creators shared the sentiment that U.S. cultural sensitivities specifically had to be accommodated. One argued certain notes were "probably for the Americans because the Americans wanted that, they thought it was great, but the [local nationality] really hate that" (Interviewee 12). Another stated, "Even if the U.S. market is not one of our main markets, we had to think, at very specific moments, of the U.S. market, what they were going to think, and some buttons we didn't want to push with them" (Interviewee 8). This hints at the U.S. market taking precedence, at least in terms of Netflix's backlash concerns. The importance of diversity for Netflix, both in terms of cast and crew, was also referenced (Interviewees 4 and 10), confirming Castro and Cascajosa's (2023) findings on diversity in Spanish Netflix series. Per Bondebjerg and colleagues' (2015) conception of a spectrum of European content, this type of note highlights that Netflix's European productions are certainly "transnational," arguably expanding the spectrum due to their U.S. production model and global reach.

Pilot notes focus on the first episode of a series, specifically the first 15 minutes. Netflix previously suggested that first episodes rarely hooked its viewers (Spangler, 2015), leading to the theory that its pilot format was less rigid than in linear television. This was directly contradicted by the interviewees in this study: Five screenwriters/showrunners who had worked on different series in different countries described how Netflix excessively focused on the first 15 minutes of a series, breaking them down into increments, which the streamer believed were crucial to engage their audience (Interviewees 8, 9, 12, and 14). As one summarized,

> I remember Netflix telling [me] that because of the data, they knew that in the pilot episode, there are critical moments in which people tune out and leave a show. [. . .] The first one is two minutes in, which I'm guessing is when people think of something else. The second one, I think, was seven minutes in, which is a little bit more worrisome, because it means that they watch the first seven minutes and nothing happens, so they quit. And then the 15-minute mark. [. . .] When you have people up until the 15-minute mark and they keep going, apparently most people at least finish the pilot. (Interviewee 8)

This meant packing action into that time frame and making it as riveting as possible, sometimes to the detriment of the screenwriter's creative vision. Most interviewees stressed that this was general knowledge— "If you don't grab people from the beginning, they will leave" (Interviewee 8)—repackaged as novel data and fixated on.

Second-screen notes are the final and most unique type of notes from Netflix, related to series targeting young adult subscribers. One interviewee described how Netflix labeled certain series as second-screen shows and designed them around the consumption patterns of their younger viewers (Interviewee 9). Another interviewee, who had experienced this firsthand, shared,

> [Netflix] basically said, "What you need to know about your audience here is that they will watch the show, perhaps on their mobile phone, or on a second or third screen while doing something else and talking to their friends, so you need to both show and tell, you need to say much more than you would normally say. [. . .] You need your audience to understand what's going on, even if they're not looking at the screen." (Interviewee 14)

Netflix, it was explained, knows that this audience segment will be "second screening" these series, that is, using social media on their phones as they watch, and therefore actively develops them as second-screen shows (Interviewees 9 and 14). What this entails is increasing narration, overly explaining the plot, and emphasizing/reiterating everything through acting, music, and voice-overs. Here "show, don't tell," the screenwriting principle of storytelling through action and visuals rather than exposition, is replaced by "show *and* tell" (Interviewee 14). An illustrative example of this can be found in the sixth episode of Netflix's U.S. hit *Wednesday* (Blair & Monteiro, 2022), in which Wednesday Addams visits the "old Gates mansion" while a voice-over repeats all the plot points that led up to this visit. Only the two previously cited interviewees had heard the term "second-screen show" directly; however, multiple others had received notes that fall into this category and felt to the screenwriters like they were having to dumb down their series.

That Netflix is developing content for a disengaged audience has unfortunate implications for screenwriters beyond Europe. As one screenwriter shared, "It saddens me, on behalf of great storytelling traditions" (Interviewee 9). Lobato (2019) foretold that "new texts may increasingly be designed for the experiential specificities of internet rather than broadcast or cable distribution" (p. 31). However, in this case, the changes in production were driven by changing consumption practices. Consequently, further research is needed to investigate the extent to which content is being designed for viewer types and how widespread this practice is.

Discussion

Through interviews with television and film industry workers in the Netherlands, Belgium, Germany, Denmark, and Spain, I find that Netflix has impacted production workers and their storytelling practices in these countries in ways that have critical implications for European production cultures.

From a cultural policy perspective, the contradictory focus on local/transnational storytelling and how Netflix shapes content highlight the need for policy to consider production and develop more nuanced definitions of local content. The risks are that an increase in European productions may

inadvertently transfer the rights of these works to U.S.-based streamers like Netflix and that these works may be so "universal" that they do not achieve the policy goals of cultural diversity in the first place. Though Netflix has proclaimed its commitment to "being a voice for European entertainment" (Netflix, 2018, para. 7), industry stakeholders are rightfully concerned about "whether the US streamers are leading, rather than simply supporting, the direction of European cultural production" (Gubbins, 2022, p. 5). One proposal by Lotz and Potter (2022) is that cultural policy could develop a more nuanced culture test for allocating funding.

From the standpoint of media production, this article contradicts the observation that streaming production is in continuity with preexisting industrial logics. Instead, it demonstrates how Netflix reshapes production practices in parts of Europe by importing a U.S. production model, giving data-informed notes, and dually addressing local and global audiences. Although Netflix's development teams have become more localized, its transnational production model compounds logistical/cultural complications already present in European coproductions by targeting local viewers alongside an ambiguous global audience. For creatives, the pervasive confusion around local/transnational notes and a decrease in Netflix's willingness to invest in innovative content will affect the types of European Originals produced. The role of Netflix commissioners and executives in shaping productions and the precarity of creatives (related to IP, residuals, data, etc.) also introduce new power asymmetries warranting further analysis.

Analytically, this article reiterates the value of production studies, demonstrating the need to go beyond conceptual debates through empirical research that engages with media industry professionals. Some of the most insightful takeaways are around Netflix's otherwise inaccessible note-giving rituals, which reveal how content is shaped, hinting at the company's strategy and goals.

Finally, this article contributes to understandings of media convergence, streaming production cultures, and transnational flows of content. Although the mechanics of producing for TV and film differ, especially in Europe, there is significant convergence in how they are commissioned and produced by streamers. Based on the productions analyzed, this article conceptualizes streaming production culture as a hybrid characterized by data-informed decisions and global/local address. In examining how cultural content is created, this article also demonstrates how the study of transnational flows of content is linked to and complicated by production culture.

It must be stressed that the divergences from local production practices identified are dependent on many variables, including the type of collaboration (coproduction versus full Netflix Original), size of the market, and whims of executives. They have been contextualized, where possible, and should not be interpreted as representative of Netflix's broader European strategies. The interviews cover countries in Western, Southern, and Northern Europe that have received relatively more investment from Netflix. This makes these countries worthwhile sites of analysis as it is possible to examine productions over time (initial content investments versus recent ones) and therein observe evolutions in Netflix's strategy. Future studies should consider the Eastern European context, a distinct production environment (Szczepanik, 2021; Szostak, 2022) where Netflix's interventions are relatively new (Tanz, 2022). Another avenue is examining other global streamers, each with their own business model and content strategy (Amazon Prime Video, Disney+, Max, etc.). Finally, the discovery that certain series are being designed as second-screen shows

for younger audiences who watch series and consume social media simultaneously, requiring screenwriters to both "show *and* tell" (Interviewee 14), is significant. The degree to which viewer and performance data seemingly filter through Netflix's notes underscores the need for future research using a framework that considers both production cultures and audience behaviors.

This article has presented empirical evidence from a production culture perspective, focusing on creative processes often overlooked in favor of investment strategies. As Netflix ramps up its local content strategy in Europe and other parts of the world, researchers should continue to critically assess its effects on production and creativity as these have strong ramifications, especially from the normative perspective of cultural diversity.

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