2

Conceptualizing the National and the Global in SVOD Original Production

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SVOD services have integrated into national markets in complex and surprising ways. From global behemoths such as Netflix and Amazon's Prime Video that are available in almost every national market through to smaller SVODs operating in only one or a few countries, the landscape of services has grown increasingly diverse, as have their business models and programming strategies. How, then, should we think about the topic of this book—SVOD original production—within a context of growing service diversity? What adjustments to our analytical concepts are required?

The present chapter takes up this challenge. Our aim is to disaggregate the category of SVOD into smaller units, reflecting differences between services and the markets in which they operate. Key to our analysis is the distinction between *global* and *national* SVOD services. For example, Netflix, Prime Video, and Disney+ are U.S.-based, global SVODs operating in almost every country, with multilingual catalogs and interfaces. These services commission originals across multiple countries and make them available to a global userbase. In contrast, services like Globo Play (Brazil), BluTV (Turkey), Movistar (Spain), and Stan (Australia) are nationally focused SVODs deeply rooted in a single, specific market, although they may also be available to other countries within their regions.

In this chapter we show how national and global SVODs operate differently when it comes to commissioning, and we explain what this means for the kinds of stories they commission. Our chapter proceeds in two parts. First, we offer some general observations about national and global SVODs. Second, we explore how two SVODs—Stan and Prime Video—have adopted contrasting production strategies for a single national market, Australia. (Note that our focus in this chapter is on broad-based "TV replacement" SVODs; as such we do not consider niche, genre-specific SVODs such as Shudder or Acorn.)

The general pattern we describe in this chapter is that smaller national SVODs tend to produce a restricted number of local-language originals per year, featuring stars and genres familiar to the relevant national market. In contrast, global services produce across multiple countries and adjust their investment accordingly, resulting in a more cosmopolitan (but less local) approach to production. Some SVODs are also expanding from national to transnational scale, reflecting the mutable nature of service categories, while others coproduce with international partners, complicating matters further. Consequently, we argue that the national and global should be understood as distinct categories at the service level but are intertwined when it comes to storytelling, aesthetics, and style.

Defining National and Global SVODs

Researchers from the European Audiovisual Observatory (EAO) have documented the evolving SVOD service landscape in a series of meticulous reports (Grece 2018; Grece and Jiménez Pumares 2020). Their analyses note important distinctions between the more than 260 SVODs that currently operate across Europe. Of these SVODs, some—such as Player (Poland) and SFR Play (France)—cater primarily to a single market. The EAO describes these services as *national SVODs* and argues that they have characteristics that set them apart from their global competitors such as Netflix and Disney+.

First, these national SVODs have smaller catalogs than these global services. Second, they tend to carry a higher proportion of local content (titles produced in the service's home nation); on average, 72 percent of TV series offered by national SVODs are local compared to 22 percent for global SVODs (Grece and Jiménez Pumares 2020, 83). Third, national SVODs are often owned by national pay-TV or telecom operators and have deep institutional roots in the countries in which they operate. This embeddedness allows for a strong understanding of audience tastes, viewing cultures, competing services, and production possibilities and constraints within their home market.

Locally based and managed, these national SVODs are firmly focused on their home markets and geolinguistic regions—in contrast to global SVODs that seek to aggregate viewers from around the world and commission content that can travel widely. This is a dynamic that we have noted in our own research. Since 2017, we have been studying SVOD catalogs and production in Australia and have observed the different character of national services, notably Stan (owned by the commercial broadcaster Nine), compared to global services Netflix and Prime Video.[1] These Australian SVODs have a relatively higher degree of local content than the global mega-platforms as well as, importantly, national sports rights. Stan is a "completely locally focused proposition," as its former CEO Mike Sneesby described it (quoted in Reilly 2016)—in practice, this means supplying a mix of Australian and U.S. content—but it steers clear of the European, Latin American, and Asian content that can be found on Netflix and Prime Video.

The European Audiovisual Observatory's concept of national SVODs is also helpful for clarifying dynamics of other SVOD markets—especially in countries where language forms a natural protective barrier. Consider India, home to a number of powerful national SVODs such as Hotstar and Zee TV, which are far more popular than Netflix. Another striking case is China, where Tencent Video, iQiyi, Youku Tudou, and LeTV dominate the market (state regulation requires that all SVODs be Chinese owned).[2] In these countries and elsewhere, national SVODs have a strong hold on mainstream audience interest because of the deep industry roots of their parent companies, which often encompass content production, broadcasting, pay-TV, and advertising. These national SVODs know their audiences well, have significant experience producing for them, and have rich back-catalogs of content to offer them.

In contrast, the major global SVODs—Netflix, Prime Video, and Disney+—operate in a fundamentally different way. Their catalogs are larger but profoundly U.S.-dominated, with what Albornoz and Garcia Leiva (2022, 64) describe as "a transnationalized American offering with an international-flavoured seasoning." Global SVODs benefit from enormous scale, resources, and network effects, but they often struggle to understand local audience preferences and may be excluded from licensing deals with local rightsholders. This makes original production an essential strategy for these global SVODs because it is often the only way they can offer quality local content to their international audiences. However, their willingness to finance such local content depends on the perceived strategic value of particular markets. To date, Netflix originals have been produced in 26 different markets across Western Europe, East and Southeast Asia, Africa, and the Americas, while Prime Video's original production is concentrated in 16 countries (with Amazon targeting those markets that align best with its e-commerce platform strategy, notably the United Kingdom, Germany, India, and Japan). The rest of their 190-odd national markets make do either with licensed local content or no local content at all.

For SVODs, the decision on whether or not to commission content in a particular country is also shaped by national policies that incentivize or require domestic content investment or production. Following the adoption of the European Union's (EU) revised Audiovisual Media Services Directive in 2018, numerous EU member states—including France, Italy, Switzerland, and Denmark—have introduced local production obligations for major SVODs, which are now obliged to put a certain amount of their national subscriber revenues back into local production. Similar measures are also being debated in other countries including Argentina and Brazil, and also in Australia, where SVODs have pre-emptively increased their local production in anticipation of (and to undermine) official regulation.

What does all this mean for SVOD storytelling? There is a paradox here for cultural critique, precisely because different catalog strategies provide different, yet equally legitimate, kinds of diversity. National SVODs are often *localist*, in the sense that they extend national screen traditions, languages, star systems, and self-representation into the streaming space. This may resonate with audiences who prefer to see content in their own language, accents, and idioms. It also has particular appeal within smaller markets ignored or underserved by global media players, where such an offering is often viewed positively in terms of a commitment to local content and framed as a progressive counterweight to Americanization, cultural imperialism, and other ideologies of cultural homogenization. Of course, with localism there is often parochialism and narrowness. In contrast, the largest global SVODs—Netflix and Prime Video—seem to offer an increasingly *cosmopolitan diversity* that is an effect of their catalog scale rather than their priori commitment to national culture. These services integrate content and genres from around the globe, bringing "the world to your screen" and offering everything from Japanese and Mexican movies to Korean and Turkish TV dramas. This globalist SVOD offering, while not "distinctively local" in its appeal, may be very attractive to audiences, depending on the prior conditions of the relevant national market. For example, the entry of Netflix has often been welcomed in many countries as a "breath of fresh air" that contrasts positively with the stale, repetitive nature of national media institutions (Lobato 2019). Straubhaar et al. (2021) argue that, in the Latin American context, this preference for international versus local content and services is often organized along class lines, with educated, well-traveled, and English-speaking elites preferring Netflix to local broadcast and cable services.

Recent scholarship on SVODs has noted this structural difference between national and global SVODs and has begun to probe its implications for longstanding debates about audiovisual diversity and the relationship between national and global media. Studies of nationally oriented SVODs, such as Blim (Mexico), Stan (Australia), and Globoplay (Brazil), have shown how these services often seek to market themselves as distinctively local (i.e., different from Netflix) and as distinct from legacy broadcast services, while nonetheless building on the catalog offerings of their parent companies, often with roots in broadcast and pay-TV (Rios and Scarlata 2018; Meimaridis et al. 2020). Related studies of SVOD content and commissioning, especially in Europe, have explored underlying market, financing, and policy drivers (Afilipoaie et al. 2021; Albornoz and Garcia Leiva 2022). Meanwhile, conceptual work (Elkins 2019; Szczepanik et al. 2020; Lotz 2021) suggests new vocabularies through which we can analyze interactions between national and global SVODs. Key questions remain, however. How, and to what extent, do these structural tendencies between national and global services manifest textually in original shows and movies? How do the stories told by national and global SVODs differ, if at all? To answer these questions, the next section considers how two very different SVODs—the Australian service Stan and the global service Prime Video—have approached and cultivated the task of producing originals in the Australian market in inverse ways.

The Production Strategy of a National, Single-Market SVOD: Stan

Stan is an Australian SVOD service with a distinctively national focus in its production, operations, ownership, and branding. It launched on the Australia Day public holiday (January 26) in 2015, shortly before the entry of Netflix into the Australian market. In contrast to Netflix, Stan brands itself as a homegrown SVOD with a catalog tailored specifically to the tastes of Australian audiences. Its original production strategy reflects this: by January 2022 Stan had released twenty-three locally made Stan Originals—including drama series, scripted and stand-up comedy, and a suite of films—all carefully calibrated to appeal to well-established local tastes, and in some cases to the preferences of international network partners.

Initially a joint venture between two Australian media companies, the national broadcaster Nine Network and the news publisher Fairfax (these entities merged as Nine in July 2018), Stan pursues a Hollywood-hits-plus-local-originals strategy (Sneesby 2019). Its catalog has consistently comprised around 10 percent local content, with the rest being mostly made up of Hollywood movies and network and cable shows (Lobato and Scarlata 2019). To secure this library content, Stan was quick to strike content deals with Sony Pictures, Disney, Warner Brothers, and, later, NBCUniversal to augment the service's existing library of titles from the Nine Network library. In other words, Stan has long recognized that demand for U.S. content is in fact a defining feature of Australia's national TV market, and that a national SVOD service in Australia needs a mix of imported and local titles. Its originals strategy shores up the "local" part of this equation, while U.S. licensed content provides the "Hollywood" part.

In its early commissions, Stan invested in Australian comedy to differentiate its offerings from Netflix and other U.S.-based services. The absurdist police comedy *No Activity* (2015–2017)—Australia's first SVOD original series—lampooned the unprofessionalism of Australian police officers during stakeouts, tapping into a tradition of laconic, low-budget sketch comedy that was immediately recognizable, and appealing, to Australian audiences. *The Other Guy* (2017–), a semi-autobiographical comedy series based on the experiences of well-known Australian radio host Matt Okine soon followed. While aiming for a slow-burn style of comedy and a dark tone characteristic of many international SVOD commissions, *The Other Guy* also recalled Australian broadcast half-hour comedy series like *Please Like Me* (2013–2016, ABC) and *Fisk* (2021–, ABC); in this sense, it extended, rather than disrupted, local genre traditions. Stand-up comedy—a format rarely broadcast on Australian television—was another strategic genre investment. In 2017, Stan released a series of six stand-up comedy specials, *One Night Stan*, featuring popular Australian comedians performing in comedy venues to a live audience.

Alongside these lower-budget comedy titles, Stan has also commissioned several prestige titles—flagship series that presume an engaged, binge-watching audience and explore adult themes unsuited to broadcast television. Key titles include Stan's outback horror series *Wolf Creek* (2016–2017) and the gritty, racism-themed urban drama series *Romper Stomper* (2018). Both of these shows made extensive use of outdoor location shooting and were adapted from well-known Australian films, thus leveraging an existing audience while also positioning Stan's originals within a tradition of successful Australian cinema. *Bloom* (2019–) was a six-part supernatural mystery with elements of action, crime, adventure, and science fiction, set in regional Victoria. Set in the aftermath of a devastating flood, *Bloom*'s mix of sentimental adult drama and magic realism was firmly located within a long tradition of state-funded Australian film and television drama once described by Dermody and Jacka (1987) as the "AFC [Australian Film Commission] genre." Indeed, this link with Australian cinema funding and institutions remains important for the service: Stan has partnered with state government screen agencies on new idea and talent development schemes that now feed into its future pipeline of originals. In contrast to Netflix's preference to commission fully developed concepts, Stan's willingness to support speculative script development (including by emerging writers) signals its intent to establish a long-term pipeline of content and advertises its engagement with Australian screen institutions and industry. Once more, we see Stan claiming the role of a *national* media service.

Stan's most successful original series to date is the hyper-local family drama *Bump* (2021). Set in Sydney's multicultural Inner West, *Bump* is about an ambitious teenage girl, Oly (Olympia), who unknowingly falls pregnant and delivers her baby in a toilet cubicle. The show explores the complications that ensue for Oly, the baby's father, Santiago, and their respective parents. Scripts explore the culture clash between the two families (Australian and Chilean) as well as their different understandings of family life and experiences of everyday life in a large, complex city. *Bump* is reminiscent of popular 1990s Australian television shows such as *Heartbreak High* (1994–1999, Network Ten) and *Love My Way* (2004–2007, FOX8), yet it also incorporates some contemporary twists on these old traditions, in line with Lotz's (2022) description of SVOD original style as "shifted 45 degrees" from what is familiar and readily available on ad-supported linear television. For example, the show uses a half-hour format (a relative novelty within premium scripted Australian drama production). Like *Bloom* and *Romper Stomper*, *Bump* has a majority-local cast—yet its multicultural orientation and youth focus gives it a more cosmopolitan character than previous Stan flagship dramas. As a generationally appropriate update to the teen/family drama, *Bump* also has strong genre credentials, allowing a certain kind of international legibility, as reflected in its licensing by the BBC, The CW in the United States, CBC in Canada, and HBO Max in Latin America.

Stan's production strategy cannot easily divorce national from international markets. Like most Australian screen productions, Stan originals are commonly presold to international studios or—more recently—coproduced with international partners; this is a longstanding practice that sustains ongoing national production by providing essential supplementary finance. A recent example is the Stan/BBC One action series *The Tourist* (2021), a transnational thriller set across remote Australia, which was produced by the UK-based Two Brothers Pictures. *The Tourist* is an unusually expensive, "premium" offering for Stan, within an uncommon and risky genre for Australian television producers (action-adventure). The show's strategic use of the Australian outback landscape, its globe-trotting story, and its transnational casting (Northern Irish actor and *Fifty Shades* star Jamie Dornan plays the lead role) suggest *The Tourist* has been designed to be both legible and engaging for audiences outside Australia as well as within it. The show marks a turning point for Stan's original production strategy, which is increasingly investing in big-budget, internationally oriented prestige shows rather than the more modest, self-consciously "local" titles it started out with (such as *No Activity* and *The Other Guy*).

What can we learn from Stan's original production strategy? Clearly, as a single-market service Stan is following a different strategy from its global competitors Netflix, Prime Video, and Disney+. Stan cannot compete with these services when it comes to resources and production scale; it has focused its energies instead on a small number of carefully developed story ideas that make the best use of its deep knowledge of national tastes and viewing histories, capitalizing on its parent company's sixty-five-year history of media production in Australia. To succeed, Stan shows have attempted to offer something different from Netflix—something more locally resonant. Yet, as we have shown in our analysis, Stan also realizes that strong international sales and successful international coproductions are an essential part of building a sustainable national-SVOD business model.

Global SVOD Production Strategy in a Peripheral Market: Amazon's Prime Video

A contrasting approach can be seen in Prime Video, which has been available in Australia since 2016, first as a standalone service and then—following the local launch of Amazon's Prime membership scheme in 2018—as an integrated service within the Prime membership bundle. Unlike Stan, which has been producing originals since its launch, Prime Video did not commission any Australian content until 2019. However, by early 2022 it had released three sports documentary series; ten local comedy specials; discrete variety, reality, sketch comedy, and drama series; and commissioned six more titles. Since then, it has pursued a strategy that is, paradoxically, the inverse of Stan's approach—beginning with a global, multi-territory focus in its local commissioning choices before venturing into more distinctly local programming. Prime Video's approach to production in Australia is also different from other international SVOD services, including Netflix and Disney+, thus providing an instructive contrast that reflects the distinct character of Prime Video as a service integrated within a wider package rather than a standalone SVOD service.

To understand the Australian Prime Video originals we first need to consider the evolution of Prime Video as a service. The streamer has a distinctive early history of supporting amateur, aspirational, and pro-am screen productions. After buying the industry standard Internet Movie Database (IMDb)—the data source bible for the industry—Amazon then, in 2008, followed this up with the acquisition of Without A Box, a fledgling internet company that helped independent filmmakers submit their films to more than 700 festivals in 200 countries and helped festival organizers manage and market events. This allowed Amazon to enter the streaming video market well *before* Netflix, using the brand Amazon Unbox. Compared to Netflix's storied reliance on big data to make creative decisions, Prime Video also demonstrated a more traditional reliance on pilots. However, much like Netflix, after Amazon Unbox, Prime Video initially adopted an original television production strategy that prioritized big budgets, recognizable actors, and high concepts, resulting in criticism that it had moved quickly away from "participatory culture" to "quality TV" (Barker 2017).

Netflix had its breakthrough originals *House of Cards* (2013–2018) and *Orange is the New Black* (2013–2019), and Prime Video laid down its early quality markers—*Transparent* (2014–2019) and *The Marvelous Mrs. Maisel* (2017–)—in turn. Netflix shifted its attention to a global rollout; Prime Video followed suit. But whereas Netflix has purposefully prioritized large subscriber bases and broad language communities, Prime Video investment in originals and licensing has been tracking international Prime subscriber growth closely. All standard subscriptions to Amazon Prime include free delivery of most purchased items (guaranteed free in North America), ad-free Amazon Music, a selection of free games, access to free in-game loot, and a Prime Gaming channel subscription with Prime Gaming, e-books, travel guides, and more with Prime Reading, along with Prime Video. The strategic approach with which Amazon had entered the audiovisual market is "not as a television provider per se, but as a seller of video products densely interlinked to multi-sided markets in retail, advertising, music, data and finance" (Tiwary 2020, 88). According to Ampere Analysis, by February 2021 Prime Video had produced 229 original titles. Just over half of all Amazon Originals were produced in the United Stated, followed by India, the UK, Australia, Spain, Germany, and Mexico, among others (Ampere Analysis 2021)—representing Amazon's key established and emerging e-retail markets.

When Prime Video began to commission original Australian content in 2019 it adopted a risk-averse, multiterritory production strategy built around familiar topics and formats. First, Prime Video had been building up a range of sports documentary programming under the *All or Nothing* banner since 2016 (e.g., *All or Nothing: Manchester City*, *All or Nothing: Dallas Cowboys*). These documentaries followed miscellaneous international football, soccer, rugby union, and ice hockey associations/national teams and were clearly designed to appeal to both specific regional communities and fans of particular sports dispersed across Amazon's key retail markets. It was inevitable that Prime Video would use this strategy in Australia too. Coproduced by Cricket Australia, *The Test: A New Era for Australia's Team* followed the Australian men's cricket team during the 2018/2019 season, in the aftermath of a ball-tampering scandal. According to Prime Video's head of content ANZ, Tyler Bern (2021a), the series did well in India, the UK, South Africa, and Canada, as well as Australia. Prime Video went on to release Australian documentary series about the Australian Football League and the country's Olympic swimmers, as well as a documentary film about the nation's arguably most famous cricket player, Shane Warne.

Next, Prime Video utilized a range of reliable and relatively inexpensive formats to venture further into the local market, but again in a way that would be familiar and translatable in different regions, and that tried to mimic what other SVODs were making at the time. Following both Stan and Netflix (Scarlata 2020), Prime Video commissioned a suite of *Australia's Funniest Stand-up Specials* (2020) featuring local comedians performing on stage. It hired Australian actress Rebel Wilson (well known to international audiences from movies such as *Bridesmaids*) to host an Australian version of the Amazon original concept *LOL: Last One Laughing* (2020). Versions of the variety format, which follows ten comedians and comedic actors trying to make each other laugh, had already been produced by Amazon in Japan and Mexico, and Prime Video has since produced eight more, in line with the established international format adaptation model that supplies customized local versions of shows for local audiences. Finally, the docu-reality series *Luxe Listings Sydney* (2021–) sought to capitalize on the success of Netflix's *Selling Sunset* (2019–) and Bravo's *Million Dollar Listing* franchises. Prime Video was producing in Australia, but with a strategic safety net and with targeted multiple international markets.

It was not until 2019 that Prime Video commissioned its first Australian drama series, *Back to the Rafters* (2021–). Mitigating risk in the time-honored way used by streamers, this was not based on an original concept but was a revival of the popular broadcast series *Packed to the Rafters* (2008–2013, Seven Network), a mainstream Australian prime-time drama about a multigenerational family living under the same roof. *Packed to the Rafters* was considered a "stylistic renovation and innovation" of popular Australian soap operas and "evidence of a shift on the part of Australian TV networks to perceiving potential in local drama as flagship programming" (Ward et al. 2010, 163). The reboot reunited the original cast and creative team behind the long-running favorite, picking up six years after where the original series left off. According to James Farrell, VP of international originals at Amazon Studios, "*Packed to the Rafters* is among the most beloved Australian series, and this revival will allow us to give our customers the locally relevant entertainment they want" (quoted in Haring 2019). It is ironic, but indicative of Prime Video's multi-options approach, that a U.S.-based global platform with only a short history in Australia would launch its local drama commissions with a surprisingly retro show, the most nostalgic "Australiana" series made in recent years.

In May 2021 Prime Video announced a slate of new titles that would take its investment in Australian productions since 2019 to $AU150 million (Slatter 2021). Focus had finally shifted to what Stan had started with: fully funded local scripted comedy and drama. The premium drama *The Lost Flowers of Alice Hart* will arguably serve as a global flagship series for Prime Video. While based on the best-selling book by Australian author Holly Ringland, it is set to star Sigourney Weaver and will be produced by Bruna Papandrea of *Big Little Lies* (2017–2019, HBO) and *Nine Perfect Strangers* (2021, Hulu) fame. But most of the Prime Video Australian originals recently commissioned are distinctly local: *Class of '07* is an eight-part comedy series about a post-apocalyptic high school reunion, written and directed by *The Other Guy*'s Kacie Anning; *Deadloch* is a feminist noir comedy series by Kate McCartney and Kate McLennan, two veterans of the Australian public-service Australian Broadcasting Corporation (ABC). Bern described these new commissions as representing an "inflection point" in Prime Video's Australian pipeline (quoted in Slatter 2021). These are more akin to series that Stan first prioritized: serving a specific national market rather than exploiting global sports fandoms and popular formats. According to Bern (2021b), Prime Video is not looking to "sanitize the Australian-ness out of a project" and is no longer "trying to make a show that's going to do well in the UK."

Rethinking National/Global Distinctions

Our analysis of SVOD originals in Australia has taken us in some surprising directions. We began by emphasizing the important differences between national and global SVOD services, which have distinct institutional forms and follow different logics of production investment: national services cater primarily to a single market, while global services have a prerogative to commission content that engages viewers in many different countries. Yet in exploring how this plays out in Australian SVOD commissioning we found—to our surprise—that the institutional logics do not map neatly onto the content that these services produce. Indeed, our case study of Australian SVOD originals commissioned by Stan and Prime Video found that the production strategies of these two very different SVOD services seem to have more in common than one might expect (or, more specifically, they have evolved in inverse ways but have landed in roughly the same place). Now, both are producing broadcast-like shows, using local stars and trusted formats, alongside a small number of more adventurous premium titles; and both have produced a mix of locally focused and more cosmopolitan titles.

The trajectory each service has followed in the national market tells us something about its current priorities. Stan started off producing defiantly local comedy shows but has since graduated to higher-budget, globe-trotting titles such as *The Tourist*. Prime Video has gone in the other direction, shifting investment from internationally adaptable formats attractive to viewers in multiple countries (e.g., sports, documentaries, reality) towards nostalgic, broadcast-like scripted dramas (*Back to the Rafters*) and recently announced comedies that tap deeply into the collective TV-viewing histories of the Australian audience.

The Australian case is of course specific, and each country has its own context. Some of what we have observed can be explained by the dynamics of a small-to-midsize national market, where there are a finite number of production companies, scripts in development, and writing talent; hence, SVODs must work with the resources available, which inevitably lends a common texture to some of the shows that emerge. The specificity of local policy conditions also plays a part: the threat of a legislated local content obligation on SVODs in Australia prompted preemptive investment in the production of "Australian stories," especially by global SVODs, to demonstrate their commitment to the local screen sector. Finally, while we have not discussed Netflix's local commissions here (other chapters in this book offer close attention to Netflix), we would note that its commissioning decisions shape in complex ways those of Stan and Prime Video, with the effect that all SVODs in Australia are now operating within a competitive field of deals, announcements, and releases. Taking all this into consideration, we are wary of extrapolating too far from this one case. However, it serves to illustrate the complex reality that, while there are clear distinctions to be made between the territorial and business strategies of national and global

SVOD services, their original production strategies exhibit dynamic diversity and surprising convergence.

Notes

1 Local content levels are much lower on Australian national SVODs than in Europe—a legacy perhaps of being part of a global Anglosphere market (Lobato and Scarlata 2019).
2 The distinction between SVOD and AVOD is blurry in China's case, as services can be viewed free with ads but also have a premium paid tier.

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