

Local production for Global Streamers: A Production Studies Analysis of Netflix within Flemish TV-Productions

Jolan Colpaert

Student number: 02311746

Word count: 9. 951

Supervisor: Prof. dr. Stijn Joye

Master's dissertation submitted in order to obtain the degree of Master of Science in Communication Science - Film and Television
Studies

Academic year 2025-2026

“This master's dissertation is part of an exam. Any comments formulated by the assessment committee during the oral presentation of the master's dissertation are not included in this text.”

ABSTRACT

This thesis examines how Flemish audiovisual professionals experience collaboration with Netflix and perceive the platform's influence on local production practices. Building on research into Netflix's role in European production cultures, (e.g. Idiz 2024), it investigates how these dynamics unfold within the Flemish audiovisual market. Drawing on eight semi-structured expert interviews covering six Netflix-related films and series, the findings present Netflix as both enabling and constraining. Experts associated the platform with financing capacity, professionalisation, international circulation and wider audience reach, but also with restrictions on rights ownership, changing power relations, formalised approval procedures and reduced creative autonomy. Its involvement varied across production stages and was most visible in development and postproduction. The findings further suggest that Netflix does not invent audience-oriented production logics. Rather, its emphasis on genre clarity, pacing, accessibility and viewer retention intensifies established television practices through platform-specific metrics, structured oversight and global scale. Netflix's influence was also interpreted through selective access to performance data rather than complete transparency. In Flanders, its engagement is increasingly mediated through the larger Dutch market: Flemish talent and production infrastructure remain valuable, while specifically Flemish stories appear less central to the Benelux strategy. The thesis contributes to production and streamer studies by showing how platform power is experienced and negotiated within a small audiovisual market.

Keywords: Netflix, production cultures, streamer studies, Flanders, small audiovisual markets, platform power

ABSTRACT (DUTCH)

Deze thesis onderzoekt hoe Vlaamse audiovisuele professionals de samenwerking met Netflix ervaren en hoe zij de invloed van het platform op lokale productiepraktijken waarnemen. Voortbouwend op onderzoek naar de rol van Netflix binnen Europese productieculturen, in het bijzonder Idiz (2024), analyseert de studie hoe deze dynamieken zich ontvouwen binnen de Vlaamse audiovisuele markt. Op basis van acht semigestructureerde expertinterviews over zes Netflix-gerelateerde films en series tonen de bevindingen Netflix als zowel faciliterend als beperkend. De experts associeerden het platform met financieringsmogelijkheden, professionalisering, internationale verspreiding en een groter publieksbereik, maar ook met beperkingen op rechtenbezit, veranderende machtsverhoudingen, geformaliseerde goedkeuringsprocedures en verminderde creatieve autonomie. De betrokkenheid van Netflix verschilde per productiefase en was het meest zichtbaar tijdens de ontwikkeling en postproductie. De bevindingen suggereren verder dat Netflix publieksgerichte productielogica's niet zelf introduceert. Het platform intensificeert bestaande televisiepraktijken rond genreduidelijkheid, tempo, toegankelijkheid en publieksretentie door middel van platformspecifieke metrics, gestructureerd toezicht en mondiale schaal. De invloed van Netflix werd bovendien geïnterpreteerd vanuit selectieve toegang tot prestatiegegevens, eerder dan volledige transparantie. In Vlaanderen wordt de betrokkenheid van Netflix steeds meer bemiddeld door de grotere Nederlandse markt: Vlaams talent en productie-infrastructuur blijven waardevol, terwijl specifiek Vlaamse verhalen minder centraal lijken te staan binnen de strategie van Netflix Benelux. De thesis draagt bij aan productie- en streameronderzoek door te tonen hoe platformmacht binnen een kleine audiovisuele markt wordt ervaren en onderhandeld.

Trefwoorden: Netflix, productieculturen, streamer studies, Vlaanderen, kleine audiovisuele markten, platformmacht

TABLE OF CONTENTS

1. LITERATURE REVIEW

1.1. Introduction

1.2. Netflix in Europe

1.3. Netflix as collaborator: Greenlighting, cultural conflict and power imbalances

1.4. Netflix's black box: Data-driven decision-making and professional judgement

1.5. Audience targeting: Cultural specificity, commercial safety, and youth-oriented viewing

1.6. Netflix in Flanders

2. METHODOLOGY

3. ANALYSIS

3.1. Development, pitching and greenlight

3.2. Preproduction

3.3. Production

3.4. Postproduction, release and feedback

3.5. Prognostics: Netflix, Flanders and the future of the local ecosystem

3.6. Critical reflection

4. CONCLUSION

LITERATURE REVIEW

Introduction

Over the past decade, streaming platforms have been widely studied for the ways in which they have reshaped audiovisual distribution, production, transnational collaboration, and consumption practices (Iordache et al., 2022; Johnson, 2019; Lotz, 2021). Netflix has attracted particular scholarly attention because of its first-mover advantage and its role as a *transnational streaming service*, operating across national borders while investing in locally produced content with international distribution potential (Iordache et al., 2022, 2026; Lotz, 2021). As a result, existing research has provided important insights into the industrial, cultural, and policy implications of this transnational production and distribution strategy (Iordache et al., 2022, 2026; Lotz, 2021).

More recently, scholars have begun to examine how Netflix's expansion is experienced within local production cultures, including how relationships with the platform affect production practices, professional roles, creative decision-making, and power relations (Asmar et al., 2026; Castro & Cascajosa, 2020; Cuelenaere & Joye, 2024; Haddad & Dhoest, 2021; Idiz, 2024; Kim, 2022). This emerging body of research demonstrates the importance of studying Netflix not only through its corporate strategies and distribution models, but also through the perspectives of the professionals directly involved in developing and producing content (Asmar et al., 2026; Idiz, 2024). However, as Idiz (2024) argues, this scholarship remains relatively recent and geographically uneven. Her findings thus “underscore the need for continued research in specific cultural contexts to map Netflix's impact on production practices around the globe” (Idiz, 2024, p. 2130). Flanders provides a valuable case through which to extend this research because of the small scale, funding structures, and linguistic position of its audiovisual market (Asmar et al., 2025; Cuelenaere & Joye, 2024; Kostovska, 2025; Raats & Iordache, 2020). Although Netflix's engagement with local production cultures has been studied in other national and regional contexts, the experiences of Flemish industry professionals have received little direct attention. Drawing on interviews with Flemish professionals who have worked on productions involving Netflix, this thesis investigates how they perceive and negotiate the platform's influence on production processes, creative decision-making, professional relationships, and working practices. The literature review first considers Netflix's European investment and localisation strategies, before examining scholarship on collaboration relationships, data-driven production logics,

audience targeting, and the specific characteristics of Netflix within the Flemish audiovisual industry.

Netflix in Europe

Netflix has established itself as the leading investor in European originals by combining transnational strategies with highly personalised viewing experiences. In 2023, the platform contributed an estimated €2 billion to productions in Europe (Iordache et al., 2022, 2026; Lotz, 2021; Netflix, 2025). Scholars have identified this transnational investment model as a central component of the platform's expansion, alongside a growing tendency to secure exclusive distribution rights (Afilipoaie et al., 2021; Iordache et al., 2022, 2026; Lotz, 2021). This development reflects Netflix's ambition to strengthen its position not only as a distributor but also as a major commissioner of European productions or, as Afilipoaie et al. (2021) describe it, to "establish itself as a strong producer of European content" (p. 314).

Although Netflix primarily targets larger and more established audiovisual markets, studies note an increasing involvement in smaller European markets such as Flanders. Here, Netflix seems to enter these markets by gradually increasing its involvement in local productions (Afilipoaie et al., 2021; Cuelenaere & Joye, 2024). Afilipoaie et al. (2021), for example, describe Netflix's trajectory in Belgium as evolving from *licensing deals* (i.e., acquiring streaming rights for existing content) for successful local releases, towards co-financing and *co-producing* releases (i.e., shared funding and creation of content by multiple partners) and eventually investing in *full Netflix Originals* (i.e., content exclusively distributed or produced by Netflix).

In light of these growing investments, scholars point to their implications for European audiovisual markets (Afilipoaie et al., 2021; Haddad & Dhoest, 2021; Iordache et al., 2022, 2026; Idiz, 2024). While collaborations with Netflix can increase the scale, visibility, and cross-border circulation of local productions, they may also reinforce existing market inequalities due to Netflix's strong market position and preference for larger and more established production territories, leaving smaller markets behind (Iordache et al., 2022, 2026). Other concerns include the limiting of long-term revenue potential through exclusive rights ownership, as well as increasing pressure on local producers to develop commercially oriented content with international appeal (Afilipoaie et al., 2021; Iordache et al., 2022; Krauß, 2024). Nevertheless, these commercial pressures do not necessarily exclude perceptions of creative opportunity. Netflix presents its investment strategy as responsive to

local audience demand, while studies also suggest that some local professionals value the creative freedom and production opportunities associated with the platform (Asmar et al., 2025; Cuelenaere & Joye, 2024; Dams, 2018; Haddad & Dhoest, 2021; Idiz, 2024; Iordache et al., 2022). Such findings illustrate an important tension between commercial imperatives and creative autonomy in Netflix-supported production. However, assessing this tension further is complicated by Netflix's limited disclosure of audience metrics, investment structures, and production decision-making, which has led scholars to characterise the platform as a *black box* (Iordache et al., 2022; Wayne & Uribe Sandoval, 2023). Despite scholarly and regulatory calls for greater transparency, the platform's content and investment strategies remain difficult to assess fully (Afilipoaie et al., 2021; Council of Europe, 2025; European Parliament & Council of the European Union, 2024; Iordache et al., 2022; Wayne & Uribe Sandoval, 2023). Taken together, these studies show that Netflix's European expansion can create both commercial pressures and opportunities for creative autonomy. Understanding how these tensions are negotiated requires closer attention to the concrete relationships between Netflix and local production professionals (Idiz, 2024; Lotz, 2021).

Netflix as a collaborator: Greenlighting, cultural conflict and power imbalances

Recent research has begun to examine these relationships more directly (Idiz, 2024; Krauß, 2024). Drawing on interviews with European industry professionals, Idiz (2024) explores how Netflix's involvement shapes local production cultures. One initially distinctive feature was the speed with which Netflix could greenlight projects, sometimes on the basis of pitches ranging from "just an idea to a short bible" (Idiz, 2024, p. 2136). This approach contrasted with established European high-end drama financing models, in which projects often depend on combinations of co-production partners, public funding, tax incentives, and distribution agreements before entering production (Cuelenaere & Joye, 2024; Iordache et al., 2022; Krauß, 2024). Research indicated, however, that Netflix has since moved towards a more conventional staged commissioning process comparable to their previous experiences with public-service broadcasters (Idiz, 2024). This shift may reflect increasing risk aversion in response to stronger competition between streaming services and a shrinking drama market, a broader development also reflected in studies and reports on European streaming competition (Iordache et al., 2022; Koljonen, 2026).

Experiences of creative freedom also varied according to the production arrangement. Interviewees from projects in which Netflix had taken on a co-financing role mentioned freedom and trust. By contrast, interviewees from *Netflix Originals* described the platform as more directly involved in creative and production decisions, with some comparing its extensive feedback structures to those of a Hollywood studio (Idiz, 2024). Idiz suggests that these differences in experiences may depend not only on the type and size of the production but also on “Netflix executives in charge, local crew experience, target region, and size of the market” (Idiz, 2024, p. 2136).

The platform’s involvement may also affect production intensity. Professionals reported accelerated production schedules, more frequent rewrites and reshoots, and tighter deadlines. Some associated this intensity with greater creative possibilities, whereas others viewed the compressed timelines negatively (Idiz, 2024). These differences were accompanied by cultural tensions, particularly during Netflix’s earlier European expansion. Its initial strategy reflected what Lobato (2019) describes as *long-distance localisation*, in which local productions were coordinated by U.S.-based executives rather than locally embedded teams (Lobato, 2019, pp. 107–134). These American executives were described as having “a different work style and little knowledge of their country’s culture or media industry” (Idiz, 2024, p. 2137), as interviewees perceived significant differences in expectations regarding professional availability, work–life balance and communication. Netflix has since gradually invested in local production hubs and hired European executives, a development that interviewees associated with improved communication and a better understanding of local working practices (Idiz, 2024; Lobato, 2019, pp. 107–134). The platform has also increasingly hired European creative professionals, including writers, into positions within its own organisational structure, which could also reduce cultural distance between the platform and local production communities (Krauß, 2024).

The pressures associated with accelerated production and intensive feedback processes also contribute to broader asymmetries of power. Idiz (2024) characterises these dynamics as “uneven and precarious” (p. 2137). They do not arise only from differences in working culture; they are reinforced by local professionals’ limited capacity to challenge the expectations of a powerful commissioner. Interviewees described frequent staff turnover within Netflix, which could expose productions to repeated or conflicting feedback from successive executives (Idiz, 2024). One professional also expressed concern that resisting too

many creative notes might place their position at risk. Such accounts indicate that Netflix's commissioning authority and organisational flexibility may transfer uncertainty and production risk to local creative workers, who often possess less influence over timelines, feedback procedures, and final decisions (Idiz, 2024). Contractual arrangements further reinforce this imbalance. In the cases examined by Idiz (2024), Netflix's exclusive-rights model restricted the long-term revenue available to producers and creative professionals because interviewees did not receive residual payments, regardless of a production's success or international circulation. This was identified as a major concern by the professionals involved (Idiz, 2024). Here, Idiz highlights how local markets have responded to this concern, citing the Danish audiovisual sector's agreement with Netflix after disputes with Danish creative workers' unions. The agreement introduced success-based remuneration, allowing creative workers to receive additional compensation if a production performs successfully. She emphasises this example may signal a shift concerning IP (intellectual property) and the industry's long-term sustainability through creative worker unions. Here, strategic responses through European regulatory and funding mechanisms, including the AVMSD, Creative Europe MEDIA, and Eurimages may strengthen the position of local producers and creative professionals. Nevertheless, as Idiz notes: "countries without Denmark's strong legacy in TV drama may have less bargaining power" (Idiz, 2024, p. 2138). Beyond revenue and IP ownership, power asymmetry is also reflected in the brand dilution experienced by local production companies. By presenting acquired or co-produced titles primarily under the Netflix name, the platform may dilute the brand identities of the local companies involved and reduce their visibility. This platform-centred branding can obscure their creative and industrial contributions and limit the reputational value they derive from internationally distributed productions (D'Arma et al., 2021; Iordache et al., 2022; Petruska & Woods, 2019).

Netflix's black box: Data-driven decision-making and professional judgement

These inequalities also extend to the distribution of information between Netflix and its production partners. Idiz (2024, p. 2138) describes this as "performance data asymmetries," whereby local professionals have limited access to the audience and performance information used by Netflix to evaluate productions. Netflix relies extensively on data to evaluate content performance and evaluates content performance through metrics such as cost per viewing hour, views within the first 91 days, audience retention and new subscriptions generated by a

release (Khazoom, 2025, pp. 5-6). Although Netflix shares selected figures, such as the number of viewers who start and complete a title, professionals considered this information incomplete and less forthcoming than that provided by local broadcasters. Production partners consequently have limited insight into how performance informs commissioning, renewal and cancellation, reinforcing perceptions of Netflix as a *black box* (Idiz, 2024; Iordache et al., 2022).

Idiz (2024) found that the information Netflix shares includes figures on viewers who start and complete a title at specific moments after release. However, professionals considered these metrics incomplete and sometimes disproportionate to local market conditions, particularly where early performance appeared to influence cancellation decisions. Interviewees also described Netflix's attention to retention around the two-, seven- and fifteen-minute marks, contributing to perceptions that audience retention may shape narrative pacing and accessibility. Nevertheless, the extent to which data informs creative and commissioning decisions remains contested (Idiz, 2024; Iordache et al., 2022; van Es, 2023). Van Es (2023) argues that Netflix has repositioned itself from a technology company towards an entertainment company while continuing to emphasise data and algorithms to uphold its image as an innovative, technologically advanced platform. At the same time, its corporate discourse increasingly acknowledges the importance of human expertise and creativity. Similarly, most participants in Idiz's study did not directly connect the creative notes they received to data, although some suspected such a relationship. Others identified clearer signs of data-informed audience targeting, describing Netflix as having precise commissioning requirements and a granular understanding of audience segments. Van Es therefore cautions against treating data-driven logics and human judgement as opposing forces, since they are intertwined in organisational decision-making. Rather than discussing "the data" or "the algorithm" abstractly, research should examine when, how and why they are used (p. 668). This underlines the value of production studies that investigate how data, professional judgement and institutional power interact within Netflix's relationships with local production professionals (Idiz, 2024; van Es, 2023).

Audience targeting: Cultural specificity, commercial safety, and youth-oriented viewing

One area in which these data-informed assumptions become particularly visible is Netflix's targeting of *local*, *trans-local*, and *global* audiences. Chalaby (2025) distinguishes between *local* content aimed primarily at one market, *trans-local* content that travels beyond its original country or geo-linguistic region, and *global* content produced according to broadly recognisable international conventions (Iordache et al., 2026). Netflix frequently presents its strategy as one of investing in local stories that can travel internationally. Such productions may draw on *banal nationalism*, in which familiar cultural cues such through familiar accents, landscapes, and national symbols reinforce local identity, while remaining accessible to wider audiences (Bengesser et al., 2023; Bossuyt & Joye, 2023; Cuelenaere & Joye, 2024; Dunleavy & Weissmann, 2023; Hansen, 2020). This relates to the term *conspicuous localism*: productions retain visible cultural specificity, but are also shaped to remain universally consumable, which resembles Chalaby's concept of *trans-local* content (Castro & Cascajosa, 2020; Chalaby, 2025; Cuelenaere & Joye, 2024; Dunleavy & Weissmann, 2023; Hansen, 2020; Iordache et al., 2026). However, the tension between cultural specificity and international accessibility is not new. European audiovisual production has long been concerned with *Europudding*, a term used to describe transnational co-productions in which cultural differences are blended so extensively that the result loses local specificity and becomes generic (De Vinck, 2009; Iordache et al., 2022; Krauß, 2024).

In the streaming context, this concern reappears through the concept of *delocalisation*: the reduction or repackaging of cultural detail to make content more easily consumable across markets (Dunleavy & Weissmann, 2023). Netflix releases may rely on nationally recognisable settings, multilingualism and symbolic cultural markers while still adhering to globally oriented genres and aesthetics (Asmar et al., 2025; Dunleavy & Weissmann, 2023; Iordache et al., 2026; Khazoom, 2025). This may support international circulation, but it can also encourage stereotyping, homogenisation or the simplification of cultural difference, as shown in research on Arab and other local production contexts (Asmar et al., 2025; Haddad & Dhoest, 2021; Kim, 2022). At the same time, cultural specificity itself can nevertheless increase international appeal, since international SVOD markets increasingly value local details and culturally specific storytelling (Bengesser et al., 2023; Dunleavy & Weissmann, 2023). *Localisation* and *delocalisation* should therefore be understood not as opposites, but as

interdependent logics that remain in constant tension (Asmar et al., 2025; Dunleavy & Weissmann, 2023; Iordache et al., 2026; Khazoom, 2025).

A second dimension of Netflix's audience targeting is its preference for commercially "safe" content: recognisable genres, formats, and narrative formulas with an established record of audience appeal. Scholars associate this risk-averse approach with genre repetition and cultural standardisation (Asmar et al., 2025; Idiz, 2024; Iordache et al., 2022, 2026). Idiz (2024), for example, found that some professionals perceived a shift from Netflix supporting content absent from local markets towards replicating established genres. Korean professionals similarly reported pressure to conform to "Netflix's taste" (Kim, 2022, p.1516). These findings suggest that the platform emphasis on predictable audience appeal may limit experimentation (Asmar et al., 2025; Idiz, 2024; Iordache et al., 2022, 2026; Kim, 2022) . However, this remains ambivalent, as other professionals continue to value Netflix for allowing creative freedom, flexible formats and themes that traditional broadcasters might reject (Castro & Cascajosa, 2020; Cuelenaere & Joye, 2024; Idiz, 2024; Iordache et al., 2026; Kim, 2022).

Younger audiences constitute another important audience segment. Sundet's (2021) concept of *youthification* helps explain how Netflix presents itself as a modern, innovative alternative to linear television by associating its streaming model with younger audiences and youth-oriented content (Johnson, 2019; Sundet, 2021). This positioning can influence genres, formats, storytelling techniques and distribution strategies (D'Arma et al., 2021; Hansen, 2020; Sundet, 2021). Netflix's focus on younger viewers is therefore not only demographic but also part of its identity as an innovative platform (D'Arma et al., 2021; Hansen, 2020; Sundet, 2021). At the same time, this youth orientation overlaps with assumptions about contemporary viewing habits, which contributes to fears of standardisation (Idiz, 2024). Idiz (2024) describes Netflix's use of *second-screen* assumptions, referring to viewers who watch while also using another device or engaging in another activity. This can result in notes requesting clearer exposition, repetition, narration, and stronger emphasis through dialogue, acting, or music. Although such practices respond to changing viewing habits, they may also reduce narrative subtlety (Idiz, 2024). Netflix's audience targeting thus combines cultural specificity, accessibility, and innovation with recurring concerns about formulaic content and reduced cultural or narrative complexity (Asmar et al., 2025; Idiz, 2024; Iordache et al., 2022, 2026).

Netflix in Flanders

Flanders provides a relevant case for examining how these transnational audience and production strategies operate within a small audiovisual market. The 2025 IMEC report indicates that Netflix now reaches nearly half of all Flemish viewers with a penetration rate of 47%, meaning that almost one in two Flemish media users report having access to or using the platform (De Marez et al., 2025). This reach is particularly significant within Flanders' small audiovisual sector, where production remains strongly shaped by public broadcasters, state support, and transnational co-production (Asmar et al., 2025; Kostovska, 2025). Although pan-European Netflix productions are described as “rare to non-existent” (Afilipoaie et al., 2021, p. 319), the platform's involvement in Flanders has mostly taken the form of Flemish-Dutch co-productions (Cuelenaere & Joye, 2024; Raats & Iordache, 2020; Vlaamse Regulator voor de Media, 2019, 2023, 2024). Cuelenaere and Joye's (2024) study of the *Undercover* franchise illustrates this pattern. *Undercover* is a Flemish crime drama produced by De Mensen and initially financed mainly by the Flemish public broadcaster VRT. Netflix first entered as the international distributor of its first season, but became a co-commissioner after the series proved successful. As viewing data reportedly indicated strong performance in the Netherlands, Netflix increasingly oriented the production towards Dutch audiences by requesting greater prominence for Dutch characters and storylines. The platform subsequently financed much of the prequel film *Ferry* and expanded the franchise through *Ferry: The Series*. By the third season and the development of the spin-off, Netflix had assumed the leading production role, while VRT's involvement was largely reduced to retaining Flemish broadcasting rights and accepting a later release window. The franchise therefore demonstrates how Netflix may limit its initial risk, assess a production's cross-border potential, and gradually increase its financial and editorial control once a title proves successful (Cuelenaere & Joye, 2024).

Although Flanders and the Netherlands share a Dutch-language audience base, cultural, linguistic, industrial, and taste barriers continue to limit the circulation of audiovisual content between them (De Caluwe, J., 2013; Cuelenaere & Joye, 2024; D'Arma et al., 2021). The Netherlands also represents a substantially larger market. Against this background, Cuelenaere and Joye (2024, p 273) describe *Undercover* as a “productional template” through which Netflix used a Flemish public-service production to address both markets while increasingly orienting the franchise towards Dutch audiences. The concept therefore highlights not only Netflix's growing involvement but also Flanders' potential function as an

entry point into the larger neighbouring market. However, because this conclusion is based largely on one franchise, further research is needed to determine whether it reflects a wider pattern. As Cuelenaere and Joye (2024) argue, more fine-grained analysis is required of how global streamers participate in local production cultures.

Beyond market access and production control, Netflix's involvement also raises questions about public and cultural values. The Flemish audiovisual sector traditionally places considerable importance on cultural diversity, local storytelling, and the representation of different communities (D'Arma et al., 2021). Asmar et al. (2025) describe Netflix's approach as one of *precarious diversity*, whereby inclusion is promoted but remains embedded in corporate, reputational, and commercial objectives rather than enforceable public obligations. As Asmar et al. (2025) note, Netflix nevertheless states that it aims to identify, train, and provide employment opportunities for talent from underrepresented communities around the world and has published diversity reports since 2021 (Netflix, 2023a, as cited in Asmar et al., 2025, p. 7).

The central difference therefore concerns institutional accountability. Diversity and inclusion are embedded in VRT's management agreement as public-service commitments, while Flemish film policy and the VAF have also developed diversity objectives. Netflix, by contrast, primarily addresses diversity through voluntary corporate reporting and representational initiatives (Asmar et al., 2025; De Man et al., 2024; Vlaamse Gemeenschap & VRT, 2025). Its diversity commitments may therefore be more dependent on shifting corporate priorities, illustrating the precariousness identified by Asmar et al. (2025). This raises questions about whether collaborations with Netflix provide the same conditions for local cultural and public values to be maintained (Asmar et al., 2025; Smith et al., 2025; Vlaamse Gemeenschap & VRT, 2025). At the same time, Flemish policy frameworks should not be idealised either, since research on VAF and Flemish media policy suggests that diversity objectives have not necessarily translated into a structural recognition of difference or more equal creative opportunities (De Man, 2025; De Man et al., 2025).

Taken together, the literature leaves unresolved whether Netflix treats Flanders as a distinct production market or primarily as a gateway to Dutch audiences (Cuelenaere & Joye, 2024), and how its growing influence affects locally embedded public and cultural values (Asmar et

al., 2025; Vlaamse Gemeenschap & VRT, 2025). This research examines how Flemish professionals negotiate these tensions.

METHODOLOGY

This study adopts a qualitative single-case design to examine how Flemish audiovisual professionals experience Netflix-related production. Eight semi-structured expert interviews were conducted in 2026 with professionals who had worked on six Flemish Netflix-related films and series produced between 2019 and 2026. Participants included one producer, one director, three writers, one director of photography, one editor, and one actor (Table 1). Interviews lasted between 26 and 61 minutes. The purposive sample captures perspectives from development and commissioning through production and postproduction, although participants' levels of direct contact with Netflix varied.

Table 1. Overview of experts

Expert	Role	Gender	Age	Production phase insight	Interview time
Expert 1	Producer	Male	52	Development, pitch and greenlight, preproduction, production, postproduction	50:24
Expert 2	Writer	Male	51	Development, pitch and greenlight, preproduction	46:06
Expert 3	Writer	Male	40	Development, pitch and greenlight, preproduction	61:01
Expert 4	Writer	Male	42	Development, pitch and greenlight, preproduction	57:04
Expert 5	Director	Male	46	Development, pitch and greenlight, preproduction, production, postproduction	40:19
Expert 6	D.O.P.	Male	41	Preproduction, production, postproduction	36:27

Expert 7	Actor	Male	55	Production	26:10
Expert 8	Editor	Male	40	Postproduction	39:50

To access these interviewees, a list of Flemish Netflix co-productions was compiled for reference. People who had worked on these and whose contact information was accessible through IMDb, LinkedIn, and/or company websites were short-listed. Approximately sixty people were contacted, of whom eight agreed to participate confidentially (N = 8). Selection prioritised variation in production roles, but the resulting sample was entirely male, aged 40–55, and weighted towards writing and development positions. It should therefore be understood as providing situated professional accounts rather than representing the Flemish audiovisual workforce as a whole. All participants received information about the study and provided written informed consent before being interviewed. Although only some participants requested anonymity, all accounts were anonymised to ensure consistency and reduce the risk of indirect identification within the small Flemish audiovisual sector. Participants are therefore referred to through numbered expert labels, and identifying details were removed or generalised where necessary.

Semi-structured interviews were used to accommodate differences in participants' roles and experiences. The interview guide addressed three overarching themes: (1) production cultures and collaboration practices, (2) content development and creative decision-making, and (3) audience targeting and market orientation. The study focused primarily on scripted drama, while allowing participants to discuss film production because of the increasing convergence between these production contexts (Idiz, 2024). The interviews were audio-recorded, subsequently transcribed, and analysed using a hybrid deductive–inductive thematic approach (Braun & Clarke, 2006; Fereday & Muir-Cochrane, 2006). Coding began deductively from the three themes structuring the interview guide: collaboration and production practices; content development and creative decision-making; and audience targeting and market orientation. Within these themes, more specific patterns were identified inductively, including rights ownership, workload, professionalisation, executive compatibility, formulaic approaches, commercialisation, creative freedom, transparency, greenlighting speed, formalisation, producer mediation, data-logics, diversity, Dutch-market orientation and future

predictions. The findings were then contextualised through comparison with the academic literature, industry reports and trade press sources discussed in the literature review.

Building on Idiz’s (2024) stage-based analytical framework, the model was adapted to the Flemish context in three ways (Table 2). First, Bignell’s distinction between development and greenlighting, preproduction, production, and postproduction was retained to trace Netflix’s influence across the content-creation process (Bignell, 2012, as cited in Idiz, 2024, p. 2135) . Second, localisation was incorporated into audience targeting and market orientation rather than treated as a separate stage, since it can shape decisions throughout development, production, and distribution (Chalaby, 2025; Cuelenaere & Joye, 2024; Dunleavy & Weissmann, 2023). Third, release and feedback were added as a fourth, cross-cutting analytical dimension rather than a final production stage, because performance data, audience assumptions, and retention logics may also shape earlier decisions concerning pitching, development, editing, and marketing (Idiz, 2024; van Es, 2023). Table 2 therefore connects four production stages with three overarching themes and one cross-cutting analytical dimension. The production stages provide a chronological structure, while the analytical dimensions allow patterns such as creative autonomy, workload, transparency, and market orientation to be examined across several stages.

Table 2. Model for analysis.

Content Creation Stages	Content Creation Stages Components	Analytical dimensions	Patterns
Development, Pitch and Greenlight	Collaboration practices, negotiations, commissioning decisions	(1) Production cultures and collaboration practices	Rights ownership, workload, professionalisation, executive compatibility, formulaic approaches, commercialisation, creative freedom,
Preproduction	Planning, budgeting, staffing, creative development	(2) Content development and creative decision-making	

Production	Day-to-day collaboration, workflow, note-giving, decision-making	(3) Audience targeting and market orientation (+localisation) (4) Release and feedback	transparency, greenlighting speed, formalisation, producer mediation, data-logics, diversity, Dutch-market orientation and future predictions
Postproduction	Editing, revisions, creative feedback, delivery requirements		

Note. Interview data across all stages are interpreted through Mayer et al.'s (2009) production studies perspective.

Consistent with production-studies scholarship, the interviews were not treated as transparent accounts of industrial reality. Instead, they were approached as situated forms of industrial discourse shaped by professional position, institutional loyalties, and ongoing working relationships (Banks et al., 2015; Mayer et al., 2009, pp. 1–21). This is particularly relevant in streaming production, where nondisclosure agreements and selective data sharing may limit what professionals know, remember, or are willing to disclose (Iordache et al., 2022). Contradictions, silences, and hesitations were therefore interpreted in context as part of how professionals make sense of a powerful and selectively transparent platform, rather than automatically dismissed as unreliable. This also allows apparently contradictory accounts to be examined as situated professional experiences (Idiz, 2024; Rasmussen, 2022; Wayne & Uribe Sandoval, 2023).

Respondents did not always distinguish consistently between Netflix as a global company and Netflix Benelux as its regional organisational structure. Where participants referred specifically to the Amsterdam-based Benelux office, this is indicated in the analysis. Otherwise, “Netflix” refers to the organisational actor as encountered and described by Flemish professionals. Decisions are attributed to a particular organisational level only when participants themselves made that distinction.

Accordingly, the following findings should be read as situated accounts of how Flemish professionals encounter and interpret Netflix, rather than as direct evidence of the platform’s

internal intentions. The analysis examines these experiences through collaboration and production practices, creative decision-making, and audience targeting, with release and feedback treated as a cross-cutting dimension.

ANALYSIS

Development, pitching and greenlight

At the development and greenlighting stage, Netflix's influence was most consistently associated with financial scale, professionalisation, international reach, and symbolic career value. All eight participants identified at least one advantage connected to the platform's resources or visibility. A director of photography described the additional means as creating a "bigger playground," while one writer (Expert 4) emphasised the reputational value of global exposure: "For small Belgian makers, the potential impact is much greater ... doing well on Netflix is something we can use to promote ourselves professionally." These accounts align with earlier research on the appeal of streamer investment but show that this appeal is symbolic as well as practical: Netflix can make ambitious productions possible while increasing the visibility of the professionals involved.

Aforementioned fears surrounding the limiting of long-term revenue potential (Afilipoaie et al., 2021; Idiz, 2024; Iordache et al., 2022, 2026) were also very present within this phase. Rights ownership emerged as the principal contractual tension at this stage. Three participants involved in development discussed the loss of exploitation rights, although the producer provided the most detailed account. He distinguished three broad collaboration models. Under full financing, Netflix provides financial security but normally acquires worldwide rights, leaving the production company mainly with a production fee or ten percent mark-up. Broadcaster–platform co-productions divide rights and release windows between partners but increase the number of creative stakeholders. In territorially divided arrangements, rights are sold to different partners, allowing producers to finance a project while retaining some long-term exploitation value. The producer regarded the latter as potentially the most advantageous model because it combined immediate financing with future revenue opportunities. This account shows that local producers can approach Netflix strategically rather than functioning only as passive recipients of platform power, understood here as Netflix's leverage through its control over financing, rights and distribution. Nevertheless, their bargaining position remains uneven. The producer described co-productions in which Netflix could overrule a broadcaster even when its financial contribution was not proportionally dominant. This suggests that decision-making power was not determined by financing shares alone.

Dutch-market orientation formed a second recurring pattern. Six participants explicitly linked Netflix's engagement with Flanders to the larger Dutch market. This aligns with Cuelenaere and Joye's (2024) argument that *Undercover* functioned as a "productional template" through which Netflix could use Flemish production infrastructure to access the wider Dutch-speaking market. The commercial consequences of this orientation were illustrated by one recent project whose setting shifted from a Flemish to a Dutch city after Netflix became involved. The example suggests that linguistic proximity is operationalised commercially: Flanders can provide production infrastructure and creative labour for content oriented towards the larger Dutch market. Netflix's investment may therefore strengthen Flemish production capacity while redirecting creative attention away from specifically Flemish storytelling.

Five participants directly involved in development or creative decision-making also connected Netflix's commissioning preferences to genre clarity, high-concept premises, and audience recognisability. Proven genres such as crime, thrillers, and young-adult drama were perceived as particularly attractive. These findings support literature on Netflix's increasing risk aversion (Asmar et al., 2025; Idiz, 2024; Iordache et al., 2022, 2026). However, three participants complicated a straightforward association between commercial safety and creative emptiness. One writer described Netflix's preferred output as a "gourmet hamburger": accessible entertainment that remained well made, while the producer and another writer suggested that recognisable, high-concept projects could still contain creative value. At the same time, the producer warned that excessive standardisation could result in fiction that was competent but "not particularly distinctive." In these accounts, commercial safety was produced through recognisable hooks, strong genre promises, existing intellectual property, proven creative teams, marketable performers, and clearly defined audiences, rather than through the complete removal of creative ambition.

Diversity was interpreted more ambivalently. Three participants perceived inclusive premises or casting as potentially strengthening a project's commercial or reputational appeal. The producer described this as "social greenwashing," but stressed that a strong concept remained more decisive than representation itself. A director similarly referred to inclusion as a "selling gimmick" while describing how Netflix pushed the same project towards a more accessible genre format and broader audience. These accounts do not establish that diversity was the primary motivation behind commissioning. Instead, they suggest that inclusion could

function as an additional selling point when combined with a recognisable genre and marketable premise, echoing critiques of Netflix's *precarious diversity* approach (Asmar et al., 2025).

Preproduction

The producer, a director and the director of photography described Netflix-involved preproduction as more formalised and approval-driven than local television production. The producer contrasted earlier co-financing arrangements, in which Netflix remained relatively distant, with more recent collaborations requiring approval of the cast and key creative personnel. The director of photography described preparing an extensive visual dossier covering references, locations, lighting, cameras, lenses and aspect ratio before receiving approval, while the director similarly recalled presenting the project's visual approach to Netflix. This supports Idiz's (2024) observation that Netflix Originals and intensive platform collaborations can resemble studio-like approval cultures. In the Flemish context, this was particularly visible because participants contrasted these procedures with local production routines, in which more practical and visual decisions are commonly delegated to the director and producer. These procedures were not evaluated uniformly. The producer and director experienced aspects of Netflix's closer involvement as micromanagement, whereas the director of photography regarded clearly defined parameters as creatively productive: "It is not less creative freedom. You are given certain boundaries within which you have to work, and I never see that as a limitation. It is interesting to look for possibilities within those boundaries" (Expert 6). This resembles Truffaut's discussion of creativity under constraint (1985, pp. 266–283). Netflix's involvement therefore did seemingly not simply reduce creative freedom; it relocated decision-making into a more formal, documented and externally approved structure.

Audience targeting also informed preproduction choices, although the role of data differed across decision-making levels. The director of photography linked Netflix's feedback to a brighter visual style, while the editor described a summery tone and simplified narrative emphasis aimed at younger viewers. This can be interpreted through Sundet's (2021) concept of *youthification*, as Netflix appeared to intensify an orientation already present in a series conceived for a young-adult audience. Its recognisable genre and clearly defined target group may also have increased its appeal to Netflix, reflecting the platform's broader preference for

proven formats and commercially legible audiences. Participants did explicitly link faster openings and more explanatory storytelling to distracted or *second-screen* viewing, closely echoing Idiz's (2024) account of Netflix's "second-screen notes." Yet writers with direct Netflix Benelux experience stressed that data was rarely presented as a straightforward creative instruction sheet. Audience research instead operated as a background logic shaping hooks, retention and accessibility. By contrast, participants perceived data as more influential in acquisition, commissioning and renewal decisions, where audience performance informed which genres, projects and further seasons received investment. Data therefore appeared to guide strategic selection more directly than everyday creative choices, supporting van Es's (2023) account of platform decision-making as an entanglement of data, professional judgement and market strategy.

A related organisational pattern concerned Netflix's direct contracting of creatives. Expert 3, a writer-showrunner, described a model in which development increasingly takes place between Netflix and the creative team before a production company is attached to execute the project. In this arrangement, the local producer may operate increasingly as a service producer rather than initiating development and retaining exploitation rights. Because this model was described in detail by one participant, it should be understood as an emerging arrangement rather than as representative of all Netflix-related productions. Nevertheless, it indicates how some Originals may reposition local producers from creative and rights-holding partners towards operational providers, echoing concerns about the sustainability and autonomy of local production companies (Afilipoaie et al., 2021; Iordache et al., 2022, 2026). The producer and Expert 3 both regarded mediation by the producer as potentially protective, particularly for younger or less experienced creatives who may struggle with institutional pressure. However, this protective role was not experienced consistently. Expert 5, the director, reported that the production company sometimes prioritised its prospects of future Netflix work, leaving the creative team feeling "thrown under the bus." By contrast, the editor described the producer as constrained by Netflix's financial authority but still attempting to facilitate the creative team. The producer's mediating position therefore depended not only on Netflix's structural power but also on the individual producer, contractual arrangement and relationship between the parties. Nevertheless, these developments occurred within broader industry pressures towards commercially oriented and internationally marketable content (Afilipoaie et al., 2021; Iordache et al., 2022; Krauß, 2024). It is therefore difficult to determine from the interviews

whether the production company's reported behaviour resulted specifically from its relationship with Netflix or reflected wider transformations in the audiovisual landscape.

Production

During production, Netflix's presence was generally described as less visible than during development, preproduction or postproduction. Once scripts, visual approaches and production plans had been approved, respondents suggested that the producer and crew were usually trusted to execute the project. However, this relative distance depended on the production model and the executive involved. More recent projects involved closer monitoring of script changes and dailies, while earlier collaborations appeared looser. Expert 6, the director of photography, explained that larger international partners require more planning and approval than Flemish productions, where minor changes can often be decided on set. He nevertheless presented this as characteristic of large-scale international production rather than Netflix alone.

Participants also stressed the importance of executive continuity. Collaboration could remain constructive when the executive understood the project and had developed relationships with its makers, whereas staff turnover could disrupt trust and introduce different priorities. Expert 5 described how a supportive contact was replaced by an American executive with little affinity for the project: "He suddenly arrived with his American bravado and had to put his stamp on it to show who was boss." This echoes Idiz's (2024) findings on executive compatibility and turnover and illustrates Lobato's (2019) account of *long-distance localisation*, in which local production remains connected to distant corporate hierarchies. At the same time, the producer described communication with Netflix as generally constructive and argued that established trust allowed disagreements and changes to be negotiated. Together with the editor's impression that a later season was managed less intensively, this suggests some development towards greater local sensitivity, although it remained dependent on the executive, project and creative team rather than representing a uniform organisational shift.

Netflix was also associated with more formal workplace standards. Expert 6 highlighted stronger attention to health and safety, ecological reporting, crew wellbeing and accessible points of contact. He related this partly to the larger budgets, higher-profile actors and greater responsibilities of international productions, while contrasting it with Flemish sets where

comparable procedures could be taken less seriously. The production phase therefore reveals an ambivalent pattern: formal oversight could be experienced as corporate control, but could also strengthen professional standards and crew protection.

Although staffing decisions mainly occurred during preproduction, participants used them to reflect on wider production cultures. Accounts of diversity behind the camera differed, but often concerned distinct organisational levels rather than directly contradictory experiences. Some respondents argued that Netflix lacked the socio-cultural mandate of the VRT or VAF and did not impose structural diversity requirements on production crews. By contrast, Expert 3 perceived Netflix's Amsterdam office as more internationally diverse than traditional Flemish institutions, particularly in its workforce and leadership. He argued that "things have been said and done at the VRT [...] that, if they ever came out, there would be a scandal," adding that diversity was still approached "in a very narrow-minded way" in Flanders. This seems in line with findings highlighting how Flemish policy frameworks have not necessarily translated into a structural recognition of difference or more equal creative opportunities (De Man, 2025; De Man et al., 2025). Alongside this, the producer expected Netflix to question whether a creative team possessed sufficient affinity with the story being told, using the hypothetical example of a series about women developed without women in its writing team. This was not an observed intervention or formal quota, but an expectation that representation should support creative credibility. These accounts align with Asmar et al. 's concept of *precarious diversity*: diversity appeared visible within Netflix's corporate culture and could inform project-specific decisions, yet behind-camera inclusion remained flexible and lacked structural guarantees. Netflix's diversity politics therefore cannot be reduced either to progressive inclusion or corporate branding. For the Flemish ecosystem, this complicates any simple opposition between a global commercial platform and culturally responsible local institutions.

Postproduction, release and feedback

Postproduction emerged as the phase in which Netflix's influence was most visible and contested. Participants described structured feedback rounds, successive edits and negotiations around pacing, clarity and audience engagement. However, the extent and motivation of this involvement varied by project. Expert 8, the editor, described a marked change between two seasons of the same series. During the first, the team completed its own cut before sending it to Netflix; during the second, Netflix requested versions every few days.

This reduced his sense of ownership: “My sense of input disappeared a little. They would send changes that had to be executed, and then more changes again. I felt a bit like a monkey performing tasks” (Expert 8). He did not experience this as a greater workload, but as reduced creative satisfaction and involvement.

More broadly, participants associated Netflix’s feedback with momentum, linearity, explicit exposition and narrative accessibility. Expert 1, the producer, linked the demand for unusually clear plot explanations to fears of second-screen viewing. The most explicit data-based intervention came from Expert 5, the director, whose non-linear opening was re-edited after Netflix stated that, although executives preferred it creatively, its algorithm indicated that non-linear first episodes produced excessive drop-off within fifteen minutes. The case shows how platform metrics could outweigh executive taste, although it represents one particularly direct example; elsewhere, participants often inferred data-driven motives from the direction of the notes rather than receiving the underlying evidence. These interventions were nevertheless evaluated differently. Some participants viewed stronger hooks, faster pacing and clearer exposition as commercially understandable responses to contemporary viewing habits. Others believed that repeated simplification and analysis removed ambiguity and contributed to more standardised content, aligning with concerns about homogenisation in streaming production (Iordache et al., 2022, 2026; Asmar et al., 2025; Idiz, 2024). Expert 3 nevertheless situated Netflix’s emphasis on openings and cliffhangers within older television practice: broadcasters sought to prevent viewers from zapping during advertising breaks, whereas Netflix tracks drop-off, completion and continuation between episodes. Netflix therefore did not invent audience-oriented production, but intensified established television logics through more granular retention metrics, platform-specific indicators and global scale (Lobato, 2019; Idiz, 2024).

Access to post-release data varied by role and production model. Participants described receiving general assessments, audience segments and, in some cases, completion information, while more detailed indicators remained confidential or undisclosed. One writer-showrunner considered Netflix relatively transparent among streamers because makers received early performance reports and some viewing data became public, yet he also stressed that many metrics shaping renewals and future commissioning were not shared. Netflix’s transparency was therefore selective rather than simply absent.

Release scheduling produced similarly mixed effects. A director valued the greater interval between editing and launch compared with fixed broadcast deadlines, whereas the director of photography described a completed series being held until Netflix identified a suitable programming window. The producer also valued Netflix's marketing capacity, noting that projects supported by the platform could receive visibility through both its interface and external campaigns. Release thus consolidated Netflix's position across the production chain: alongside financing and editorial influence, it controlled much of the timing, performance knowledge and visibility through which local content circulated.

Prognostics: Netflix, Flanders and the future of the local ecosystem

Participants' forecasts clustered around three issues, although these were not equally widely shared. First, Netflix Benelux's production approach was portrayed as still developing. The producer described a shift from limited involvement towards closer control, while the editor speculated that, after moving from little oversight to intensive intervention, Netflix may now be seeking a more workable middle ground. This should be presented as a perceived process of organisational learning, rather than evidence of a confirmed company-wide change. Netflix's role in Flanders therefore appeared to evolve through negotiation and adaptation rather than through a fixed production model.

Second, respondents doubted whether Netflix would continue investing significantly in specifically Flemish local content. Several argued that the Flemish market is too small to justify many *Netflix Originals*, especially when the Dutch market offers a larger Dutch-speaking audience base. Instead, Netflix appears more interested in Dutch Originals that can draw on Flemish talent, postproduction expertise or production experience. Respondents connected this market orientation not only to audience size, but also to perceived cultural differences between Flanders and the Netherlands. Experts 5 and 8 considered Dutch production culture closer to American commercial culture, describing it as more streamlined, polished and commercially oriented than Flemish practice. Other respondents similarly contrasted a comparatively cautious Dutch market with Flemish makers' perceived willingness to embrace absurd humour, rougher characters and greater creative risk. Expert 3 nevertheless cautioned against treating Dutch culture as inherently "flatter", arguing that such distinctions were broad generalisations and that both markets

ultimately sought compelling stories. These accounts should therefore be read as situated professional perceptions rather than stable national characteristics.

Finally, Expert 5 predicted that stronger European co-productions or a gradually expanding European platform might provide an alternative to American streamers. He linked this scenario to Creative Europe support, increasing cross-border partnerships, changing attitudes towards the United States and demand for culturally specific content that Netflix might not commission. This remains one participant's forecast rather than a shared expectation. Nevertheless, it resonates with D'Arma et al. (2021) and Iordache et al. (2022, 2026), who emphasise the importance of European policy, public-service institutions and cross-border collaboration in sustaining cultural diversity within platform-dominated markets.

Critical reflection

The findings should be interpreted as situated professional accounts rather than direct evidence of Netflix's internal decision-making. Participants' knowledge varied according to their role, project and degree of contact with the platform. Although several experts explicitly distinguished Netflix Benelux from Netflix's wider international hierarchy, responsibility for particular decisions was not always visible from their professional positions. Descriptions of the platform as controlling, data-driven or unreliable should therefore be understood as professional interpretations shaped by specific experiences and partial access to organisational processes.

This uneven access is not simply an absence of information, but a form of selective visibility. Netflix discloses certain data and explanations while retaining control over the criteria through which performance and strategic decisions are evaluated. Expert 3, for example, linked perceptions of Netflix as unreliable among Flemish makers to reported incidents in the wider Benelux production community in which projects described as already greenlit were cancelled before production. However, he did not present this as a universally shared assessment and noted that some Flemish suspicion towards Netflix did not correspond with his own experience. Netflix has also expanded its public-facing data disclosure and shares certain performance information with production partners, including early viewing reports and, in some cases, completion or demographic data. This development occurs within a broader European context in which audience-measurement transparency has received increasing industry and regulatory attention, including through the European Media Freedom

Act (BARB, 2022; European Commission, n.d.; Netflix, 2021, 2023). Nevertheless, as Wayne and Uribe Sandoval (2023) argue, Netflix's limited explanation of what it means for content to "perform well" reflects its long-standing anti-transparency practices. Detailed benchmarks, subscriber effects, country-level performance and the criteria governing commissioning, renewal and cancellation remained largely unavailable to the experts. The scholarly characterisation of Netflix as a *black box* therefore remains useful, provided that it is not equated with complete opacity (Iordache et al., 2022; Wayne & Uribe Sandoval, 2023). Netflix is better understood as a selectively transparent black box: it discloses some information to makers and the public while retaining control over the metrics and evaluative criteria through which success is defined. This information asymmetry helps explain why some professionals interpreted creative notes, cancellations and performance feedback through broader assumptions about data, risk and audience retention.

Netflix should not, however, be treated as uniquely responsible for every development identified. Hooks, pacing, genre clarity and efforts to prevent audience drop-off long predate streaming. Netflix intensifies these established television logics through its global scale, granular performance indicators and formalised approval systems, but does not invent them. The relevant issue is therefore how the platform's infrastructure amplifies and reorganises existing industrial practices. This distinction preserves concerns about standardisation while avoiding the attribution of wider changes in audiovisual production to a single company.

Comparable caution applies to references to "Flemish", "Dutch" and "American" production cultures. Respondents used these categories to interpret differences in taste, commercial orientation and working practices, but their accounts were neither uniform nor neutral. Scholarship on Dutch–Flemish screen culture likewise warns against essentialising neighbouring audiovisual markets (Cuelenaere et al., 2016, 2018, 2019). These distinctions remain analytically useful as professional narratives through which cultural distance and power are understood, but not as objective national characteristics.

The findings also complicate a simple opposition between a commercially oriented global platform and culturally responsible local institutions. Netflix's diversity practices were criticised as commercially mediated, yet its Amsterdam workforce was simultaneously perceived as more internationally diverse than Flemish institutions. Its involvement was described as constraining creative autonomy while also strengthening procedures, planning

and workplace protections. These tensions are not weaknesses in the findings. Rather, they demonstrate that Netflix's influence is negotiated differently according to professional role, production model, project phase, producer mediation and executive continuity.

More broadly, the findings suggest that the effects of platformisation in a small audiovisual market depend not only on the strategies of the global platform, but also on the strength of the surrounding production ecosystem. Netflix creates opportunities for financing, employment and international circulation while generating dependencies concerning rights, information and creative authority. Its influence should therefore be understood relationally: it is shaped by the bargaining capacity of local producers, the continuing role of broadcasters and public-service institutions, and the availability of alternative financing and circulation structures. Netflix consequently emerged neither simply as a threat nor as an opportunity, but as a powerful partner whose effects depend on the conditions under which collaboration occurs.

CONCLUSION

This thesis examined how Flemish audiovisual professionals experience collaboration with Netflix and how they perceive the platform's influence on local production practices. The findings provide an ambivalent answer. Netflix can expand the scale, financing, international circulation and professional infrastructure of Flemish productions, while simultaneously creating dependencies around rights ownership, approval procedures, data access and creative authority. Its influence is therefore neither uniformly enabling nor constraining, but varies according to the production model, project phase, professional role, producer and executives involved. The study consequently aligns with and extends research on Netflix's ambivalent position within European production cultures (Idiz, 2024; Iordache et al., 2022, 2026). More specifically, building on Idiz (2024), it shows how this ambivalence varies across production stages and collaboration models within the specific conditions of the Flemish audiovisual market.

The findings first demonstrate that Netflix's involvement differs across production stages. During development and greenlighting, experts valued the platform's financing capacity, comparatively direct decision-making and ability to move projects forward. However, projects with Netflix could reduce producers' long-term exploitation opportunities, while the direct contracting of creative professionals risked repositioning local production companies

as service producers. In preproduction, Netflix's influence became visible through more formalised approval structures and negotiations concerning audience positioning, casting and visual style. During production, its day-to-day presence was generally more limited and mediated through local production companies, although the degree of oversight varied with production scale and executive relationships. Netflix's professionalising influence was more consistently associated with procedures, planning and workplace standards. Its creative influence was most visible in postproduction, where experts described repeated feedback concerning pacing, exposition, linearity, accessibility and audience retention.

Second, the findings complicate the idea that data simply replaces creative judgement. Experts frequently interpreted Netflix's decisions through assumptions about audience data, particularly regarding retention, target groups, genre and performance. In a small number of cases, metrics were explicitly invoked to justify creative changes. More often, however, data operated as a background logic shaping discussions about hooks, clarity and accessibility rather than as a fixed set of instructions. Its influence appeared more direct in acquisition, commissioning, renewal and performance evaluation than in everyday creative choices. Netflix's production culture can therefore be understood as a hybrid system in which data, executive judgement, market strategy and creative labour remain intertwined (van Es, 2023). This does not remove concerns about standardisation, but it suggests that platform power operates through negotiation and professional interpretation rather than automated decision-making alone.

A particularly significant finding for Flanders is that Netflix's local engagement is increasingly mediated through the larger Dutch market. Flemish professionals, production companies and postproduction infrastructure remained valuable, but specifically Flemish stories were not perceived as central to the platform's current Benelux strategy. This extends Cuelenaere and Joye's (2024) account of Dutch–Flemish co-production as a gateway structure. The interviews suggest that Flanders may function not only as a local market, but also as a source of talent, expertise and production capacity for content primarily oriented towards the Netherlands. This raises questions about how Flemish producers and policymakers can benefit from international investment while safeguarding creative autonomy, rights ownership and culturally specific storytelling.

Academically, the thesis connects platform studies, production studies and research on small audiovisual markets. It provides empirical insight into how commissioning structures,

approval systems, rights arrangements and audience-retention logics are encountered by professionals working within platform-related production (Idiz, 2024; van Es, 2023; Wayne & Uribe Sandoval, 2023). By focusing on professional experience rather than primarily on catalogues, investment figures or corporate discourse, it shows how platform power is interpreted, negotiated and sometimes resisted in everyday production practice (Banks et al., 2015; Mayer et al., 2009). The Flemish case also demonstrates how market size, linguistic proximity and unequal relationships between neighbouring territories shape platform localisation (Afilipoaie et al., 2021; Cuelenaere & Joye, 2024; Iordache et al., 2022, 2026). Finally, drawing on scholarship on localisation and transnational production (Chalaby, 2025; Dunleavy & Weissmann, 2023), the thesis shows how Flemish talent and infrastructure can be incorporated into projects primarily oriented towards the larger Dutch market. This complicates a clear distinction between *local* and *trans-local* production, since production may remain locally embedded while its cultural and commercial orientation is directed towards an adjacent market.

Several limitations qualify these contributions. The study is based on eight qualitative expert interviews covering six Netflix-related films and series. It therefore provides depth rather than statistical representativeness. The sample was entirely male, aged 40–55 and weighted towards writing and development, limiting the extent to which the study captures gendered, generational and role-specific differences within the wider Flemish audiovisual workforce. Furthermore, the research relied on professional perceptions and did not include interviews with Netflix representatives, internal documents, contractual comparison or access to the platform's complete audience and commissioning data. It could therefore examine how Netflix's influence is experienced and interpreted, but not independently reconstruct its internal decision-making.

Future research could compare Flemish experiences with those of professionals in the Netherlands, Francophone Belgium and other small European audiovisual markets. This would help determine which patterns are specific to Flanders and which reflect wider regional or platform-related dynamics. Research on other global and local streaming services could similarly clarify which developments are particular to Netflix. A more diverse professional sample, including younger workers and more women and minority professionals, would broaden understanding of how platformisation is experienced across the production hierarchy. Contractual analysis, production and investment data, audience research and

interviews with platform representatives could further connect perceived influence with measurable industrial change and future research should also examine whether role shifts observed around producers extend to writers, directors and editors as well.

Overall, Netflix's future significance for Flanders will depend not only on whether it continues to invest, but on the conditions under which that investment occurs. Its effects will be shaped by the capacity of producers, creative professionals, broadcasters and policymakers to negotiate rights, creative authority, access to performance information and the continued production of culturally specific stories. Netflix should consequently be understood neither as a solution to the limitations of a small audiovisual market nor solely as a threat to its autonomy, but as a powerful partner whose opportunities and risks depend on the strength of the surrounding local and European ecosystem.

REFERENCES

- Afilipoaie, A., Iordache, C., & Raats, T. (2021). The “Netflix Original” and what it means for the production of European television content. *Critical Studies in Television*, 16(3), 304–325. <https://doi.org/10.1177/17496020211023318>
- Asmar, A., Raats, T., & Van Audenhove, L. (2025). Producing diversity: On the discourses at the heart of Netflix’s production culture. *Media and Communication*, 13, Article 9410. <https://doi.org/10.17645/mac.9410>
- Asmar, A., Orestes, G., & Raats, T. (2026). Working with global streamers: Navigating revenue, reach and autonomy in European television production. In T. Raats & C. Iordache (Eds.), *Streaming Europe: How transnational streaming is reshaping European film and television markets* (pp. 45–59). Routledge. <https://doi.org/10.4324/9781003672128-6>
- Banks, M. J., Conor, B., & Mayer, V. (Eds.). (2015). *Production studies, the sequel!: Cultural studies of global media industries*. Routledge. <https://doi.org/10.4324/9781315736471>
- BARB. (2022, October 12). *Netflix signs up to BARB*. <https://www.barb.co.uk/news/netflix-signs-up-to-barb/>
- Bengesser, C., De Rosa, P., Jensen, P. M., & Spalletta, M. (2023). Audiences of popular European television crime drama: A nine-country study on consumption patterns, attitudes and drivers of transcultural connection. *European Journal of Communication*, 38(2), 148–165. <https://doi.org/10.1177/02673231221112535>
- Bignell, J., & Woods, F. (2022). *An introduction to television studies* (4th ed.). Routledge. <https://doi.org/10.4324/9781315619675>
- Bossuyt, L., & Joye, S. (2023). Teken en van banaal nationalisme in de Vlaamse en Nederlandse adaptaties van het televisieformat SKAM. *Tijdschrift voor Communicatiewetenschap*, 51(1), 4–24. <https://doi.org/10.5117/TCW2023.1.002.BOSS>
- Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology*, 3(2), 77–101. <https://doi.org/10.1191/1478088706qp063oa>
- De Caluwe, J. (2013). Nederland en Vlaanderen: (A)symmetrisch pluricentrisme in taal en cultuur. *Internationale Neerlandistiek*, 51(1), 45–59. <https://doi.org/10.5117/IVN2013.1.CALU>
- Castro, D., & Cascajosa, C. (2020). From Netflix to Movistar+: How subscription video-on-demand services have transformed Spanish TV production. *Journal of Cinema and Media Studies*, 59(3), 154–160. <https://doi.org/10.1353/cj.2020.0019>

- Chalaby, J. K. (2025). Streaming giants and the global shift: Building value chains and remapping trade flows. *Journal of Communication*, 75(2), 112–124.
<https://doi.org/10.1093/joc/jqae040>
- Council of Europe. (2025). *Regulations in force in 2025* [Eurimages co-production support regulations].
<https://www.coe.int/en/web/eurimages/regulations-coproduction>
- Cuelenaere, E., Joye, S., & Willems, G. (2016). Reframing the remake: Dutch–Flemish monolingual remakes and their theoretical and conceptual implications. *Frames Cinema Journal*, 10(1), 1–19.
<https://framescinemajournal.com/article/reframing-the-remake-dutch-flemish-monolingual-remakes-and-their-theoretical-and-conceptual-implications/>
- Cuelenaere, E., Joye, S., & Willems, G. (2019). Local flavors and regional markers: The Low Countries and their commercially driven and proximity-focused film remake practice. *Communications*, 44(3), 262–281.
<https://doi.org/10.1515/commun-2019-2057>
- Cuelenaere, E., & Joye, S. (2024). From *Undercover* to *Ferry*: SVOD franchise development in small European audiovisual markets. In C. Meir & R. Smits (Eds.), *European cinema in the streaming era: Policy, platforms, and production* (pp. 259–280). Palgrave Macmillan. https://doi.org/10.1007/978-3-031-42182-2_13
- Cuelenaere, E., Willems, G., & Joye, S. (2018). Same same same, but different: A comparative film analysis of the Belgian, Dutch and American *Loft*. *Tijdschrift voor Communicatiewetenschap*, 46(4), 263–279.
<https://doi.org/10.5117/2018.046.004.002>
- Dams, T. (2018, June 21). How Netflix, Amazon and HBO are expanding into Europe. *Screen Daily*.
<https://www.screendaily.com/features/how-netflix-amazon-and-hbo-are-expanding-into-europe/5130197.article>
- D’Arma, A., Raats, T., & Steemers, J. (2021). Public service media in the age of SVoDs: A comparative study of PSM strategic responses in Flanders, Italy and the UK. *Media, Culture & Society*, 43(4), 682–700.
<https://doi.org/10.1177/0163443720972909>
- De Man, A. (2025). *Producing difference: The cultural politics of diasporic cinema in Flanders (2002–2022)* [Doctoral dissertation, Ghent University and University of Antwerp].
<http://hdl.handle.net/1854/LU-01JZFXK2QW1RMSWWPYWXN1M39K>

- De Man, A., Willems, G., & Biltereyst, D. (2025). Discourses of cultural diversity and inclusion in film policy: The case of Flanders (2002–2022). *European Journal of Cultural Studies*, 28(2), 306–325. <https://doi.org/10.1177/13675494241228937>
- De Marez, L., Georges, A., Sevenhant, R., & Devos, E. (2025). *imec.digimeter 2024: Digitale trends in Vlaanderen*. imec.
- De Vinck, S. (2009). Europudding or Europaradise? A performance evaluation of the Eurimages co-production film fund, twenty years after its inception. *Communications*, 34(2), 257–285. <https://doi.org/10.1515/COMM.2009.017>
- Dunleavy, T., & Weissmann, E. (2023). Cultural diversity in internationally coproduced high-end drama. *Critical Studies in Television*, 18(2), 117–127. <https://doi.org/10.1177/17496020231161643>
- European Commission. (n.d.). *European Media Freedom Act*. https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/new-push-european-democracy/protecting-democracy/european-media-freedom-act_en
- Regulation (EU) 2024/1083 of the European Parliament and of the Council of 11 April 2024 establishing a common framework for media services in the internal market and amending Directive 2010/13/EU (European Media Freedom Act), 2024 O.J. (L 1083). <https://eur-lex.europa.eu/eli/reg/2024/1083/oj/eng>
- Fereday, J., & Muir-Cochrane, E. (2006). Demonstrating rigor using thematic analysis: A hybrid approach of inductive and deductive coding and theme development. *International Journal of Qualitative Methods*, 5(1), 80–92. <https://doi.org/10.1177/160940690600500107>
- Haddad, F. G., & Dhoest, A. (2021). Netflix speaks Arabic, Arabs speak Netflix: How SVOD is transforming Arabic series screenwriting. *Journal of Arab & Muslim Media Research*, 14(2), 261–280. https://doi.org/10.1386/jammr_00034_1
- Hansen, K. T. (2020). Nordic Noir from within and beyond: Negotiating geopolitical regionalisation through SVoD crime narratives. *Nordicom Review*, 41(S1), 123–137. <https://doi.org/10.2478/nor-2020-0012>
- Idiz, D. R. (2024). Local production for global streamers: How Netflix shapes European production cultures. *International Journal of Communication*, 18, 2129–2148. [No DOI assigned.]
- Iordache, C., Raats, T., & Afilipoaie, A. (2022). Transnationalisation revisited through the Netflix Original: An analysis of investment strategies in Europe. *Convergence*, 28(1), 236–254. <https://doi.org/10.1177/13548565211047344>

- Iordache, C., Afilipoaie, A., Raats, T., & Li, R. (2026). Investments in original fiction series by foreign streamers and the boundaries of localisation. In T. Raats & C. Iordache (Eds.), *Streaming Europe: How transnational streaming is reshaping European film and television markets* (pp. 60–75). Routledge.
<https://doi.org/10.4324/9781003672128-7>
- Johnson, C. (2019). *Online TV*. Routledge. <https://doi.org/10.4324/9781315396828>
- Khazoom, F. (2025). Televisuality on a global scale: Netflix’s local-language strategy. *Media and Communication*, 13, Article 9356. <https://doi.org/10.17645/mac.9356>
- Kim, T. (2022). Cultural politics of Netflix in local contexts: A case of the Korean media industries. *Media, Culture & Society*, 44(8), 1508–1522.
<https://doi.org/10.1177/01634437221111917>
- Koljonen, J. (2026). *Challenging projections: Nostradamus report 2026*. Göteborg Film Festival.
- Kostovska, I. (2025). Corporate ownership in the TV production sector and cultural diversity: Analysis of consolidated companies and indies’ access to TV drama financing. *Communication & Society*, 38(1), 574–589.
<https://doi.org/10.15581/003.38.1.040>
- Krauß, F. (2024). *Television drama from Germany: Production, storytelling and “quality”*. Palgrave Macmillan. <https://doi.org/10.1007/978-3-031-60622-9>
- Lobato, R. (2019). *Netflix nations: The geography of digital distribution*. New York University Press. <https://doi.org/10.18574/nyu/9781479882281.001.0001>
- Lotz, A. D. (2021). In between the global and the local: Mapping the geographies of Netflix as a multinational service. *International Journal of Cultural Studies*, 24(2), 195–215. <https://doi.org/10.1177/1367877920953166>
- Mayer, V., Banks, M. J., & Caldwell, J. T. (Eds.). (2009). *Production studies: Cultural studies of media industries*. Routledge. <https://doi.org/10.4324/9780203879597>
- Netflix. (2021, November 16). *Top 10 things to know about our weekly Top 10*. <https://about.netflix.com/news/top-10-things-about-netflix-top-10>
- Netflix. (2023, December 12). *What we watched: A Netflix engagement report*. <https://about.netflix.com/news/what-we-watched-a-netflix-engagement-report>
- Netflix, Inc. (2025). *2024 annual report (Form 10-K)*. <https://ir.netflix.net/financials/annual-reports-and-proxies/>
- Petruska, K., & Woods, F. (2019). Traveling without a passport: “Original” streaming content in the transatlantic distribution ecosystem. In M. Hilmes, M. Hills, & R.

- Pearson (Eds.), *Transatlantic television drama: Industries, programs, and fans* (pp. 49–68). Oxford University Press.
<https://doi.org/10.1093/oso/9780190663124.003.0004>
- Raats, T., & Iordache, C. (2020). From Nordic Noir to Belgian Bright? Shifting TV drama production and distribution in small markets: The case of Flanders. *VIEW Journal of European Television History and Culture*, 9(17), 79–92.
<https://doi.org/10.18146/view.243>
- Rasmussen, N. V. (2022, November 2–5). *The Netflix machine: How European screen workers interpret and interact with streaming data* [Paper presentation]. AoIR 2022: The 23rd Annual Conference of the Association of Internet Researchers, Dublin, Ireland. <https://spir.aoir.org/ojs/index.php/spir/article/view/12953>
- Screen Flanders. (n.d.-a). *Financing*. <https://www.screenflanders.be/en/financing>
- Screen Flanders. (n.d.-b). *Screen Flanders*.
<https://www.screenflanders.be/en/financing/screen-flanders>
- Smith, S. L., Pieper, K., Neff, K., & Wheeler, S. (2025). *Inclusion in Netflix original U.S. scripted films & series: Full report*. USC Annenberg Inclusion Initiative.
<https://assets.uscannenberg.org/docs/aai-2025-netflix-full-report.pdf>
- Sundet, V. S. (2021). “Youthification” of drama through real-time storytelling: A production study of *blank* and the legacy of *SKAM*. *Critical Studies in Television*, 16(2), 145–162. <https://doi.org/10.1177/17496020211005311>
- Truffaut, F. (1985). *Hitchcock* (Rev. ed.; H. G. Scott, Collaborator). Simon & Schuster. [No DOI assigned.]
- Van der Elst, P., Iordache, C., & Raats, T. (2026). Strategic responses by public service media to global video streamers: Practices and key trends in Europe. In T. Raats & C. Iordache (Eds.), *Streaming Europe: How transnational streaming is reshaping European film and television markets* (pp. 209–223). Routledge.
<https://doi.org/10.4324/9781003672128-19>
- van Es, K. (2023). Netflix & big data: The strategic ambivalence of an entertainment company. *Television & New Media*, 24(6), 656–672.
<https://doi.org/10.1177/15274764221125745>
- Vlaamse Gemeenschap, & Vlaamse Radio- en Televisieomroeporganisatie. (2025). *Beheersovereenkomst tussen de Vlaamse Gemeenschap en de VRT 2026–2030*.
- Vlaamse Regulator voor de Media. (2019). 3.4 De Vlaamse mediasector in een internationale context. In *Mediaconcentratie in Vlaanderen 2019*.

<https://www.vlaamseregulatormedia.be/nl/over-vrm/rapporten/2019/rapport-mediaconcentratie/mediaconcentratie-in-vlaanderen-2019/3-7>

Vlaamse Regulator voor de Media. (2023, March 27). *Erkenning coproductieproject “Blind Sherlocks” (Netflix International B.V.)*.
<https://www.vlaamseregulatormedia.be/nl/beslissingen/2023/erkenning-coproductieproject-blind-sherlocks-netflix-international-bv>

Vlaamse Regulator voor de Media. (2024, March 25). *Erkenning coproductieproject “Knokke Off S2 en S3” (BV Netflix International)*.
<https://www.vlaamseregulatormedia.be/nl/beslissingen/2024/erkenning-coproductieproject-knokke-s2-en-s3-bv-netflix-international>

VRT. (2025, March 26). *From historical conflicts to family ties: New8 showcases second slate of international drama series*.
<https://communication.vrt.be/from-historical-conflicts-to-family-ties-new8-showcases-second-slate-of-international-drama-series>

VRT. (2026, January 28). *Eight public broadcasters continue New8 to co-produce more high-quality European drama*.
<https://communication.vrt.be/eight-public-broadcasters-continue-new8-to-co-produce-more-high-impact-european-drama>

VRT tekent akkoord met Vlaamse tv-makers: “We moeten de Vlaming laten genieten van kwaliteitsvolle verhalen van hier.” (2025, September 30). *Het Nieuwsblad*.
<https://www.nieuwsblad.be/media-en-cultuur/tv-en-radio/vrt-tekent-akkoord-met-vlaamse-tv-makers-we-moeten-de-vlaming-laten-genieten-van-kwaliteitsvolle-verhalen-van-hier/94073065.html>

Wayne, M. L., & Uribe Sandoval, A. C. (2023). Netflix original series, global audiences and discourses of streaming success. *Critical Studies in Television*, 18(1), 81–100.
<https://doi.org/10.1177/17496020211037259>