

## **The Success of Spanish Series on Traditional Television and SVoD Platforms: From *El Ministerio del Tiempo* to *La Casa de Papel***

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This article explores the changes of the Spanish television industry upon the arrival of the international Subscription Video on Demand (SVoD) platforms and how Spain has become a noticeable player in the international market. To analyze the hybridization of the industry, a content analysis of the Spanish catalog of SVoD services has been conducted to evaluate the offerings of local series. To further exemplify the current complex relationships among traditional broadcasters, independent producers, and SVoD platforms, an analysis of the evolution of the series *The Ministry of Time* and *Money Heist* (two of the most internationally successful Spanish shows) in terms of production, distribution, and cultural trades, reveals the different types of agreements with SVoD players and the balance between the international and domestic markets. Results also indicate the importance of the Spanish geolinguistic market for the success of Spanish series even as the popularity of its shows has transcended the language borders.

*Keywords: television, series, Spain, SVoD, international, Netflix, TVE*

In recent years, the international success of Spanish serialized fiction has prompted headlines around the world. Specifically, the success of *La Casa de Papel/Money Heist* (Pina, 2017) surprised experts and viewers. The fourth season, released on Netflix on April 3, 2020, became the most watched series worldwide in the following weeks (Parrot Analytics, 2020). The launch of the first season of the series on the same platform at the end of 2017 was one of the most viewed shows for 10 consecutive weeks worldwide (Shirk, 2018).

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Apart from *Money Heist* (Pina, 2017), titles such as *El Ministerio del Tiempo/The Ministry of Time* (Olivares & Olivares, 2015), *Élite* (Montero & Madrona, 2018), or *Locked Up* (Écija, Pina, & Martínez Lobato, 2015) have had high audience figures also in other countries. These achievements, together with the arrival of the main international SVoD platforms in the country, have altered the local production system and the partnerships between Spanish broadcasters and producers. As some of the first main consequences, this has led to a clear increase in the number of series produced per year (Vassallo de Lopes & Orozco Gómez, 2019) and a considerable rise in their international circulation.

These global changes are reshaping domestic television industries and altering the windowing process of television programs and industry competition in the markets. The on-demand platforms have become simultaneously international distributors of local products, a second window for old domestic titles, partners of legacy television providers, direct competitors to broadcasters, and commissioners of original local content (Martínez Lobato, 2019). In this context, Spanish serial fiction is having a golden age and has become the key content for both legacy television and the new SVoD platforms operating in the market (European Audiovisual Observatory [EAO], 2015; Prado, Delgado, García-Muñoz, Monclús, & Navarro, 2020). One of its main products comes from TVE, Spain's public broadcaster, thus proving that Spanish public service media is also pursuing goals in terms of effectiveness and commercial success beyond its own frontiers, a new strategy for TVE (Arriaza Ibarra, 2015a).

Concurrently, transnational flows of television series have increased considerably. The U.S. market continues to have a leading role in transnational exchanges, in terms of both volume and ownership of the main SVoD platforms, reactivating the debates on cultural imperialism that were prominent in the 1970s and '80s (Nordenstreng & Varis, 1974; Schiller, 1976). However, the strategies of international SVoD players such as Netflix, Amazon Prime Video, and HBO have fostered the growth of audiences for international series (Ju, 2020) and have altered the dynamics of these cultural exchanges through the positioning of some peripheral markets at the center of these flows.

In this sense, some authors use the concept of *asymmetrical interdependence*, which maintains the focus on the hegemonic position of the United States (and, to a lesser extent, of the United Kingdom) while it recognizes some multidirectional audiovisual flows (Alankus & Yanardagoglu, 2016; Straubhaar, 2013). Some examples that currently have prominent positions internationally are Nordic-noir dramas from the Scandinavian countries (Creeber, 2015), Turkish soap operas (Alankus & Yanardagoglu, 2016; Yörük & Vatikiotis, 2013), K-pop teen dramas from South Korea (Ju, 2020), and the topic analyzed in this article, Spanish television series.

This article analyzes the changes in the Spanish television industry upon the arrival of the main international SVoD platforms and how Spanish traditional broadcasters and production companies are adjusting their roles in the local and, simultaneously, the international markets. It starts with a discussion on the need to analyze these platforms as local agglomerations and not only international platforms, and the different impacts and levels of disruption that they have in domestic markets. Then, a description of the current hybridization of the Spanish industry is made with an analysis of the number of Spanish titles on the SVoD services with the greatest numbers of subscribers. A content analysis of the catalog of the biggest

local SVoD service Movistar+ and the three main international platforms in Spain (Netflix, Amazon Prime Video, and HBO) has also been made to classify all serialized fiction by their origins and types of production.

This is followed by an in-depth analysis of two of the most internationally successful Spanish series: *The Ministry of Time* (Olivares & Olivares, 2015) and *Money Heist* (Pina, 2017). Because of their success and their commissioners—the first by TVE, the public national corporation, and the second by Atresmedia, a commercial broadcaster—these series were chosen to exemplify the current complex relationships among the different players that operate in the Spanish market: traditional public and commercial broadcasters, independent production companies, and SVoD platforms. To carry out the analysis, industry reports, official audience information, and news articles have been used for each case study. Furthermore, interviews were conducted in October–November 2019 with Javier Olivares, creator, showrunner, and producer of *The Ministry of Time*, and Esther Martínez Lobato, cocreator of *Money Heist*, to gather information directly from the series' creators. The conclusions shed light onto the current hybridization of the Spanish television industry and the different models of relationships between legacy players and international SVoD platforms. It will be proved that even when *asymmetrical interdependence* continues to exert the dominant role of the United States in the audiovisual international field, the Spanish series chosen are also very clear examples of the contraflow culture that is nowadays promoted by the SVoD platforms.

### **The Impact of International SVoD Platforms on Local Markets**

There is an ongoing debate on whether the recent changes that have impacted the television industry form a complete, new disruption, or instead a mere continuation of the changes that have been present since the beginning of this media (Piñón, 2019; Shahaf & Ferrari, 2019). What is undeniable is that an "extra layer" has been added to the industry matrix with significant changes to the production, distribution, and consumption of television (Lobato, 2019). SVoD platforms are already the most popular types of professional streaming services in Europe (EAO, 2020a). These platforms have split the attention of the viewers with a further fragmentation of audiences and changes in the consumption of television with the popularization of binge-watching (Jenner, 2017; McDonald & Smith-Rowsey, 2016).

Even though the main international SVoD players are U.S. companies, audiovisual markets are still based on national borders and the licensing rights are acquired individually in a country or regional basis. Considering this fragmented offering and the strikingly different experiences of SVoDs in local markets, we agree with Lobato (2019) that it is important to understand SVoD platforms not only as "global brands" but also as *aggregations of catalogs across countries*.

The impact and levels of disruption that SVoD platforms have had differ considerably in each local market. Several studies analyze the effects of these platforms in domestic markets around the world, in countries such as Israel (Wayne, 2018), Japan (Tse, 2020), Australia (Lobato, 2019), and Mexico (Cornelio-Marí, 2020; Rios & Scarlata, 2018), showing that SVoDs can be both competitors and new opportunities for local industries.

In Europe, legacy players still have a hegemonic position in local markets. However, SVoD platforms accounted for 82% of the sector's growth in 2018 (EAO, 2020a). These services have become key

cultural intermediaries among all the content available worldwide and local audiences (Navarro & Prado, 2019; Smith Maguire & Matthews, 2012). While at the beginning of their international expansion SVoD platforms were mostly intercessors acting as second-window television distributors, nowadays they are present in most aspects of the audiovisual industry (Karatzogianni & Matthews, 2020) with the commissioning of original content, including in local markets outside the United States. Consequently, SVoDs are increasing the quantity of original commissions of the European production of serialized fiction, which rose from 3% in 2015 to 8% in 2018 (EAO, 2020a). While traditional broadcasters are clearly still the main commissioners of fiction, those titles originally produced by SVoDs are available in most international markets, an important advantage that distinguishes them from traditional broadcasters.

From this perspective, the production of original content is linked (apart from the established legislative quotas) to the need to adapt catalogs to domestic viewers. In this sense, local audiences tend to prefer audiovisual content that is culturally closer to their own. However, cultural proximity is limited by different elements of identity, such as social class or global influences (Straubhaar, 2013).

These platforms allow the creation of transnational niche audiences that bypass local cultural barriers (Malik, 2019). As Ju (2020) highlights, "cultural proximity can neither explain the latest flow of K-drama to the United States, Canada, Latin America, and many parts of Europe, nor can it offer answers about Asian fans' consumption of popular Western TV shows alongside K-dramas" (p. 35). Therefore, international SVoD platforms need to balance global trends with local preferences.

### **The Hybridization of the Spanish Television Industry**

The current Spanish television market is made of a wide variety of audiovisual services that include free-to-air television with DTT channels, free catch-up services, satellite or IPTV platforms, plus domestic SVoD services and international platforms. In addition, the telecommunication companies have triple-play offers (telephone, Internet, and television). This has led to an increase in competitiveness of the Spanish industry and its transnational dimension.

The slow (but unstoppable) penetration of Pay TV in Spain has been an important factor in the fast growth of SVoD platforms. According to data from the EAO (2020b), in 2018, 31% of Spanish households had access to Pay TV, while the European average was 62%. Therefore, SVoD platforms had clear room to grow in the country. In terms of consumer revenues of SVoD services, 2018 income was €315.1 million, significantly higher than the previous year's figure of €210.4 million. This rapid growth is further illustrated by the fact that SVoD income in Spain in 2015 was only €54.7 million.

At the end of 2019, there were 54 SVoD services available in Spain (EAO, 2020b); however, the most used were Movistar+, from the main telecommunications company *Telefónica*, Netflix, *HBO España*, and Amazon Prime Video (Statista, 2019). The first ones to appear were the domestic companies *Filmin* and *wuaki.tv* in 2010, the latter acquired by the Japanese corporation Rakuten in 2012. Netflix arrived in October 2015 as the first international SVoD platform. In May 2016, HBO landed, but only for the clients of the British telephone operator Vodafone; six months later, in November 2016, it became available to everyone. The last one to arrive was Amazon Prime Video, launched in December 2016.

Spain is the European country with the fifth highest production of television series, after the United Kingdom, Germany, France, and the Netherlands. The global economic crisis from 2008 to 2014 deeply affected the country, and the number of series produced reduced over the last decade. However, in recent years, all sorts of players, including Pay TV channels and on-demand platforms, have resumed the production of series, thus indicating a strong recovery with a major increase between 2015 and 2018 (EAO, 2020a). In 2018, 76 titles premiered in Spain, 20 more than the previous year. The majority were launched on traditional channels, led by the public corporation RTVE with 11 different titles, while 16 were launched directly on SVoD services (Vassallo de Lopes & Orozco Gómez, 2019).

To protect and promote domestic production, and in anticipation of the approval of the 30% quota for European audiovisual works by providers of on-demand audiovisual services in October 2018, the Spanish government passed legislation in 2010 requiring on-demand providers to reserve at least 30% of the catalog for European titles, half of them in any one of Spain's official languages (Spanish, Catalan, Basque, or Galician). Also, 5% of their total income each year has to be invested in producing new European titles (Article 5.2–3 of the General Law 7/2010 on Audiovisual Media). These measures have not been adapted yet for transnational SVoD services and, as an example, in the Netflix catalog of February 2020, only 22.2% was European-origin content (Catalan Audiovisual Council, 2020).

In terms of the international circulation of Spanish series, before the multiplatform era, some Spanish series had already achieved significant success abroad—such as *El Secreto de Puente Viejo/The Secret of the Old Bridge* (Guerra, 2011), *Gran Hotel* (Campos & Neira, 2011), or *Velvet* (Campos & Neira, 2014)—and there were also some international remakes of series such as *Médico de Familia/Family Doctor* (Écija, Aragón, Valdivia, & Cueto, 1995), or the hit success of *Polseres Vermelles/Red Bracelets* (Espinosa, 2011) from a Catalan public channel. However, the export of local titles has benefited from the appearance of international SVoD platforms. Spain is the fourth-placed European exporter within the continent, mostly because of the current high levels of Spanish series on Netflix, surpassed only by the United Kingdom, Germany, and France (EAO, 2020a). However, when examining local catalogs outside Europe, it is easy to see that Spain, while still far behind the United Kingdom, responsible for 64% of European exports in the sector, is the second-placed European country in terms of number of programs on SVoD platforms, representing 10% of the total European episodic-series abroad. This is partly because of Netflix's presence in Latin America and the shared language in most countries (EOA, 2020a).

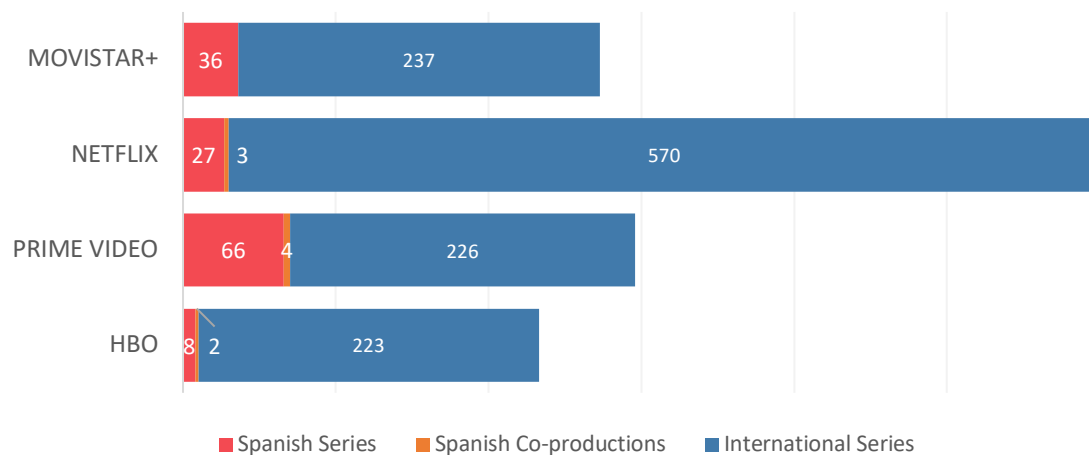
The rise and popularization of Spanish-speaking programs are some of the main aspects that have positioned Spain as a major player in the international audiovisual market. As Straubhaar (2013) argues, language is one of the key factors that conditions cultural proximity. Consequently, the Spanish language and the position of Spain as a "bridge" to Latin America and to Europe facilitates the circulation and international success of many Spanish productions. As an example of the importance of Spain as a production hub for SVoD players, in April 2019, Netflix opened a huge production center in Madrid. According to Francisco Ramos, Netflix business development vice president, Spain has the third highest production volume for the company, after the United States and the UK (Green, 2019).

### ***The Presence of Spanish Series in SVoD Catalogs***

In order to provide an overview of the Spanish series on the main SVoD platforms operating in the country, their volume, their types of production, and their connections with Spanish legacy players, catalogs of the four services with the most Spanish users (Movistar+, Netflix, Amazon Prime Video, and HBO) were analyzed (see Figure 1). In the case of Movistar+, it must be highlighted that the company is also a multichannel provider with its own general-interest channel #0. The on-demand plan combines the catch-up services of some of the channels and only on-demand programs.

To include all serialized fiction, catalogs were accessed during the first week of May 2020 through the unofficial website *justwatch.com*, where lists of the catalogs of different SVoD services are available by country. These lists were confirmed by reference to the interfaces of the services during the same week.

For content analysis, series were first classified by their production country of origin and then were divided into: (1) local Spanish titles; (2) Spanish co-productions, produced between a Spanish player and another one from an external market; and (3) international series, produced 100% internationally. In addition, Spanish titles were coded by their types of production; series were showcased as (1) original, differentiating between first window (native to the platform) and second window, or (2) licensed in the cases where the SVoD service has only the exhibition rights.



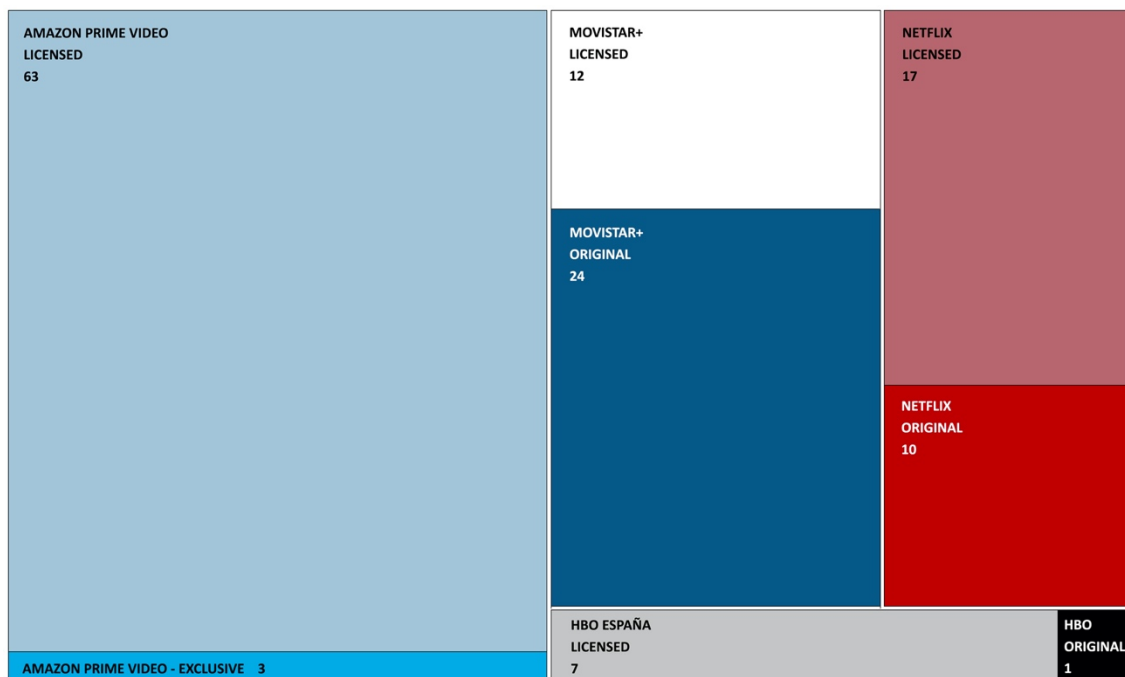
**Figure 1. Proportion of Spanish series and co-productions in the SVoD catalogs (May, 2020).  
Source: Authors, based on information available on SVoD catalogs.**

Within the Spanish catalogs, the platform with the most serialized fiction is Netflix with 600 different titles, followed by Amazon Prime Video with 296, Movistar+ with 273, and, finally, HBO with 233. Regarding the presence of Spanish series in their catalogs, the four platforms have clearly defined different strategies.

In terms of quantity, Amazon Prime Video tops the ranking with 66 Spanish series in its catalog and four co-productions, three of them between a Spanish producer and another Latin American audiovisual company. As an example, the Amazon original series *Hernán* (Muruzabal, 2019), based on the life of Hernan Cortés, the Spanish conqueror of Mexico, was a co-production between the Spanish production company Onza Producciones and the Mexican audiovisual conglomerate TV Azteca. These co-productions, some of the most traditional ways for content internationalization, highlight the link among Spanish-speaking countries.

Movistar+ is the second-placed platform with 36 Spanish series (see Figure 2). Netflix is far behind with 27 Spanish titles and another three co-productions; in this case, Netflix Spanish co-productions strengthen the link to Latin America and to Europe with titles such as *Criminal* (Kay & Field Smith, 2019), a co-production of the United Kingdom, France, Germany, and Spain. Finally, HBO includes only eight Spanish titles in its catalog and two European co-productions, *The Young Pope* (Sorrentino, 2016) and *The New Pope* (Sorrentino, 2020).

When looking into the types of production, there are also differences in the number of local original titles in each platform, which indicates the investment of production in the country and the relationship with domestic legacy players. However, those titles, presented as originals to users, *hide* different relationships with the producers, window exhibition processes, and ownership of the licenses (Martínez Lobato, 2019).



**Figure 2. Types of production of Spanish series present in the SVoD catalogs (May, 2020).**

**Source: Authors, based on information available on SVoD catalogs.**

Movistar+ is the SVoD service with the highest number of original Spanish productions, with a total of 24 series. While it started in 1994, with several name changes and business mergers, it did not start commissioning series until 2011, when it launched *Crematorio*, a family drama with good reviews. Despite its success, Movistar+ did not commission further series until 2017, coinciding with the increase of competition in the market, particularly for serialized fiction, by international SVoD platforms.

At the time of the analysis, Netflix is the international platform with the largest number of original Spanish titles, with 10 different series. As previously commented, Spain has rapidly become one of the key markets for original productions for Netflix, being the third country worldwide by production volume (Green, 2019). The first Spanish Netflix original was *Cable Girls* (Campos & Neira, 2017), produced by Netflix and the Spanish Bambú Producciones. The strategy was to create a series that followed the Spanish popular trend for period dramas and female lead characters (Chicharro-Merayo, 2018). Soon this process was followed by Netflix in other markets when it realized that the *glocalization* of catalogs was key to its international success (Lobato, 2019), as it happened in Mexico, where Netflix had to “crack” the local taste to engage viewers.

All Netflix original Spanish series are *native* to the platform and are distributed directly to all international markets. In the case of *Money Heist* (Pina, 2017) and *Paquita Salas* (Ambrossi & Calvo, 2016), the first two seasons and the first season, respectively, were first aired on another platform, but the following seasons were directly commissioned by, and launched on, Netflix, which adopted a more aggressive approach when dealing with traditional broadcasters in terms of exclusivity rights and promotional strategies.

Furthermore, Netflix also acts as the international distributor for some Spanish series licensed in Spain, such as *Vivir Sin Permiso/Unauthorized Living* (Gabilondo, 2018). This strategy is also used by the platform in several other countries, as it is the case of the United Kingdom and the BBC series *Bodyguard* (Mercurio, 2018). This type of agreement with the Spanish legacy players allows Netflix to immediately launch series internationally, with successful examples such as *Merlí* (Lozano, 2015), a series produced by the regional public channel TV3, which received high ratings in several Latin American countries (Piñeiro, 2018). Nevertheless, this type of agreement reduces the role of the local broadcasters and tightens the control of the SVoD platform over the internationalization of its content.

While Netflix has commissioned a significant number of Spanish series with exclusivity rights, Amazon Prime Video opts to buy the licensing rights in the Spanish market of both recent and old domestic titles. Therefore, it uses *reruns* of series as a value-content element for its local users (Gilbert, 2019). This provides the possibility of an additional source of income to broadcasters within the same market, therefore increasing the viability of the Spanish series while, at the same time, Amazon can exploit those titles on its platform.

An alternative type of agreement for Spanish shows is the parallel broadcast of a title. Episodes on SVoD platforms are made available every week immediately after their linear broadcast in the local market. This is a strategy implemented by Amazon Prime Video and *HBO España*. However, an emerging trend is to make the series available in the catalog first and then broadcast it on linear television. These collaborations are being made even with highly popular series that started more than a decade ago, as the comedy series



*La Que Se Vecina* (a wordplay in Spanish that combines "neighbors" with "trouble"; Caballero, 2007), which premiered its 12th season (2020) on the Amazon Prime Video platform first.

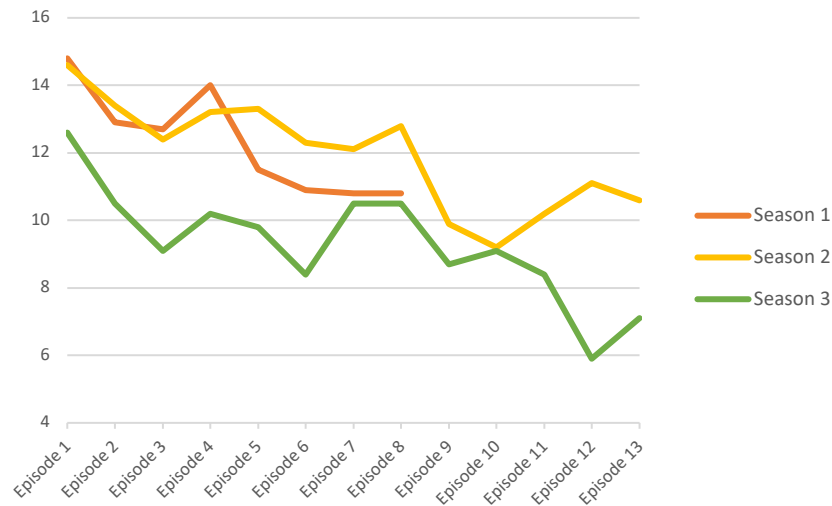
Finally, *HBO España* is currently the platform with the smallest number of Spanish original series; nevertheless, in 2019, it started to commission Spanish original titles, and it already has six series between those already released and those under production. *Patria* is a big-budget series about the Spanish terrorist group ETA, based on the homonym best seller. This series was launched between September and November 2020 in Spain, the United States, and 61 European and Latin American countries. It was co-produced with Alea Media, a production company linked to Mediaset, currently the largest commercial broadcasting corporation in Spain.

### ***The Ministry of Time: The Complex Meaning of Success for Linear Broadcasters***

*The Ministry of Time* (Olivares & Olivares, 2015) is a television series that combines real historical facts with fictional events in which the main characters prevent certain unpredictable factors or intruders from changing, even slightly, the course of history. The novelty is that it refers exclusively to real Spanish history in different eras, and it presents well-known historic characters like painters Diego Velázquez and Pablo Picasso, cinema directors such as Luis Buñuel, and the feminist pioneer Clara Campoamor.

The story line came from an original idea by Onza Producciones, a Spanish independent production company owned by brothers Pablo (deceased in 2014) and Javier Olivares, current producer and showrunner of the series, and also co-produced by Cliffhanger, another Spanish producer. The first window of the series throughout the four seasons has been the national public broadcaster *Televisión Española* (TVE) through La 1, its main channel. This fact clearly impacted the local and international success of the series and the relationships among all the (changing) players involved in the production and distribution of the series, including transnational SVoD platforms and Spanish local production companies.

All eight episodes of the first season were broadcast on La 1 (TVE) between February 2015 and April 2015 with an average audience share of 12.3% and 2.527.000 viewers (see Figure 3). While the audience slowly fell through the episodes, the results were significantly higher than the average quota of 9.8% that the main public channel *La 1* achieved that year. The public channel ranked third, after Telecinco and Antena 3, the main Spanish commercial channels (Barlovento Comunicación, 2018). In addition to the traditional audiences, the series was also available on demand on RTVE.es, and the first season was also aired on the international channel of TVE, *TVE Internacional*, with the highest number of viewers being in Europe and Latin America. However, the reach of these two extra platforms (and the likely large volume of illegal downloads) is unknown, thus complicating the analysis of the impact of the episodes and the value of the series by the corporation.



**Figure 3. The Ministry of Time—Evolution of audience share of the linear broadcast in TVE, Spain (Seasons 1–3). Source: Authors, based on data from RTVE.**

Nevertheless, alongside the moderate success of the series on linear television as its first window, the Spanish public channel series was enthusiastically welcomed by viewers and television critics, a key aspect for the current highly competitive audiovisual context. *The Ministry of Time* (Olivares & Olivares, 2015) is nowadays referred to as a masterpiece of cult TV, in this case with some elements of historical fiction and the devotion from the fans added as extra elements. Furthermore, the series won several national and international awards such as the Spanish *Ondas* and the *Platino* for best television series in Spain and Latin America.

While *The Ministry of Time* (Olivares & Olivares, 2015) was not a top audience television series in Spain when compared with the share of the main commercial channels, it was the first Spanish series to create a whole online “army” of fans, inside and outside the country. By the end of July 2015, the Twitter account @MdT\_TVE had 33.718 followers and its Facebook page, 33.216 followers. As Selva (2016) states, social television, understood as “the social practice of commenting on television shows with peers, friends, and unknown people, who are all connected together through various digital devices” (p. 160) has become another factor to assess the level of success of television programs in the multiplatform context. In addition, by the end of 2015, the series already had thousands of fans even in countries where it had not been broadcast, like France and Italy (personal communication, October 26, 2019), an effect that can be understood only with the impact of the series on social media. China, on the other hand, bought the rights to produce its own version, making this the first time for a Spanish series to be copied by Chinese producers (personal communication, October 26, 2019).

Despite the big investment and commitment from both the public broadcaster and the producers, after the second season (aired on 2016), the series was “put on hold” because of the lower ratings of the new episodes, which dropped to 10.8% on linear television, and budget difficulties. The public corporation

seemed unable to reach the budget requested by the producers (personal communication, October 26, 2019). While during the first two seasons the cost was approximately €580,000 per episode, the needs of the series required a production increase for a new season.

The solution came when Netflix entered the scene as co-producer shortly after the third season. Netflix had entered the Spanish market in October 2015 as one of the last European countries where it arrived. However, as already mentioned, the SVoD platform soon started to produce its own original content in the country, playing an active role not only as an exhibitor but also as a commissioner of Spanish content.

In *The Ministry of Time* (Olivares & Olivares, 2015), the entrance of Netflix as a co-producer allowed a larger budget of up to €700,000 for each episode in the third season. In exchange, Netflix requested the inclusion of the third season of the series on its catalog after it had been aired on the public channel, and to have the exclusivity in the international market for all the episodes, including the old seasons in the Spanish catalog as well. As a result, TVE was not able to offer the series on its on-demand platform or to have it on its international channel from the end of the third season (November 2017) until February 2020, when the contract with Netflix ended. While the Spanish public corporation was able to keep the first window of the series, by assigning the exclusivity rights to Netflix, the broadcaster was not the main exhibitor of the series for more than two years, eroding the link between the series and the public corporation in the minds of old fans and new viewers. However, the presence on Netflix catalogs outside Spain made it possible for the series to reach new audiences, something that could not have been achieved under the sole control of TVE.

In terms of content, Netflix also requested the introduction of more international well-known characters—like film director Alfred Hitchcock, French artist Dora Maar, and British statesman Winston Churchill—to increase the appeal of the series on international markets, but they always appeared within Spanish contexts (personal communication, October 26, 2019). This dichotomy further alters the meaning of success of a television series in the current television multiplatform context, which demands a certain level of international appeal, at least for high-budget series such as *The Ministry of Time* (Olivares & Olivares, 2015). This innovation also facilitated the international success of the series, particularly in Latin America, a region that the producers had originally foreseen as a second market because of the shared language, as previously commented, and where it was soon enthusiastically welcomed by thousands of fans. The introduction of well-known international characters had a cultural impact on the series back then, with the need to combine and interweave local and global cultural elements. Accordingly, the transnational niche communities of viewers are key in understanding the success of certain local genres across countries (Ju, 2020).

With the objective to gain back part of TVE's control over the series, the fourth season, aired in 2020 (three years after the third season), had a partnering shift: *Globomedia/The Mediapro Studio*, one of the main Spanish production companies, entered as a co-producer substituting Netflix and Cliffhanger (personal communication, October 26, 2019). At the same time, at the distribution level aside from the linear broadcast, Netflix was replaced by another international SVoD platform, HBO, which had different distribution conditions. HBO included the first three seasons of the series in its Spanish and Portuguese catalogs and launched each episode one day after it was aired on TVE. While Netflix released the previous season of the series only after it was finished on linear television, the main difference with the partnership

with HBO was the lack of an exclusivity clause; TVE retained the licensing rights allowing all four seasons on its website, even when the last season can temporarily be seen only outside Spain, after its linear release.

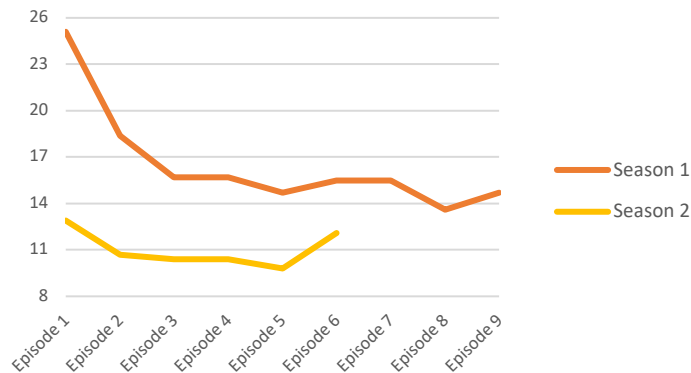
The different agreements with Netflix and HBO clearly exemplify the diverse approaches of Spanish broadcasters when they collaborate with transnational SVoD players. The high commitment to *The Ministry of Time* (Olivares & Olivares, 2015) by the public corporation, mainly as part of its public service remit, has influenced the evolution of the four seasons of the series and its relationship with SVoD platforms. The partnership with Netflix, and later on with HBO, helped increase the budgets of the episodes and secure the continuity of the series, but always with the Spanish public broadcaster TVE as the first window.

### ***Money Heist, From Domestic Cancellation to an International Success***

*Money Heist* (Pina, 2017) is a Spanish television crime series following the unfolding of a meticulously prepared heist by a group of thieves recruited and led by an enigmatic figure known as the "Professor." The series became a huge international success and left a permanent mark on the international popular culture through its distinctive brand images: the names of the characters based on cities around the world, the red outfits worn by the robbers, and their use of masks with the face of painter Salvador Dalí, plus the partisan song *Bella Ciao* (Pilas, 2018) as the main soundtrack. However, *Money Heist* did not start on the right foot in Spain, as it did later in the international markets.

The series was created by Alex Pina, author of some Spanish top rating series like *The Serranos* (Écija & Pina, 2003), the police comedy *Paco's Men* (Pina & Écija, 2005), and the jail drama *Locked Up* (Écija et al., 2015; in FOX Spain, 2018)—all of them with international success or country adaptations, like the Italian remake of *The Serranos*. The first two seasons of *Money Heist* (Pina, 2017) were produced by Vancouver Media, an audiovisual production company created by Pina and Esther Martínez Lobato in 2016 to produce *Money Heist*, and Atresmedia, the second largest commercial broadcasting company in Spain. Movistar+, the main Pay TV platform, participated as a minor partner. The pilot episode was first broadcast on prime time on May 2, 2017, on Antena 3, the main television channel of Atresmedia, with 25.1% of audience share and nearly 4 million viewers.

The first season included nine episodes, but audience decreased gradually (see Figure 4). For the last episode, there were only 2 million viewers and a share of 12.3% (Barlovento Comunicación, 2018). Given that it was a high-budget series, this was not considered a success for the linear channel. However, views on the Atresmedia catch-up platform were not included, which is still a characteristic of the audience measurement system in the Spanish market. The second season, with only six episodes, continued the plotline of the heist in the Royal Mint of Spain and had even lower ratings, since none of the episodes reached 2 million viewers and it also had a limited impact on social media. As a result, Atresmedia canceled the series, which had already concluded the different initial plotlines.



**Figure 4. Money Heist—Evolution of audience share of the linear broadcast in Antena 3, Spain (Seasons 1–2). Source: Authors, based on data from Kantar Media.**

Netflix, which had recently started operating in the country, showed interest in the series since the presentation of the pilot episode in Madrid and acquired the rights for its international distribution before its initial linear broadcast (personal communication, November 6, 2019). The deal allowed Netflix to make *Money Heist* (Pina, 2017) available in its catalogs after the linear broadcast of the first two seasons. However, episodes were to be shortened from 70 minutes (the Spanish standard time for drama) to 50 for the international version.

Consequently, the first nine episodes turned into 13 for Part 1, and the second batch was turned into nine episodes for Part 2. The adaptation of the length of each episode to the international standards benefited its international circulation and was pivotal in the decision taken by Atresmedia to shorten its future productions to 50 minutes, a measure that was soon copied by the Spanish public corporation TVE. In terms of production, this alteration has been one of the major disruptions that international SVoD players have brought to Spain (Castro & Cascajosa, 2020).

Netflix launched Part 1 of *Money Heist* (Pina, 2017) internationally as a “Netflix original” at the end of 2017. Even though there was a rather low-profile promotion of the series, it soon became a total success in many international markets such as Italy, France, Argentina, Brazil, and Turkey. It also became the most binge-watched series worldwide, even more than other popular English-language series (Shirk, 2018). With the release of Part 2 in April 2018, Netflix announced that it would commission another season of the acclaimed series.

Netflix became the only commissioner of the series with the new episodes originally launched on Netflix without a first window on Antena 3, the linear channel. While Netflix demanded exclusivity rights for all the episodes, Atresmedia remained linked to the project as a co-producer with Atresmedia Studios. As stated in the press release of its launch, the aim of the studio was “to create fiction exclusively for the main national and international television platforms branding themselves as expert producers of quality Spanish series” (Antena 3, 2017). In this case, the approach taken by Atresmedia differs greatly from the one taken by the public corporation when dealing with transnational SVoD players.

While Antena 3 conceded the first-window rights of the series to Netflix, Atresmedia leveraged the success and impact of the series to position its own brand, as a co-producer of the new episodes with Vancouver Media and Netflix. In 2018, Atresmedia Studios and Vancouver Media, as producers of the first part of *Money Heist* (Pina, 2017), won an international Emmy for best drama and became the first Spanish series to win this well-known award. In addition, the first two parts of the series and the extra content could be watched on Atresplayer Premium, its SVoD Pay TV platform. Nevertheless, as of February 2020, the number of subscribers was around 147.000, a very low number compared with the three main SVoD services operating in the market (*La Vanguardia*, 2020).

The appearance of Netflix as co-producer in the third part of the series, alongside the two Spanish companies involved, had a major impact on the production of the series other than just the change of the first window. In economic terms, the per episode budget more than doubled when compared with the previous parts. This allowed the producers to film in overseas locations, thereby increasing the international appeal of the series. All the dubbing and subtitling, as well as the national and international promotion of the series, were undertaken exclusively by Netflix (personal communication, November 6, 2019).

Despite the fact that Netflix does not disclose audience data for its platform, not even to its partner Vancouver Media (personal communication, November 6, 2019), the international success of *Money Heist* (Pina, 2017) Part 3 was undeniable. In the company's U.S. Twitter account (@lacasadepapel), it posted that "34.355.956 households around the world watched 'Money Heist' Part 3 in its first week!" (Netflix, 2019). After the low ratings of the initial episodes on Antena 3, the new season was also successful in the Spanish market. The release of the entire season at the same time and the *binge-watching* trend as a speedy strategy to consume the series (Jenner, 2017; McDonald & Smith-Rowsey, 2016), may have increased the fandom and interest in the story line by local viewers.

Netflix's commitment to this series was underscored by the international campaign to promote the third part of the show by creating various impressive marketing actions around the world. For example, in September 2019 at the Frankfurt Airport, several red boxes filled with faux money and with the names of the series characters were located at the baggage collection belts; in Milan, a large sculpture with the red costume and mask worn in the series was placed in the main square of the city, and in New York City, a billboard was situated in the middle of Times Square. These campaigns underline the international appeal of the series and the powerful strength of Netflix to promote local series. It is also a clear example of the contraflow argument (Ju, 2020) since a series from a peripheral country such as Spain is at the center of the transnational audiovisual flows.

Besides that, *Money Heist* (Pina, 2017) has become a popular global culture element that would not have been possible without Netflix. However, given the second role undertaken by Spanish players in linear broadcast, the international distribution of the series questions the role of Spanish broadcasters in the production and commissioning within and outside domestic frontiers.

### Conclusions

The entrance of the main global SVoD platforms in the Spanish market has had profound consequences in terms of industry and cultural trades of serialized fiction on the local market. We can affirm that the hybridization of the market has a current mutual and complex relationship among public and commercial players, local independent producers, Pay TV services, and the new global SVoD platforms.

First, the entrance of these new players has increased the volume of commissioned television series in the market, and this has had a clear economic impact on Spanish producers. Nevertheless, and despite the undeniable importance of transnational SVoD platforms and their impact on the local market, the larger commissioners of Spanish fiction production continue to be the traditional channels and, as of recent years, one brand in particular: Movistar+, Spain's leading multichannel service. Since 2017, it has significantly increased its production, both in number and areas. Therefore, while the main international SVoD platforms are altering the Spanish market, these *do not dominate* the Spanish audiovisual industry—at least not yet.

Second, because of the recent success of series such as *The Ministry of Time* (Olivares & Olivares, 2015) and *Money Heist* (Pina, 2017), the Spanish television industry has become a noticeable player on those international markets that before these series seemed unreachable. Therefore, both can be considered “pioneers” that led the way for other Spanish series that want to make it big in the international market. These series also brought along local audience competition and clear profit-oriented goals, something relatively new for the Spanish public broadcaster RTVE (Arriaza Ibarra, 2015a). In this sense, we assert the *asymmetrical interdependence* created by the imported content and the exported Spanish series around the world. While Spain has increased the number of its series that reach international audiences, the number of imported series, mainly from the United States, is still by far greater than those exported, as it also happens in other parts of the world.

Third, and closely related to the international success of some Spanish series, international SVoD platforms nowadays consider Spain as a key market for their growth outside the United States. They have become recurrent co-producers of Spanish series in exchange for a second window, a parallel distribution, or even a first window before the broadcast in the linear schedules of traditional channels. As we have stated, the windowing process of the Spanish series is being reformulated through the combination of different strategies and windowing tactics. In this respect, Amazon Prime Video and HBO have a strategy that combines their provision of Spanish series with the traditional airing on linear Spanish TV channels, before or after the on-demand release.

While there are some original titles produced exclusively for both platforms, Amazon Prime Video and HBO have established clear relationships of mutual benefit with traditional Spanish broadcasters. The *Ministry of Time* (Olivares & Olivares, 2015) is a clear example of this level of collaboration, where the public broadcaster and the local producer have managed to continue the series, despite low linear ratings, with a partnership with HBO that did not include the licensing rights. The confidence in the series as public service product, key in the European television system (Arriaza Ibarra, 2015b) has been demonstrated repeatedly and through its different seasons by TVE. In contrast, Netflix has shown a more aggressive approach, situating the exclusivity rights at the center of the negotiations with other local players and creating a higher

volume of original Spanish titles native to the platform, as requested for the new seasons of *Money Heist* (Pina, 2017). In addition, the income resulting from the different deals established with SVoD platforms determines the level of success of serialized fiction. SVoD platforms offer a clear advantage for the internationalization of Spanish series and a second-window revenue in the same country. However, the lack of broadcasters' control of their series—sometimes by ceding the first window to an SVoD platform—leads to a weaker brand image, even in the same local market. Other European corporations such as the BBC are positioning their logos on the Netflix catalog, while Spanish viewers do not know the commissioner of the local series they are watching, and, in our opinion, this will diminish Spain's presence in the viewers' minds.

The exclusivity rights for television series are at the center of the different negotiations with international SVoDs. Most of the Spanish series present in SVoD catalogs are reruns of local series that found a second window for distribution, as this is a recurrent strategy used to increase the appeal and volume of catalogs (Gilbert, 2019). However, Spain still receives more imported content than the volume it exports, as a clear example of the *asymmetrical interdependence* matrix of the current transnational television flows (Alankus & Yanardagolu, 2016; Straubhaar, 2013).

On the other hand, in terms of cultural trade, as shown through the analysis of *The Ministry of Time* (Olivares & Olivares, 2015) and *Money Heist* (Pina, 2017), the content of Spanish series has been altered because of the entrance of transnational services such as co-producers and distributors. This alteration, to a greater or lesser extent, erodes the local cultural significance of the series and promotes a more culture-neutral fiction (Cornelio-Marí, 2020). In contrast, this promotes the international and economic success of the series, thus facilitating the creation of transnational niche audiences (Ju, 2020). The rising international success of the Spanish series analyzed in this article has proved to be a clear example of this trend.

Yet unlike other countries, the popularity of Spanish series is not connected to a distinctive genre that identifies and resumes the Spanish brand as it happens in some other regions, like Turkey or South Korea (Alankus & Yanardagolu, 2016; Ju, 2020; Yörük & Vatikiotis, 2013). While the television exchanges between Spain and Latin America were not high before in on-demand distribution (Navarro & Prado, 2019), SVoD platforms are increasing the flows between Spanish-speaking territories in both directions and facilitating co-productions between countries. Spanish-language productions have become popular, creating a strong geolinguistic market with Latin America (Sinclair, Jacka, & Cunningham, 1996). Furthermore, we confirm that there is a "Latino" brand, coming not only from Spain but also from other Spanish-language countries, rising rapidly in the international market, and this is a fact that has become a considerable *push* in the popularization of these fictional series.

As a final general conclusion, Spain has proved to be a pertinent case study to analyze the effects of SVoD platforms in local markets. The findings in this article reflect the reformulation of the Spanish television industry, which now has a significantly higher presence in the transnational market in terms of industry and cultural trades than, for example, only one decade ago. Without any doubt, the entrance of the international SVoD platforms has produced a mutually beneficial relationship with the public and commercial domestic broadcasters, Pay TV platforms, and independent producers. Nevertheless, these changes are still led by Spanish domestic players as the highest commissioners and distributors of Spanish series in the country, albeit it implies a lower role in the internationalization of their series. With this in



mind, further research is advisable to ascertain the presence of Spanish series in the international catalogs of the main SVoD platforms.

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