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Miscellaneous

The production of Spanish fiction series for SVOD: evolution, trends and strategies

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Abstract
The consolidation of digital television via subscription video on demand (SVOD) services has created an unprecedented increase in the consumption of serialised TV shows, which has had direct consequences on the content production sector. Faced with an increasingly demanding, hyperconnected and discerning audience and a supply of content never previously seen, television production and distribution strategies are involved in a process of change and adaptation. This paper seeks to analyse the production of Spanish television series created to be distributed on SVOD platforms. The aim is to know the role that production companies play in the creation of television series for SVOD so as to identify strategies and cooperative alliances between production companies and platforms and to detect possible patterns and trends in the operations of the audiovisual market. Using a mixed methodology that combines quantitative study with qualitative data analysis, the 88 Spanish TV series and miniseries that premiered on SVOD platforms from 2016 to 2021 are analysed, taking as a starting point the year in which these platforms began operating in Spain. The results confirm a trend towards cooperation between independent production companies and the platforms themselves, while no presence of in-house production is observed. Likewise, the atomisation of the role of production companies in the context of SVOD is shown, a phenomenon that already existed in generalist television production.

Keywords
Spanish TV fiction, audiovisual production, TV series, SVOD, TV.

1. Introduction

Television offerings have multiplied dramatically in the last two decades with digital technologies, leading to an ongoing fragmentation of the television audience, as several authors have already noted (Napoli, 2011; Lotz, 2007; Anderson, 2006). In its most recent phase, the arrival and rapid popularisation of *streaming* platforms has not only changed the way television is watched and consumed but has also shaken the foundations of the audiovisual business landscape. In this way, the great majority of operators and agents in the television market have had to adapt to the consumption habits of new audiences in order to survive in today's complex and competitive media environment.

Digital and online television brings together a remarkable range of audiovisual offerings, business models and user practices (Prado, 2017, p. 127). The concept of over the top (OTT), which refers to the transmission of audio, video and other content over the internet without the involvement of traditional operators in the distribution of content, is undergoing a certain distortion of its original function (Prado, 2017, p. 128). This decontextualisation of the technical employability of OTT has generated "a shift towards industrial players that articulate professional content by implementing a financing system based essentially on advertising, subscription and/or the purchase and/or rental of content" (García Leiva, 2019, p. 3, citing Prado, 2017). Indeed, the professionalisation and consolidation of OTT services in the audiovisual market has led to different monetisation models for video on demand, including SVOD (subscription video on demand), in which the audience pays a monthly or annual subscription to access the content, AVODs (advertising video on demand), which base their policy on free access to content in exchange for the insertion of advertising, and TVODs (transactional video on demand), where consumers purchase content on a pay-per-view basis on an ad hoc basis.

The arrival of Netflix in 2015, together with the first *á la carte* actions of Movistar+, marked the beginning of a new television era in Spain orientated towards on-demand consumption. A year later, HBO and Amazon Prime Video, as well as the rest of the platforms that have successively joined the on-demand service, ended up altering both the way of consuming television and the usual programming process and, by extension, the production of television content. The flow TV, or planned flow, which Raymond Williams (1974) defined as the strategy based on the programming blocks of television channels whose intention was to retain and build audience loyalty, loses its meaning in the context of on-demand television, in which big data and personalisation algorithms are the only valid flows for building loyalty, recommending or making attractive content visible to digital audiences (Heredia-Ruiz, Quirós-Ramírez & Quiceno-Castañeda, 2021). Accordingly, in recent years the planned flow that had characterised television strategy almost from its origins has been replaced by the offer of on-demand content, modifying the strategic positioning of the different multimedia groups, television channels, production companies and, of course, consumers themselves.

In a changing television scenario, in which video on demand appears to lead the race for content, new interests, formulas and strategies are emerging that condition the way in which content is created, produced and distributed (Telkmann, 2021; Doyle, 2016; Smith & Hendricks, 2010). Television series, in particular, are presented as the central element in the offer of SVOD platforms, so it could be said that the rise of the serialised fiction format has been decisive in the transition towards on-demand consumption, while other formats such as reality shows have gained great weight in conventional television (Villegas, 2018; Hidalgo-Marí *et al*., 2021).

This paper includes research carried out from the perspective of content production that provides data on production companies, platforms and production strategies detected in the recent scenario of Spanish serialised fiction created specifically for SVOD. The study aims to establish a state of the art that goes a step further into the study of production and its different formulations as a determining element of the general offer of series on SVOD platforms. To this end, through an exploratory qualitative analysis supported by quantitative data that takes as a reference the totality of Spanish serialised fiction originally distributed on SVOD from 2016 to 2021 inclusive, some of the keys that structurally condition the supply of fiction on SVOD platforms are presented.

2. Audiovisual production in television: the state of the art

Television content production companies have been present practically from the origins of television in Spain in 1956. However, in those years, their work was aimed only at providing content for public television and, therefore, there were few production companies dedicated exclusively to television production. Analysis of press dossiers (*El País*, 1978, p. 23; *Diario Ya*, n.d.) referring to the first decades of operation of Spanish public television shows that in the

1970s there were already independent production companies responsible for both entertainment and fiction programmes[1]. In the 1980s, more than 20 fiction series were produced for prime-time programming on the state public channel. Many of these series were produced by companies outside of TVE (Palacio, 2008, p. 158). However, it was with the arrival of the regional television channels and the approval of the Private Television Law in 1988, which put an end to a television monopoly in Spain that had lasted almost 35 years, that there was an unprecedented growth in the number of television production companies (Medina-Nieto, 2018). It was precisely this growth that made it possible to overcome the economic difficulties suffered by the nascent channels and TVE itself, which "continued to operate under the same system as during the monopoly period, increasing its debt year after year" (Tijeras, 2005, pp. 112-113).

As Fernández-Quijada (2009, p. 60) states, the opening of the Spanish television market to private channels led to a significant increase in the number of television content production companies, a fact that made the outsourcing of production commonplace and, in turn, helped cope with the budgetary constraints in force at the time (Artero, 2008; Bustamante, 2003; Bustamante, 1999). Consequently, the new model of television competition established after the end of the public television monopoly in Spain completely transformed the way in which television was understood, not only in terms of programming and planned flow but also in terms of the advertising industry and the production of audiovisual content itself (Bardají & Gómez, 2004, p. 33). A text by Guerrero (2010) alludes to the almost exclusive presence of in-house production of the new channels in their early stages, following the model of public television, while also referring to an early and pressing need to outsource production in order to reduce costs:

> From the outset, the channels had complete television studios and a large staff to base their programme offerings on in-house production content, i.e., produced with their own technical and human resources. This conception of the television channel as a producer and broadcaster made it a potential client for independent production companies, but also a competitor. However, the model implemented, a faithful copy of the prevailing system in public television, implied such high maintenance costs that it soon proved to be economically unsustainable (Guerrero, 2010, p. 151).

A revealing study by Lacalle and Sánchez (2019) noted the importance of independent production companies in the development and consolidation of Spanish fiction series on generalist television. One of the main conclusions of this work emphasises the atomisation of production companies, whose operation is fundamentally characterised by the dispersion of production. Although this study focuses on the analysis of production for generalist television, its authors, being aware of the migration of television consumption towards video on demand, predicted that:

> The incursion into in-house production by streaming fiction distributors (Netflix, Amazon Prime Video, etc.) and teleoperators (Movistar+), with a clear commitment to niche television, prefigures a reconfiguration whose medium- and long-term scope seems inextricably linked to the future [...] of generalist free-to-air television (Lacalle & Sánchez, 2019, p. 7).

Indeed, the giants of the streaming market in Spain, led by platforms such as Netflix and HBO, have forced generalist television channels to rethink their content programming strategies and planned flows (Heredia-Ruiz, Quirós-Ramírez & Quiceno-Castañeda, 2021). Thus, these channels have reformulated their approaches, among other things, by retrieving their products to distribute them on their own platforms in order to counter the offer of large SVOD providers (Komissarov & Sánchez-Narvarte, 2019; Alcolea-Díaz *et al.*, 2022). But, above all,

[1] Aldebarán Films S. A. as responsible for the series *Cañas y barro (*1978); Telestar S. A. as responsible for *Curro Jiménez* (1976); or Pax Films S. A. as responsible for *El juglar y la reina (*1978), among others.

they have influenced the strategic approach of other operators, especially pay-TV operators such as Movistar+, which has included the production function among its main tasks, becoming a producer as well as a distributor (Pérez-Rufi, Gómez-Pérez & Castro-Higueras, 2020, p. 397).

This competitive scenario has meant that the response of the major pay platforms in Spain has been a commitment to original and exclusive production, a constant feature in recent years in platforms such as Netflix, Amazon Prime Video and HBO, which has already been evident in other works (Hidalgo-Marí 2020; Hidalgo-Marí *et al.*, 2021). However, in this competitive context, win/win cooperative strategies have also been developed, which show that alliances and cooperation between the agents involved probably represent the survival mechanism in a market as uncertain as the current audiovisual market. According to Pérez-Rufi, Gómez-Pérez & Castro-Higueras (2020):

> The audiovisual industry, as a central sector in multimedia groups, is well aware of the market situation and its instability. The introduction of OTT platforms in the Spanish market, but also internationally, has led to unexpected alliances and convergences, as well as risky bets on products and services whose profitability and viability remain to be seen (2020, p. 7).

A phenomenon that Cascajosa-Virino already anticipated when he considered that fiction production in Spain is experiencing a "strange" moment in which competitive relations are becoming, in turn, cooperative, with traditional operators allying with new agents in search of "the joint exploitation of content through increasingly sophisticated production and distribution formulas" (2018a, p. 21). A good example of this is the series produced on behalf of generalist television channels that have subsequently been successfully transferred to SVOD platforms, as detailed in an article by Arriaza Ibarra and Navarro (2022) on the cases of *El ministerio del tiempo* and *La casa de papel*, among others.

Knowing and studying the role of production companies in the vast ecosystem in which they operate constitutes a research challenge, but also a necessity in order to understand how the market works, as well as the strategic formulas from which productions derive. After all, as Siri (2016) stated in a work on Netflix that is applicable to the rest of the platforms:

> Netflix [or any other platform] does not exist in isolation but as an element of an ecosystem where it maintains relationships of competition, dependence and collaboration with other industry players, both traditional and new (2016, p. 49).

3. Objectives and methodology

The main objective of this paper is to analyse the production of Spanish television fiction originally created for its premiere and distribution on video-on-demand platforms. This analysis seeks to understand the context and evolution of the production of this type of content, with the ultimate intention of contributing to the study of the current state of the audiovisual production sector in Spain. This main objective leads to a series of specific objectives. Firstly, to discover the role played by production companies in the creation of consumer series in SVOD (OE1). Secondly, to identify formulas for cooperation and business relations between production companies and distribution platforms (SO2). Finally, to detect possible patterns and trends in the functioning of the current serialised fiction market (SO3).

In order to respond to the above objectives, a method is applied combining an exploratory qualitative study with a quantitative approach. This mixed methodology, designed *ad hoc* research in which all fiction series released in Spain on SVOD platforms from 2016 to 2021 have been recorded. The beginning of this time-frame coincides with the first year in which one of the major global SVOD platforms, namely Netflix, released its first original Spanish-produced series.

To create the specific database, the research team used the digital catalogues of the platforms themselves, completing this information with data available in the main Internet databases[2], and proceeded to analyse and classify all the titles released.

The final sample comprises a total of 80 Spanish series released on SVOD platforms from 2016 to 2021, including miniseries, a format in demand in the context of digital television production. Other fiction formats, such as *telenovelas*, telefilms and the like, have been excluded, as they are considered to be outside of the initial scope of this research.

Once the sample was collected, each of the series was subjected to an analysis of categories created *ad hoc*: 1) year of broadcast; 2) premiere platform; 3) production company; 4) number of episodes; 5) number of seasons broadcast and 6) length of episodes. Once analysis of these categories had been performed, the nature of the production relationship that gave rise to each series was classified on the basis of the following criteria:

- External production: those series produced by a single independent external production company, i.e., without a direct, stable and exclusive business relationship with the platform, which finances the entire production.
- Co-production between external production companies: those series collaboratively produced (regardless of their percentage of participation) by more than one external production company without a direct, stable and exclusive business relationship with the platform, which provides all the financing for the production.
- Co-productions between production companies and platforms: series in which the production has been carried out jointly by one (or more than one) external production company and a platform (or a production company or studio subsidiary of the latter), which, in addition to its direct participation in the production, provides all of the financing.

These classification categories derive from an adaptation of the typologies of television production proposed by Fernández-Quijada (2013, p. 105), who identified three types of production: internal production, external production and co-production, and external production. In submitting this typology to the needs of the present analysis, it was considered convenient to divide the external production and co-production proposed by Fernández-Quijada into three different categories, while excluding external production (or independent production without a prior financing agreement) since, as Álvarez Monzoncillo and López Villanueva (1999) point out, in practice this type of production does not exist in Spain. Moreover, after the initial classification, the label of in-house production was dispensed with. If we understand in-house production as series produced by the platform itself, either directly or through a production company or subsidiary studio, without the participation of external production companies, we can see that this formula does not exist in Spanish SVOD productions[3].

The results below show the weight of each of the types of production analysed in the Spanish fiction production scenario for SVOD, and include both the number of series produced in each category and the qualitative specifications of each formula[4].

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[2] The Movie Db, IMDb and AllMovie databases were consulted, as well as Filmaffinity, in order to corroborate and contrast the information available in the digital catalogues of the platforms under study.

[3] This absence corresponds to the decline of purely domestic production already predicted by Lacalle and Sánchez (2018) in their study on production for conventional television.

[4] As a methodological note, it is necessary to point out that, after the breakdown by typology and the analysis of the nature of each of the production companies included in this study, one special case has been identified. This is the production company Buendía Estudios, the second in volume of productions in the sample, a company created in 2020 through a 50/50 alliance between the multimedia groups Atresmedia, which thereby integrated the already existing Atresmedia Studios, and Telefónica España, through Movistar, with the aim of generating content both for platforms outside both holding companies and for broadcasting on their own channels (such as the Atresplayer and Movistar+ platforms). In the practice of its business operation, this production company acts externally, without

4. Results

Analysis of the total production of Spanish fiction in the period studied (2016-2021) indicates that a total of 80 serialised TV fiction series have been released on SVOD platforms. These premieres present a dynamic scenario that, when analysed diachronically, shows a marked change of trend in terms of the orientation of Spanish production, as already indicated in a work by Mateos-Pérez and Sirera-Blanco (2021, p. 5). When comparing the data obtained in our study with those provided by the above work regarding the production of Spanish serialised fiction for conventional television (2021, p. 6), we observe that, in the first year of our sample (2016), production for SVOD was residual, with just a single case compared to 16 productions for conventional television. As time progresses, the commitment to the production of Spanish serialised fiction exclusively for SVOD platforms grows significantly, to the point of surpassing production for conventional television. 2017 and 2018 are the years with the highest volume of production for conventional television, with 30 and 32 instances respectively, also coinciding with a cautious but growing commitment to production for SVOD, with 3 and 10 instances respectively. 2020 is the first year in which SVOD production first exceeds conventional TV production, with 29 instances compared to 21. In the last year of the study, despite a drop in the number of premieres on platforms (21 instances), these are still higher than those for conventional television (15 instances), confirming the gap between the two media. We should bear in mind that 2020 was a year marked by the Covid-19 pandemic and that the consequences of the social and labour stoppage significantly affected the audiovisual sector, something that would explain why fiction premieres in general fell in number in 2021.

4.1. *Overview of Spanish fiction production for SVOD*

In the six-year period covered by this study, a total of 80 fiction series created for video on demand platforms were produced in Spain, of which 61 (76%) are series of six or more episodes and 19 (24%) have been identified as miniseries of five or fewer episodes[5]. These overall figures represent a total broadcasting of 785 episodes created expressly for on-demand consumption, spread over 104 seasons, generating a total of more than 33,000 minutes of content.

If we look at the evolution by year, we observe a marked upward trend, characterised by a modest take-off in 2016 (a single case), followed by 3 instances in the following year. From this point onwards, there is a progressive increase that brings the total number of series released in the final year of the sample (2021) to 21 instances.

When specifically examining the destination platforms of the series, we observe that the most prolific platform in terms of releasing Spanish fiction was Movistar+, with a total of 28 series, followed by Netflix Spain, with 16 releases. In turn, Atresplayer released 11 series, while HBO and Amazon Prime Video had 10 instances each (see Table 1).

direct and exclusive links to any platform. Therefore, in this research Buendía Estudios has been considered an independent production company in the broad sense of the term.

[5] Given the disparity of criteria and the ambiguity that exists when it comes to establishing the limits between series and miniseries, we have opted to follow the guidelines of the National Academy of Television Arts and Sciences of the United States for the Emmy Awards. Thus, a fictional production falls into the category of a series if it has a minimum of six episodes, and a miniseries (or "limited/anthology series" in the Academy's most recent denomination) when the number of episodes is between two and five (National Academy of Television Arts & Sciences, 2022, pp. 50-51).

Table 1. Spanish productions released on platforms by year.

	2016	2017	2018	2019	2020	2021	Total
Atresplayer				1	8	2	11
Filmin					1	1	2
HBO		1		2	5	2	10
Movistar+		1	8	7	5	7	28
Netflix	1	1	1	5	3	5	16
Orange TV					3	-	3
Amazon Prime Video			1	1	4	4	10
Total	**1**	**3**	**10**	**16**	**29**	**21**	**80**

Source: Own elaboration.

In general terms, a significant growth in fiction production by the platforms can be seen, although the year 2021 (particularly affected by the consequences of the Covid-19 pandemic) represented an overall decrease. However, the data for the final year analysed show that the SVOD platforms with the highest production (Netflix and Movistar+) exhibited slight growth. The case of Atresplayer is noteworthy, since after debuting in SVOD production with a single series in 2019, it produced 8 series in 2020, leading the commitment to Spanish fiction in that year. However, in 2021 its production dropped considerably, registering only two premieres. Orange TV, on the other hand, after a commitment to production in 2020, stopped producing in 2021.

Special mention should be made of HBO, which shows a drop of more than 50% on its previous production (from 5 premieres in 2020 to 2 in the last year of the study). However, a broader analysis of HBO's production in 2021 would enable us to note a commitment to other types of premieres, such as documentary fiction, a genre not considered in this study. For their part, Amazon Prime Video and Filmin remain constant in terms of production volume.

A detailed analysis of the predominant genres shows that Spanish productions for video on demand are committed to drama as the priority genre, representing 55% (44 instances) of the total number of fictions registered, followed by thrillers, which represent 21% (17 instances). We see, therefore, that 76% of instances are distributed between drama and thriller, highlighting the prominence of these genres in the overall SVOD offer. Comedy, on the other hand, occupies only 19% of the sample analysed (15 instances), while other genres such as historical fiction (2 instances) or horror (2 instances) are barely relevant in Spanish fiction production for SVOD.

A study of the production companies behind the television fiction created for platforms from 2016 to 2021 shows a total of 83 production companies that contributed to the development of these contents. Without for the moment going into the collaboration or co-production relationships existing between the production companies and the platforms, we can state that there is no concentration in terms of production, since of the 83 production companies identified, only 39 (47%) produced more than three titles in the period of the study. As can be seen in Graph 1, Bambú Producciones has the greatest weight in the sample, with 11 productions, followed by Buendía Estudios, Corte y Confección de Películas and Zeta Audiovisual, with 5 productions each. Vaca Films, Diagonal TV, Plano a Plano Producciones and Vancouver Media produced between three and four series. The remaining 53% of production companies contributed with a single production, a fact that allows us to advance the notion that there is considerable atomisation in the Spanish production of series for SVOD, which replicates the trend in the generalist television market, as confirmed by other previous studies (Pérez-Rufi, Gómez-Pérez & Castro-Higueras, 2020; Lacalle & Sánchez, 2019).

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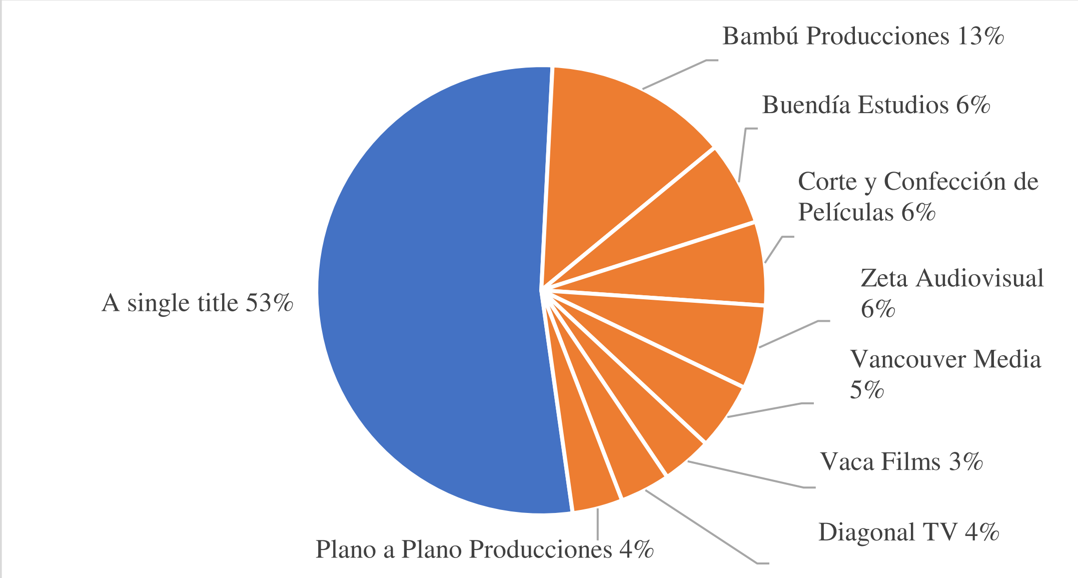
Graph 1. Volume of series released by production companies.

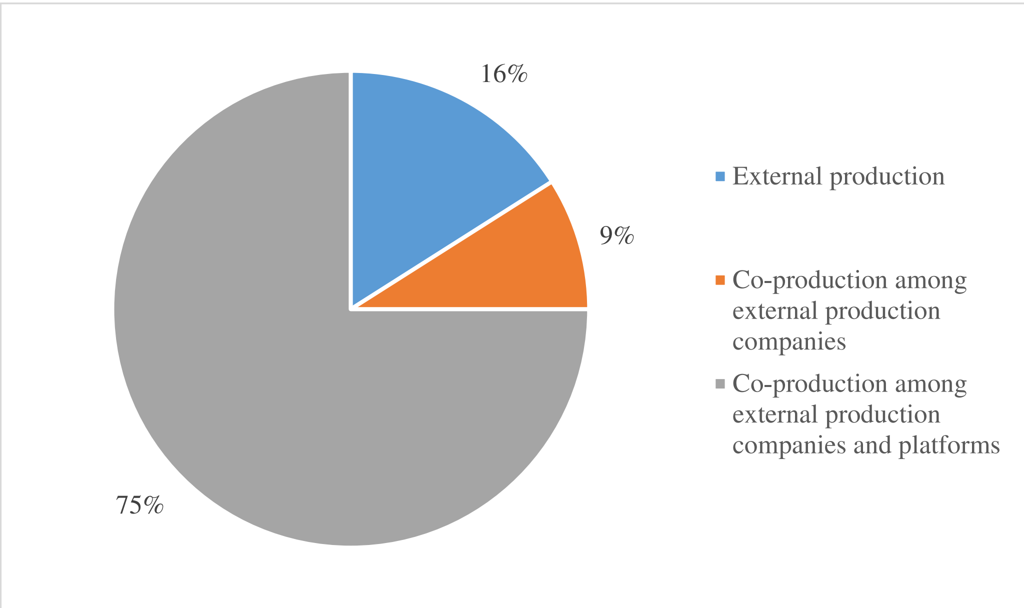


Source: Own elaboration.

4.2. *Relationships and alliances in the new Spanish fiction production scenario*

Having reviewed the role of each production company and examined the different relationships established between production companies and platforms when developing the series, the 80 productions under consideration are distributed into the following typologies: 1) external production, 2) co-production between external production companies, 3) co-production between external production companies and platforms; while there is no case that corresponds to the internal production typology (see Graph 2).

Graph 2. Series according to type of production.



Source: Own elaboration.

As shown in Graph 2, the commonest production formula is co-production between SVOD platforms and external production companies, something noted in 75% of productions (60 instances). In second place, despite representing only 16% of the total (13 instances), there are series produced by external production companies that, through a prior financing agreement, offer their fiction to the platforms. Thirdly, there are 7 instances (9%) in which two or more external production companies co-produce a fiction series for a platform, although this is not a very common formula in the SVOD context, as was already the case in generalist television production. As for in-house production by the platforms, as previously noted, in the six years under analysis no instance was detected that fits this typology, which indicates that it is a practice that is not attractive, at least for the time being, for the platforms themselves. Finally, it should be noted that, if we add the cases of external production and those of co-production between external production companies, we have 20 instances (25%) of what we could generically call "external production formulas," compared to the 60 instances (75%) in which the platforms themselves participated in co-production with an independent production company.

4.2.1. External production

As noted above, 13 productions are derived from an external production by a single production company (see Table 2). We note that external production appears for the first time in 2019, after three years of development of Spanish fiction for SVOD. These data enable us to point out that, in the first phase, with the novelty of the implementation of SVOD in the Spanish audiovisual market, the platforms opted for the co-production model, so that they ensured a more direct presence and greater control in the production of the series. However, as the on-demand consumption of Spanish fiction has consolidated, the platforms have moved into the field of external production, following the operating patterns already established for conventional television.

Table 2. Series produced by external production companies.

YEAR	Typology	Title	Producer company	Format	Seasons	Episodes
2021	External	Nevenka	Newtral Media	MS	-	3
2020	External	Física o química: el reencuentro	Buendía Estudios	MS	-	2
2020	External	Los favoritos de Midas	Nostromo Pictures	S	1	6
2020	External	By Ana Milán	Buendía Estudios	S	1	8
2020	External	Escenario 0	Calle Cruzada	S	-	6
2020	External	Campamento Albanta	Lucky Road Productions	S	1	6
2020	External	Caminantes	100 balas	S	1	8
2020	External	Benidorm	Plano a Plano	S	1	8
2020	External	#Luimelia	Diagonal TV	S	2	12
2020	External	Tus monstruos	Calipo PC	S	1	6
2019	External	Hernán	Onza	S	1	8
2019	External	Hache	Weekend Studio	S	1	8
2019	External	Criminal: España	Idiotlamp Productions	MS	-	3
2021	Co-production	Parot	RTVE, ViacomCBS, Onza Entert.	S	1	10
2021	Co-production	Los protegidos: el regreso	Buendía Estudios, Boomerang TV	S	1	4
2021	Co-production	Historias para no dormir	VIS, Prointel, Isla Audiovisual	MS	1	4
2020	Co-production	Relatos con-fin-a-dos	Morena Films, Gessas Producciones	MS	-	5
2020	Co-production	En casa	WarnerBros España, Caballo Films	MS	-	5
2019	Co-production	La sala	Isla Audiovisual, Funwood Media	S	1	8
2016	Co-production	Cuatro estaciones en la Habana	Mistery Prod., Nadcon Film, Tornasol	MS	-	4

Source: Own elaboration.

4.2.2. Co-production between external production companies

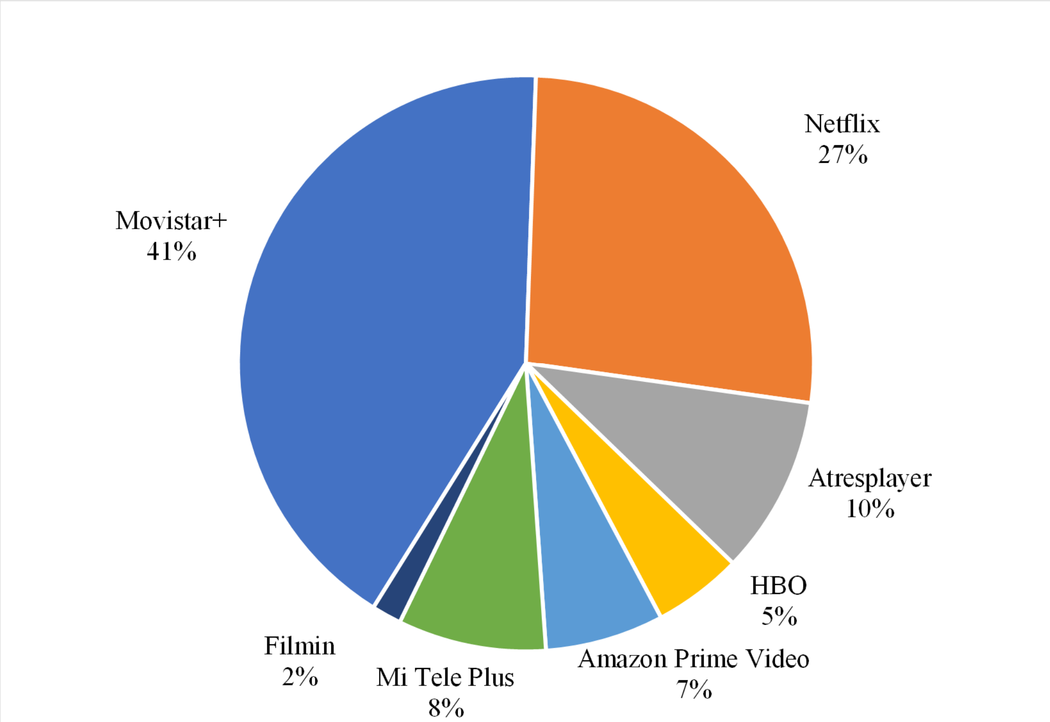
In some cases, production is carried out in the form of collaboration or co-production between external production companies. This form of production has been identified in 7% of the total production (7 series), listed in Table 2 under the label of co-production. This is not a new development, since the first entry categorised in the sample, the miniseries *Cuatro estaciones en la Habana* (Netflix, 2016), was already made through the cooperation of three independent production companies, namely Mistery Producciones, Nadcon Film and Tornasol Films. The cases detected indicate that co-production between external production companies occurs in both miniseries and series (see Table 2).

4.2.3 Co-productions between external production companies and platforms

Of the 80 series released on SVOD platforms in the period analysed, 60 were made through co-production between external production companies and the platforms themselves. This fact, which represents 68% of the total, is a determining factor that highlights the most prolific formula for the production of series for SVOD (see graph 3).

We can say that the most relevant production in this sense is that of Movistar+, which appears as a co-producer of the series on 25 occasions, which represents 41% of the total of this type of co-productions. This figure shows that co-production by Movistar+ has a great specific weight in the overall production of Spanish fiction for SVOD. The position of Movistar+ as the leading platform in co-production is far removed from the rest of the field, with Netflix being the second most likely platform to co-produce Spanish fiction, with 16 instances (27%). Atresplayer is even further behind, with 6 co-productions (10%).

Graph 3. Platforms according to co-productions released.



Source: Own elaboration.

A joint analysis of the most active production companies with the greatest presence in co-production with platforms enables us to determine that the development of these products was carried out by 34 different production companies. A more specific view of these production companies shows us that there is a dispersion in production work, as only Bambú Producciones stands out, with 5 fiction products released, and only 3 other production companies repeat co-productions: Zeta Audiovisual, Vaca Films and Alea Media, with 2 co-productions each. It is clear, therefore, that 24% of co-productions between production companies and SVOD platforms are concentrated in four production companies. The remaining 76% are instances in which the production company participated in a co-production of this type only once, which confirms the considerable dispersion that exists in this respect.

5. Discussion and conclusions

This study confirms a very significant commitment to Spanish fiction production in the context of SVOD, with exponential growth from the first and only Spanish production in 2016 to the 21 productions released in 2021. Movistar+ (28 productions) and Netflix (16 productions) are the platforms that have hosted the most titles in the six years covered by the study, although other platforms that have joined the video on demand market in Spain later also show very significant growth, as is the case with Atresplayer (11 productions) or Amazon Prime Video and HBO (with 10 productions each).

In terms of genre, SVOD fiction is characterised by a clear preference for drama and thrillers, leaving only a 19% share for comedies, which, bearing in mind that the comedy genre is less exportable due to its cultural conditioning factors, is largely explained by the desire for internationalisation that characterises SVOD fiction and which has been noted in other studies (Hidalgo-Marí, 2020).

The study on the role of production companies in Spanish mainstream television fiction by Lacalle and Sánchez (2019) showed that:

> The progressive abandonment of internal and associated external production modalities in favour of funded external production has contributed to perpetuating the traditional atomisation of a sector in which more than 60% of independent company producers have been involved in a single project between 1990 and 2017 (2019, p. 6).

The data exhibited in this paper present a similar situation in the SVOD context, despite entailing a much smaller sample due to the novelty of the phenomenon. We observe that, while internal production is non-existent in Spanish fiction production for SVOD, external production (either by a single independent production company or by two or more production companies in co-production) is highly fragmented in a large number of production companies. In this sense, we have been able to verify that only 16 production companies have contributed more than one production to the analysed offer, thus confirming the tendency towards atomisation already detected by Lacalle and Sánchez (2019) when analysing fiction production in generalist television. Therefore, it can be said that the irruption of SVOD has not meant, at least for the moment, any significant change in this particular aspect of the Spanish audiovisual production landscape.

In terms of production formulas, the study of relationships has confirmed that the most recurrent format is collaboration between external production companies and the platforms themselves, with 75% of the productions analysed occupying this modality, followed by production by external production companies, which occupy around 25% of the total production. The collaboration between external production companies and platforms shows a certain parallelism with a phenomenon already noted by Cascajosa-Virino (2018) in a study on the role of generalist channels and the management of television fiction in the face of the arrival of SVOD services, which showed how Spanish generalist channels opted to carry out alliances with SVODs instead of extending the profitability of series.

A diachronic view of the results enables us to detect that, over the first years of SVOD production, the novelty, the changes and the coexistence of generalist television and the platforms generated a certain caution in relation to the external production of fiction for SVOD by the platforms. However, as the on-demand consumption of Spanish fiction consolidates, the platforms are increasingly opting for the formula of external production by independent production companies, following the operating patterns already established for conventional television.

In any case, the relative novelty of the SVOD market represents a major business opportunity both for distribution platforms and for independent production companies and the audiovisual cultural industries in general, especially considering that co-production between Spanish production companies and distributors (not all of which are of Spanish origin) is the most common way of operating in the national market. In this sense, the new General Law on Audiovisual Communication (Law 13/2022, of 7 July – GLAC) seeks to underpin this beneficial relationship for the Spanish audiovisual industry. While the previous law (Law 7/2010) focused mainly on free-to-air DTT, the new legislation also includes streaming platforms. Thus, a relevant change in this law is the extension of the obligations to finance European audiovisual works (with 5% of their revenues when these are greater than 50 million euros) to SVOD providers, both those established in Spain (such as Movistar+ or Filmin) and those which, although of US origin and based in other EU states, direct part of their services specifically to the Spanish audience (such as Netflix, Amazon Prime Video or the more recent Disney+).

In short, this study has put on the table the role of production companies and platforms in relation to Spanish fiction released between 2016 and 2021. Our study, which analyses the first six years of SVOD operations in Spain, leaves open a series of future research projects such as, for example, those referring to assignments, product sales, exploitation licences and other secondary strategies that go beyond production and focus on the commercialisation of fiction. Likewise, an in-depth study of the new alliances that have arisen after the creation of production companies owned by media conglomerates on which, in turn, some platforms depend, such as the aforementioned case of Buendía Estudios, is still pending. This last factor introduces a relevant particularity that notes the importance of closely following the movement of production companies and their operating strategies, which undoubtedly have an impact on the available supply of Spanish fiction.

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