

# Why to regulate Netflix: the cross-national politics of the audiovisual media governance in the light of streaming platforms

Media, Culture &amp; Society

1–11

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DOI: 10.1177/01634437231182565

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## Abstract

Today, at a time of major downturn in the audiovisual sector, several regions and countries are reconsidering the scope and reach of domestic or regional audiovisual media governance and are developing policy instruments in order to involve transnational Video on Demand (VOD) platforms, such as Netflix, Prime Video, Disney+, in the financing, distribution and visibility of local, national and regional audiovisual content. A key issue that emerges from this backdrop is to provide convincing answers about why public authorities are feeling the urge to develop new regulations towards global VOD streamers in a specific sequence and temporality and to focus on variables, which are expected to understand this cross-national policy momentum for regulating VOD services. In addition, even though transnational VOD services represent disruptive new actors, creating industrial, technological and institutional shock, this disruption does not lead to the same political issue cross-nationally and to the same kind of policy responses. Firstly, the article explores the key outlines that the academic literature highlights in order to understand the regulation of online platforms in the media sectors. Secondly, it provides a cross-national portrayal of policy initiatives towards the VOD streamers, focusing on the EU Member States, Australia, Canada, Mexico and South Africa. Thirdly, the article argues that political struggles over VOD platforms are expected to be framed and fought simultaneously by two crucial variables, dealing with state-society relationships and global interdependence.

## Keywords

audiovisual regulation, Australia, Canada, cultural policy, European Union, media governance, Netflix, VOD platforms

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End of January 2023, the Australian government unveiled plans to impose Australian content investment quotas on Netflix, Disney+, Prime Video and other international streamers; at the same time, Canadian Senate and House of Commons were debating the Online Streaming Act requiring streaming services companies to contribute to Canadian audiovisual content. Indeed, global video-on-demand (VOD) streamers, such as Netflix, Amazon Prime Video or Disney+ have become major enablers of a transnational flow of cultural contents (Albornoz and Leiva, 2019; Lobato, 2018). While public policies in several countries are a historical feature of the audiovisual industries – with financial aid, taxation, market regulation –, over the recent years global VOD platforms have generated wholly new audiovisual markets beyond the reach of current policies putting high pressure on policymakers (Vlassis, 2021a; Vlassis et al., 2020). In this respect, they have been a key driver for rethinking audiovisual media governance in national and regional contexts (Flew and Gillett, 2021).

Today, several regions and countries have developed policy measures, such as content quotas and investment obligations, for involving large streaming platforms in the financing, distribution and visibility of audiovisual content. The key example is the European Union (EU), which adopted in 2018 a revised version of the Audiovisual Media Services Directive (AVMSD). In this respect, the EU Member States (MSs) are obliged to implement European/national content quotas in the online catalogues of VOD streamers, whereas several EU MSs and Switzerland are also developing investment obligations for VOD platforms (Vlassis, 2023). In a similar vein, on-going debates in Australia, Canada, Mexico and South Africa are dealing with the perspective of establishing similar measures for online streamers in the new platform-based audiovisual economy.

Following the rapid transition of audiences from linear services to VOD ones and the increasing multiplication of policy initiatives towards the streaming platforms across the globe, systematic reflexion is now required on the rationales for such policy intervention, as well as on the extent to which these changes impact on the audiovisual media governance. As Freedman (2008: 14) and Puppis (2010: 138) pointed out, media governance is seen as broader than media regulation and ‘refers to the sum total of mechanisms, both formal and informal, national and supranational, centralized and dispersed, that aim to organize media systems’. The article suggests that audiovisual media governance in the light of VOD streamers can be understood as a political process for organizing the relations of power and of regulation with respect to activities of platforms at multiple levels – local, national, regional and global (Freedman, 2008; Puppis, 2010; Vlassis, 2023); it’s composed of ideas, norms and institutions, impacting on several aspects in the platforms’ activities and allowing the involved actors to seek to coordinate their practices in a context of polyarchic authority (Avant et al., 2010).

The article argues that there is an analytical urgency to explore variables, which are expected to play a key role in the ongoing policy and regulatory changes in the audiovisual media governance. Obviously, today these normative demands towards platforms are at the core of various types of platform governance and – almost – no one doubts about the urge to regulate global online platforms (Cammaerts and Mansell, 2020; Flew et al., 2019; Helberger et al., 2018). However, the existence of pressing issues related to streaming platforms does not automatically give rise to governance arrangements to

meet them (Avant et al., 2010). In this respect, the academic literature should further highlight why public authorities have decided to adopt new regulations in a particular sequence and temporality – and not earlier or later. In other terms, it's crucial to investigate why and in which ways various stakeholders in audiovisual media governance have started putting into question the dominant normative pattern that VOD platforms are exclusively technical systems for content delivery and multiplying straightforward discussions about the virtues of self-regulation, whereas government controls over the internet were long associated with illiberal regimes (Flew and Wilding 2021: 49).

The article is composed of three sections: firstly, it aims to highlight the key outlines that the academic literature highlights in order to understand the regulation of online platforms in the media sectors. Secondly, it provides a cross-national portrayal of policy initiatives towards the VOD streamers, focusing on the EU MSs, Australia, Canada, Mexico and South Africa. Thirdly, the article discusses these policy initiatives through two crucial variables in the audiovisual media governance, dealing with state-interest groups relationships and global interdependence.

## **Media governance in the light of streaming platforms**

Scholars, in an analytical attempt to make sense of policy developments, have produced various assumptions towards media governance in the light of streaming platforms, which can be articulated around two approaches: the normative approach and the institutionalist perspective.

### *The normative approach*

Any attempt to analyse the on-going policy debates should start by aiming to define what normative principles ought to be followed in the media governance. The normative approach emphasizes how current regulatory regimes should reframe the platform power (van Dijck et al., 2019) and in which ways public authorities should update the governance norms for online platforms (Poell, 2020). By formulating statements as to what standards media governance ought to be based upon, Helberger et al. (2018) recommend platform governance will achieve the realization of public values provided that it would be articulated around the norm of 'cooperative responsibility' and on the dynamic interaction between platforms, users and public institutions. In a similar vein, platform governance should expand the notion of consumer welfare to citizen wellbeing, considering platform companies as part of an integrated platform ecosystem (van Dijck et al., 2019). From a democratic viewpoint, Cammaerts and Mansell (2020) consider a 'radical democratic framing' of the dominant digital platforms, relying on new deliberative process, which would denaturalize the prevailing logics of commercial datafication. Finally, in an industry-led governance system with opaque content-curation strategies, a growing part of the literature explores the personalized process of content discovery on platforms and seeks to highlight in which ways the discoverability and prominence of media content should be matters in platform governance with crucial implications for the general interest (McKelvey and Hunt, 2019; Mazzoli, 2020).

### *The institutionalist perspective*

Institutional rules are the basis of media regulation in the light of streaming platforms and any attempt to explore the on-going policy debates should start by exploring the institutional arrangements in which all forms of regulation are rooted (Donges, 2007: 327). Consideration of the place of online platforms in the institutional environment has inspired the emergence of works with attention to the role of different actors involved – States, non-governmental organizations, firms – in the platform governance (Gorwa, 2019a) and to the different modes – self-governance, external governance, co-governance – of regulating online platforms, their success and limits (Gorwa, 2019b). This perspective also focuses on the policies that have been emerged for regulating online platforms, but also on self-restrictions implemented by platforms in order to govern their activities for meeting market and consumer requirements (Gillespie, 2018). As such, the institutionalist perspective deals with the privatization of the media governance, through social media platform policies and technical design choices, affecting the free flow of information on the Internet and, in doing so, promoting or constraining public interest obligations in the media sectors (Flew et al., 2019). Besides, several scholars seek to compare regulatory frameworks and their effects on crucial issues for the audiovisual industries, such as the role of the AVMSD about the functions of data for advertising (Micova and Jacques, 2020) or the ways in which the EU strengthens the internal media market through measures affecting the transnational action of VOD platforms (Albornoz and Leiva, 2021; Iordache et al., 2022; Kostovska et al., 2020).

Indeed, the two approaches provide relevant insights on the interactions between media governance and online platforms. However, they should further explore three key aspects regarding the new policy developments. Firstly, in the liberal democracies, since the 2000s, media governance in the light of online platforms has been built on a scepticism towards the controlling ability of the State and on a fear of inappropriate and untimely public top-down intervention. Accordingly, major digital platforms have been able to successfully convince that they are technology companies rather than *stricto sensu* media or cultural industries, as well as to establish themselves as vital investors of cultural content and/or as technical systems for content delivery, shirking regulations that have applied to media and cultural governance (Popiel and Sang, 2021). Thus, it's necessary to understand why the norm of self-regulation in the digital media governance has come under increasing pressure since late 2010s and why new regulations towards streaming platforms and their market power are being developed in the media governance. In other terms, it's relevant to investigate why public authorities in several liberal regimes are feeling the urge to regulate online platforms in the media sectors, both considering large platforms not only as technology systems but also as cultural and media industries and multiplying discussions about the effectiveness of self-regulation.

Secondly, even though the institutionalist perspective argues that the on-going policy changes in the audiovisual media governance have been introduced in a path-dependent way, by building on familiar policy instruments from the analogue-content governance, the path-dependence framework does not provide a convincing answer why several public authorities have decided to apply regulations in a particular sequence and temporality and why the various policy measures governing VOD streamers have started taking

place since late 2010s. In addition, it's crucial to further investigate the differences in the decision-making processes: for instance, why do countries, such as Canada, with well-established public intervention in the audiovisual sector, are struggling to implement new measures on VOD platforms?

Thirdly, the academic literature recognizes the huge capabilities of global VOD streamers in capitalization and in investment regarding the production of national audiovisual content, putting into question criticism and concerns towards the distinctive treatment between global streamers and national broadcasters (Gomez and Larroa, 2022; Kim, 2022). However, the fact that Netflix or Prime Video have been strong investors in producing national cultural content in several countries, such as Australia, Canada, Mexico, South Africa and France, does not automatically give rise to the same kind of policy responses towards global streamers in these countries. In other terms, it's urgent to analyse the arrival and reception of these platforms in different national contexts, by assuming that these disruptive actors in the audiovisual sectors generate the mobilization of different interests and values, as well as of different coalitions in each national context (Thelen, 2018).

## **A cross-national overview towards the regulation of VOD streamers**

Today, at a time of major downturn in the audiovisual sector, several countries are reconsidering the scope and reach of domestic or regional audiovisual media regulation in focusing on transnational online platforms (Flew and Gillett, 2021). Since end 2010s, the idea to translate some of the challenges imposed by VOD services into concrete regulation has gathered cross-national momentum. In the EU, the revised AVMSD includes not only obligations for providers of on-demand audiovisual services to respect a quota of 30% for European works on their catalogues, but also exceptions to the country-of-origin principle in order to tax non-domestic VOD players targeting a given EU Member State (Vlassis, 2023). As of March 2023, several EU countries – namely Belgium (Flemish and French Communities), Croatia, Denmark, Germany, France, Italy, Poland, Portugal, Romania, Slovenia, Spain – and Switzerland are developing investment obligations for non-domestic providers of on-demand audiovisual media services. Here, the case of France is revealing regarding the implementation of the AVMSD. Following long-term negotiations between French authorities, online streamers and national broadcasters, in December 2021, France's broadcasting authorities announced that Netflix, Amazon, Disney+ and other video streamers signed an agreement to start investing 20% of their annual revenues on French cultural content. The investment will be between 280 million USD and 330 million USD per year and Netflix will be the key contributor with 225 million USD annually. According to Variety (2021), streamers have to dedicate 80% of the 20% invested in French content to audiovisual works (shows, movies, documentaries). It's worth noting that the French rate of investment obligation is the highest one among liberal democratic systems across the globe, whereas so far, the majority of EU MSs seeks to adopt rates of investment obligation between 2.5% (Germany) and 6% (Denmark).

At the same time, several national governments beyond Europe started debating the perspective of imposing obligations towards the VOD streamers. Firstly, in South Africa,

the publication of the 2020 White Paper on Audio and Audiovisual content services policy framework (South African Government, 2020) proposed the introduction of a 30% local content quota on streaming services. Public Hearings (2021) on the White Paper was held between 10 May and 14 June 2021. The National Association of Broadcasters (NAB) noticed that ‘support for local content and content diversity remains a key consideration and the NAB is encouraged to note that local content quotas in particular will remain relevant in the new regulatory framework’, whereas Netflix stressed ‘quotas imposed in regions like the EU may be wholly inappropriate for the South African context. The EU 30% local content quota for example is fulfilled by content from across Europe as a whole (serving 450 million people) rather than local content of only one MS’. The propositions from the White Paper are still under discussion.

Secondly, in 2022, the Australian Government (2022) introduced a Streaming Services Reporting and Investment Scheme (hereafter ‘the scheme’) in order to incentivize investment in Australian content by large streaming services. The scheme recommended that a streaming service should invest 5% of its gross Australian revenue on new Australian content. However, the Australian Screen Industry Group (ASIG) considered the proposition of 5% as ‘weak’, falling far short of what is required. It also warned of damage to the industry from delayed regulation and it called for a 20% Australian content expenditure requirement (Financial Review, 2022). End January 2023, the Australian government unveiled ‘Revive National Cultural Policy’, a 5-year plan to renew the wider cultural landscape, including investment quotas towards the VOD streamers. Public consultation with broadcasters and streamers will take place over the next 6 months to shape legislation.

Thirdly, in February 2022 the government of Canada introduced the Online Streaming Act – known as Bill C-11 – which aims to bring online audiovisual streamers under the same regulatory framework as traditional broadcasters in Canada, to adapt the country’s broadcasting policy to the new challenges coming from online streamers and to give powers to Canada’s broadcasting regulator – the Canadian Radio-television and Telecommunications Commission (CRTC) – towards online streaming. In March 2023, Canada’s lower house of the parliament and the Senate are still debating amendments regarding the obligations of streamers in the domestic audiovisual market. It’s worth noting that the bill was first introduced in November 2020 in order to integrate global platforms into the existing Broadcasting Act. Besides, the propositions included in the Online Streaming Act are based on the report ‘Canada’s Communications Future: Time to Act’ submitted by a group of experts in January 2020.

Finally, early 2021, the Mexican government announced its intention to promote a new Federal Cinematography and Audiovisual Law, which would impose at least a 30% quota of national content on the catalogues of streaming platforms. End March 2021, whereas the Mexican Senate was set to vote on this proposal drafted by Senator Ricardo Monreal (2021) – the leader of the ruling National Regeneration Movement (MORENA) in the upper house of Mexican legislature – the ruling party decided to postpone the Senate’s discussions on the project following criticisms by various stakeholders (see section above).

A key issue that emerges from this backdrop is to provide convincing answers about why public authorities in Europe and beyond are feeling the urge to develop new regulations towards global VOD streamers in a specific sequence and temporality and to focus

on variables, which are expected to understand this cross-national policy momentum for regulating VOD services.

## **Discussion: bringing the state-society relationships and global interdependence back in**

The article argues that audiovisual media governance does not emerge spontaneously from moral relevance of normative principles, deterministic power of digital technologies, business plans of global platform corporations or path-dependence decisions, but it is a political act, shaped by conflict and competing political worldviews that aim to promote their own values and objectives (Freedman, 2008: 1–4). In this respect, the politics in digital cultural governance should not be an unacknowledged element, something regarded as unproblematic; instead, our research proposition is more concerned with highlighting the dynamics through which the decision-making process takes place (Popiel and Sang, 2021; Vlassis, 2022). By avoiding ‘one-sided monolithic understandings of platform dominance’ (Poell et al., 2022: 2), the article suggests that the key assumptions of the academic literature seem to be too distant from the agents making governance arrangements (Radu, 2019) and leave little space for exploring in which ways the national policy responses in the audiovisual media governance are shaped both by state-interest groups relations and global interdependence. Against this backdrop, regulatory outcomes depend both ‘on the specific alliances’ (Thelen, 2018: 941) VOD platforms inspired among interest groups and politicians and on the ways global interdependence influences the national policy-making process. Much systematic research remains to be done in order to understand how different countries are confronting the challenges posed by the advent of VOD platform capitalism and why different countries have responded in different ways to the new VOD services, ‘from welcome embrace and accommodating adjustments’ to strong regulation (Thelen, 2018: 938–939). In other terms, even though transnational VOD services represent disruptive new actors, creating industrial, technological and institutional shock, the latter is not translated to the same political issue cross-nationally and to the same kind of policy responses. Political struggles over VOD platforms are expected to be framed and fought simultaneously by two crucial variables, dealing with state-society relationships and global interdependence.

The first factor emphasizes state-society relationships and national preference formation towards the media governance. The most fundamental influences on media governance are the identity of important societal groups (media organizations, platforms and tech companies, civil society associations), the nature of their interests, their resources, their strategies and their relative influence on domestic media policy. The identity, interests and influence of groups vary across time, place and issue-area (Dür et al., 2015). A special attention should be paid to the preferences advocated by various societal groups in the media governance, the resources, such as money, political support, information and expertise, that they endow, the strategies through which these groups employ their resources effectively.

In addition, state priorities regarding media governance are determined by politicians at the head of national governments who are embedded in domestic and transnational

civil society, which decisively constrains their identities and purposes (Moravcsik, 1997). Regulatory changes in audiovisual media governance require the support of a coalition of domestic voters, parties, interest groups and bureaucracies, whose views on media governance are transmitted, directly or indirectly, through domestic institutions and practices of political representation. Consequently, the first factor should focus on the degrees of political consensus that the regulation towards streaming platforms generates and the ways that governments aggregate the various preferences into policy outcomes (Moravcsik, 1997).

For instance, Canada has not yet succeeded to adopt and implement new measures towards major VOD streamers, since the issue of regulation has been highly confrontational among actors involved. The policy debate on regulation started during the 2015 legislative elections, when Stephen Harper, Conservative leader and Canadian prime minister from 2008 to 2015, expressed his explicit opposition to a so-called ‘Netflix tax’, by generating, since then, a strong political confrontation over the regulation of VOD streamers (Schnitzer, 2019). In addition, from 2020 to present, the process of passing the Online Streaming Act has been significantly slowed down by the Conservative opposition and by several associations, which have pointed out the pending Act will undermine the rights and freedoms of Canadian users on social media (Vlassis, 2021b). At the same time, in South Africa, the governmental White Paper received strong criticisms by various stakeholders, such as Netflix, AT&T, Walt Disney and the US Chamber of Commerce (Public Hearings, 2021), whereas in Mexico, audiovisual professionals opposed to a 30% content quota because the latter would not have the expected result but it could generate a reverse result that would benefit the distributor Videocine rather than the independent producers and filmmakers (Alfaro, 2021).

In contrast, in France, a wide political consensus around the ‘cultural exception’ principle has been developed since the end of 1980s and also persisted against global VOD streamers. In this respect, the regulation on VOD platforms in France has received a broad political acceptance from a variety of actors and in December 2021, France’s broadcasting authorities announced that Netflix, Amazon, Disney+ signed an agreement to start investing 20% of their annual revenues on French cultural content. Thus, the article argues that states and other political institutions represent some subset of domestic and/or transnational society (Moravcsik, 1997) and understanding the political and social conditions under which the behaviour of stakeholders converges towards cooperation or conflict matters in audiovisual media governance.

Secondly, variations in the national preferences towards audiovisual media governance depend not only on the intrinsic features of each state, but also on the ways that the international factor is expected to influence the internal policy-making process. Each state seeks to realize its distinctive preferences towards regulation of online streamers under varying incentives or constraints imposed by global interdependence. National policy responses in the audiovisual media governance are shaped by externalities generated by technological and economic interdependence between firms, by international commitments of each state and by political influence of transnational norm entrepreneurs (Avant et al., 2010). Besides, national governments receive strong demands from domestic media and audiovisual industries facing transnational economic competition from major streamers and seeing that global VOD platforms disrupt the level-playing



field and threaten the carefully established equilibrium among the actors involved in the value chains (producers, broadcasters, distributors, etc.). These parameters are expected to have implications for audiovisual media governance choices made by public authorities.

The regional and international commitments of national governments – such as the United States-Mexico-Canada Agreement (USMCA) or the Australia-United States Free Trade Agreement (AUSFTA) – are also supposed to generate incentives or constraints for the development of new regulations in the audiovisual media governance. For instance, in a white paper released in mid-January 2023, the Computer & Communications Industry Association stated that the pending Canadian broadcasting legislation dealing with VOD platforms is ‘explicitly discriminatory’ and, if enacted, will violate the country’s commitments under the USMCA. In a similar vein, the same kind of concerns have been expressed by the Latin American Internet Association, because the introduction of quotas in the Mexican online audiovisual market would ‘violate the Telecommunications and Digital Trade chapters of the USMCA’ and tech companies could ‘initiate arbitrations arguing discriminatory treatment’ (El Heraldo de México, 2021). Finally, in 2021, during the public consultation on the Australian Green Paper ‘Modernising Television Regulation in Australia’, the Motion Picture Association – bringing together the Hollywood studios and online streamers – stressed that ‘in considering whether to impose burdensome regulation on VOD services, the Australian Government must consider its international obligations, particularly the AUSFTA’ (Vlassis, 2021b). In this respect, policy and economic interdependence imposes constraints or incentives on state behaviour, by shaping conditions under which the attitude of stakeholders in audiovisual media governance will converge towards cooperation or conflict.

To conclude, end 2010s-early 2020s, there has been an important change in the audiovisual media governance and in ways public authorities deal with major VOD platforms. Clearly, the audiovisual media governance does not drop from the sky neither emerge in some deterministic and organic way from the political debates. Instead, it’s crucial to systematically delve into the specific political dynamics that VOD platforms have generated in each national context and explain how the variables mentioned above relate to different regulatory outcomes that we’re noticing cross-nationally. Likewise, the audiovisual media governance should not be seen as a static approach for the today power relationships between streaming platforms and other involved actors, but rather a continuous process within which a constant game of bargaining, exchanges and political confrontations is made. The two variables promise to be fruitful for exploring the variation of regulatory outcomes and understanding why and how the normative frameworks are built under specific institutional and political conditions. Scholars in media-cultural policy studies can truly benefit from investigating further these variables in order to view media governance as process, which is expected to be shaped by state-society relationships and global interdependence.

## **Funding**

The author received no financial support for the research, authorship, and/or publication of this article.

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