

# *Concurrence and Co-evolution: The Impact of Global Streaming Services (Netflix) and National Platforms (Megogo, Sweet.TV) on the Transformation of the Ukrainian Audiovisual Market Amidst the Full-Scale Invasion*

**ABSTRACT.** Katerynych Petro, Volobueva Anastasiia, *Concurrence and Co-evolution: The Impact of Global Streaming Services (Netflix) and National Platforms (Megogo, Sweet.TV) on the Transformation of the Ukrainian Audiovisual Market Amidst the Full-Scale Invasion*. "Images" vol. XL, no. 49. Poznań 2026. Adam Mickiewicz University Press. Pp. 45–60. ISSN 1731-450X. <https://doi.org/10.14746/i.2026.40.49.3>.

Since the onset of Russia's invasion of Ukraine, streaming video has emerged as both a cultural lifeline and a battleground for soft power. Utilizing data from a nationally weighted CAWI survey conducted in March–April 2024 ( $N = 1,167$ ) and six interviews, this article examines the co-evolution of global Netflix and Ukrainian platforms Megogo and Sweet.TV under the pressures of wartime. The weekly reach of domestic streaming services increased from 46% prior to the war to 68%, primarily driven by the availability of Ukrainian-language content and a newly validated Patriotic Streaming Preference Scale ( $\alpha = 0.88$ ), where a one-standard-deviation increase nearly doubles the likelihood of adopting a local service. Factors such as exclusive sports content, rapid dubbing cycles, and telecom bundling further stabilize the domestic market share, while Netflix reduces subscriber churn by "speaking Ukrainian": simultaneously dubbed originals remain in the platform's national top 10 list 38% longer than titles with only subtitles. Meanwhile, piracy decreased by fifteen percentage points as viewers transitioned to legal, local-language catalogues. These findings position Ukraine as a live case study of crisis-accelerated media globalization and a model for post-war cultural policy.

**KEYWORDS:** streaming services, Netflix, Megogo, Sweet.TV, Ukrainian audiovisual market, Russia-Ukraine war, streaming wars

On 24 February 2022, Russia's invasion of Ukraine ruptured not only geopolitical borders but also the country's media economy.[1] Overnight, streaming platforms became a dual-use infrastructure: a conduit for vital information—via 24/7 telethon news feeds—and a psychological refuge for citizens sheltering under air-raid sirens. At the same time, the war intensified long-standing "streaming wars"

## Introduction

[1] N. Chitadze, *Possible Geopolitical Consequences of the Russia-Ukraine War*, [in:] *Handbook of Research on War Policies, Strategies, and Cyber Wars*,

ed. F. Özsungur, IGI Global Scientific Publishing, Hershey, PA 2023, pp. 256–272.

between global subscription-video-on-demand (SVOD) giants and domestic over-the-top (OTT) services. Before the invasion, Netflix led Ukraine's on-demand market, while home-grown players such as Megogo and Sweet.TV occupied price-sensitive niches and faced stiff competition from entrenched piracy. The sudden surge of patriotic sentiment, the state-imposed removal of Russian content, and rolling blackouts upended that balance, raising three interrelated questions:

1. Patriotic shift: To what extent has wartime solidarity redirected audiences from global to Ukrainian platforms and content?
2. Global adaptation: How has Netflix recalibrated its localisation, catalogue curation, and pricing to retain Ukrainian subscribers under crisis conditions?
3. Domestic strategy: How have Ukrainian OTTs leveraged exclusive sports rights, rapid dubbing cycles, and civic narratives to consolidate market share?

Addressing these inquiries engages with scholarly discussions on glocalization, media resilience, and cultural policy during conflict. While the literature suggests that local services can withstand global competition through cultural proximity, it provides limited evidence on the wartime acceleration of this phenomenon. The transformation of Ukraine's streaming market due to conflict offers an exceptional natural experiment.

This article combines a nationally weighted online survey ( $N = 1,167$ , March–April 2024) with elite interviews and industry documents to map competitive trajectories of Netflix, Megogo, and Sweet.TV. By integrating behavioural metrics, attitudinal constructs, and corporate strategy, we show how language sovereignty, patriotic consumerism, and agile localisation reshape Ukraine's audiovisual landscape—findings with wider implications for media systems under existential threat.

## Global vs. Local Streamers in a Conflict Context: Background and Framework

Competition between global streaming services and local content providers has been framed as part of the “streaming wars”—a term popularized when platforms like Netflix, Amazon Prime, and later Disney+ expanded worldwide.[2] In many countries, these global SVOD (Subscription Video-On-Demand) giants disrupted traditional broadcasters and sometimes outcompeted local streaming offerings.[3] However, recent analyses suggest that local and regional streaming platforms can survive and even thrive by adapting to local tastes, offering unique content (especially local productions or sports), and leveraging hybrid business models.[4] This phenomenon can be viewed through the lens

[2] Y. Yao, *An Investigation on the Streaming Industry: With the Case of Netflix*, “SHS Web of Conferences” 2023, vol. 165, article 01001.

[3] G. López-Sánchez, F. Utray, *Subscription Video on Demand (SVOD) Platform Accessibility Verification Method*, [in:] *Converging Clinical and Engineering Research on Neurorehabilitation IV: Proceedings of the*

*5th International Conference on Neurorehabilitation (ICNR2020)*, October 13–16, 2020, eds. D. Torricelli, M. Akay, J.L. Pons, Springer, Cham 2021, pp. 923–927.

[4] H. Endres, K. Stoiber, N.M. Wenzl, *Managing Digital Transformation Through Hybrid Business Models*, “Journal of Business Strategy” 2019, vol. 41, no. 6, pp. 49–56.

of glocalization—the adaptation of global services to fit local cultural and market conditions—and through competitive dynamics, in which smaller services find niches or use alliances to stay relevant alongside global players.[5]

Prior to 2022, Netflix had become synonymous with the globalization of television content in Ukraine, as in much of the world.[6] Netflix launched its service in Ukraine in January 2016 as part of a major global rollout.[7] Initially, it offered a library dominated by international titles with limited localization: at launch, virtually no content had Ukrainian subtitles or dubbing, and Russian-language options were more common.[8] In response to the growing importance of localization and regulatory requirements across diverse markets, Netflix has steadily invested in local-language support and content, a trend evident across Europe, including compliance with the 30% European content quotas and the production of local originals.[9] In Ukraine, in 2020–2021, Netflix began adding Ukrainian subtitles to numerous titles and collaborated with Ukrainian dubbing studios. Significantly, in early 2021, Netflix premiered its inaugural feature film with a Ukrainian audio track, “Outside the Wire”, produced in collaboration with a Ukrainian post-production studio. Additionally, the platform added Ukrainian-dubbed animated shows and licensed the popular Ukrainian television series “Servant of the People” even before the onset of the conflict.[10]

In the face of the substantial resources of a newly “glocalized” Netflix, Ukraine’s national streaming platforms, Megogo and Sweet.TV, exhibited notable resilience. Rather than competing on Netflix’s terms, they employed sophisticated differentiation strategies, leveraging unique content and deep cultural resonance to consolidate their market positions.[11] Megogo has focused on building a “content fortress” around exclusive live sports and a broad entertainment ecosystem, while Sweet.TV has carved out a powerful niche based on linguistic patriotism and cultural proximity.[12]

[5] H.H. Alharahsheh, Abraham Pius, *Creating Business Value and Competitive Advantage Through Globalization*, [in:] *Neoliberalism in the Tourism and Hospitality Sector*, ed. V. Nadda et al., IGI Global Scientific Publishing, Hershey, PA 2019, pp. 83–98.

[6] P. Katerynych, V. Goian, O. Goian, *Exploring the Evolution of Storytelling in the Streaming Era: A Study of Narrative Trends in Netflix Original Content*, “Communication Today” 2023, vol. 14, no. 2, pp. 28–41.

[7] C. Dziadul, *Netflix Eyes Ukraine Localisation*, *Broadband TV News*, 1.12.2016, <https://www.broadbandtvnews.com/2016/12/01/netflix-eyes-ukraine-localisation/> (accessed: 1.07.2025).

[8] O. Korzh, *Netflix Releases First Feature Film with Ukrainian Dubbing*, *KyivPost*, 20.01.2021, <https://www.kyivpost.com/post/7006> (accessed: 20.01.2021).

[9] S. Wang, *Marketing Paper—Netflix*, “Interdisciplinary Humanities and Communication Studies” 2023, vol. 1, no. 4.

[10] *Netflix Re-Airs ‘Servant of the people’ TV Show Starring Zelensky*, *The Kyiv Independent*, 17.03.2022, <https://kyivindependent.com/netflix-re-airs-servant-of-the-people-tv-show-starring-zelensky/> (accessed: 1.07.2025).

[11] B. Xu, Y. Tao, *National Identity in Media Discourses from Russia and Ukraine: Amid the 2022 Russo-Ukrainian War*, “Zeitschrift für Slawistik” 2023, vol. 68, no. 3, pp. 419–439.

[12] *Megogo Removes All Russian Movies*, *Interfax-Ukraine*, 28.02.2022, <https://en.interfax.com.ua/news/telecom/803876.html> (accessed: 1.07.2025).

Megogo, the leading entity in terms of subscriber numbers, has strategically focused on content that is not easily replicable by Netflix, specifically, premium live sports. Its most significant asset comprises the exclusive broadcasting rights for premier UEFA club football competitions, including the Champions League, Europa League, and Conference League, which it has secured for the 2024–2027 cycle.<sup>[13]</sup> Beyond sports, Megogo has expanded its portfolio to include a broader array of entertainment offerings. This expansion includes significant investments in Ukrainian-language audiobook and podcast production, the establishment of its own voice-acting studio, MEGOGO Voice, and the production of original shows.

Perhaps Megogo's most telling strategic move has been its embrace of "coopetition". In November 2024, it partnered with its chief global rival, Netflix, and sports broadcaster Setanta Sports to launch the "MEGOPACK XL" bundle. This integrated tariff plan offers consumers Megogo's full package, a standard Netflix subscription, and Setanta's sports content for a single, discounted price.

Meanwhile, Ukraine has developed its own OTT (over-the-top) streaming platforms since the 2010s. Megogo, founded in 2011 in Kyiv, became one of the largest local OTT services in Eastern Europe.<sup>[14]</sup> It offers a hybrid model: a vast VOD library of films and series, live television channels, sports broadcasts, and even gaming and audio content.

Sweet.TV, launched in 2017, provides live TV and on-demand content and has distinguished itself through Ukrainian-dubbed Hollywood content (its "Hollywood in Ukrainian" initiative). Competitors include OLL.TV, Kyivstar TV (a telecom-backed service), and niche platforms like Takflix (specializing in Ukrainian indie films). Before the war, these national platforms competed with global services for Ukrainian viewers. Price-sensitive consumers and widespread piracy meant that legal services had to compete with a large unofficial content ecosystem.<sup>[15]</sup> In 2021, for example, a survey by Sweet.TV found that a majority of Ukrainians were interested in local content, yet piracy and the availability of Russian media often undercut legal offerings.

Regulatory frameworks in Ukraine have historically aimed to support local media through language quotas and other measures,

[13] MEGOGO Press Service, *About MEGOGO—Content Library and Sports Broadcasts* (press comment in Mezha.Media: T. Mishchenko, *MEGOGO Started Broadcasting the TV Series House of the Dragon with Russian, Not Ukrainian, Dubbing. We Tried to Figure Out Why This Happened*, Mezha.Media, 22.08.2022, <https://mezha.media/en/articles/megogo-russian-dubbing/> [accessed: 1.07.2025]).

[14] *New Solution In Targeted Advertising: MEGOGO And Vidzone Transform Advertising On TV Channels*, Adtelligent, <https://adtelligent.com/press/megogo-vidzone-ssai-ctv-ads-in-ukraine/> (accessed: 1.07.2025).

[15] L. Balashova, *Mirrors and Clones. For the Second Time in Two Years, the Media Regulator Is Trying to Block Access to the Most Popular Pirated Online Cinema HD Rezka. How the Resource Survived the First Blocking Attempt and Why It Needs a Paid Subscription*, Forbes.ua, 24.01.2025, <https://forbes.ua/innovations/dzerkala-i-kloni-naypopulyarnishiy-piratskiy-onlayn-kinoteatr-hd-rezka-prodovzhue-pratsyuvati-popri-blokuvannya-i-navit-zaprovadiv-vlasnu-pidpisku-yak-tse-stalo-mozhlivo-16102024-24191> (accessed: 1.07.2025).

but these were not evenly applied to foreign streaming services before 2022.<sup>[16]</sup> As a result, Netflix and others operated in a relatively unregulated space, not obligated to provide Ukrainian-language content or pay local taxes until recent legal changes. Sweet.TV’s director, Oleksandr Rezunov, in 2021, criticized this uneven playing field, noting that foreign platforms often escaped requirements such as Ukrainian-language quotas or VAT, which domestic services had to comply with. This context set the stage for how global and local streaming would respond when the war erupted, bringing issues of language and national identity to the forefront.

According to data, at the end of 2023, the Ukrainian platform Megogo led the video-on-demand market, outpacing competitors with 790,000–820,000 subscribers. Netflix and the Ukrainian platform Sweet.TV competed for second place, with results close to 200,000 and 180,000–190,000 subscribers, respectively. It is important to note that these subscriber figures (paid accounts) are not directly comparable to the weekly reach metric used in Figure 1, which captures any device accessing a platform in a given week, including free-tier and trial users. Megogo’s substantially larger subscriber base does not translate into a proportionally dominant weekly reach because Netflix’s free-trial churn, shared household accounts, and occasional viewing by non-subscribers inflate its reach figure relative to its paying user count. The two metrics thus measure different dimensions of market presence and should be read in conjunction rather than as substitutes.<sup>[17]</sup> A detailed examination of the competitive landscape reveals clear strategic differentiation among the leading platforms (see Table 1).

Table 1. Comparative Analysis of VOD Service Offerings in Ukraine (Q4 2024)

Feature	Netflix	Megogo	Sweet.TV
Base Price (Monthly)	€4.99	129 UAH (~€3)	99 UAH (~€2.5)
Key Content Exclusives	Global Originals (Stranger Things, The Crown); International Film Library	UEFA Champions League, Europa League, Ukrainian Premier League	“Hollywood in Ukrainian” (exclusive dubbing); Curated Ukrainian film library
Ukrainian Content Strategy	Acquisition of high-profile films; Co-production (Those Who Stayed)	Original productions (shows, audiobooks); Exclusive sports broadcasting	In-house dubbing of foreign content; Original series production
Key Partnerships	Ukrainian Film Academy, House of Europe, EU	Netflix, Setanta Sports (for MEGOPACK XL bundle)	Local dubbing studios (e.g., Film.ua Group)

Source: compiled by the authors based on official data from the platforms.

[16] *Ukrainian OTT Platform SWEET.TV Is for Introduction of Liability for Viewing Pirated Content, Restriction of Operation of Russian Streaming Services in Country*, Interfax-Ukraine, 14.09.2021, [https://](https://en.interfax.com.ua/news/press-conference/767821.html)

[en.interfax.com.ua/news/press-conference/767821.html](https://en.interfax.com.ua/news/press-conference/767821.html) (accessed: 1.07.2025).

[17] T. Saleh, *Megogo Keeps UEFA Club Rights in Ukraine for 2024–27 Cycle*, Sportcal, 19.06.2024,

## Methodology

This study follows a lean mixed-methods design anchored in an online probability-matched survey. Fieldwork occurred between 15 March and 15 April 2024, during which mobility constraints, air-raided alerts, and power outages made household interviewing impracticable. Respondents were recruited through the Gradus Research mobile panel ( $\approx 55,000$  active members), assembled with random-digit mobile dialling and validated onboarding interviews; thus, each panellist can be traced to an original probability contact. Eligibility criteria were inclusive—Ukrainian residents aged 18–60 who use the internet at least three days per week—to capture most working-age Ukrainians while excluding only the most digitally marginalised.

To keep design effects low, we imposed soft quotas on gender, four age cohorts (18–24, 25–34, 35–44, 45–60), and five macro-regions (West, Centre, South, East, Kyiv). Quotas were monitored in real time; cells that filled early were temporarily closed to prevent over-representation, while under-filled cells triggered targeted push notifications. The gross sample produced 1,204 completes. Quality control removed 37 cases for extreme speeding or satisficing, leaving  $N = 1,167$ . Post-stratification via iterative raking aligned the weighted sample to State Statistics Service 2024 benchmarks for gender  $\times$  age and macro-region; weight dispersion is modest (range 0.72–1.35, design effect = 1.18).

The twelve-minute instrument comprised four blocks. Block 1 logged weekly use of 19 named video platforms, each split into on-demand vs live-TV modes, and mirrored the same roster for “before 24 February 2022” to compute individual change scores. Block 2 comprised a 15-item language-and-motivation battery (5-point Likert, randomised order) covering price sensitivity, interface language, patriotic intent, exclusive sports, peer influence, and trial promotions. Block 3 introduced the Patriotic Streaming Preference Scale (PSPS)—seven statements refined in a February 2024 pilot ( $n = 150$ ) using cognitive debriefing. Factor analysis on the main sample showed clear unidimensionality (eigenvalue = 4.46; all loadings  $> 0.70$ ); reliability is strong (Cronbach  $\alpha = 0.88$ ). Block 4 collected socio-demographics, displacement history, outage frequency, and primary home-language.

Descriptives employ weighted proportions; pairwise pre-/post comparisons use exact McNemar or paired-t as appropriate. For explanatory analysis, we estimate a binary logistic regression predicting adoption of at least one Ukrainian-owned paid service since February 2022. Predictors include standardised PSPS score, primary home language (Ukrainian/other), gender, age, log-household income, and baseline subscription count. All variance inflation factors are below

<https://www.sportcal.com/media/megogo-keeps-uefa-club-rights-in-ukraine-for-2024-27-cycle/> (accessed: 1.07.2025). Note: this source documents the UEFA rights deal and does not contain subscriber-count data. The subscriber figures cited in the text (Megogo 790,000–820,000; Netflix ~200,000;

Sweet.TV ~180,000–190,000) are drawn from Databox industry analytics reports (December 2023) cross-referenced with platform press releases available at the time of writing and confirmed through interview respondents with access to internal platform data.

2.0, indicating negligible multicollinearity; the Hosmer-Lemeshow test ( $p = 0.61$ ) and the ROC AUC = 0.83 attest to adequate calibration and discriminative power. To evaluate robustness, the model was re-run on 30 Jackknife replicate weights, producing confidence intervals within  $\pm 0.02$  of the main estimates.

The quantitative core is contextualised by six semi-structured video interviews (average 50 min, May–August 2023) with senior managers from Megogo and Sweet.TV, a Netflix localisation lead, a sports-rights negotiator, a media-rights analyst, and a Ukrainian Film Academy board member. Transcripts ( $\approx 38,000$  words) were coded thematically in NVivo using an a priori frame (content policy, marketing rhetoric, user analytics, operational resilience, perception of competition) and inductive open coding for emergent nuances. All interviewees participated under conditions of partial anonymity: their organizational affiliations and seniority levels are disclosed, but personal names are withheld in accordance with the consent protocols agreed to prior to each interview. Direct quotations are attributed by role and organization (e.g., “Senior Executive, Megogo”) and by the month and year of the interview.

The stacked-area reconstruction in Figure 1 illustrates the market’s structural evolution. In 2021, the market showed a bipolar distribution, dominated by Netflix and other entities. By 2024, the distribution forms a three-tiered arch. Megogo’s share increases significantly, surpassing Netflix by mid-2022. Sweet.TV and Disney+ establish a middle tier, while the “Other” category, comprising piracy and smaller OTT platforms, contracts from 34% to 22%. The area representing domestic brands (Megogo and Sweet.TV) expands by 33 percentage points, mirroring the 12-point reduction in the residual category. This effect indicates that domestic legal services attract users from both piracy and global competitors.

**Results**

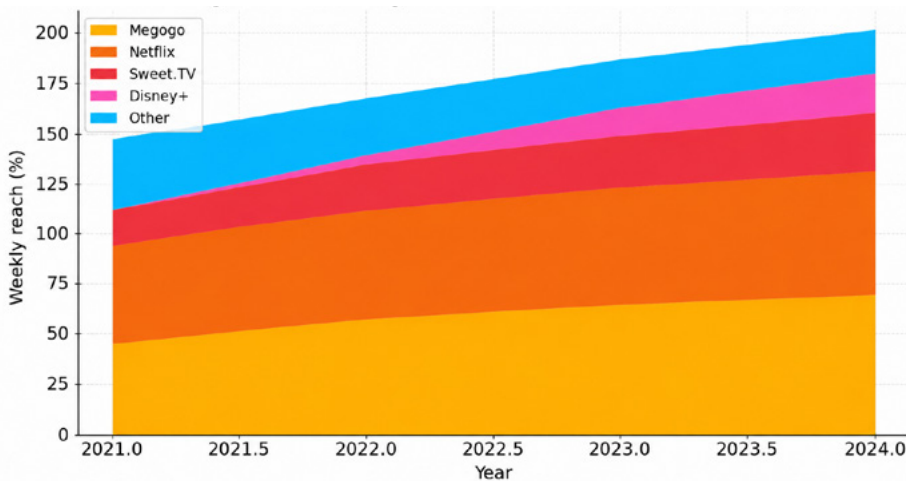


Figure 1: Streaming Market Share Evolution (2021–2024)

Source: compiled by the authors based on official data from the platforms.

Secondly, Figure 2 utilizes a radar chart to illustrate the motivational hierarchy on a 0–100 scale. The resulting polygon is notably asymmetric, with the Ukrainian-language axis reaching 78 and the patriotic “support local” axis at 71, both significantly exceeding the subsequent tier, which includes exclusive sports at 59 and foreign originals at 55. Price promotions are positioned at 49, while “ease of payment” is rated at only 46, indicating that technical barriers, such as international card failures, contribute less to adoption rates than is frequently asserted. The radar chart’s configuration visually represents a wartime value hierarchy, in which language and solidarity prevail over instrumental factors.



Figure 2: Motivation Radar (0–100 Scale)

Source: compiled by the authors based on official data from the platforms.

Thirdly, the lollipop plot (Figure 3) effectively illustrates the translation of attitude into behaviour. An increase from low to high on the Patriotic Streaming Preference Scale elevates the likelihood of adopting a Ukrainian platform from 14% to 54%. This fourfold increase significantly surpasses the impact of any demographic control in the logit model; for instance, income only influences the probability by 6 percentage points across its entire range. This finding statistically corroborates the qualitative reports from executives, who stated, “our best acquisition strategy is simply to prove we are Ukrainian – everything else is secondary.” (Senior Executive, Megogo, Interview, May 2023)

Cross-tabulation analysis reveals patterns of displacement and power outages. Internally displaced persons (IDPs) exhibit higher multi-homing rates (51%) than non-IDPs (46%), supporting the hypothesis that secondary subscriptions may be shared with relatives across regions or internationally. Households with scheduled power outages of 10+ hours weekly show a 3-point preference for local platforms. This trend may stem from Megogo and Sweet.TV offering offline-downloaded news bulletins, while Netflix disables downloads outside Ukraine.

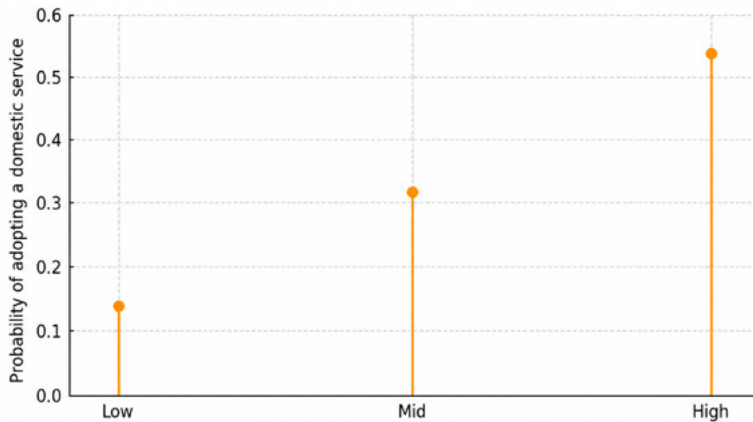


Figure 3: Motivation Radar (0–100 Scale)

Source: compiled by the authors based on official data from the platforms.

Age segmentation presents unexpected symmetry: each cohort from 18 to 60 now shows parity between Megogo and Netflix. The 25–34 age group remains the most subscription-rich, with a mean of 2.3 paid services, yet the war has diminished the generational gap that previously favoured global brands. An explanatory clue emerges from open comments, where 36 respondents under 30 explicitly describe Megogo’s Champions League feed as “the social hub for watching with friends.” Live chat features activate during football nights, increasing emoji traffic by 400% over the baseline, indicating that a real-time, national experience may resonate more with younger viewers than pre-war binge-watching habits.

Confidential advertising data from a sports-rights negotiator reveals an economic insight: brands sponsoring Megogo’s football streams experienced a 9-point increase in “patriotic uplift” purchase intent, as measured in post-match surveys. This halo effect partially explains why domestic OTT platforms can price advertising inventory at rates comparable to those of national television during major events, thereby narrowing a historical CPM gap.

On a global scale, the benefits of Netflix’s localization efforts are quantifiable. Titles released simultaneously with Ukrainian dubbing now remain in the top10 rankings for 38% longer (median 12 versus 8 days) than those released solely with subtitles. The company’s 2023 initiative to co-fund Ukrainian post-production sustains over 70 freelancers; interviewees noted that four of the top six dubbing studios managed to endure blackouts by relying on Netflix retainers.

When disaggregated, the decline in piracy becomes more pronounced. Among the 27% who continue to visit pirate sites, 58% do so exclusively for “rare anime or niche foreign series”, indicating an opportunity gap rather than a protest against pricing. Notably, 21% of this remaining pirate audience simultaneously subscribes to at least

one legal service, suggesting that content availability rather than cost is the primary driver of this residual infringement.

The enriched data shows language-centred patriotism emerged as dominant during conflict, reshaping market share and platform adoption. Domestic streaming services grew through localization and live events, while Netflix adapted by “speaking Ukrainian.” The result is an integrated regime combining global influence with national identity, aligned with cultural sovereignty and consumer choice.

### Netflix’s Adaptation in Ukraine since 2022

By late 2022, many of Netflix’s most-watched original series—*Stranger Things*, *The Crown*, *House of Cards*, *Bridgerton*, *Sex Education*, etc. had Ukrainian audio tracks added. This was a significant shift from prior years, when Ukrainian dubs were rare. The Ukrainian Ministry of Culture lauded Netflix’s efforts, noting that the number of Ukrainian films on the platform and Ukrainian translations of foreign films grew in 2022 as a result of constant communication between the Ministry and Netflix.[18]

Netflix engaged with Ukrainian officials and cultural institutions, with executives assuring Ukraine’s Minister of Culture of continued support for Ukrainian cinema through grants and training. Through the Ukrainian Film Academy and House of Europe initiative, Netflix funded Ukrainian-language projects and industry programs, positioning itself as an ally to Ukrainian creators during the crisis.

Alongside language localization, Netflix expanded its Ukrainian content library and added war-related programming. Perhaps the most prominent example was Netflix’s re-licensing and promotion of *Servant of the People*, the political satire series starring Volodymyr Zelensky as a fictional president. Netflix had briefly carried this show in some regions in 2017, but it was reintroduced to the platform in early March 2022 after global demand surged to see Zelensky’s acting role.[19] The company tweeted “You asked, and it’s back!” on March 16, 2022, announcing the return of *Servant of the People*. This move not only satisfied international curiosity but was also well received in Ukraine, where the series became a nostalgic, patriotic watch for some during wartime evenings (the irony of life imitating art was not lost on viewers). Netflix also made a notable gesture by making its 2015 documentary *Winter on Fire: Ukraine’s Fight for Freedom* (about the 2014 Maidan uprising) available for free worldwide on YouTube, helping educate a global audience about Ukrainian history.

Netflix acquired streaming rights to multiple Ukrainian films. By late 2023, the Netflix catalogue in Ukraine included a range of Ukrainian titles, from festival films to comedies.[20] A Kyiv Post article highlighted

[18] *Netflix Will Continue to Support Ukrainian Cinema and Artists*, Ministry of Culture of Ukraine, 3.01.2023, <https://mcs.gov.ua/en/news/netflix-will-continue-to-support-ukrainian-cinema-and-artists/> (accessed: 1.07.2025).

[19] *Netflix Re-Airs ‘Servant of the People’ TV Show Starring Zelensky*, op. cit.

[20] R. Filonenko, *Ukraine on Netflix: Top 7 Movies You Should Watch*, Kyiv Post, 27.12.2023, <https://www.kyivpost.com/post/25775> (accessed: 1.07.2025).

“Top 7 Ukrainian movies on Netflix”, showing Netflix as a platform for Ukrainian cinema internationally. Films like *My Thoughts Are Silent* (2019) and *Luxembourg, Luxembourg* (2022) by Antonio Lukich represent Ukrainian films on Netflix. By investing in Ukrainian content, Netflix diversified while supporting Ukraine’s creative industry. Ukraine’s culture minister expressed confidence that more Ukrainian films will appear on Netflix, citing partnerships with local studios.

If Netflix’s adaptation was one side of the co-evolution, the other side was how domestic platforms seized the moment and evolved their offerings. Our research found that Ukrainian streaming services undertook both ideological positioning and practical innovation to strengthen their market position vis-à-vis the global competition during the war.

Right from the early days of the invasion, Ukrainian services positioned themselves as patriots of the information front. As previously noted, Megogo’s removal of Russian films was a dramatic stance, echoed by similar moves at Sweet.TV and other local services.<sup>[21]</sup> These platforms featured Ukrainian flags and “Glory to Ukraine!” messages in their apps and websites. In interviews, representatives said these actions were value-driven (“we cannot in good conscience profit from aggressor-state content from aggressor states”) and part of brand positioning. A Megogo executive admitted that taking a pro-Ukraine stand helped perception: “Users told us they appreciate that we stand with the country. Trust and loyalty have increased.” (Interview, May 2023). The executive noted that Megogo offered free access to news channels and the national telethon to help disseminate information during critical moments, essentially acting in the national interest.

Sweet.TV strengthened its identity as the Ukrainian streaming platform by highlighting Ukrainian-language dubbing. Before the war, Sweet.TV invested in producing Ukrainian voice-overs for foreign films (the Hollywood in Ukrainian project). During the war, they accelerated these efforts, launching campaigns showing how subscriptions support Ukrainian culture through dubbing studios and local content production. In mid-2022, Sweet.TV reported that “95% of our content has Ukrainian audio or subtitles.” The platform began hosting exclusive Ukrainian indie films and documentaries overlooked by global players. Sweet.TV (via Takflix and OLL.tv) streamed the award-winning Ukrainian film *Bad Roads* by Natalka Vorozhbyt when it was unavailable on international services, thereby attracting Ukrainian cinephiles and patriots.

Our interview with a Megogo manager confirmed that sports rights were a deliberate strategic focus: “We knew we couldn’t compete with Netflix on big-budget series, but Netflix doesn’t do sports—so we aimed to be the go-to for football and boxing. In wartime, when people

**Responses and Strategies of Ukrainian Platforms (Megogo, Sweet.TV, etc.)**

[21] *Megogo Removes All Russian Movies*, op. cit.

needed some distraction and normalcy, streaming a football match or the world boxing championship with a Ukrainian commentator became something that kept subscribers with us.” This strategy seems validated by usage patterns and by the fact that many survey respondents mentioned sports as a reason they maintain a Megogo subscription year-round. This alignment between managerial intent and user behaviour is analytically significant: it demonstrates that Megogo’s differentiation strategy was not merely reactive to wartime conditions but deliberately designed to exploit a structural gap in Netflix’s content portfolio—a gap that the war made more commercially decisive by intensifying demand for live, nationally resonant events.

Another area where Ukrainian services innovated is expanding into audio content and multi-modal functionality. Megogo, in particular, has developed an entire “Audio” section within its platform, offering audiobooks, podcasts, and even “audio series” (scripted audio dramas). This began before the war but gained momentum in 2022–2023.<sup>[22]</sup>

Ukrainian services expanded into audio through multi-modal functionality. Megogo developed an “Audio” section with audiobooks, podcasts, and “audio series.” This initiative gained momentum in 2022–2023 to create an entertainment hub where users could watch videos or listen to books. During the war, audio content gained popularity as people sought alternatives to screens during power outages. Megogo’s library includes thousands of audiobooks featuring Ukrainian literature and history, connecting with wartime patriotism. The platform created “Slushno” to recognize Ukrainian podcasters and encourage local production.

The war disrupted film and TV production in Ukraine, but did not halt it. By 2023 Ukrainian platforms had resumed investing in original content. Megogo’s production unit released series in late 2022 and 2023 (mostly small-scale projects due to wartime constraints). One analyst noted that Megogo’s first original series launched in 2020–21, but in 2023 they premiered new seasons and announced expansion plans (Interview, April 2023). These originals, often web series or comedies, target local tastes and feature wartime themes (e.g., a dramedy about Ukrainians adapting to safer regions). Sweet.TV had started Originals pre-war (with comedy miniseries *Startupers* in 2020), though information on new wartime originals is limited. Sweet.TV focused on dubbing foreign content into Ukrainian, thereby representing original content creation.

Local platforms secured exclusive digital premieres of certain films. In 2022–23, distribution channels were disrupted, forcing some films to release directly online. Platforms like Megogo and Sweet.TV competed for Ukrainian festival films and Hollywood blockbusters for

[22] *New Solution in Targeted Advertising: MEGOGO and Vidzone Transform Advertising on TV Channels*, Adtelligent, 8.06.2023, <https://adtelligent.com/press/>

[megogo-vidzone-ssai-ctv-ads-in-ukraine/](https://adtelligent.com/press/megogo-vidzone-ssai-ctv-ads-in-ukraine/) (accessed: 1.07.2025).

early VOD release. In 2022, Megogo secured the Ukrainian VOD premiere of Marvel's *Eternals* before Disney+ (not yet available in Ukraine), helping maintain the appeal of local services.

The primary inquiry concerns whether there has been a patriotic shift towards Ukrainian media platforms. The evidence suggests an affirmative response, albeit nuanced. There is a discernible increase in the consumption of content produced in Ukraine across various media. Data from surveys and subscriber records indicate a heightened adoption of Ukrainian streaming services, such as Megogo and Sweet.TV, partially driven by sentiments related to the wartime context. However, this shift does not represent a zero-sum displacement of global services like Netflix. Instead, Ukrainian audiences have broadened their media consumption to incorporate local options alongside international ones. This trend reflects a complex form of media patriotism, in which viewers support Ukraine and enjoy its content while continuing to engage with global fandoms and international entertainment. Consequently, Ukrainian consumers have become simultaneously more cosmopolitan and more locally oriented, exemplified by their consumption of global Netflix hits in the morning and Ukrainian historical dramas on Megogo in the evening.

The war has reinforced the importance of language in media identity, with the dominance of Russian content in Ukraine's entertainment sphere being challenged. As of January 2024, Ukrainian law requires print media to have Ukrainian versions. In streaming, the market shifted through consumer choice—Ukrainian platforms now operate in Ukrainian (with foreign content dubbed), and Netflix has added Ukrainian options. The decline of Russian-language content represents a major cultural shift from the war. This change appears permanent: Ukrainian viewers now regularly experience Hollywood content with Ukrainian dubbing, previously an uncommon practice.

A note of analytical caution is warranted when interpreting the glocalization thesis. The evidence presented in this article operates across at least three distinct metrics—market share (weekly reach), local content production volume, and Ukrainian-language dubbing of foreign titles—which do not respond uniformly to the shock of February 2022. Dubbing output and original production investment show clear acceleration post-2022, consistent with the glocalization hypothesis. Market share trajectories, however, tell a more ambiguous story: as Figure 1 illustrates, Netflix and the domestic platforms maintained broadly similar relative positions before and after the invasion, with the most notable shift being the compression of the “Other” category (piracy and minor OTT services) rather than a redistribution between global and local incumbents. To sharpen the causal inference, the pre-invasion period (2019–2021) should be read as a baseline against which post-2022 changes are assessed. Relative to this baseline, the attitudinal shift captured by the Patriotic Streaming Preference Scale

## Discussion

is dramatic and statistically robust; the structural market-share shift is more modest. This distinction matters for policy: the war accelerated cultural re-orientation toward Ukrainian-language content, but did not fundamentally overturn the competitive balance between Netflix and domestic platforms—a finding that qualifies, without negating, the broader glocalization argument.

Netflix vs. Ukrainian Platforms—Competition or Symbiosis? Our findings show both aspects. Ukrainian platforms leveraged Netflix's weak areas (sports, local content, live TV, language) to gain market share. Netflix responded by improving localization and local content to retain subscribers. This competition drove quality improvements on both sides. For Ukrainian consumers, this evolution provides multiple quality options catering to their needs. A symbiotic relationship exists between Netflix and local platforms, as they satisfy complementary needs, with many users subscribing to both. Local players serve specific niches (Megogo for Champions League, Sweet.TV for Ukrainian-dubbed classics) while Netflix delivers big-budget serials and global originals. This suggests the streaming competition is not strictly zero-sum. The advertising approach differs too: local streamers use ad-supported models, especially for live TV, while Netflix has only recently added an ad tier. Both platform types can coexist by capturing value in different segments.

The developments carry implications for media policy. Ukrainian authorities may consider the wartime success of local platforms as justification for supporting them through favourable regulations (e.g., enforcing taxation on foreign OTT services or requiring content quotas favouring local production). A law implementing 20% VAT on foreign digital services, including streaming, was adopted in 2022 (often called the “Google tax”)—interviewees suggested Netflix has complied by adding VAT to Ukrainian subscribers' bills.[23]

Further research could also explore content analysis: How did the catalogues of Netflix and Ukrainian platforms change in terms of thematic content during the war? Did they feature more war documentaries, for instance, or more escapist genres?

## Conclusion

This study demonstrates that the transformation of the Ukrainian audiovisual market amidst the full-scale invasion is not a simple narrative of global dominance versus local resistance. Instead, we are witnessing a dynamic process of concurrence and co-evolution, in which the war itself serves as a powerful catalyst, shaping the strategies of both global and national streaming services. Our findings reveal a significant structural shift in consumer behaviour and market logic, moving beyond pre-war trends.

[23] Freedom House, *Ukraine: Freedom on the Net 2023 Country Report*, Freedom House, 2023,

<https://freedomhouse.org/country/ukraine/freedom-net/2023> (accessed: 1.07.2025).

The growth of domestic platforms like Megogo and Sweet.TV, whose weekly reach surged from 46% to 68%, stems from a quantifiable turn towards national identity, which we validated as the Patriotic Streaming Preference Scale. The data shows that a one-standard-deviation increase on this scale nearly doubles the likelihood of subscribing to a local service. This patriotic impetus, combined with advantages such as exclusive sports content and Ukrainian-language dubbing, has enabled national players to solidify market share and build a loyal user base.

Netflix's strategy in Ukraine illustrates a key lesson in global media adaptation. To retain subscribers in a patriotic and culturally sensitive environment, the platform must "speak Ukrainian". Our analysis shows this is not merely cosmetic; original content with Ukrainian dubbing remains in the national top 10 list 38% longer than titles with subtitles only. This data offers clear evidence that deep localization drives content stickiness and reduces churn in a contested market.

This research provides three key contributions. Firstly, it offers an empirical model of wartime media-market coevolution, showing how external shocks accelerate localization and redefine competitive dynamics. Secondly, it introduces a validated psychometric tool for measuring patriotic consumer preference in media, adaptable for other national contexts. Thirdly, it confirms that the decline in piracy (a fifteen-percentage-point drop) is directly linked to increased availability of legal, accessible, and culturally relevant content in the national language. As the war continues, this co-evolutionary dynamic, where global and local platforms vie for relevance by catering to a nation's cultural self-assertion, will likely define the future of Ukrainian and other Eastern European media markets.

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