

# *Digital Wars of the World-System: Technofeudalism and the Geopolitics of Streaming Platforms*

**ABSTRACT.** Stelmach Miłosz, *Digital Wars of the World-System: Technofeudalism and the Geopolitics of Streaming*. “Images” vol. XL, no. 49. Poznań 2026. Adam Mickiewicz University Press. Pp. 61–80. ISSN 1731-450X. <https://doi.org/10.14746/i.2026.40.49.4>.

The article examines the contemporary streaming market from a geopolitical, economic, and technological perspective, portraying it as a battleground for cultural power and infrastructural dominance. Drawing on Immanuel Wallerstein’s world-systems theory, the author argues that digital audiovisual distribution not only reproduces but also intensifies the existing centre—periphery hierarchies through the technofeudal logic of platforms. The article explores four key tensions: internal competition among streaming services, the clash between traditional media industries and tech giants, the algorithmization of cultural access, and the geopolitical rivalry between the US and China. The author contends that the digital revolution in media distribution has not led to democratization, but instead has reinforced an oligopolistic system of control based on data, infrastructure, and algorithmic power.

**KEYWORDS:** streaming, film studies, Netflix, geopolitics, technofeudalism

The year 2025 may go down in media history as a significant watershed in the evolution of audiovisual content distribution. According to Ampere Analysis, it marks the moment when streaming platforms surpassed traditional commercial broadcasters in content investment for the first time, allocating \$95 billion to this end—accounting for 39% of all global expenditure.<sup>[1]</sup> This development reflects a fundamental shift of power from traditional media to digital platforms, which are increasingly effective in controlling both the production and distribution of audiovisual content. At the same time, the streaming market itself in 2025 is undergoing a phase of significant structural transformation. These changes confirm the thesis of progressive centralization of power and capital in this area, the starkest evidence of which were the advanced merger negotiations between Warner Bros. Discovery and Paramount Global, following a period of intense speculation involving Netflix.

The aim of this paper is to examine the streaming market precisely from the perspective of the ongoing struggle for control and dominance taking place at the intersection of capital, technology, and politics. Setting aside the textual, aesthetic, and even production perspective (in the sense of the process of creating a specific film or series), I aim

[1] P. Ingram, *Streamers to Spend \$95BN on Content in 2025, Surpassing Commercial Broadcasters*, Ampere Analysis, 4.02.2025, <https://www.ampereanalysis.com/insight/streamers-to-spend-95bn-on-content-in-2025-surpassing-commercial-broadcasters> (accessed: 18.07.2025).

com/insight/streamers-to-spend-95bn-on-content-in-2025-surpassing-commercial-broadcasters (accessed: 18.07.2025).

to outline certain macro-trends that currently define the dynamics of the industry. Among the many parallel processes that may shape the future of media—as well as the entities behind the audiovisual market and our own capabilities, habits, and positions as audiences—I would like to identify four key axes of tension that define the field for many current disputes and conflicts. Each of these clashes has a slightly different scope and defines a different axis of conflict in the contemporary media landscape; however, they often overlap, which points to the multifaceted transformation of the contemporary audiovisual scene. Given the incredibly dynamic development of this sector—which academic literature (in film and media studies, as well as economics and political science) often fails to keep pace with due to the nature of the analysis and publishing procedures—these considerations are largely based on data derived from popular publications, particularly industry reports and internet portals that track shifts in this market in real time. These will be supplemented by broader analyses and theoretical inspirations that allow for the interpretation of this data through a critical academic lens.

I will attempt to situate these issues primarily within the theoretical framework provided by Immanuel Wallerstein's concepts and his proposed method of world-systems analysis.<sup>[2]</sup> I have attempted to outline its key assumptions regarding the film market elsewhere,<sup>[3]</sup> but in brief, it assumes the existence of an integrated economic-cultural space of global scope produced by the capitalist economy. While political, social, and economic actors from various countries participate in this space, the relationships between individual entities assume a hierarchical character. In this way, a relatively durable relationship is formed between the core of a given system (in the case of the contemporary film market, this is conventionally understood as Hollywood—the commercial film industry located in the USA) and its (semi)peripheries—smaller film industries attempting to gain autonomy but subordinated to the centre in both economic and discursive dimensions. A position in this hierarchy determines the horizons of a given film industry—its potential for capital accumulation and mobilization, its ability to reach local or global audiences, its capacity to generate its own aesthetic or narrative formulas, and the independence of the local market from the decisions of the centre, etc. This framework is particularly relevant when discussing the streaming market, which, even more than earlier channels of audiovisual distribution, assumes a global character and is dominated by a few major players, against whom any local alternatives occupy a necessarily marginal position.

[2] The foundations of this concept were laid out by Wallerstein in the canonical book: *World-systems Analysis: An Introduction*, Duke University Press, Durham 2004.

[3] M. Stelmach, *Escape from the Periphery: World-system of Cinema and Polish Film*, "Studia Filmoznawcze" 2023, no. 45, pp. 35–60.

Clash I—Streaming  
Civil Wars

Despite the rapid expansion of streaming platforms in recent years, which has enabled the growth and operation of numerous market participants, the field of their activity has been described from the outset through the prism of fierce rivalry. The owners of individual VOD portals constantly fight for users, content, recognition, and finally, the profits that result from all of the above. By the end of the second decade of the 21st century, publicists were describing this rivalry with the evocative term “Streaming Wars”, which quickly permeated the academic and popular science literature.[4] During the phase of rapid market development, the prospects of continuously acquiring new customers and the increasing time spent by them consuming VOD content drove the growth of a relatively large number of competing services—giving each hope of obtaining a satisfactory share. However, market saturation in recent years (and the consequent slowdown in growth and increased competition) has placed the expected profitability of at least some of them in serious doubt.

According to some forecasts, the era of the free coexistence of a relatively large number of independent streaming services may be coming to an end. Analysts predict that in the near future, “at least one second-tier streaming service—Max, Paramount+, or Peacock—will cease to exist as a standalone platform” and may be taken over by a stronger competitor.[5] Pressure to achieve profitability amidst rising content costs and fierce competition is leading to market consolidation, examples of which include the merger of HBO Max and Discovery+ into MAX in 2023, and Disney’s assumption of full control over Hulu in 2025. Particularly symptomatic was Amazon’s 2022 acquisition of the production rights (and brand) of the classic studio MGM for \$8.5 billion, allowing for the inclusion of over 4,000 films and 17,000 television programmes into the Amazon Prime library. This acquisition demonstrates how the company utilizes its platform position to integrate its operations and control content, including future content. As Mike Hopkins, Senior VP of Amazon Studios/Prime Video, stated: “The real financial value behind this deal is the treasure trove of IP in the deep catalogue that we plan to reimagine and develop together with MGM’s talented team.”[6] This transaction illustrates how technology platforms leverage their capital advantage to build monopolistic positions in the audiovisual content value chain, in which it will be increasingly difficult for smaller players to find a place.

At the same time, their profitability remains questionable—for many years, all leading streaming portals brought losses to their owners,

[4] See, among others: M. Jenner, *Introduction to the Second Edition: Netflix and the Streaming Wars*, [in:] eadem, *Netflix and the Re-invention of Television*, Palgrave Macmillan, Cham 2023.

[5] D. Dillon, *Streaming’s Next Act: Hub Predicts Major Shifts Coming in 2025*, NCS, 12.12.2024, <https://www.newscaststudio.com/2024/12/12/streaming->

[2025-outlook-hub-entertainment-research/](https://www.newscaststudio.com/2024/12/12/streaming-2025-outlook-hub-entertainment-research/) (accessed: 18.07.2025).

[6] Quoted in: E. Hayden, *MGM Sold to Amazon for \$8.45 Billion in Blockbuster Deal*, The Hollywood Reporter, 26.05.2021, <https://www.hollywoodreporter.com/business/business-news/mgm-sold-to-amazon-deal-4075596/> (accessed: 20.07.2025).

accumulating debt year after year.[7] By the end of 2020, Netflix had reached a total debt of \$15 billion; Disney+ brought its owners over \$3 billion in losses in 2022 alone; and the Peacock service, owned by NBCUniversal (part of the Comcast conglomerate), lost \$2.75 billion in 2023. Recently, this trend has slowly begun to reverse—while in 2023 major market players (Disney, Paramount, Comcast, Netflix, and Warner Bros. Discovery) lost \$0.7 billion on streaming activities, in the first half of 2024 they earned \$3.3 billion. This occurred not only thanks to subscriber growth but also due to continually rising prices (while in 2019 the combined cost of subscriptions to major streaming services was \$59, in 2024 it was over 70% higher, reaching \$110), as well as the introduction of cheaper options for users requiring ad viewing (bringing profits from advertisers to the platforms). Netflix, which projected revenues of \$43.5–44.5 billion in 2025 (a 12–14% year-over-year increase), announced in a letter to shareholders following the close of the second quarter that it expects to double ad revenue and increase its operating margin to approx. 29–30%.[8] This strategy reflects a broader trend toward hybrid models combining subscriptions with advertisements, allowing platforms to monetize user attention in various ways.

This trend confirms that after a period of aggressive expansion, platforms are entering a phase of consolidation and optimization, which may lead to further market concentration. Deloitte forecasts also indicate that “stacking”—combining various VOD services by a single recipient—will peak in 2025, with an average of four subscriptions per consumer in the United States. Consequently, the video industry may ultimately consist of a few, usually two or three, standalone SVOD players per domestic market, alongside aggregators. In the UK, according to data from September 2024, 43% of SVOD subscribers purchased at least one of their services through a third party (pay-TV provider, telecommunications operator, or technology platform).[9] This trend points to a possible return to models resembling traditional pay television, but retaining a digital infrastructure of control, wherein a single provider bundles offers from various platforms, much like television channels.

Nevertheless, the spectre of a “streaming bubble” still hovers over the market—the risk that the market is overvalued and that a collapse or absorption of even some leading platforms is possible. Despite a record number of subscribers—surpassing 300 million global users by the

[7] The statistics presented below are based on Forbes data, see: B. Adgate, *Streaming Units Are Beginning To Be Profitable. Here's Why*, Forbes, 11.10.2024, <https://www.forbes.com/sites/bradadgate/2024/10/11/streaming-units-are-starting-beginning-to-be-profitable/> (accessed: 18.07.2025).

[8] See: [https://s22.q4cdn.com/959853165/files/doc\\_financials/2025/q2/FINAL-Q2-25-Shareholder-Letter.pdf](https://s22.q4cdn.com/959853165/files/doc_financials/2025/q2/FINAL-Q2-25-Shareholder-Letter.pdf) (accessed: 20.07.2025).

[9] See: P. Lee, R. Darbyshire, K. Westcott et al., *Reevaluating Direct-to-Consumer: The Shift toward Video Aggregators*, Deloitte Center for Technology, Media & Telecommunications, 19.11.2024, <https://www.deloitte.com/us/en/insights/industry/technology/technology-media-and-telecom-predictions/2025/tmt-predictions-video-streaming-bundles-bigger-than-ever.html> (accessed: 20.07.2025).

end of 2024<sup>[10]</sup>—and the highest brand awareness, identified almost synonymously with streaming by many viewers, there have hitherto been several significant arguments suggesting that Netflix might prove to be the weakest link in the system. First is the fact that, unlike Disney, Universal, or other major media conglomerates, Netflix lacks a support base in the form of theme parks, television networks, or extensive merchandising, limiting its content monetization possibilities outside the streaming platform. Disney can leverage its content across multiple business fronts, creating a synergy effect or allowing for losses in one branch of activity, whereas Netflix is dependent mainly on subscription revenue. It also possesses significantly weaker intangible assets related to rights for exploited content. Netflix does not own franchises with long-term value comparable to the Marvel Universe or Star Wars. Even popular series such as *Stranger Things* (2016–), *Squid Game* (2021–), or *Money Heist* (2021–) do not have the potential to generate revenue comparable to franchises belonging to traditional studios, and their long-term popularity is uncertain. Amazon attempted to remedy this problem by acquiring so-called “legacy content” associated with the MGM brand, while Netflix must constantly invest in new productions to maintain subscriber interest, which increases financial pressure. This is corroborated by the statistics for 2022 that showed that out of all major VOD platforms Netflix experienced the smallest demand for content that is at least 20 years old—only 11% compared with HBO MAX 36% and Paramount+ 40%.<sup>[11]</sup>

Despite its dominant market position, there were legitimate suspicions over the last decade that Netflix could share the fate of Nokia or BlackBerry – erstwhile leaders of the mobile phone market displaced by a change in technological and business paradigms. Research confirmed that Motion, the manufacturer of BlackBerry phones, held a 56% share of the American smartphone market in 2009, yet by the end of 2016, this had fallen below 0.1%.<sup>[12]</sup> The histories of these brands show that once market advantage is gained, especially in the area of new technologies, it can be quickly lost. However, this situation was supposed to change radically with the Netflix’s attempted acquisition of Warner Bros. Discovery, a move that could be treated as a peculiar “flight forward” (a *fuite en avant*): an attempt to remedy existing problems resulting from the scale of operations being too large by expanding them further into areas where those problems were most manifest. This unprecedented merger, reportedly valued at over \$80 billion, was not only intended to equip the streaming giant with one of the richest

[10] L. Manfredi, *Netflix Tops 300 Million Subscribers Globally, Adds Record-Breaking 19 Million in Q4*, TheWrap., 21.01.2025, <https://www.thewrap.com/netflix-earnings-q4-2024/> (accessed: 18.07.2025).

[11] *Which Streamers Are Getting the Most Out of Their Classic Movies?*, Parrot Analytics, 14.10.2022, [https://www.parrotanalytics.com/insights/which-](https://www.parrotanalytics.com/insights/which-streamers-are-getting-the-most-out-of-their-classic-movies/)

[streamers-are-getting-the-most-out-of-their-classic-movies/](https://www.parrotanalytics.com/insights/which-streamers-are-getting-the-most-out-of-their-classic-movies/) (accessed: 25.02.2026).

[12] S. Heritage, *The Rise and Fall of the BlackBerry*, The Guardian, 15.10.2023, <https://www.theguardian.com/technology/2023/oct/15/blackberry-smartphone-status-symbol-then-crashed-and-burned> (accessed: 20.07.2025).

libraries of legacy content (including DC franchises, Harry Potter, and the HBO back catalogue) but primarily to complete the process of hybridizing the business model.[13] On the other hand, the proposed Paramount—Warner merger consolidates the biggest entities of the “old Hollywood”, isolating Netflix even more. If the deal between Warner Bros. Discovery and Paramount is finalized, it will create a vertically and horizontally integrated mega-conglomerate controlling the full lifecycle of content. This entity would combine the potentials of HBO MAX and Paramount+, creating a formidable rival for Netflix. This, in turn, shifts the pressure and risk of dropping out of the ‘streamer race’ back onto standalone players, including the streaming giant itself.

## Clash II—The California Derby

Focusing on the business models of individual market participants, however, one must note that the rivalry described above involves two fundamentally different types of entities, defining yet another additional axis of dispute. One of the conflicts most frequently commented upon, brought about by the popularization of streaming in the last decade, is the rivalry between traditional audiovisual content producers (primarily the largest film studios and television stations concentrated in corporations such as the aforementioned Disney, Comcast, and WarnerMedia, but also Sony and Viacom/CBS) and the new giants of the digital age (sometimes collectively referred to by the acronym FANGA, formed from the names of the industry leaders—Facebook, Apple, Netflix, Google, Amazon). Although they all invest in digital activity, including internet distribution of audiovisual content, what distinguishes them is the core business of the given enterprise and, consequently, the offer connected with other types of activities and monetization methods standing behind the streaming model.

With the significant exception of Netflix, the largest streaming platforms constitute a supplement to the main activities of the firms that manage them. In the contemporary media market, the dominant role is played by vast conglomerates gathering various types of entities under their wings, achieving economies of scale (consisting of lowering unit costs with a sufficiently large volume of production) through this accumulation, and benefiting from the synergy flowing from vertical and, especially, horizontal integration, relying on mutual promotion and multiple sales of related goods. Tanner Mirrlees describes all these mechanisms excellently in his book *Global Entertainment Media*, also drawing attention to the international character and cultural ramifications of the functioning of this type of conglomerate.[14] However, this publication from 2013 focuses on traditional media conglomerates, usually rooting back to the first half of the 20th century, shaped in their current form

[13] N. Rocha, *What to Know About Netflix’s \$83 Billion Deal for Warner Bros. Discovery*, The New York Times, 6.12.2025, <https://www.nytimes.com/2025/12/06/business/netflix-warner-bros-what-to-know.html> (accessed: 2.01.2026).

[14] T. Mirrlees, *Global Entertainment Media. Between Cultural Imperialism and Cultural Globalization*, Routledge, New York and London 2013.

under the conditions of neoliberal economic and cultural policies of the turn of the century, and focusing primarily on the production of entertainment content (music, films, television, games, etc.) and methods of its distribution. Writing in the early 2010s, Mirrlees does not yet account for the rise in importance and competition from a new type of media giant. Meanwhile, as Lev Manovich aptly put it in *Cultural Analytics*:

However, though large-scale computational analysis of content and interaction data by companies such as Google, Facebook, Instagram, Amazon, and their counterparts in other countries gives them lots of power, they are not simply new iterations of the tightly integrated Hollywood conglomerates from the 1940s. The web, social media, and the use of media analytics create a new type of culture industry that coexists and interacts with the older one established in the 1910s–1940s. This earlier culture industry was focused on creating, distributing, and marketing content, such as movies, radio shows, songs, books, and TV programs. The new cultural industry of our time is focusing on organizing, presenting, and recommending content created by various actors, as well as capturing and analyzing individuals' interactions with this content. In other words, these companies are usually not content creators themselves.[15]

The differences between traditional Hollywood and tech giants thus extend beyond issues of capital, encompassing fundamentally different philosophies of conducting their business. Anecdotally, this clash can be described as “The California Derby”—a struggle between different types of activity, business models, and work cultures developed in Hollywood (in the south of the state, around Los Angeles) and in Silicon Valley (located just a few hundred kilometres north, near San Francisco). While Hollywood has historically concentrated on content creation, technology firms specialize in data organization and analysis, giving them an advantage in understanding and predicting user behaviour. Manovich emphasizes that this ability to analyse vast collections of cultural data constitutes a new form of power over the production of social meanings. Tech companies use advanced data analysis methods to understand user behaviour and optimize content, giving platforms an advantage over traditional studios that are only just learning to use data in the production and distribution process.

Moreover, platforms do not merely distribute content in a way tailored to observed audience preferences: they actively shape cultural tastes through algorithmic recommendations based on an analysis of millions of users' behaviour. Their analysis extends far beyond watched films or series. Amazon illustrates this trend by integrating its VOD platform with e-commerce and other services, creating a synergistic ecosystem that increases customer loyalty, tracking not only our audiovisual consumption habits but also what we buy, on what devices, at what time, in what location, etc. Therefore, while the sale of audiovisual content for Warner, Universal, or Disney was a goal in itself, for Amazon or Apple it

[15] L. Manovich, *Cultural Analytics*, MIT Press, Cambridge, MA and London 2020, pp. 70–71.

is merely a means to an end—a way to acquire data on consumer preferences, bind them to the brand, and sell various other goods—electronic equipment, services, or any other type of product, including those of other manufacturers—for which the Amazon platform is solely an intermediary.

In other words, the major Hollywood studios, whose history in many cases reaches back a hundred years or more, have encountered an adversary they have never faced before in this period—one that wants to take over a significant part of the market they dominate, without simultaneously being fully part of it. This does not mean, however, that they have no experience in dealing with competition. Historically, Hollywood has demonstrated an ability to absorb competing technologies and media, as was the case with traditional television in the 1950s or cable TV and the home video market in the 1980s. Currently, traditional studios are employing similar adaptive tactics toward streaming. Primarily, they naturally mobilize their resources, building their own streaming platforms based on existing content libraries (the aforementioned Disney+, HBO Max, Paramount+), placing a significant emphasis on high-quality productions. Secondly, they attempt to co-opt new entities into their oligopolistic model developed in the classical era, effectively offering a division of the current audiovisual market, but maintaining its general model. A sign of this action may be the fact that the Motion Picture Association (MPA)—the organization representing the interests of major film studios, which until recently counted only five members (Paramount Pictures, Universal Pictures, Warner Bros., Walt Disney Studios, and Sony Pictures)—invited Netflix in 2019, and Amazon in 2024, incorporating them into existing power structures. This process of co-optation allows traditional studios to retain some control over market evolution while simultaneously legitimizing new players.

This trajectory would be consistent with Wallerstein's diagnoses, who, when tracking the developmental cycles of the Western capitalist economy, noted significant regularities regarding the development—but also the self-liquidation—of quasi-monopolistic structures. The global media market, built after a series of acquisitions and mergers since the 1980s, can certainly be termed as such. As Wallerstein writes:

Over time, every quasi-monopoly is undone by the entry of further producers into the market. Quasi-monopolies are thus self-liquidating. But they last long enough (say thirty years) to ensure considerable accumulation of capital by those who control the quasi-monopolies. When a quasi-monopoly does cease to exist, the large accumulators of capital simply move their capital to new leading products or whole new leading industries. The result is a cycle of leading products. Leading products have moderately short lives, but they are constantly succeeded by other leading industries. Thus the game continues. As for the once-leading industries past their prime, they become more and more 'competitive', that is, less and less profitable. We see this in action all the time.[16]

[16] I. Wallerstein, *op. cit.*, p. 27.

Perhaps this observation will also prove accurate in relation to current transformations in the audiovisual market. Wallerstein describes the world-system as a social whole with boundaries, structures, and rules of legitimation, in which conflicts between groups striving to realize their own interests create the dynamic of development. It is possible that within this dynamic, accumulated capital will flow to new areas of the digital economy, ultimately combining traditional and digital distribution channels in a new way.

A sign of this is precisely the previously mentioned acquisitions of classic film studios by Silicon Valley giants—MGM by Amazon in 2022 and the consolidation of Warner Bros. and Paramount in 2026. While the Amazon deal represents a synthesis of Hollywood and Silicon Valley, the latter transaction signals a defensive consolidation of traditional “narrative culture” against the “data culture” of tech giants. However, both processes lead to the creation of even larger mega-conglomerates that combine traditional Hollywood with tech giants (an example of which could be the hypothetical merger of Apple with a major film studio, speculated upon by the media). Traditional studios can thus utilize their rich content libraries and experience in producing high-quality films and series, while benefiting from the digital giants’ capabilities for promotion, customer data acquisition, and binding customers to the digital ecosystems created in this way. However, the nature of such marriages will depend on the balance of power in the industry. Former media giants would like to reduce large digital platforms to the role of distributors of their content, similar to the case of cable television. Conversely, the new leading players in this market view Hollywood studios in a more subordinate and servile role as content providers for their proper business of managing digital infrastructure. The most radical scenario predicts a complete victory for the data-driven model, where content becomes merely a byproduct in the process of collecting, analysing, and monetizing user data. This scenario is the most pessimistic for creators, as artistic value becomes completely subordinated to algorithmic efficiency and the maximization of user engagement.

At the same time, the perspective outlined above introduces another key axis of tension observable around the development of the streaming market and accompanying discourses. This is the tension between the promise of democratization and differentiation of the audiovisual offer in the streaming era, and the traditional ambitions of large corporations (including those operating in the media market) to control content, limit access to it, and homogenize it. The digital revolution in audiovisual content distribution, including the expansion of streaming platforms, was widely presented as a democratization of access to culture. Henry Jenkins, in his pioneering approach to “participatory culture,” suggested that digital technologies would enable the blurring of boundaries between creators and audiences, opening new

### Clash III—Toward Technofeudalism

possibilities for audience engagement in creating and disseminating content.[17] Parallely, Chris Anderson, in the “Long Tail” concept, predicted that digital distribution would allow for the profitability of even very niche productions thanks to low storage costs and global scale of operation.[18]

These optimistic forecasts seemed to find confirmation in phenomena observed at the beginning of the 21st century: the lowering of the production threshold (symbolized by films made by smartphones), the emergence of internet infrastructure allowing for free sharing of one’s own materials (e.g., on portals like YouTube or Vimeo), and finally, the apparent limitlessness of content choice and declared inclusivity of digital platforms. However, reality turned out to be more complex and paradoxical. Instead of the expected democratization, we observe a progressive centralization of control, an increase in entry barriers for independent creators, and the consolidation of power in the hands of a few global technological players. Streaming platforms, despite declared openness, in practice strengthen oligopolistic structures, leading to the conclusion that this apparent revolution masks the reproduction of hierarchy, merely transferring it from traditional film studios to new digital gatekeepers. Significantly, attention is drawn to this not only by critically inclined observers and academics but also by participants in the film industry themselves, the best proof of which may be the 2023 report by the Writers Guild of America West, calling streaming platforms the “new gatekeepers” of the media market and pointing to the threat of market monopolization.[19]

This stems from the fact that the streaming market is characterized by fundamental economic contradictions that undermine its democratizing potential. Anderson’s “Long Tail” assumed that digital distribution would enable profitability for even very niche productions due to virtually zero storage costs and global scale. SVOD (Subscription Video on Demand) models were theoretically supposed to support content specialization through a predictable revenue stream, greater attachment to content value by users, and better subscriber retention. In practice, however, many analyses and commentators point to the fact that consumer choices in the case of platforms do not result so much from user preferences as from the algorithmic logic of the platforms—which promotes content generating the highest engagement—and from competitive pressure requiring the constant attraction of

[17] H. Jenkins, *Confronting the Challenges of Participatory Culture: Media Education for the 21st Century*, MIT Press, Cambridge, MA 2006.

[18] C. Anderson, *The Long Tail: Why the Future of Business is Selling Less of More*, Hyperion, New York 2006. I wrote more about this concept and its relation to the contemporary film market production in the text *Wszystkie niewidziane filmy. Długi ogon*

*światowego kina*, “Kwartalnik Filmowy” 2022, no. 117, pp. 6–25.

[19] See: *The New Gatekeepers: How Disney, Amazon, and Netflix Will Take Over Media*, Writers Guild of America West, August 2023, <https://www.wga.org/the-guild/advocacy/politics-public-policy-pac/the-new-gatekeepers-how-disney-amazon-and-netflix-will-take-over-media> (accessed: 21.07.2025).

new subscribers.[20] Paradoxically, therefore, the “democratization” of access to content leads to the homogenization of the offer, where the logic of profit forces investments in safe franchises at the expense of diversity and artistic experiment. Streaming platforms, despite possessing libraries containing tens of thousands of titles, algorithmically steer users toward similar productions, creating an effect of apparent diversity amidst actual uniformity of cultural experience.

Despite the theoretical reduction of production costs thanks to digital technologies, we also observe a paradoxical dominance of high-budget blockbusters requiring capital unavailable to independent creators, reproducing the economic model of traditional film studios. An example of this trend can be Amazon’s series *The Rings of Power* (2022–), the first season budget of which amounted to an astronomical \$715 million (including \$250 million for the adaptation rights alone and \$465 million for production). Similarly, Netflix has regularly produced films with budgets exceeding \$150 million in recent years, and recently invested about \$320 million in the production of the film *The Electric State* (2025, A. Russo, J. Russo), demonstrating the scale of capital required to compete at the level of global platforms. This escalation of production costs is not accidental but stems from the aforementioned logic of platforms competing for user attention, resulting in the data cited at the beginning regarding record platform investments in content. Thus, paradoxically, the “democratization” of access to production tools coexists with the oligopolization of distribution possibilities on a global scale.

Significantly, this global dimension concerns not only the mastery of distribution—that is, having subscribers all over the world willing to consume films flowing from the Hollywood centre—but also engagement in local production. This is, of course, not a new phenomenon: traditional studios have willingly invested in local content since the 1960s,[21] but the scale of these investments was incomparable. Today, Netflix’s global production consists largely of content commissioned from local subcontractors (or purchased at a later stage of production) and directed primarily to local audiences, with the hope of, at most, occasional international success. In 2025, for the first time, a majority of new seasons of Netflix original series were non-English-language productions, while non-English language movies accounted for 44% of platform’s output.[22] Jack Valenti, the legendary long-time president of the MPA, once reportedly said: “European cinema? We will make European cinema for you.”[23] Netflix, which commissions the produc-

[20] See: *The Netflix Effect: Technology and Entertainment in the 21st Century*, eds. K. McDonald, D. Smith-Rowsey, Bloomsbury, New York and London 2016.

[21] See: T. Guback, *Film as International Business*, “Journal of Communication” 1974, vol. 24, iss. 1, pp. 90–101.

[22] R. Patel, *A First for Netflix: Non-English Content Takes the Lead in TV Originals*, Ampere Analysis,

19.02.2026, <https://www.ampereanalysis.com/insight/a-first-for-netflix-non-english-content-takes-the-lead-in-tv-originals> (accessed: 25.02.2026).

[23] Quoted in: M. Adamczak, *Globalne Hollywood, filmowa Europa i polskie kino po 1989 roku: Przebicia kultury audiowizualnej przelomu stuleci, slowo obraz/terytoria*, Gdańsk 2010.

tion of its original films and series in 44 different countries, seems to be very close to fulfilling this motto. Since 2020, more new content on Netflix originates from outside the USA than in the streaming giant's country of origin,[24] and in 2024, for the first time, it allocated higher expenditures to foreign production.[25]

Ramon Lobato analysed the global dimension of Netflix's (and other platforms') activities in detail in his 2019 book *Netflix Nations*,[26] pointing to the complex tensions arising between the international scale of Netflix's activity and various types of regional technological, legal, cultural constraints, etc. In the face of these types of processes, the question arises whether this "glocalization" (to use a concept fashionable in the 90s and 2000s from the field of globalization studies, denoting simultaneous globalization and localization of certain cultural processes[27]) of Netflix and other leading platforms is a sign of unsealing the division into core and periphery by admitting privileged streams of content circulation from outside the discursive centre—designated by high-budget, English-language productions realizing American narrative, ideological patterns, etc.? The global popularity of series such as *Squid Game* or *Money Heist*, as well as local successes of content produced in situ (in Poland, e.g., the series *High Water* [2022–] or *1670* [2023–]), might indicate this. On the other hand, this process can be treated as another stage of mastering the peripheries—taking over not only local sales markets but also local production, by making it dependent on itself in an economic sense while simultaneously establishing its own standards and production culture (which, incidentally, in many cases actually constitutes an improvement of previously prevailing management mechanisms, adherence to labour rights, set culture, etc.[28]). Regardless of the interpretation or valorization of this process, there is no doubt that streaming giants want to present themselves as globally engaged, acting also as local entities.[29]

In the most pessimistic interpretation, therefore, technological giants are monopolizing the global network infrastructure of information and content flow, making entire industries dependent on their services. Their strength lies not in the ability to produce the most desired content (it is worth adding that Netflix itself does not engage in

[24] *Netflix Looks to International Commissions for Growth*, Ampere Analysis, <https://www.ampereanalysis.com/press/release/dl/netflix-looks-to-international-commissions-for-growth> (accessed: 21.07.2025).

[25] *More Than Half of Netflix's Content Spending Now Outside of North America*, Ampere Analysis, 11.03.2024, [www.ampereanalysis.com/insight/more-than-half-of-netflixs-content-spending-now-outside-of-north-america](http://www.ampereanalysis.com/insight/more-than-half-of-netflixs-content-spending-now-outside-of-north-america) (accessed: 25.02.2025).

[26] R. Lobato, *Netflix Nations: The Geography of Digital Distribution*, New York University Press, New York 2019.

[27] See: Z. Bauman, *On Glocalization: or Globalization for Some, Localization for Some Others*, "Thesis Eleven" 1998, vol. 54, no. 1, pp. 37–49.

[28] See: S. Szostak, *Serwisy streamingowe a lokalna branża audiowizualna—mapowanie wpływu Netflix na polski sektor produkcji*, "Images. The International Journal of European Film, Performing Arts and Audiovisual Communication" 2023, vol. 35, no. 44, pp. 204–226.

[29] See: E. Elkins, *Algorithmic Cosmopolitanism: On the Global Claims of Digital Entertainment Platforms*, "Critical Studies in Media Communication" 2019, vol. 36(4), pp. 376–389.

production, instead hiring firms specialized in this locally) but precisely in possessing aggregated data that enables client preferences to be shaped, along with the tools to reach them and provide them access to the service. This introduces a new type of control and market that is even harder for new players to enter if they do not possess a comparably vast capital and technological backing. Nick Srnicek called this model “platform capitalism” in his 2017 book, while in recent years some authors, led by Yanis Varoufakis, promote the more explicit term of “technofeudalism.”[30] This signifies a situation in which the goal of the largest enterprises is not production and the profitable sale of a product, but rather rent extracted from the mere fact of owning digital infrastructure. This is not, of course, a process limited to the film and television market, but rather a broader reality in which, as Jeremy Gilbert observes while analysing Varoufakis’s concept, “a new mode of production has emerged, as a novel type of corporation comes to dominate the world economy: American and Chinese mega-platforms such as Google, Facebook, Amazon, Alibaba and Tik Tok.”[31]

The fundamental mechanism of this new form of cultural control is the algorithmization of access to content. Streaming platforms utilize advanced machine learning algorithms and analysis of user behavioural data to personalize the offer, which theoretically is supposed to increase audience satisfaction. However, as Tarleton Gillespie convincingly argues in his research on “algorithmic culture”, these systems actually limit the diversity of content, creating “filter bubbles” and promoting mainly those productions that generate the greatest engagement, not necessarily of the highest artistic quality. Algorithms in this situation do not function as neutral curatorial tools but become new gatekeepers of culture, actively deciding what is visible and popular, and what remains in the digital shadow. In his now-canonical essay on the subject, Gillespie emphasized that algorithms not only curate existing content but also shape what is considered valuable, relevant, and even “real” culture.[32] This process has particularly destructive consequences for auteur and experimental cinema, which, due to its specificity, rarely generates mass engagement measured by platform algorithms.

As usual, such oligopolistic practices require laws to guard their interests. In the traditional media system, its guarantor was primarily restrictive regulations protecting property rights to intellectual property, on which the American entertainment industry has largely based itself for several decades. In the digital age, the Digital Rights Management

[30] See: N. Srnicek, *Platform Capitalism*, Polity Press, Cambridge 2017; Y. Varoufakis, *Technofeudalism: What Killed Capitalism*, Bodley Head, London 2023.

[31] J. Gilbert, *Techno-feudalism or Platform Capitalism? Conceptualising the Digital Society*, “European Journal of Social Theory” 2024, vol. 27, no. 4, pp. 561–578.

[32] T. Gillespie, *The Relevance of Algorithms*, [in:] *Media Technologies: Essays on Communication, Materiality, and Society*, eds. T. Gillespie, P.J. Boczkowski, Kirsten A. Foot, The MIT Press, Cambridge, MA 2014, pp. 163–194.

(DRM) system and content licensing enable platforms unprecedented supervision over the exploitation of audiovisual works. These security technologies allow platforms to control not only access to content but also the manner of its consumption, thereby limiting user possibilities and perpetuating platform dominance. DRM uses advanced encryption methods and authorization mechanisms to precisely control who, when, and how one can access digital content.[33] This system extends far beyond traditional forms of copyright control, creating a technological surveillance infrastructure that can be used to limit access to content for political, economic, or cultural reasons.

#### Clash IV—Digital Rivalry of Powers

It is no wonder that the processes described above have raised numerous voices of concern, and even sparked outrage. Traditionally, the concentration of too many resources in single hands was countered by antitrust laws, the tradition of which in the USA reaches back to the Sherman Act of 1890, then serving to temper the ambitions of industrialists gaining too strong a position, e.g., oil or steel magnates. Some analyses point to the similarity of the current situation to the period of dominance of major studios in the classical Hollywood era, when the state regulator, by virtue of the Paramount Decree of 1948, decided to end the period of free vertical integration of leading entities in the film market.[34] However, although numerous reports and expert voices appeal for the introduction of regulations limiting the influence of the largest digital corporations, the US administration shows a tendency to soften antitrust regulations towards domestic technology giants.

The fact that they are currently being weakened may be related to another axis of conflict worth mentioning here. Namely, this impressive expansion of the streaming market does not mean an even distribution of benefits or democratization of access to content production, neither in light of the process of creating technofeudal, oligopolistic structures described above nor in the geopolitical dimension. The geographic structure of the market reveals clear power asymmetries. According to Coherent Market Insights forecasts, North America is expected to maintain a hegemonic position in 2025 with a 46.6% share of the global market, where major players like Amazon Prime, Disney+, and Netflix are intensifying competition. At the same time, the fastest-growing Asia-Pacific region, forecasted to reach a 38.7% market share in 2025, indicates the global character of the digital transformation of content distribution, but also the reproduction of geopolitical divisions in the digital cultural space.[35]

[33] See: *Digital Rights Management: A Complete Guide to DRM*, Fortra, <https://www.digitalguardian.com/resources/guides/guide-to-digital-rights-management> (accessed: 21.07.2025).

[34] M.E. Norris, *Now Streaming: How Streaming Services Are Following in the Antitrust Footsteps of*

*Hollywood's Golden Age*, "University of Miami Business Law Review" 2023, vol. 31, iss. 1, pp. 160–195.

[35] *Media Streaming Market Analysis*, Coherent Market Insights, <https://www.coherentmarketinsights.com/industry-reports/media-streaming-market> (accessed: 21.07.2025).

Asia, especially its eastern and southern parts, represents not only the largest potential consumer base for American platforms but also possesses the potential to create real competition for it, including—using Wallerstein's terminology—its own world-system, alternative to the Western economy dominated by the USA. Indeed, contrary to the belief in the unrivalled position of American entities in this market, which viewers in the Western cultural circle (where there are not many significant alternatives to Netflix, Disney+, or HBO Max) might hold, it is worth noting that the global market is somewhat more diversified. Indeed, among the ten streaming platforms with the largest number of subscribers, there are five American firms (sequentially Netflix, Amazon Prime, Disney+, HBO Max, and Paramount+/Sky Showtime), as well as one Indian one, albeit cooperating closely and linked in terms of capital with Disney (Jio-Hotstar), but also four Chinese ones, completely independent of Western media conglomerates (Tencent Video, iQIYI, Youku, and MangoTV). Moreover, controversies surrounding TikTok show how geopolitical conditions influence platform policies, where rivalry concerns not only the film market but also user data and digital infrastructure.[36]

The context of this dispute is also the general rapid development of the Chinese film market, taking place since the beginning of the 21st century, which has made it capable of competing in terms of production outlays, viewer numbers, and achieved revenues with the American one.[37] A testament to these processes is the expansion of Chinese entities into Western markets ongoing since the previous decade, symbolized by acquisitions such as the purchase of AMC Theatres (2012) and Legendary Entertainment (2016) by Wanda Group. These purchases gave Chinese conglomerates control over the distribution of significant American productions. At the same time, Chinese streaming platforms, the largest of which have over 100 million users, are developing dynamically, creating alternative centres for global content distribution.

In this light, it seems that ignoring alarmist voices calling on Western governments for stricter supervision over leading digital giants seems to be a deliberate strategy to support “national champions” in global rivalry, representing a reversal of traditional American antitrust policy. This policy aims to strengthen the position of American technology and media firms in the international arena. Global rivalry for dominance in the sphere of audiovisual content distribution extends far beyond economic issues, becoming an element of a broader geopolitical game, taking place primarily between the United States and China. The American response thus takes the form of approval for mega-mergers of the Warner Bros.-Discovery type (2022), which create corporations “too big to fail”, and capable of competing with Chinese giants. The US ad-

[36] See J.E. Gray, *The Geopolitics of “Platforms”: The TikTok Challenge*, “Internet Policy Review” 2021, vol. 10, iss. 2, pp. 1–26.

[37] This development was described in detail a few years ago by Marcin Adamczak in the book: *Kapitały przemysłu filmowego: Hollywood, Europa, Chiny*, PWN, Warszawa 2018.

ministration increasingly approves large media mergers that in the past might have been blocked due to antitrust concerns. This geopolitical logic leads to further market concentration, where national security considerations justify the creation of media oligopolies. Another litmus test of the American administration's mood in this regard will be the Paramount and Warner Bros. merger process.

Simultaneously, China is introducing its own regulations, for example, forcing Apple to move Chinese citizens' data to data centres located in China.[38] In India, in turn, a three-tier content regulation structure on video platforms was introduced, including complaint resolution, industry self-regulation, and an oversight mechanism.[39] This type of assertive regulatory policy is often not available to (semi) peripheral states located in the orbit of United States influence. For example, when work began in Poland in 2019 on a so-called tax on digital giants, shortly thereafter US Vice President Mike Pence appeared on an official visit, and as a result of the arrangements made, work on new burdens for internet giants was halted.[40] The fact that streaming platforms are essentially important for international relations and the cultural-economic policy of the state can also be evidenced by the fact that when South Korean President Yoon Suk Yeol visited the United States on a state visit in 2023, he held two official meetings—with US President Joe Biden and with Netflix CEO Reed Hastings.[41]

In the face of this economic-social entanglement, governments worldwide are introducing regulatory mechanisms for streaming platforms, often, however, in a way that does not question fundamental power structures but merely regulates their functioning. The European Union strives for greater “digital sovereignty”, introducing regulations aimed at balancing structural asymmetries in communicative power. These regulations concentrate on resources of control and power in the digital media ecosystem, recognizing that the structure and distribution of communicative power fundamentally determine the character of the digital media environment. Similar dilemmas obviously do not concern only platforms providing access to audiovisual production, but to an equal (or even greater) degree, portals such as Google, Facebook, YouTube, X, TikTok, or Instagram, which contemporarily fulfil the role of critical digital infrastructure, responsible for access to information, official channels, and social contacts or tools ensuring the continuity of numerous services. VOD platforms in this context constitute part of a much larger process, which is the geopolitical dimension of the previously described tendency to create technofeudal structures.

[38] See: <https://www.apple.com/legal/transparency/cn.html> (accessed: 20.07.2025).

[39] See: <http://mib.gov.in/ministry/our-wings/digital-media> (accessed: 20.07.2025).

[40] See: A. Traczyk, *Amerykanie “głęboko wdzięczni”: Po wizycie Pence’a Polska wycofuje się z podatku cyfrowego dla korporacji*, OKO.press, 3.09.2019, <https://>

[oko.press/amerykanie-gleboko-wdzieczni-po-wizycie-pencea-polska-wycofuje-sie-z-podatku-cyfrowego-dla-korporacji](https://oko.press/amerykanie-gleboko-wdzieczni-po-wizycie-pencea-polska-wycofuje-sie-z-podatku-cyfrowego-dla-korporacji) (accessed: 20.07.2025).

[41] See: *Koreańskie kino na rozdrożu*, M. Stelmach in conversation with Park Ki-young, “Ekrany” 2024, no. 1, pp. 70–74.

The digital revolution in film distribution, contrary to the rhetoric of democratization, in reality reproduces and deepens the inequalities described by Immanuel Wallerstein in his world-systems theory, where all media channels are controlled by a few players. The technofeudal character of the new distribution system manifests itself in an unprecedented concentration of power in the hands of digital platforms, which control not only access to content but also user data and technological infrastructure. The key factor determining the future will be the regulatory role of states, particularly the European Union, and the resilience of local markets to the dominance of global platforms. As Ramon Lobato's analyses show, streaming platforms encounter diverse regulatory and cultural barriers in different countries, which may limit their totalizing dominance.

Writing about the digital revolution that touched cinema at the turn of the millenium, John Belton repeated after Giuseppe Tomasi di Lampedusa that "sometimes everything must change so that nothing changes." He argued that the digitalization of cinema and the digital transformation of film distribution, contrary to the moods prevailing at the time, did not constitute a true revolution, but rather an evolution of existing structures of power and control, masking the reproduction of existing hierarchies in a new form.[42] Similarly, digital platforms, despite their declarations of democratizing access to culture, in practice strengthen oligopolistic structures of control over the audiovisual industry. The paradox of digital democratization lies in the fact that technologies lowering theoretical entry barriers simultaneously create new, more subtle mechanisms of exclusion. Algorithmic access control, economic contradictions of VOD models, and geopolitical rivalry between mega-corporations lead to a situation where apparent diversity masks a real uniformity of cultural experience.

True democratization of access to culture would require a fundamental change in the structures of power and control over digital distribution channels, which seems unlikely in the current economic and political paradigm. Without strong regulatory intervention and the development of alternative distribution models, the digital transformation of cinema will continue the process of centralizing cultural power in the hands of a handful of global platforms, making the democratization of culture merely a marketing slogan masking new forms of technofeudal dominance, in which digital platforms control not only access to content but also user data and technological infrastructure. Algorithmic power over culture constitutes the essence of the technofeudal character of digital film distribution in 2025, where apparent diversity and personalization mask deep structural inequalities in access to the means of cultural production and distribution.

[42] J. Belton, *Digital Cinema: A False Revolution*, "October" 2002, vol. 100, pp. 98–114.

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