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URUGUAY

FICTION ON THE RUN AND INDUSTRY ON THE RISE.

DOI: <https://doi.org/10.7764/obitel.21.E.11>

Authors:

Rosario Sánchez Vilela (orcid ID: 0000-0003-2995-0520

Lucía Gadea (orcid ID: 0000-0003-3996-3122)

Introduction

The year 2020 began with a new government in Uruguay, as the result of the 2019 presidential elections. After 15 years of government of the Frente Amplio, there was an alternation of parties. This implied changes in the conduction of cultural policies and state agencies specifically linked to audiovisual development, such as the Institute of Cinema and Audiovisual of Uruguay (ICAU) board and the public channel, TNU, board. A few days after the new government took office, it was declared a public health emergency. These two events shaped a unique

context, with moments of bewilderment and paralysis, but also of dynamism in the field of the national audiovisual industry.

In recent years -mainly in 2020-, broadcast television has experienced a retreat to the traditional formats of contest and live programs based on conversation -*talk shows* in the broadest sense-, classics of the television since its origins. Programming strategies aim to capture a family audience, with proven recipes and risk reduction. In that design the novelty seems to have little place and serial fiction has seen its space greatly reduced: the volume of hours of Ibero-American fiction premiere barely reaches 3% of the total hours broadcast. Fiction is on the run to other screens and it is found in other settings.

In contrast to what happens on broadcast television, the Uruguayan audiovisual industry is experiencing a moment of great impulse and expansion. The carrying out in Uruguay of international projects of fiction series for large platforms, which had already been in progress, was strengthened in the pandemic context and seems to be projected into the next few years. Anyway, Uruguay seems to be a country without scripts: there is still no perspective of the execution of a Uruguayan television fiction with local showrunners for any of these platforms.

1. The Audiovisual Context of Uruguay in 2020¹

1.1. Broadcast television in Uruguay:

Chart 1. TV Networks/ national broadcast television channels in Uruguay

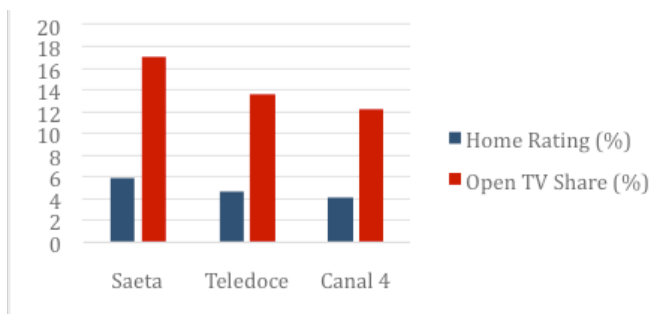
Private broadcast / channel (3)	Public broadcast / channel (2)
Canal 4 (Channel 4)	Televisión Nacional del Uruguay TNU (Channel 5)
Saeta (Channel 10)	TV Ciudad
Teledoce (Channel 12)	
CHANNELS TOTAL = 5	

Source: Obitel Uruguay

Graph 1. Rating and share by TV channel:

Channel	Home Rating (%)	Total TV Share (%)	Open TV Share (%)
Saeta	5,88	39,8	17,14
Teledoce	4,7	31,8	13,69
Canal 4	4,2	28,4	12,23
TNU	s/d	s/d	s/d
TV Ciudad	s/d	s/d	s/d
TOTAL	14.78	100	43.06

1 The analysis of broadcast television was based on data provided by Kantar Ibope Uruguay. We are particularly grateful for this contribution and in particular for the collaboration of Carolina Arigón and Valentina Cal.



Source: Kantar Ibope-Obitel Uruguay

The total annual audience of private broadcast television channels reached a *rating* of 14.78% and a 43.06% *share*. Although the general perception in 2020 was that broadcast television had increased its audience *share* -as reported by some articles in the national press- the data shows a new drop in annual audience with respect to 2019: about two points less in *rating* and four points less of *share*. This confirms the downward trend since 2013, already pointed out in previous reports. (Sánchez Vilela, Gadea, 2020, p. 324)

The pandemic situation caused that at times the citizens were concerned about information, especially of the press conferences that were broadcast daily by the Presidency of the Republic. Thus, according to Kantar-Ibope, between March 2nd and 18th, the *rating* in homes grew by 28%². However, in the global result of the year, this growth in audience volume is diluted and does not cushion the decline that had already been taking place. In this context of meager audiences, Saeta is the TV station that concentrates almost 40% of the *rating* with an an-

2 On March 13th, the pandemic was decreed in Uruguay, but the information of the spread of the COVID-19 around the world began to cause alarm before.

nual average of 5.88 points, followed by Teledoce and Canal 4. There are no audience measurements for public television stations.

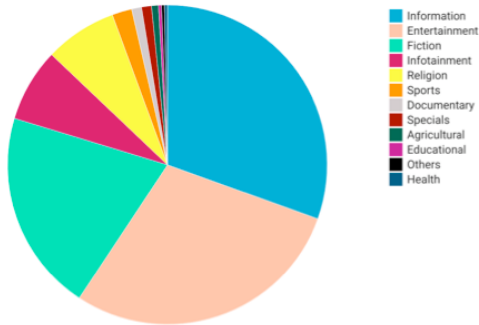
The study of the programming (Graph 2) reveals how the broadcast time was distributed by genre: the first two places corresponded to Information (30.47) and Entertainment (28.82). Fiction ranks third with 20%, 3,603 hours, including cinema³.

In 2020, 75% of the total broadcast hours corresponded to nationally produced programs. The historical trend had been around 60% and in 2019 reached 68%. This growth, which could be encouraging, was not really so for fiction: information, entertainment and infotainment occupied 84% of the broadcast hours, while fiction did not reach a percentage point.

Graph 2. TV genres and broadcast programming hours.

Genre	Hours	%
Information	5387:04:30	30.5
Entertainment	5094:19:30	28.8
Fiction	3603:05:15	20.4
Infotainment	1310:37:30	7.4
Religion	1297:05:15	7.3
Sports	347:23:15	2.0
Documentary	182:15:45	1.0
Specials	178:56:15	1.0
Agricultural	130:19:30	0.7
Educational	51:45:45	0.3
Others	48:57:00	0.3
Health	46:35:15	0.3
Total	17678:24:45	100

³ The study of programming by gender only took into account private channels because we do not have uniform information to incorporate into TNU. Anyway, we did a study of their programming to identify Ibero-American titles. TV Ciudad was not included as it is a public channel with a metropolitan reach.

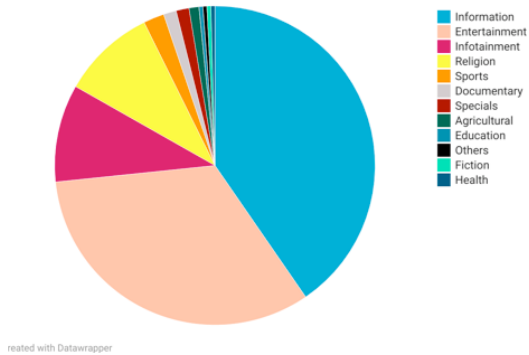


Source: Obitel Uruguay on data from Kantar Ibope

Graph 2.a TV genres and broadcast programming hours of national production:

Genre	Hours	%
Information	5387:04:30	40.5
Entertainment	4393:33:45	33.0
Infotainment	1310:37:30	9.9
Religion	1257:53:15	9.5
Sports	285:33:00	2.1
Documentary	169:18:45	1.3
Specials	169:18:45	1.3
Agricultural	130:19:30	1.0
Education	51:45:45	0.4
Others	48:57:00	0.4
Fiction	46:52:30	0.4
Health	46:35:15	0.4
Total	13297:49:30	100

Source: Obitel Uruguay on data from Kantar Ibope



The 2020 audience measurement marked some trends in relation to genres that need to be highlighted. *Reality shows* such as *Got Talent* -20.11 rating points and 33.57 share points- and *Master Chef Celebrity Uruguay* -15.27 rating points and 24.6 share- concentrated the largest audience. Other programs such as *Pasapalabra* came close with a rating of 14.54 points and *Polémica en el Bar* reached 13.53. All these programs had *rating* and *share* values much higher than any premiere serial fiction title, not only Ibero-American, but of any origin.

With lower values in audience measurement it is placed the most watched newscast with a *rating* of 13.66 and a *share* of 23.24. These programs that occupy the first places are all national and broadcast by Saeta Canal 10.

1.2. Pay TV and VoD platforms in Uruguay

Chart 2. Pay TV networks in Uruguay

6 Pay TV Networks most viewed in 2020¹
1) DirecTV (foreign), 2) Cablevisión (foreign), 3) TCC (national), 4) Nuevo Siglo (national), 5) Montecable (national), 6) Multiseñal (national)

Source: Obitel Uruguay

Chart 3. VoD in Uruguay

Top Active VoD Platforms in 2020	Total
Netflix, HBO Go, Prime (Amazon), Flow (Cablevisión), NSNOW (Nuevo Siglo), TCC Vivo (TCC), MC GO (Montecable), DirecTV Go (DirecTV) Movistar+ (telecommunication company), Claro Video (telecommunication company), Vera+ (state telecommunication company)	
TOTAL	11

Source: Obitel Uruguay

4 These are the networks for which the largest number of users are registered (URSEC Report 2020). Audience measurements cannot be accessed.

1.3. Independent television fiction production companies

Some independent production companies are consistently committed to the production of content for broadcast television, but not fiction. In the year 2019 in the three private channels 4140:17:15 of the broadcast hours were produced by independent companies. For 2020, according to the title grid of each channel, the panorama should not be very different. Channels turn to independent production companies for entertainment or infotainment content: Kubrick Media for Teleocho and Zur for Saeta are examples of this.

On the other hand, production companies engaged in the production of fiction are dedicated to feature film projects and usually do not have links to television channels. Those that venture on serial content have carried out their projects with public funds. Some large production companies with a track record in advertising develop projects of fiction. Currently those in charge of serial fictions for platforms such as Amazon and HBO are Salado Films and Cimarrón.

1.4. Sources of funding for the audiovisual sector

Audiovisual production in Uruguay, documentary or fiction, has been supported by national public funds and co-production alliances with other countries. Since the return to democracy, several funds have been developed for different stages of implementation. In general, each audiovisual project tries to add several of these funds to be able to carry out the production. As a quick summary, the main funding sources available today, for film and television, will be described here.

ICAU, an institute under the sphere of the Ministry of Education and Culture (MEC), is the institution responsible for carrying out

public policies relating to the audiovisual sector. Manages the Film and Audiovisual Development Fund, established by the Film Law that allocates \$ 25,000,000 to support national productions and co-productions, as well as the dissemination of productions. The amount had been fixed in the 2008 law and, in response to complaints from the sector, annual indexation was introduced in 2018. Also the Audiovisual Fund of the Ministry of Industry, Energy and Mining (MIEM), of annual call, awards prizes to fiction or documentary series, as well as to short films. Well before that, in 1985, the Fund for the Promotion and National Audiovisual Development (FONA) was created, as the result of the joint activities of public and private institutions⁵.

Other funds come from the departmental government of Montevideo, for example: the Montevideo Socio Audiovisual Program, which allows pay back funds for the completion of film and television productions; Montevideo Filma that supports the production of fictions or documentaries with a duration longer than 45 minutes.

From 2019, first as a pilot scheme and since 2020 as a continuous policy, the Uruguay Audiovisual Program (PUA) was created, carried out by the National Development Agency (ANDE) with the participation of ICAU and MIEM. The programme consists of a cash rebate of a percentage of the expenditure made in the country, which varies according to the size of the production and with different maximum return ceilings. It has a credit line that serves national productions to be carried out in Uruguay, with two types of support: one for production and post-production (with the *cash rebate* mechanism) and another for development (non-refundable fund)⁶.

5 The Municipality of Montevideo, the broadcast and cable television channels, Asoprod in addition to the MEC. It awards prizes to feature films with Uruguayan director.

6 Up to 80% of the project is paid back. The projects that access the fund are of two types: projects with amounts between \$ 445,740 and \$ 891,480; projects greater than \$891,480. For each case ANDE sets maximum support amounts: \$445,740 in the first case and \$891,480 in the second.

A second line serves international productions that take place in Uruguay. It covers feature films, short films, documentaries, video clips, animations, series but also international advertising production services. In this line the reimbursements depend on the volume of investment of each project and with established ceilings. Thus, a project that has an expenditure of between US\$ 300,000 and US\$ 4 million will be refunded 25% with a ceiling of US\$ 700,000.

The SeriesUy⁷ fund, created in 2016, offers \$5,000,000 and it is intended for production projects of a fictional television series of eight episodes between 46 and 52 minutes each. The display screen is that of the public media (TNU and TV Ciudad). In its three calls, three projects were selected. Only one was aired, *Todos Detrás de Momo* (2017 call, premiered in 2018). *Metro de Montevideo* is in production (2019 call).

All these lines of financing aim to boost the audiovisual local industry; they go in parallel with those of the financing of broadcast television and hardly intersect. Traditional advertising is the main income of the channels, but in recent years the *product placement* has invaded the entertainment programs, to which the channels have bet.

According to data provided by Kantar Ibope, the advertising on broadcast television fiction was 1,467,228 seconds, lower than 2019 (1,932,705). The main advertisers of fiction continue to be Tele Shopping and Unilever. This year, Laboratorio Genoma occupied the third place, displacing El País to fourth place and finally SC Johnson.

7 It is made up of the ICAU, TNU, the MIEM, through the National Directorate of Telecommunications and Audiovisual Communication Services (DINATEL), the Montevidean Locations Office and TV Ciudad.

1.5. Communication policies

The new government brought the initiative to replace the Audiovisual Communication Services Law (LSCA) -that was conceived during the government of the Frente Amplio (FA)- with a new law. Let us recall briefly that the contents of the LSCA began to take shape in 2010, within the framework of a Technical Advisory Committee, convened by the Executive. The bill entered Parliament in 2013 and was passed in December 2014. However, the following year appeals of unconstitutionality were filed on some articles and their regulation was only approved by the Executive in June 2019⁸, so the application of the law was very partial. On the other hand, the institutionality created in the LSCA never worked totally. Thus, after the last period of government of the FA, the Audiovisual Communication Council had not been appointed⁹.

With the new government, the repeal of the eight articles that had been declared totally or partially unconstitutional was announced. In April 2020, a new bill to replace Law 19,307 entered Parliament. In the new draft, the questioned articles were eliminated and other provisions were maintained, such as the maximum duration of the advertising slots, the percentage of national production and the obligation to broadcast events of general interest and public welfare campaigns, as well as the provisions regarding audiovisual accessibility. Among the most relevant changes proposed by the new law are: the modification of the limit of media concentration in a natural or legal person going from three to eight authorizations for radio and broadcast television in the LSCA; the elimination of the complex institutional structure de-

8 The process began in the government of José Mujica and ended in the last year of Tabaré Vázquez's second term.

9 The Honorary Advisory Commission for Audiovisual Communication Services (CHASCA) was installed in October 2017, almost three years after the law was passed, but the Audiovisual Communication Council, the central entity for the application of the law and to which Chasca was to report, was never appointed.

signed¹⁰ in the LSCA; the elimination of the fee that the channels had to pay for licences and use of the radio spectrum, which nullifies the Promotion Fund that the LSCA created.

1.6. Digital and mobile connectivity infrastructure

The percentage of internet users continues the growth trend that had been registered in previous years. According to the report *Informe del Internauta Uruguayo*, conducted by Radar Group, 93% of the population of all ages use the Internet (Montevideo Portal, 2020). This number is two percentage points more than in 2019. It also notes a reduction in the digital divide with regard to age and socio-economic status. By 2020 the use in the highest socioeconomic levels reached 99% while in the lowest levels it reached 90%. With respect to age ranges, there is a growth in users between 0 and 5 years old (more than 75%) and also in those over 65 years old, which reaches 76% (Montevideo Portal, 2020; Radio Uruguay, 2021).

The same report reveals that almost 60% of the devices used to connect to the internet in homes are smartphones and smart TVs, the remaining 40% is distributed among other devices such as tablets, laptops and desktop computers. In addition, there is an increase in the frequency of internet use in the year 2020 with an average connection of six hours per day. Only 2% of users declared not to connect in the last 24 hours, when in the previous year that percentage reached 10%. These data are consistent with the pandemic situation (Montevideo Portal, 2020; Radio Uruguay, 2020). On the use of the internet for entertainment and television consumption, another report reveals that 72% of the adult population used the internet to watch TV or listen to music (CIFRA, CEDU, 2020).

10 One of the criticisms here was that the roles and competences of different institutions overlapped.

2. Analysis of the Year: National and Ibero-American Premiere Fiction on broadcast television

Table 1. Fictions aired in 2020 (national and imported; premiere, reprises and co-productions)

PREMIERE NATIONAL TITLES – 1

TNU - 1

1. *C+* (series - Uruguay)

CO-PRODUCTIONS – 1

Canal 4 - 1

2. *Los Internacionales* (series- Argentina, Colombia)

PREMIERE IMPORTED TITLES OBITEL – 14

Canal 4 – 1

3. *100 Días Para Enamorarse* (soap opera- Argentina)

Saeta – 1

4. *Jesús* (soap opera– Brazil)

Teledoce – 10

5. *Monzón* (series- Argentina)
6. *Huérfanos de su Tierra* (soap opera- Brazil)
7. *Nuevo Sol* (soap opera- Brazil)
8. *Partes de Mí* (soap opera- Brazil)
9. *Salve al Rey* (soap opera- Brazil)
10. *Suerte de Vivir* (soap opera- Brazil)
11. *Qué Vida Buena* (soap opera – Brazil)
12. *Casa de Muñecos* (soap opera- Chile)
13. *Cuna de Lobos* (soap opera- Mexico)
14. *Soltero con Hijas* (soap opera- Mexico)

TNU – 2

15. *Servir y Proteger* (series – Spain)
16. *Bajo Sospecha* (series – Spain)

PREMIERE IMPORTED TITLES NO OBITEL– 24

Canal 4 – 9

17. *4 Familias en 1* (series – USA)
18. *Médicos de Guardia* (series – USA)

19. *Policía del Futuro* (series – USA)
20. *Un Médico Brillante* (series – USA)
21. *Alas Rotas* (soap opera – Turkey)
22. *Amor y Venganza* (soap opera – Turkey)
23. *Cennet* (soap opera – Turkey)
24. *De los Labios al Corazón* (soap opera – Turkey)
25. *Gulperi* (soap opera – Turkey)

Saeta – 6

26. *FBI* (series – USA)
27. *Coraje de Mujer* (soap opera– Turkey)
28. *Flores de Cristal* (soap opera – Turkey)
29. *Meryem* (soap opera – Turkey)
30. *Sureya* (soap opera – Turkey)
31. *Y Tú Quién Eres* (soap opera – Turkey)

Teledoce – 12

32. *Código Negro* (series – USA)
33. *Hudson y Rex* (series – Canada)
34. *New Amsterdam* (series – USA)
35. *Quantico* (series – USA)

TNU – 5

36. *Fargo* (series – USA)
37. *Asesinatos de Midsomer* (series – United Kingdom)
38. *Genius: Einstein* (series – USA)
39. *Genius: Picasso* (series – USA)
40. *El Cuento de la Criada* (series – USA)

RERUNS OBITEL TITLES - 5

Canal 4 – 3

41. *Casados con Hijos* (series - Argentina)
42. *Los Nuevos Simuladores* (series - Mexico)
43. *Graduados* (soap opera – Argentina)

TNU – 2

44. *Ernesto. Exterminador de Seres Monstruosos* (series – Uruguay, Brazil)
45. *Todos Detrás de Momo* (series – Uruguay)

TOTAL PREMIERE NATIONAL TITLES: 1

TOTAL PREMIERE OBITEL TITLES :15

TOTAL PREMIERE TITLES (NATIONAL AND OBITEL):16

Table 1 reveals the sharp decline in the supply of Ibero-American premieres. This phenomenon must be understood within the programming strategies of the channels that, as seen in Graph 2, have opted for the expansion of entertainment programs, with the purchase of some formats for local realization or the import of original versions. Consequently, the Ibero-American premiere titles were only 16 which represents a sharp drop compared to the previous year (27 premieres).

The fiction offer for release in 2020 was completed with ten Turkish productions and some American (21 titles, of which nine are premieres). Teledoce was the channel that aired more Ibero-American premieres; Saeta premiered only one and instead offered five of the ten Turkish fictions; the others were offered by Canal 4.

As for the reruns, Canal 4 is the one that used this strategy the most to cover hours of programming during the last years. Thus, *Casados con Hijos* is systematically repeated in the programming of this channel. TNU repeated two national productions.

Table 2. Fiction Premiere in 2020: Countries of Origin

Country	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	1	6.2	125	13	46:52:30	9
OBITEL COUNTRIES (total)	14	87.5	845	86	487:49:15	90
Argentina	2	12.5	22	2	14:06:45	3
Brazil	7	43.7	532	54	364:24:00	68
Chile	1	6.2	53	5	37:11:15	7
Colombia	0	0.0	0	0	00:00:00	0
Ecuador	0	0.0	0	0	00:00:00	0
Spain	2	12.5	155	16	16:50:00	3
Mexico	2	12.5	83	8	55:17:15	10
Peru	0	0.0	0	0	00:00:00	0
Portugal	0	0.0	0	0	00:00:00	0
Uruguay	1	6.2	125	13	46:52:30	9
Venezuela	0	0.0	0	0	00:00:00	0
CO-PRODUCTIONS (total)	1	6.2	8	1	04:53:15	1
Uruguayan coproductions	0	0.0	0	0	00:00:00	0
Co-productions Obitel countries	1	6.2	8	1	04:53:15	1
GRAND TOTAL	16	100	978	100	539:35:00	100

Source: *Obitel Uruguay*

One of the most significant data information contained in Table 2 is the volume of hours devoted to Ibero-American premiere fictions: 539:35 hours. The data highlights the sharp drop in the presence of Ibero-American fiction on Uruguayan screens in 2020, with a decrease of almost 50% compared to the 968 hours of 2019, when we already noted the downward trend that had been occurring in previous years, but not with the acute degree that is shown here (Sánchez, Gadea, 2020, p. 332).

As for the composition of the offer, it can be observed the predominance of Brazil as a supplier (7 titles with 70% of the hours) and the scarce presence of Argentinian fiction, not only for the number of titles, but also for the scarce participation in terms of number of chapters (22) and volume of hours (3% of the total). This is a radical change. Historically the images of the Argentinian soap opera occupied the local screen and that space has been overtaken by the Turkish soap opera.

Table 3. National and Ibero-American fiction formats

Format	National						Ibero-American						
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%	
Soap opera	0	0.0	0	0.0	0:00:00	0.0	11	73	677	79	463:09:00	94	
Series	1	10	0	125	10	46:52:30	0	4	27	176	21	29:33:30	6
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0	0	0	0	0:00:00	0	
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0	0	0	0	0:00:00	0	
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0	0	0	0:00:00	0	
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0	0	0	0:00:00	0	
Total	1	10	0	125	10	46:52:30	15	10	853	10	492:42:30	10	

Source: Obitel Uruguay

National fiction was reduced to an educational fiction series, with 125 chapters and accounted for 9% of the total hours devoted to premiere fiction, which is an exception to the records of previous years. In this case the format was that of the series, but most Ibero-American fictions adopted that of the soap opera.

Table 4. The 10 most watched titles on broadcast television

Title		Channel	TV Producer	Format/genre	Nº of chap/ep (in 2020)	Time slot	Rating	Share
1	<i>Nuevo Sol</i>	Teledoce	Rede Globo	Soap opera	41	Prime Time	8.7	13.9
2	<i>Cuna de Lobos</i>	Teledoce	Televisa	Soap opera	25	Prime Time	7.8	12.8
3	<i>Suerte de Vivir</i>	Teledoce	Rede Globo	Soap opera	79	Afternoon	7.5	15.6
4	<i>¡Qué Vida Buena!</i>	Teledoce	Rede Globo	Soap opera	141	Afternoon	7.1	16.1
5	<i>Huérfanos de su Tierra</i>	Teledoce	Rede Globo	Soap opera	85	Prime Time	6.5	11.3
6	<i>Casa de Muñecos</i>	Teledoce	Mega	Soap opera	53	Night	5.9	11.9
7	<i>Partes de Mí</i>	Teledoce	Rede Globo	Soap opera	50	Afternoon	5.4	11.5
8	<i>Jesús</i>	Saeta	Record TV	Soap opera	118	Night	5.0	14.9
9	<i>Salve al Rey</i>	Teledoce	Rede Globo	Soap opera	18	Afternoon	4.9	11.7
10	<i>Soltero con Hijas</i>	Teledoce	Televisa	Soap opera	58	Afternoon	4.2	10.7
Total productions: 10				Foreign scripts: 10				
100%				100%				

Source: Obitel Uruguay

The most relevant fact that the table shows is that for the first time in the history of Obitel Uruguay, Argentine fiction is not in the *top ten*. Seven of the fictions are Brazilian and almost all of Globo. The biblical soap opera remains in the *top ten* with a Record TV title, *Jesús*. The remake of the Mexican soap opera *Cuna de Lobos* ranked second (*rating* 7.79 and *share* of 12.77) and the only Chilean title of the year, *Casa de Muñecos*, also appears in the *top ten*.

However, the main aspect that this table offers us is not so much its composition, but the low *rating* that these titles reached. The highest barely reached 8.16 points in *Nuevo Sol* and the largest share was obtained by *¡Qué Vida Buena!* with 16.14%. This noticeable

decline also affects fictions of other origins. Thus, the Turkish soap operas this year met the same fate as the Ibero-American ones: the most viewed was *Y Tú Quién Eres* with 8.14 *rating* points. In previous reports we pointed out that some Turkish titles surpassed the *rating* of some Ibero-American titles. This trend was interrupted in 2020, although the *share* of Turkish fictions as a whole tended to be larger, showing that they captured more audience. American premiere fictions did not perform better and could not surpass six *rating* points.

Table 5. Audience profile of the 10 most viewed titles: gender, age, socio-economic status

	Titles	Channel	Gender %		Socioeconomic status %				
			Women	Men	A+A-	M+	M	M-	B+B-
1	<i>Nuevo Sol</i>	Teledoce	63.21	36.79	13.96	16.35	18.55	14.11	37.02
2	<i>Cuna de Lobos</i>	Teledoce	63.79	36.21	16.50	10.35	29.66	14.19	29.31
3	<i>Suerte de Vivir</i>	Teledoce	68.16	31.84	9.30	16.17	31.26	20.75	22.51
4	<i>Qué Vida Buena</i>	Teledoce	65.65	34.35	11.03	12.70	18.84	30.06	27.37
5	<i>Huérfanos de su Tierra</i>	Teledoce	65.77	34.23	14.94	13.54	20.64	17.31	33.57
6	<i>Casa de Muñecos</i>	Teledoce	67.71	32.29	13.14	13.02	16.78	12.04	45.02
7	<i>Partes de Mí</i>	Teledoce	61.61	38.39	9.79	14.63	20.45	22.99	32.15
8	<i>Jesús</i>	Saeta	74.66	25.34	10.79	19.07	23.06	10.39	36.69
9	<i>Salve al Rey</i>	Teledoce	66.71	33.29	11.11	14.85	13.75	17.68	42.62
10	<i>Soltero con Hijas</i>	Teledoce	65.09	34.91	10.35	10.66	12.25	20.14	46.60

	Titles	Channel	Age groups %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	<i>Nuevo Sol</i>	Teledoce	7.58	7.23	6.80	7.98	27.93	13.73	28.74
2	<i>Cuna de Lobos</i>	Teledoce	8.88	7.94	5.30	13.80	21.53	10.23	32.33
3	<i>Suerte de vivir</i>	Teledoce	7.88	5.84	5.03	15.43	18.13	9.27	38.41
4	<i>Qué Vida Buena</i>	Teledoce	5.31	5.57	4.24	12.27	18.80	10.54	43.27
5	<i>Huérfanos de su Tierra</i>	Teledoce	4.34	5.63	4.73	13.28	22.76	10.25	39.00
6	<i>Casa de Muñecos</i>	Teledoce	6.85	8.89	5.01	9.55	24.69	12.11	32.90
7	<i>Partes de Mí</i>	Teledoce	4.48	6.38	5.41	12.91	17.73	14.35	38.73
8	<i>Jesús</i>	Saeta	5.59	6.89	4.97	11.93	14.48	16.81	39.32
9	<i>Salve al Rey</i>	Teledoce	9.71	9.56	5.77	7.09	20.96	12.35	34.55
10	<i>Soltero con Hijas</i>	Teledoce	10.08	7.54	6.27	7.67	20.53	6.45	41.45

Source: *Obitel Uruguay* on data from Kantar Ibope Uruguay

The composition of the audience of *the top ten* repeats the traits already observed in previous reports: predominance of female audiences and percentages around 36% of men; higher concentration of audience in low socioeconomic status and in those over 60 years. However, there is a slight increase in the percentages in the range of 4 to 11 years and 12 to 17 years.

3. VoD Monitoring 2020

3.1. VoD Market platforms

In the pandemic context, there has been an increase in subscriptions to *streaming* platforms and content consumption for entertainment on any platform (see Table 3). While there is a growth in subscriptions of those platforms that have come to the country in recent years, this did not affect the number of subscribers to Netflix, because its users also subscribed to other platforms such as HBO GO and Amazon Prime.

The market movement on these platforms has a strong opacity. Information is in the hands of companies and it is difficult to weigh profits as well as consumer trends in each of them. Indirectly, through the taxes (VAT plus INR), it is possible to look at the volume of money at stake. In 2019, US\$ 24 million were raised from audiovisual content platforms and in 2020 the amount was around US\$ 19 million (Alcuri, Silva, 2021).

3.2. Analysis of VoD in 2020: national and Ibero-American premiere fiction

Table 6. National and Ibero-American fictions in 2020 on VoD systems

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
<p>UN3TV (on YouTube) – 1</p> <p>1. <i>El Último Youtuber</i> (series web – Uruguay)</p>	<p>Amazon Prime – 6</p> <p>2. <i>Madres, Amor y Vida</i> (series – Spain)</p> <p>3. <i>Desaparecidos</i> (series – Spain)</p> <p>4. <i>El Cid</i> (series – Spain)</p> <p>5. <i>Pequeñas Coincidencias T2</i> (series – Spain)</p> <p>6. <i>El Presidente</i> (series – Chile)</p> <p>7. <i>Cómo Sobrevivir Soltero</i> (series – Mexico)</p> <p>Claro TV – 2</p> <p>8. <i>R</i> (series -Mexico)</p> <p>9. <i>Hijos de su Madre</i> (series - Mexico)</p> <p>Flow - 5</p> <p>10. <i>Tony</i> (mini series – Argentina)</p> <p>11. <i>Adentro</i> (series web – Argentina)</p> <p>12. <i>Lumelia T2</i> (series – Spain)</p> <p>13. <i>Post Mortem</i> (series – Argentina)</p> <p>14. <i>Pepper Todo por un Like</i> (series – Argentina)</p> <p>HBO GO – 3</p> <p>15. <i>La Unidad</i> (mini series – Spain)</p> <p>16. <i>Patria</i> (mini series – Spain)</p> <p>17. <i>30 Monedas</i> (mini series – Spain)</p>	<p>Netflix – 4</p> <p>54. <i>Alguien Tiene que Morir</i> (mini series – Spain, Mexico)</p> <p>55. <i>White Lines</i> (series – Spain, United Kingdom)</p> <p>56. <i>Narcos México T2</i> (series – USA, Mexico)</p> <p>57. <i>No te Puedes Esconder</i> (series- Spain, Mexico)</p> <p>UN3 TV (on YouTube) – 1</p> <p>58. <i>Fehler 78</i> (series web – Argentina, Spain, Uruguay)</p>

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
	<p>Movistar + - 6</p> <p>18. <i>El Embarcadero</i> T2 (series – Spain) 19. <i>La Línea Invisible</i> (mini series – Spain) 20. <i>Mira lo que Has Hecho</i> T3 (series – Spain) 21. <i>Antidisturbios</i> (mini series – Spain) 22. <i>Nasdroyvia</i> (mini series – Spain) 23. <i>Dime Quien Soy</i> (series – Spain)</p> <p>Netflix – 27</p> <p>24. <i>Puerta 7</i> (series - Argentina) 25. <i>Casi Feliz</i> (series - Argentina) 26. <i>Coisa Mais Linda</i> T2 (series – Brazil) 27. <i>3% T4</i> (series – Brazil) 28. <i>La Venganza de Analia</i> (series – Colombia) 29. <i>La Reina de Indias y el Conquistador</i> (series – Colombia) 30. <i>Chichipatos</i> (series – Colombia) 31. <i>Amar y Vivir</i> (series – Colombia) 32. <i>El Robo del Siglo</i> (mini series – Colombia) 33. <i>100 Días para Enamorarnos</i> (series – USA Hispanic production) 34. <i>Las Chicas del Cable</i> T5 (series – Spain) 35. <i>Elite</i> T3 (series – Spain) 36. <i>La Casa de Papel</i> T4 (series – Spain) 37. <i>Valeria</i> (series – Spain)</p>	

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
	<p>38. <i>Perdida</i> (series – Spain) 39. <i>Alta Mar</i> T3 (series – Spain) 40. <i>Memorias de Idhún</i> (series – Spain) 41. <i>Los Favoritos de Midas</i> (series- Spain) 42. <i>El Desorden que Dejas</i> (series – Spain) 43. <i>La Valla</i> (series – Spain) 44. <i>Diablero</i> T2 (series – Mexico) 45. <i>La Casa de las Flores</i> T3 (series – Mexico) 46. <i>El Dragón. El Regreso de un Guerrero</i> T2 (series – Mexico) 47. <i>La Piloto</i> T2 (series – Mexico) 48. <i>Control Z</i> (series – Mexico) 49. <i>Historia de un Crimen. La Búsqueda</i> (mini series – Mexico) 50. <i>Oscuro Deseo</i> (series – Mexico)</p> <p>NSNOW – 3</p> <p>51. <i>Campamento Albanta</i> (mini series – Spain) 52. <i>Cromo</i> (mini series – Argentina) 53. <i>La Otra Mirada</i> (series – Spain)</p>	
Total: 1	Total: 52	Total: 5
GRAND TOTAL: 58		

Source: Obitel Uruguay

On the contrary to what happens with broadcast television, the platforms increase the offer of Ibero-American productions. In 2020, 58 titles were offered, almost half of Spanish origin. The other two countries with the most titles were Mexico and Argentina. Netflix continued to be the platform that provided more Ibero-American serial fiction and with the most variety of origins.

National fiction on VoD appeared in two web series: *El último Youtuber* and *Fehler 78*, both available on UN3TV and to which we will refer in the next section.

Table 7. Fiction premiere in 2020 on VoD: countries of origin

Country	Titles	%
NATIONAL (total)	1	1.7
OBITEL COUNTRIES (total)	52	89.7
Argentina	7	12.1
Brazil	2	3.4
Chile	1	2.7
Colombia	5	8.6
Spain	26	44.8
USA (Hispanic production)	1	1.7
Mexico	10	17.2
Peru	0	0.0
Portugal	0	0.0
Uruguay	1	1.7
Venezuela	0	0.0
CO-PRODUCTIONS (total)	5	8.6
Uruguayan coproductions	1	1.7
OBITEL inter-country co-productions	4	6.9
GRAND TOTAL	58	100

Source: *Obitel Uruguay*

4. Fiction and audience engagement in digital environments

In 2020 TV channels continued not using digital platforms and social media to expand the activity of their audiences. Private channels renewed their websites, but the strategy for the VoD consumption of their fictions remained the same: the chapters were available on their websites after they were aired and were removed once the title came to an end. Nor can be highlighted the activity on its social networks to create *engagement* and audience participation related to its main fiction titles.

However, the public channel TNU aired a national fiction, the only premiere of the year, which is a cross-platform series. It is an educational fiction *C+ Transmedia Marathon* of 125 chapters (of 15 minutes approximately) and it is a project promoted by the National Administration of Public Education (ANEP), Plan Ceibal¹¹ and TNU. The following points are developed in this case.

4.1 Digital expansion proposals

C+ Maratón Transmedia appears in the pandemic context as a result of the need of public education institutions to reach students throughout the country with a proposal that was not only accessible through the *online* platforms of the Plan Ceibal. The objective was to accompany students and their families in the pandemic context and “provide tools that enhance a new learning environment from home” (Plan Ceibal, June, 2020).

It targets an adolescent audience by integrating the new forms of audiovisual consumption that are part of this sector of the audience,

11 The Plan of Educational Connectivity of Basic Computing for Online Learning (Plan Ceibal) is the socio-educational project inspired by Negroponte’s One Laptop per Child, which was promoted in Uruguay since 2007 for primary and secondary education.

not only in the possibilities of accessing the series, but also in the contents of its episodes and its narrative thread. The program is hosted by a young Uruguayan *youtuber* named Alaska (Gimena Sauchenco who has a published book, more than 100,000 followers on Instagram and more than 200,000 on YouTube and Tik Tok) and another popular young man in the virtual space, the *gamer* Mad Raider (Nicolas Studer). Two referents of the youth sector are united, with two different models of content that are consumed in the *online* environment: that of video games of the gamer environment and that of videos about adolescent world situations and current issues from the youth perspective.

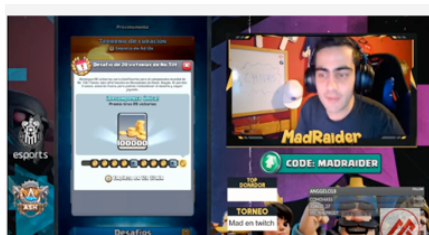
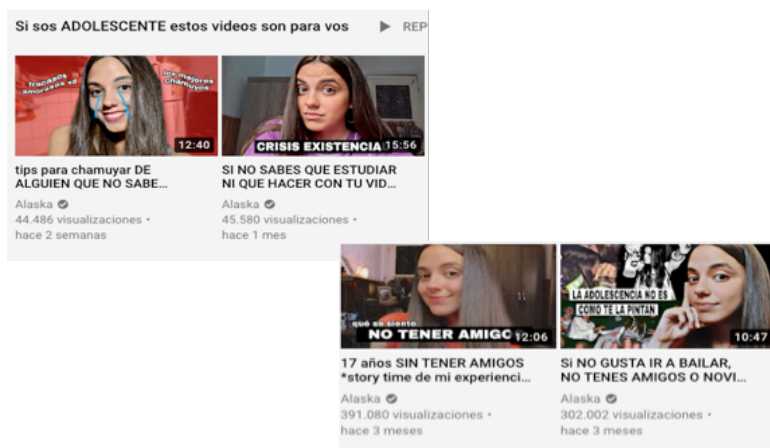


image source: Alaska's channel on YouTube, 2021, and Man Raider's channel on YouTube, 2021.

The series was aired on television but also on Facebook, Instagram, YouTube and Spotify. The website gives access to the episodes on YouTube, offers subscriptions to their contents and allows interaction with the program through the button “Unite the C+ legion”. In addition to that, it has a section for middle school teachers with guidance on ways to articulate the contents of the series with the classroom work. A link to a *webinar* provides previews of the series and a repertoire of resources to delve into the topics (Cmas, 2020).

It manages to present in a single content, an educational proposal, articulated in a fictional narrative that includes, both inside and outside the narrative universe, ways of consumption and participation of the young audience in digital environments. The story, which takes place at present, poses as characters Alaska and Mad Raider, from their personalities and real trajectories. One day, while preparing the contents to upload to their channels, they are convened by an anonymous message to the Alpha Hall, a mysterious place full of technology that evokes some kind of headquarters of control and that was built “to preserve knowledge”. There, Mrs. Alpha, a computer voice, summons them to carry out the mission of learning and preserving the knowledge of the misdeeds of the Watchmaker, a kind of villain who tries to hack the world’s knowledge bases. They are invited to ask the support of their social media followers to solve the puzzles that are posed. Alaska and Mad Raider are guided through a series of contents that appear on the computer of the Alpha Room. These contents are usually educational fragments on the subject in question, sometimes with testimonies of specialists, scientists or real teachers from Uruguay.

Most of the narrative takes place inside the Alpha Room, but the story is also constructed by adding the videos that Alaska and Mad Raider upload to YouTube, where they recount what is happening to them and how they feel.

4.2. An educational proposal that includes social interactivity

From the social networks (Facebook, Instagram and Twitter) they invite the audience to become part of “C- guidores” and to participate in interactive playful activities with questions about the topic discussed in each episode. In some cases they raffled a day of visit to the Alfa Hall and the winners were part of a program with question and answer games with the youtubers.



Image Source: Cmas Instagram Profile, 2021

The second cycle of the program changed its structure, with more spaces for audience interaction. Instead of Mad Raider as Alaska's partner, she is accompanied by Pablo Arnoletti, former singer of the band *Márama*¹². It maintains the fictional framework and encourages interviews on set with young people who promote educational, environmental, artistic, business or sports projects. It also has question and answer games posted on social networks.

4.3. Emerging fiction productions

In previous editions we have reported web series made by emerging directors and production companies that were broadcast on Youtube. In 2020 two web series were shown: *El Último Youtuber* and *Fehler 78*, both on UN3TV.

In a retrospective view at the web series produced in Uruguay, surveyed in the *Obitel Yearbooks*, it is possible to identify a gradual quality growth. This is clear in the layout of the stories and their technical resolution, with more sophisticated productions, which could show a greater degree of resources or expertise of the filmmakers. The first web series belonged to the *mockumentary* genre, then it moved to an audiovisual language that abandons the *low cost* appearance as a narrative strategy. Thus, *El Maravilloso Parque Hoolister* (2018) meant a shift towards suspense and *Hotel Romanov* (2019) presented a story that left behind the narrative elements of the false documentary and got fully into suspense, with unusual characters and situations with a certain amount of humour and irony.

12 *Márama* is an Uruguayan *cumbia* youth band, popular at the national and regional level.

The 2020 web series, *Fehler 78*¹³, repeats that same formula but with situations in which the suspense is emphasized and the humour is presented in a somewhat less obvious way. It is set in a dystopian future in which some kind of virus seems to have hit the country and the only ones left healthy are a group of five young people (with only one woman), who live locked up in a *motorhome* and interact with a computer program, with irreverent attitude, which gives them data on the environmental conditions.

With regard to *El Último Youtuber*, it is a science fiction *web series*¹⁴ with nine chapters of six minutes each. The story, told in a humorous way, is also set in a dystopian future, this time of zombie apocalypse. In a ruined Montevideo full of living dead, the only survivors seem to be three young men living together in a flat. The protagonist, an inveterate *youtuber* named Victor spends his days posting videos that portray his daily life between jokes that cause the weariness of his peers. The story presents a turning point when they meet Fernanda, a still healthy girl, who while looking for her boyfriend turned zombie, agrees to share the house with these boys.

A differential aspect presented by *El Último Youtuber*, is its aim to exploit other platforms for narrative expansion. While it did not have a significant development, the official Instagram profile of the series offered some videos that would be uploaded by the main character, Victor. These videos of just a few minutes, add situations to what happens in the series.

13 It is a co-production of Argentina, Spain and Uruguay in which referents of the production company Finoli Films participate. The company has been producing this type of web series since 2016.

14 Martín De Benedetti's project was the winner of the 2018 Film and Audiovisual Development Fund of the National Institute of Cinema and Audiovisual (ICAU).

These emerging fictions were shown on the UN3 TV channel. On the one hand this shows the establishment of this platform as an actor that expands the possibilities of exhibition of emerging Uruguayan projects. On the other hand, it shows the disregard of broadcast channels and national cable companies towards national fiction projects. They do not seek to include in their virtual platforms this type of content designed for web consumption.

5. Highlights of the Year

Data analysis related to broadcast television leads us to conclude that the highlight of 2020 was the collapse of the *rating* and *share* of Ibero-American television fiction in particular, but also of fictions of other origins. In a diachronic perspective of the last five years we can see that in 2015 the *rating* values of the Ibero-American *top ten* were between 20.2 and 9.7 points. It was the year of the arrival of the Turkish soap opera and titles premiered that year such as *Las Mil y Una Noches*, *Qué Culpa Tuvo Fatmagul* and *Sila*, reached *ratings* of 20 and 22 points and their *share* exceeded 30 points (Sánchez Vilela, 2016). That was the last year with such high standards for serial fiction. In the last three years the *ratings* of the ten most viewed titles ranged between 14 and 8 points, while in 2020 the highest value was 8.16. The same fate befell the Turkish and the American fiction.

This phenomenon of declining audiences is accompanied by a sharp reduction in the supply of fiction. The total number of television fiction offered in 2020, of all origins and including reruns, was 42 titles. In previous years that amount corresponded only to the Ibero-American premiere titles. This data allows us to weigh the size of the decline.

It is true that the broadcast television audience fell; however, some specific programs, such as *Got Talent* and *Master Chef*, achieved high *ratings*. The question is then: why did this drop in fiction audiences occur?

It is possible to venture some hypothesis. The decline of the television fiction audience could be explained by supply reduction, added to the displacement of fiction towards the margins of *prime time*. The programs that obtained the highest ratings were those that were offered in *prime time*, between 7 pm and 10:30 pm, as has historically happened. But this year, that slot was intended for newscasts and entertainment, when the traditional combination was newscast-soap opera.

Likewise, the reduction in supply is explained by a confluence of factors: the continuity and expansion of a programming strategy – which has been established since 2013 and which aims at entertainment and the extension of time allocated to the newscast (three daily editions and a three-hour evening edition); the purchase of formats and local realization of the *reality* show in contest modality; the response to the health emergency situation that opted for programs alluding to the situation and executed with few resources (*Quédate en casa*, for example). At a time when the demand for content is increasing, the channels seem to leave the ground open of television fiction supply to the platforms.

6. Theme of the Year. Fiction in times of pandemic

To address this issue we have chosen to explore different manifestations that can account for the impact that the pandemic had in 2020 on the Uruguayan audiovisual industry. In this general framework we set out to identify the impact in fiction, inside and outside the traditional television scenario.

Covid-19 became a topic that crossed media and genres on the national panorama. The slogan “*Quédate en casa* (Stay at home)” promoted videos from home, programs on broadcast television held by the videoconferencing software Zoom, but also prompted more ambitious initiatives such as the Detour Festival¹⁵ which had a special section, “The year we lived with Coronavirus”, in which 25 short film pieces of very different genres (five of fiction) were presented. In the series category, *Emilia en Casa* was presented as a mini series web, multimedia and interactive of four episodes of four minutes each. The series tells the story of a 14 year old girl, who goes through quarantine with her parents and her cat. This production was supported by the Creative Fund 2020 of the National Research and Innovation Agency (ANII), created especially for the pandemic context and aimed at creative industries.

As for fiction, two aspects stand out. The first refers to the production of educational programs in order to support virtual and hybrid learning. On the national public channel, TNU, two educational programs were broadcast for this purpose: one of non-fiction content, *Ta, tiempo de aprender*, and the other a fiction, *C+Maratón Transmedia*, which we dealt with in section 4. The second aspect is the strong momentum experienced by the audiovisual industry, with the development of international projects carried out in Uruguay, taking advantage of the favourable health situation of the country in comparison with (that of) the region.

15 Detour, New Film Festival is an event that since 2013 is dedicated to emerging national cinema and that has also included the category series and web content.

6.1 Audiovisual industry situation in pandemic: a scenario of opportunities

The pandemic led to an abrupt interruption of audiovisual productions of various kinds. As estimated by GremioCine, some 20 ongoing productions, including films, commercials and series, many of them international projects, were suspended (Solomita, 2020). The government did not order the suspension of filming, but the sector did it itself. However, after a brief period of inactivity there was a strong boost of the audiovisual industry.

The activity was gradually relaunched from May and in June, permits for filming in public spaces were allowed. The confluence of three groups, the Chamber of Advertising Production Companies (CEPPU), the Association of Film Producers and Filmmakers of Uruguay (Asoprod), the Union of Workers and Professionals of Cinema and Audiovisual, GremioCine, in association with the Ministry of Labour and Social Security, made it possible to draw up an operating protocol: the Health and Safety Plan for the Audiovisual Industry. The protocols were reviewed on a permanent basis and were very thorough in covering all stages of work and detailing the corresponding measures for each type of activity.

The speed up occurred first in advertising¹⁶ and then with international productions of fiction, mainly from Amazon Prime and HBO. The health context of the country with controlled Covid and the gradual opening of almost all activities, made Uruguay an attractive place for production services and filming. In short, a scenario of opportunities arose.

16 According to Santiago López, secretary general of Asoprod and director of Cimarrón Cine, in July and August the advertising had a record sales result (La Diaria, 2020).

As a quick overview: of the 148 advertisements, mostly aimed at the foreign market, 78% occurred during the pandemic; in film, television and other contents, of the 36 shoot or being shot, 25 were carried out after the health emergency was declared (Staricco, 2020).

The effervescence experienced by the audiovisual industry, that continues in 2021, showed the professional capacities towards the demands of large international projects. Some tools that were already in use before, developed their potential for teleworking. Thus, taking advantage of the very good connectivity of the country, the use of a software that through a streaming service allows remote direction from anywhere in the world, in real time and in contact with the local team that runs the filming, was exploited.

However, this situation of intense activity in the sector is explained, not only by the conditions of exceptional health, coupled with political stability, but also by a development of actions by state and private actors. Without pretension of exhaustiveness, we will try to give an account of this articulation that brought a certain enthusiasm in the possibilities for a national audiovisual industry and the development of fiction.

One of the lines of action started in previous years was the Uruguay Audiovisual Program (PUA), a public policy instrument that was announced in December 2018, in two directions: one to encourage national production and the other to international production (see section 1.4 of this chapter). The central purpose is to attract large audiovisual projects, including advertising. The first television fiction to benefit from this program was Keanu Reeves' *Conquest* series for Netflix, made by the production company Salado in 2019. From there other projects were planned for being implemented in 2020 and, after the pandemic was controlled, they were sped up in May. Some of the most relevant television fiction are: *Sentença*, *Mañana do Setembro*,

Iosi, El Espía Arrepentido, Lov3, El Presidente, for Amazon; *Amsterdam* for HBO.

With regard to private actors, one of the most outstanding initiatives is that of the Reducto project¹⁷: an audiovisual production center of 10,000 m², with film studios, offices with different functionality and very good connectivity. This initiative carried out by Musitelli¹⁸, began its adventure with the purchase of the lot in 2016, but the biggest boost was in recent times. It brings together a cluster of companies working for international productions. In addition to Musitelli itself, post-production companies such as Colour or VFX Boat are based there; TRIM, a company that provides montage and montage assistance services for films and series; the production companies Cimarrón and Mediapro, among others. The total investment of the Reducto project would reach US\$ 8 million dollars¹⁹. The context of the pandemic did not stop the progress of the project but contributed to its development with filming, editing and other services, for series of powerful international platforms.

Beyond this encouraging outlook, the shutdown of activities from 13th March led to economic losses and unemployment[□] and highlighted some sector fragilities: most of the labour relations are non-dependent, with sole proprietorships or public limited companies, specific contracts, therefore it does not have the social security coverage that did support other sectors. The first two or three months of the health emergency was a major shock for the sector workers and for companies that had invested based on the international projects they had in hand.

17 See the official website of Reducto: <https://www.reducto.uy/es/uruguay/>

18 Musitelli is a family business, of the family of that name, practically the only supplier of equipment for audiovisual production that has been in activity since 1997.

19 Statements by Ernesto Musitelli (Amoroso S., June 2020).

The audiovisual sector in Uruguay creates around 1,500 direct jobs and another 3,500 indirect ones and exports on average US\$ 20 million annually. This information comes from official sources[□] which indicate the existence of 460 companies linked to the sector, mostly small and with an average workers' salary of \$53,000 (US\$ 1,200). In audiovisual budgets on average 55% corresponds to salaries and about 30% corresponds to services such as hospitality, catering, transportation, and consultants[□]. These data provide an approximation to the economic dimension of the sector, but this is an aspect that still needs to be studied in more depth in order to be able to weigh up the actions that will consolidate the development of the national audiovisual industry.

The promotion of Uruguay as an ideal place to film is driven by different public entities in confluence with organizations and investments of private actors, producers and service providers, in a fabric of alliances that had been built before the pandemic, enhanced by it, and that was reaffirmed as a government decision in 2020.

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