

ARGENTINA¹: SERIALIZED FICTION IS ELSEWHERE

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In 2021, a slight rebound was observed in the number of programs and hours of national fiction released, compared to the historical minimum of 2020, the first year of confinement due to the pandemic and paralysis of the fiction industry. A total of eight programs were broadcast, one more than the previous year, representing 103:30 hours. However, these are the lowest indicators of the last five years. El Trece, once one of the main broadcasters of telenovelas, series and unitaries, programmed only one telenovela, one series and released two episodes of a series that was not broadcast in its entirety on open television but on Star+. Telefe, the leading channel in terms of audience, premiered three short-lived series that had already been released on different video-on-demand platforms. ViacomCBS channel completed its fiction offer with seven Turkish productions, continuing, almost alone, with the trend reported since 2014 in relation to the entry of fictions of that origin. In the case of reruns, the number remained stable in relation to the previous year, mainly concentrated in TV Pública, which again broadcast fifteen public funding series, and Net TV, which opted for the narcotelenovela of Colombian origin.

1. The Audiovisual Context of Argentina in 2021

1.1 Open television in Argentina

The open television system in Argentina is comprised of six networks with nationwide coverage. TV Pública is part of the Federal System of Public Media and Contents and is financed with contributions from the National Treasury, official advertising, taxes provided for by the Audiovisual Communication Services Law and other resources of its own. The other five channels are privately managed commercial channels.

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Box 1. National open television channels in Argentina

Private networks (5)	Public networks (1)
América (channel 2)	TV Pública (channel 7)
El Nueve (channel 9)	
Telefe (channel 11)	
El Trece (channel 13)	
Net TV	
TOTAL NETWORKS = 6	

Source: Obitel Argentina

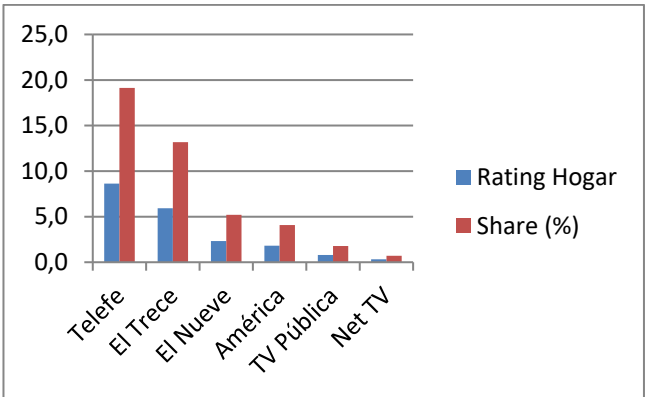
The four traditional networks reach the entire country through affiliates, repeater stations or sale of content: TV Pública, Telefe, El Trece and El Nueve. Although with marginal audience levels, Grupo Perfil’s on-air channel Net TV has been operating since 2018, with generalist programming and foreign fiction. In some time slots this signal disputes the sixth position to a very weakened TV Pública. The six national channels broadcast their programming through cable television, mostly privately managed and with high penetration in the country. TV Pública is formally under the board of directors of Radio y Televisión Argentina Sociedad del Estado (RTA S.E.). América is part of the América Medios group. Telefe is owned by Viacom Inc. of the United States, together with eight repeater stations in the interior of the country. Clarín holding company operates El Trece through its Artear division and owns radio stations, newspapers, open channels and the most important pay TV and fixed broadband companies in the country. El Nueve is controlled by Grupo Octubre, which has expanded in recent years in the print media business with the acquisition of *Página/12* newspaper and several magazines; radio broadcasting through the ownership of one of the most listened AM radio stations in Buenos Aires (AM 750) and several FM radio stations. By the end of 2020, it also created a news signal for pay TV, IP. On March 14, 2022, the seventh open television channel, Bravo TV, began broadcasting and is available on Digital Terrestrial Television and pay TV operators’ offerings. The broadcaster is the result of an agreement between Grupo Perfil and Grupo Olmos. The former publishes the newspaper *Perfil* and a dozen magazines; it also operates Perfil radio, an FM station in the City of Buenos Aires. Grupo Olmos has extensive experience in television with its news channel *Crónica TV* and in print media with the newspaper *Crónica*. It also owns other graphic media and Internet

portals of lesser relevance. At the end of this chapter, the lineup of the new station, on which we will report next year, includes a large number of Obitel telenovelas, some variety programs and a newscast.

Chart 1. TV rating and share by broadcaster (rating per household).

Broadcaster	Rating	%	Share (%)
Telefe	8,6	43,6	19,1
El Trece	5,9	29,9	13,2
El Nueve	2,3	11,7	5,2
América	1,8	9,2	4,1
TV Pública	0,8	4,0	1,8
Net TV	0,3	1,6	0,7
TOTAL	19,8	100	44,1

Source: Kantar Ibope Media and Obitel Argentina



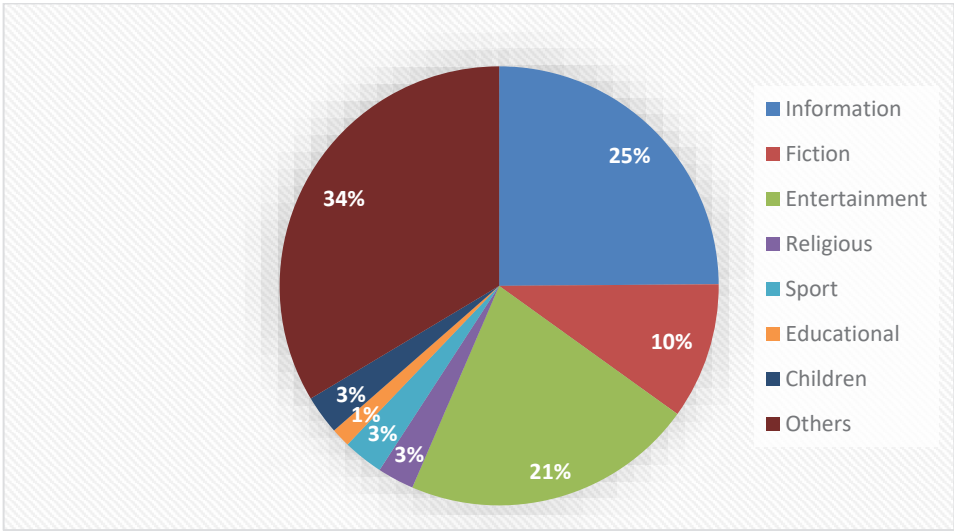
Source: Kantar Ibope Media and Obitel Argentina

In 2020, the drop in open TV audience that Obitel has been reporting for at least 12 years was halted. Telefe was the channel that grew the most in the year-on-year comparison (8.6 in 2021 vs. 7.8 in 2020), while the rest managed to maintain their audience levels or increase them marginally. The gap between Telefe and El Trece, the two channels that have led the market since the early 1990s, widened even more this year, in favor of the former. Although the channels' household rating grew modestly, their share in total television (air and pay) went from 44.8% in 2020 to 44.1% in 2021.

Chart 2: Genres and hours broadcasted in TV programming

Genres broadcast	Broadcast hours	%
News	12382	24,9
Fiction	4996	10,0
Entertainment	10724	21,6
Religion	1342	2,7
Sports	1480	3,0
Educational	702	1,4
Children	1428	2,9
Others	16708	33,6
TOTAL	49762	100

Source: Kantar Ibope Media and Obitel Argentina



Source: Kantar Ibope Media and Obitel Argentina

In terms of genres broadcast by all open channels, there was a 6% increase in entertainment content compared to the previous year. This is explained, among other issues, by the proliferation of local adaptations of successful foreign formats such as *La Voz*, *Bake Off* or *MasterChef*. The presence of educational content halved from one year to the next: 3.4% of total programming in 2020 and 1.4% in 2021. This may be due to the withdrawal of the *Seguimos Educando* series from TV Pública, which, in 2020, as part of an educational continuity plan in the midst

of the pandemic, turned to the screen of the state channel a large number of hours of this genre. As for fiction, there is a drop in the total number of hours broadcast and its participation in the total programming. In 2020 it had represented 14.3% of the programming, while in 2021 it reached 10%. This may seem contradictory with the data we will expose below, which show a slight increase in national fictions and in the Obitel scope. However, the drop is due to a slight decrease in the presence of hours of Turkish origin and other non-standard origins, outside the Ibero-American sphere.

1.2 Pay TV and VoD platforms in Argentina in 2021

According to data from the Ente Nacional de Comunicaciones (ENaCom) for the third quarter of 2021, 69.3% of Argentine households had some pay TV service, mostly through physical links, while satellite technology captures a smaller market share of less than 20%. If clandestine connections are added, it is estimated that close to 80% of the country's households have access to this service, one of the highest penetration levels in the continent. There are 7.3 million households with this service, a marginal increase in relation to those reported the previous year. However, according to the same official agency, there are important geographical asymmetries in the access to the service: while provinces such as Córdoba, Tierra del Fuego, La Pampa and the Autonomous City of Buenos Aires show figures above 60%, at the other extreme Catamarca, Tucumán, La Rioja, among others, have around 25%. The pay TV market is strongly concentrated mainly in Cablevisión (rebranded as Personal Flow), a division of Grupo Clarín, which controls 40% of the market, especially in provincial capitals and the most profitable urban centers. There are also peripheral players such as telecommunications cooperatives and SMEs that provide this service in places farther away from large urban centers and with lower population density and commercial interest, which together account for less than 20% of the pay TV market.

Box 2. Most watched pay TV channels in Argentina.

10 most watched pay TV channels in Argentina			
Channel	Genre	Origin	Rating household
TN	News	Argentina	1,7
C5N	News	Argentina	1,3
ESPN	Sports	United States	0,9
A24	News	Argentina	0,9
Crónica TV	News	Argentina	0,9
Canal 26	News	Argentina	0,8
LN+	News	Argentina	0,8
TYC Sports	Sports	Argentina	0,7
Star Channel	Various	United States	0,6
Cartoon Network	Children	United States	0,5

Source: Kantar Ibope Media and Obitel Argentina

The pay-TV market in Argentina has the particularity of offering a profuse and growing number of national channels dedicated to the broadcasting of news, opinion and political debate content. In 2021, there were seven nationally-owned channels along with CNN en Español, which produces some programs hosted by Argentine journalists. As shown in the box above, Argentine news signals are the most watched on pay TV, and some of them manage to surpass Net TV, TV Pública, América and El Nueve in their prime time slots. In fact, during 2021 the informative signals that entered the list of the 10 most watched signals added together 6.1 annual average rating points, a number only lower than the average of the leading broadcast TV channel, Telefe. During this year, there was no release of national fiction on any subscription television channel.

Box 3. VoD in Argentina

Main VoD platforms active in 2021
Netflix; Prime Video (Amazon); Disney+; Star+ (Disney); Paramount+ (ViacomCBS); HBO Max (Warner Media); Cablevisión Flow (Telecom); Movistar+ (Telefónica); Claro Video (América Móvil); Cine.ar Play and Cont.ar (Estado Nacional); Sensa (Colsecor)
TOTAL: 12

Source: Obitel Argentina

The box above presents a list of the 12 main video-on-demand platforms active in Argentina as of 2021. It is not an exhaustive list but just a sample of players with the highest market penetration (Netflix, Amazon Prime, Cablevisión Flow) together with others that provide ownership diversity, such as Sensa (a cooperative VoD platform) or those belonging to the National State. For the purposes of this list, the official YouTube channels of open TV broadcasters are not included.

1.3 Independent television fiction production companies

The independent production firms that produced fiction in 2021 are in all cases medium-large production companies based in the City of Buenos Aires and with extensive background in fiction production. It is therefore a concentrated segment in which there are no major novelties in relation to the previous year. An exceptional case is the series *No Abras Ese Mensaje* (El Nueve) produced in the northern province of Formosa by the local production company IRU TV, with the support of state funds. It is the only fiction produced outside the City of Buenos Aires that managed to be released on a national channel during the year. On the other hand, the fiction production market continues to be dominated by Pol-ka, a captive production company of El Trece and others such as Kapow, Pampa Films or K&S which, besides producing fiction for broadcast television, are some of the companies chosen by global video-on-demand platforms to develop their originals in the country.

1.4 Sources of financing for the audiovisual sector

According to data published by the Argentine Chamber of Media Agencies⁴, television received a total investment of USD 364.5 million between January and December 2021, which represents an improvement of 28% over the same period of the previous year. Thus, television continues to be the medium that captures more private advertising (41%), followed by digital media, which includes news portals, social networks and search engines (40%). Likewise, the digital media is the one that shows the highest year-on-year growth, while television has maintained its share stable over the last three years, concentrating between 39 and 41% of the total gross investment. In terms of government support for the production of audiovisual content, the highlight of the year was the launching of the Renacer Audiovisual plan, through which the Ministry of Culture selected 640 audiovisual projects submitted from different regions of the country, with a projected investment of almost USD 21 million. At the close of this report the shooting of some of these productions had already begun, so their results will be observed next year.

1.5 Communication policies

2021 was a year of low intensity for communication policies. One of the main regulatory actions of Alberto Fernández's government, the Necessity and Urgency Decree 690/2020, which declared ICT services a public service, was in court, so that for practical purposes it had no effect. In April 2022, by means of Decree 156/2022, the National Government set the deadlines for the analogical switch-off of open channel television, which would begin in mid-2022 with the public channel and would then continue in a staggered manner by regions until December 2023. At the close of this chapter, different actors of the audiovisual sector show their concern for the expiration of a series of specific allocation funds at the end of 2022, with which film, theater, music, public media, popular libraries among other cultural activities are partly financed. In December 2017 during the administration of Mauricio Macri (2015-2019) the Congress of the Nation sanctioned a law that determined that on December 31, 2022 would come to an end a series of specific allocations created by different laws and that make part of the financing of cultural industries. In April 2022 the uneasiness in the film sector in particular due to this and other issues, caused the Minister of Culture to request the resignation of the president of the Instituto de Cine y Artes Audiovisuales (INCAA), Luis Puenzo. In the meantime, there is a bill in Congress to extend these funds for 50 years.

⁴ Available in April 2022 at <https://www.agenciasdemedios.com.ar/inversiones-publicitarias/>.

1.6 Digital and mobile connectivity infrastructure⁵

Mobile telephony continues to be, together with free and open television, the most widespread information access technology, with a nationwide penetration that exceeds 100% in almost all regions of the country, and a national average of 126.1% according to ENaCom data for the third quarter of 2021. As of September 2021, there were 57.81 million mobile accesses in the country, out of an estimated population of 45.3 million. However, more than 50% of active mobile lines are prepaid, usually more widely used among lower middle socioeconomic sectors. The deployment of 4G technology has grown rapidly in recent years, reaching a wide coverage of the territory. Regarding broadband to the home, the average penetration at national level reaches 70.58% of the country's households, an increase of 4% compared to 2020. Likewise, there are regions such as the City of Buenos Aires where the adoption of the service is almost total, and other provinces such as Formosa, Mendoza, San Juan and Santa Cruz, where this figure does not exceed 40% of households. Although the national average speed exceeds 48.46 Mbps download (8 Mbps more than the previous year) and access offers of more than +30 Mbps are common, almost 30% of domestic connections are concentrated in the speed range from 1 to 6 Mbps, with large variations in the speed available depending on the province. The territorial extension added to the dispersion of the population in rural areas or in small urban concentrations, combined with the absence or low quality of connectivity infrastructure in some regions and economic difficulties, impede Internet access. The absence of the market and the State in some areas of the country has allowed the deployment of telecommunications cooperatives and, more experimentally, the emergence of community Internet access networks self-managed by the inhabitants themselves.

⁵The data in this section is presented by the Ente Nacional de Comunicaciones (ENaCom). Available in April 2022 at <https://indicadores.enacom.gob.ar/>.

2. Analysis of the Year: National and Latin American fiction released in 2021

TABLE 1: Fictions screened in 2021

Previously unreleased, national – 8 Telefe - 3 1. <i>Pequeñas Victorias</i> (series) 2. <i>Apache. La Vida de Carlos Tévez</i> (series) 3. <i>Monzón</i> (series) El Trece – 3 4. <i>El Tigre Verón 2</i> (miniseries) 5. <i>La 1-5/18. Somos Uno</i> (telenovela) 6. <i>Terapia Alternativa</i> (series) El Nueve – 2 7. <i>Maradona Sueño Bendito</i> (series) 8. <i>No Abras Este Mensaje</i> (series) TV Pública - 0 América – 0 Net TV – 0 Co-productions – 0	Previously unreleased, Obitel - 9 Telefe - 2* 1. <i>Club 57 2</i> (miniseries – US Hispanic e Italia) 2. <i>Dulce Ambición</i> (telenovela – Brazil) El Trece- 1** 3. <i>Te Doy La Vida</i> (telenovela - Mexico) Net TV- 6 4. <i>Bloque De Búsqueda</i> (telenovela – Colombia) 5. <i>El Bronx</i> (telenovela – Colombia) 6. <i>El Señor De Los Cielos</i> (telenovela – US Hispanic) 7. <i>La Piloto</i> (telenovela – Mexico) 8. <i>La Venganza de Analía</i> (telenovela – Colombia) 9. <i>Sobreviviendo a Escobar</i> (telenovela – Colombia) El Nueve - 0 América – 0 TV Pública –0 PREVIOUSLY UNRELEASED, TOTAL: 17
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Source: Kantar Ibope Media and Obitel Argentina

In 2021, eight domestic productions were broadcast, seven series and miniseries, and a single long-running production. This represents four more shows compared to the previous year, when fiction production was completely paralyzed due to the pandemic. However, this slight improvement in production and exhibition levels keeps the country among those with the lowest production capacity within the

Obitel scope and far from the 1000 average hours of 2010. Telefe programmed as novelties in open television series already released on video-on-demand platforms: two biopics of sports personalities (Carlos Tévez and Carlos Monzón) and a sequel to the telenovela *Pequeña Victoria* (Telefe, 2019) produced for Prime Video. El Trece was the only open television channel to invest in a telenovela with the daily series *La 1-5/18. Somos Uno*, set in a vulnerable neighborhood settlement. It also released *El Tigre Verón 2* (El Trece), although with half the audience obtained by the first part aired in 2019. For its part, the series *Terapia Alternativa* released only two episodes on open television and then became available in its entirety on the Star+ platform, so that open television joins the visibility circuit of series as an advertising screen to generate interest in content that is not broadcast there in full. The same happened with Prime Video's series *Maradona, Sueño Bendito* (El Nueve), whose first episode was released on open television as an advertisement, to be later exclusive on the video-on-demand platform. As regards imported productions from Obitel, the largest contribution is made by NetTV channel, which programs, as Obitel Argentina has been reporting, a large number of narconovelas of Colombian origin.

TABLE 1b. Reruns during 2021 (domestic productions, foreign Obitel productions and co-productions).

Reprises, national – 17	Reprises, foreign – 9
Telefe–2	Telefe–1
1. <i>Casados con Hijos</i> (series – Argentina)	1. <i>Josue y la Tierra Prometida</i> (telenovela – Brazil)
2. <i>Floricienta</i> (telenovela – Argentina)	
TV Pública – 15	Net TV - 8
3. <i>Bien de Familia</i> (miniseries – Argentina)	2. <i>Betty la Fea</i> (telenovela – Colombia)
4. <i>Decisiones de Vida</i> (unitary – Argentina)	3. <i>El Patrón del Mal</i> (series – Colombia)
5. <i>El Donante</i> (miniseries – Argentina)	4. <i>En la Boca del Lobo</i> (telenovela – Colombia)
6. <i>El Marginal</i> (miniseries – Argentina)	5. <i>Fugitivos</i> (telenovela – Colombia)
7. <i>El Marginal 2</i> (miniseries – Argentina)	6. <i>Infiltrados</i> (telenovela – Colombia)
8. <i>El Marginal 3</i> (miniseries – Argentina)	7. <i>La Ruta Blanca</i> (telenovela – Colombia and Mexico)
9. <i>Historias de la Primera Vez</i> (unitary – Argentina)	8. <i>Pedro el Escamoso</i> (telenovela – Colombia)
10. <i>La Caída</i> (miniseries – Argentina)	9. <i>Sin Tetas No Hay Paraíso</i> (telenovela – Colombia)
11. <i>La Celebración</i> (unitary – Argentina)	
12. <i>La Chica que Limpia</i> (miniseries – Argentina)	
13. <i>La Última Hora</i> (miniseries – Argentina)	REPRISES, TOTAL: 26
14. <i>La Viuda de Rafael</i> (miniseries – Argentina)	
15. <i>Los Sónicos</i> (miniseries – Argentina)	
16. <i>Según Roxy</i> (miniseries – Argentina)	
17. <i>Ultimátum</i> (miniseries – Argentina)	

Source: Kantar Ibope Media and Obitel Argentina

This year, TV Pública, which usually contributes to the list of releases with state-supported productions, limited itself to reruns of Argentine miniseries already released in previous years. Among the foreign reruns, Colombian narconovelas once again stand out, programmed exclusively by Net TV.

TABLE 2. National fiction released in 2021 and its evolution over the five-year period.

Year	Productions	Episodes	Hours
2017	23	716	645:00
2018	20	650	481:00
2019	21	504	393:35
2020	6	91	71:30
2021	8	115	103:30

Source: Obitel Argentina

The trend shown in the table above shows a generalized drop in the three indicators observed (productions, episodes and hours). The decline has its origin beyond the last five-year period and can be located in 2010, when open television began to rapidly shed national fiction as part of its programming grid, leaving it as a space for entertainment, news and live events. The slight upturn in 2021 does not represent an improvement in production capacities nor is it indicative of the channels’ decisions to return to local fiction, but, in any case, a rebound effect after the historical minimum reached by the production and release of Argentine fiction at the beginning of the pandemic.

TABLE 3. Formats of national fiction released in 2021 and their evolution during the five-year period.

Format	Productions					Hours				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Telenovela	7	5	4	1	1	562:30	389:05	289:20	35:00	72:15
Series	3	3	5	0	2	67:25	55:10	38:00	0:00	14:15
Miniseries	12	10	8	4	5	112:10	66:20	36:20	26:25	17:00
Sitcom	0	2	1	0	0	0:00	0:00	0:00	0:00	0:00
Unitary	1	0	0	0	0	12:30	16:00	7:25	0:00	0:00
Docudrama	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Others	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00

Source: Obitel Argentina

The evolution of formats in the last five years allows us to notice the reduction of telenovela and long-running formats and a greater presence of series and miniseries. As we have mentioned, in 2020 only one Argentine telenovela was released against seven in 2017. However, the gradual disappearance of fiction from over-the-air television is observed in the decline of all formats.

TABLE 4. Fiction releases exhibited in 2021: countries of origin

Country	Productions	%	Hours	%
NATIONAL (total)	8	50	103:30	13
OBITEL COUNTRIES (total)	9	50	684:20	87
Argentina X	8	50	103:30	13
Brazil	1	6	105:00	13
Chile	0	0	0:00	0
Colombia	4	22	274:25	35
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
US Hispanic	2	11	94:35	12
Mexico	2	11	209:25	26
Peru	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (Totals)	0	0	0:10	0
National co-productions	0	0	3:10	0
OBITEL countries co-productions	0	0	0:00	0
TOTAL	17	100	787:50	100

Source: Obitel Argentina

Compared to 2020, during 2021 almost twice as many hours of fiction were released, adding national and Ibero-American fiction. Also, in a similar way to the previous year, the proportions are maintained, corresponding between 13 and 15% to national fiction and the rest to fiction from other Obitel countries. Colombia was the main supplier of fictions, all of them programmed by Net TV. In recent years, there has been a

growth in Colombian productions, to the detriment of other origins previously more frequent, such as Brazil or Mexico.

TABLE 5. Formats of national and Ibero-American fiction screened in 2021

Format	Productions				Hours			
	Nationals	%	Obitel zone	%	Nationals	%	Obitel zone	%
Telenovela	1	11	9	100	71:35	68,1	684:20	100
Series	2	33	0	0	20:20	20,1	0:00	0
Miniseries	5	56	0	0	11:30	11,8	0:00	0
Sitcom	0	0	0	0	0:00	0	0:00	0
Unitary	0	0	0	0	0:00	0	0:00	0
Docudrama	0	0	0	0	0:00	0	0:00	0
Others	0	0	0	0	0:00	0	0:00	0
Total	8	100	9	100	103:30	100	684:20	100

Source: Obitel Argentina

In the field of national fiction, short formats are predominant. Series and miniseries represent almost 90% of the Argentine fiction broadcast. In the opposite direction and as in previous years, the productions imported from the Obitel sphere correspond to long formats (68%) and, to a lesser extent, to series and miniseries (32%).

TABLE 6: 10 Most watched productions in 2021

Production		Channel	Production company (country)	Format/genre	No. of chapters/ episodes in 2021	Timeslot	Rating	Share
1	<i>La 1-5/18.Somos Uno</i>	El Trece	Pol-ka - Argentina	Telenovela / Drama	72	Prime Time	10,3	18,5
2	<i>Apache. La Vida de Carlos Tévez</i>	Telefe	Torneos - Argentina	Miniseries / Biopic	10	Prime Time	9,4	21,7
3	<i>Dulce Ambición</i>	Telefe	Globo - Brazil	Telenovela / Drama	115	Noon	8,7	22,3
4	<i>Pequeñas Victorias</i>	Telefe	Viacom - Argentina	Series / Drama	7	Prime Time	8,6	20,9
5	<i>Maradona,Sueño Bendito</i>	El Nueve	BTF Media Dhana Media Latin We – Prime Video - Argentina	Series / Biopic	1	Prime Time	8,2	14,4
6	<i>Monzón</i>	Telefe	Pampa Films - Argentina	Series / Biopic	13	Prime Time	7,4	18,7
7	<i>Terapia Alternativa</i>	El Trece	Kapow. Star+ - Argentina	Miniseries	2	Prime Time	7,1	14,7
8	<i>Te Doy La Vida</i>	El Trece	Las Estrellas - Mexico	Telenovela	60	Prime Time	6,2	12,0
9	<i>El Tigre Verón 2</i>	El Trece	Pol-ka - Argentina	Miniseries / Drama	8	Prime Time	4,6	10,1
10	<i>Club 57</i>	Telefe	Nickelodeon - USA Hispanic /Italy	Telenovela / Children	56	Morning	1,1	6,1
Total of national productions: 7				Foreign original screenplays:3				

Source: Obitel Argentina

The trend observed in recent years of a drop in the average rating and share of the ten most watched productions continues. In 2020, the most watched production of the year, *Jesus* (RecordTV, Brazil) had averaged 12.6. In 2021, the most watched fiction barely reaches double digits with 10.3 points. Seven of the ten most watched are Argentine productions, and the remaining three are from Mexico, Brazil and the Hispanic United States. A withdrawal of Brazilian fiction, which in previous years reached high audience levels in prime time, such as the aforementioned case of *Jesús* (Telefe, 2020), is observed. If fictions of Turkish origin were considered, the list of the most watched fictions would include several of that origin with the telenovela *Doctor Milagro* (Telefe, 2021) at the top with 16.35 rating points⁶.

**TABLE 7: Audience profile of the 10 most viewed productions:
gender, age, socio-economic level**

			Gender %		GSE%			
Title		Channel	Women	Men	ABC1	C2	C3	D
1	<i>La 1-5/18. Somos Uno</i>	El Trece	53,3	46,7	19,6	22,3	26,8	31,3
2	<i>Apache. La Vida de Carlos Tévez</i>	Telefe	56,7	43,3	22,9	15,8	24,6	36,7
3	<i>Dulce Ambición</i>	Telefe	61,0	39,0	26,9	18,1	21,1	33,9
4	<i>Pequeñas Victorias</i>	Telefe	59,4	40,6	34,7	14,0	21,9	29,5
5	<i>Maradona Sueño Bendito</i>	El Nueve	44,6	55,4	30,7	22,7	23,9	22,7
6	<i>Monzón</i>	Telefe	57,5	42,5	24,5	19,9	21,6	34,0
7	<i>Terapia Alternativa</i>	El Trece	52,7	47,3	24,9	26,7	20,9	27,6
8	<i>Te Doy La Vida</i>	El Trece	57,8	42,2	8,7	26,1	27,5	37,7
9	<i>El Tigre Verón 2</i>	El Trece	47,4	52,6	13,6	26,6	26,9	32,8
10	<i>Club 57</i>	Telefe	63,3	36,7	3,8	11,1	20,3	64,8

⁶The 6th table with the 10 most watched national fictions is not presented because the previous table contains 7 of the 8 most watched Argentine fictions released in 2021, leaving out of the list only the horror series *No Abras Ese Mensaje* (El Nueve), which averaged 0.74 rating points.

Title		Channel	04 – 12	13 - 19	18 - 24	25 - 44	45 y +
1	<i>La 1-5/18. Somos Uno</i>	El Trece	16,9	20,0	20,5	19,1	23,5
2	<i>Apache. La Vida de Carlos Tévez</i>	Telefe	23,6	23,2	20,2	18,7	14,3
3	<i>Dulce Ambición</i>	Telefe	17,6	20,3	21,8	22,2	18,2
4	<i>Pequeñas Victorias</i>	Telefe	20,4	24,8	21,5	19,5	13,8
5	<i>Maradona Sueño Bendito</i>	El Nueve	21,2	14,2	20,1	26,4	18,1
6	<i>Monzón</i>	Telefe	20,3	22,0	22,5	20,4	14,8
7	<i>Terapia Alternativa</i>	El Trece	11,6	16,3	31,3	16,9	24,0
8	<i>Te Doy La Vida</i>	El Trece	14,9	19,5	19,8	17,4	28,4
9	<i>El Tigre Verón 2</i>	El Trece	14,8	21,3	17,8	23,4	22,6
10	<i>Club 57</i>	Telefe	36,2	16,4	19,7	15,1	12,6

Source: Obitel Argentina

On average, 55.3% of the audience of the 10 most watched productions of the year were women and the rest were men, continuing with a usual characteristic of greater adoption of television fiction by the female audience. The male audience is in the majority among titles that deal with specific issues such as *Maradona Sueño Bendito* (55.4% men and 44.6% women), or the series *El Tigre Verón 2* (El Trece) that narrates the life of a union leader, his family and his relations with the political and judicial powers and the security forces (52.6% men and 47.4% women). As for the socioeconomic level of the audience, no significant changes were observed in relation to previous years, with almost 60% of the audience being located in the lowest income strata, C3 and D.

Observing the audience age segments, it is observed that on average the consumption of serialized fiction on open television is transversal to all ages, although 40% of the viewers are 25 years old or older. Children and pre-adolescent audience represents an average of 19.8%, but the figure increases when specific productions for that age range are offered: the series *Club 57* (Telefe) aimed at that audience, for example, concentrates 36.2% of its audience between 4 and 12 years old. However, in absolute terms, this is a small number of households (an average of only 1.1 rating points), so that the migration of the youngest audiences to other spaces for audiovisual content consumption continues its usual course.

3. VoD 2021 Monitoring

During 2021, the ecosystem of platforms, particularly global or international platforms that produce fictional content in Argentina, continued to consolidate

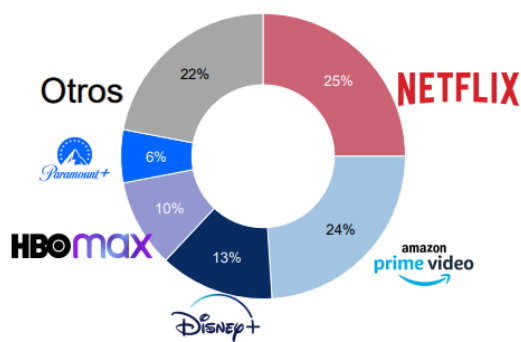
and diversify. The number of serialized fiction titles released on platforms remains stable since 2019, but the platforms that produce and distribute them are diversified. There are already seven video-on-demand services that not only include in their catalog licensed national content, but also produce original content from the country. It is also noteworthy that the number of national releases on VoD services (13) far exceeds the number of releases on open television (8). For the first time since Obitel started with its VoD Monitoring in 2019, the displacement of fiction production from the traditional screen to video-on-demand systems is observed.

3.1 VoD platform market in 2021

The platform market in Argentina during 2021 experienced a process of diversification of the offer with the launch of players such as Paramount+ or Star+ and, as a consequence, also of the offer of available content. The market leadership, until recently largely dominated by one company, this year is divided between Netflix (25%) and Amazon Prime Video (24%), according to Havas data for the third quarter of 2021.

According to this consulting firm, Disney+ (13%), HBO Max (10%) and Paramount+ (6%) also have significant market shares. Movistar+ (Telefónica) and Claro Video (América Móvil) include their platforms as an additional to their telecommunications services, but they are not yet significant spaces to observe the presence of serialized fiction.

Figure 1: OTT Market Share Argentina Q3 2021



Source: Havas with data from Just Watch

On the other hand, Flow, the TV Everywhere platform of pay TV operator Cablevisión (renamed Personal Flow) is not currently marketed in stand-alone mode with the pay TV and broadband service offered by the company, so it is not possible to compare it in terms of market with other players. It works, however, as an aggregator of its own and third-party content, gathers and facilitates access to other

video-on-demand platforms and distributes fiction from open television channels, pay TV channels and other “originals”, usually commissioned to universities or smaller production companies. According to the Havas data mentioned at the beginning of this section, YouTube, with 31.4 million unique users (Dec-2021), continues to maintain its leadership as a video platform.

3.2. Supply of local VoD platforms in 2021

Along with global and transnational platforms and some local initiatives such as Flow, linked to the subscription television operator Cablevisión, which serves as an Internet aggregator of content from different sources, we find the platforms of the National State. The first one, Cine.ar Play, managed by the National Institute of Cinema and Audiovisual Arts (INCAA) under the National Ministry of Culture and the other one, Cont.ar of the state-owned company Contenidos Públicos S.E. Cine.ar Play has been operating since 2015 (previously under the brand Odeon) so it has an already established identity, which, as we reported in the previous yearbook, doubled its active user base during the first year of the pandemic (from 240 thousand in 2019 to 514 thousand in 2020). The service offers mainly Argentine fiction and documentary films, and a smaller number of serialized fiction productions. Some of the contents are free of charge, and others can be accessed on a pay-per-transaction (TVoD) basis, even from outside the country. On its part, Cont.ar is a new version of a predecessor platform, Contenidos Digitales Abiertos (CDA) of 2011, which operates in a completely free mode (FVoD) and includes in its catalog a significant number of national series, particularly those made with state support. It is also a space where access to live streaming transmissions of all public channels (TV Pública, Encuentro, Paka Paka, Depor TV), Radio Nacional and other cultural contents converge.

3.3. VoD analysis in 2021: national release fiction and co-productions.

In 2020, seven different platforms released a total of 13 national serialized fiction productions. This is the highest number since Obitel Argentina began to monitor VoD systems, particularly because this figure does not include state-owned platforms (Cont.ar and Cine.ar), which in previous years were included leading the numbers upwards. Thus, we can observe a greater interest of global and international streaming platforms in producing Argentine content. This year there are no co-productions for VoD between Argentina and other Obitel countries.

TABLE 8. National fiction and co-productions
screened in VoD systems in 2021

RELEASED NATIONAL PRODUCTIONS	CO-PRODUCTIONS
Netflix – 1 1. <i>El Reino (series)</i> Prime Video – 2 2. <i>Maradona Sueño Bendito (series)</i> 3. <i>Pequeñas Victorias (series)</i> HBO Max – 2 4. <i>Entre Hombres (series)</i> 5. <i>Días de Gallo (series)</i> Star + - 1 6. <i>Terapia Alternativa (series)</i> Movistar + - 1 7. <i>Manual de Supervivencia (series)</i> Disney + - 1 8. <i>Entrelazados (miniserie)</i> Flow – 5 9. <i>Mi Amigo Hormiga (series)</i> 10. <i>Abejas El Arte Del Engaño (miniseries)</i> 11. <i>El Mundo de Mateo 2 (miniseries)</i> 12. <i>Esto No Es Un Hotel (series)</i> 13. <i>Che Peruano (miniseries)</i>	<i>No co-productions between Obitel countries to report.</i>
Total: 13	Total: 0

Source: Obitel Argentina

In 2021 Netflix released only one fiction series, *El Reino* (2021), in addition to three other Argentine original stand up comedy productions and documentary series. In turn, at the beginning of 2022 the platform had released two other serialized fictions: *Casi Feliz 2* (2022) and *El Marginal 4* (2022), which will be observed next year. For its part Prime Video released two domestic productions in 2021 but in the first

months of 2022, like Netflix, it released two other original Argentine series, *Porno y Helado* (2022) and *Iosi, El Espía Arrepentido* (2022) the latter based on the eponymous investigative book published in 2015. HBO Max provided two locally produced serialized fictions, in addition to two other documentary biopics, *Bilardo, El Doctor Del Fútbol* and *Diego, El Último Adiós*, linked to two notable sports personalities. In 2021 ViacomCBS launched its Paramount+ platform with content from its Telefe, Nickelodeon, Comedy Central and MTV channels. The available content includes a profuse amount of reality shows already aired on some of its networks, and the release of others specially prepared for the platform. In terms of fiction, in 2021 it hosted the telenovela *El Primero De Nosotros* (always with a previous release on Telefe). At the end of this chapter, *Medusa*, which will be the first original serialized fiction of Paramount+ in the country, was shooting. Star+ incorporates Argentine fiction for the first time. It is the series *Terapia Alternativa*, whose first two episodes were released on El Trece (Artear - Clarín) and then became available exclusively on the platform. At the beginning of 2022, Star+ also released the fiction series *Los Protectores*, and other national contents related to well-known sports and show business personalities: *En Primera Persona: China Suárez* (interview, reality show) and *En Primera Persona: Juan Martín Del Potro* (interview, reality show). Platforms linked to telecommunications companies maintain a very embryonic national content production policy. Movistar+ (Telefónica) released the fiction series *Manual de Supervivencia*, while Claro Video (América Móvil) sealed an agreement with ViacomCBS to reproduce some Paramount+ contents, but without its own productions in the country. Flow (Cablevisión - Clarín), in addition to serving as a second window for fictions premiered on other channels such as Telefe or El Trece, presented five original fictions, including the second season of *El Mundo de Mateo*, a miniseries conceived in its first part with state participation and released on TV Pública. Its continuity, however, turned out to be a Flow original without a free-to-air release.

3.4. Narrative characteristics of VoD in 2021

In contrast to previous years, when platform releases focused on corruption, organized crime or violence, this year the narrative landscape is more diverse.

The series *El Reino* (K&S Films, Netflix), one of the most resonant Argentine releases of the year, narrates the life of a religious leader who assumes the presidential candidacy in Argentina after an assassination. The series, which has been the subject of extensive media coverage and public discussion due to the manichean and implausible way in which it portrays the evangelical church, is one of the few released on platforms that insists on a narrative centered on corruption, violence and collusion between actors in power to commit acts that are against the law or ethics. Another relevant production released on platform, *Maradona Sueño Bendito* (BTF Media, Dhana Media, Latin We, Prime Video) tells the story of Diego Maradona, a

boy from an impoverished neighborhood in Argentina who became a world football star. Episode 1 of the series aired on open television and generated special interest not only because of the personality it deals with, but also because it was released less than a year after the football player's death. The platform released the last episode of the series to coincide with the first anniversary of the football player's death.

Other series released on different platforms address a wide range of topics. *Terapia Alternativa* (Kapow, Star+) is a romantic comedy in which a therapist must help a couple separate using unconventional methods. *Manual de Supervivencia* (Magma Cine and Movistar) tells the story of a lawyer who decides to leave his profession to become an actor, in a world where numerous obstacles await him. In its series *Entre Hombres* (Warner Media Latin America and Pol-Ka, HBO), HBO Max takes up the most recurrent stories of the fictions produced for platforms and narrates the string of deaths and police corruption that follows the leak of an orgy recorded on a VHS cassette. However, the same platform also released *Días de Gallo* (Warner Media Latin America and Zeppelin Studios, HBO), which focuses on the story of two young men who seek to make their way in the competitive world of freestyle.

4. Fiction, interactivity and audience participation

The resumption of post-pandemic serialized fiction production on open television in Argentina is delayed. However, in September 2021 *La1-5/18. Somos Uno* (Pol-Ka) occupies the first place in the top ten, with an average of 10 rating points and a little more than seventy chapters broadcasted in the year. Pol-Ka's production deals with the dramas of a popular neighborhood in the City of Buenos Aires. Both the name of the telenovela and the location where the stories take place combine images taken in Barrio 31 (located near the port and the city's railroad stations) and studio images. This is noteworthy in that the neighborhood was reconstructed in the production company's new studios (formerly BAIREs film studios). Given this production condition, the show began its run with extensive press coverage, both in print and television. This coverage focused on two features, on the one hand, the investment made to rebuild the whole neighborhood in the studios and, on the other hand, the number and variety of actors summoned for a set of choral stories.

La1-5/18. Somos Uno narrates the struggle for survival of local leaders (teacher, priest, shopkeepers) in a popular slum, facing crime (robberies, drug dealing, swindles) and dealing with forms of community assistance. In the group of stories, there is the story of a mother recovering her son given up for adoption against her will, the rescue of young people from drugs and crime.

This story was released by the production company as a blockbuster, but this characteristic did not attenuate the criticism with which the release was received: "while some celebrated the arrival of the show, which was recorded in compliance with the sanitary measures due to the pandemic, a large number of Internet users criticized

the format, the presentation, the story and even the choice of actors, among other things”. (*La Mañana de Neuquén* Newspaper, June 18, 2021⁷). Among other comments, the following stand out: “Enough of romanticizing poverty”, “The rich culture and history that this country has... but they have no other idea than to continue exploiting marginality. What a scourge, brother”, “A slum where they are all white and thin. They have never eaten a ‘torta frita’ in their lives”, “What is this fashion of making series of hippies from Palermo pretending to be marginalized?”⁸

In the same sense, many memes work on the artificiality of the marginalized nature of the cast. This disconnection between portrayal and reality is one of the most criticized aspects, considering that the slum known as “Villa 31” was replicated in the studio for the fiction.

In its October 1, 2021 edition, *La Nación* newspaper interviews residents of poor areas, who reject the show because of its idealization:

“I think that what you see in the series does not represent what really happens in the neighborhood. The problems of the neighborhoods are totally different, I think they make the novela for a certain audience that does not understand or does not know what happens in a neighborhood and those who write the novela see it from another point of view, not the one you have when you are inside”, says Alejandro González, 40 years old, inhabitant of Ciudad Oculta, also known as Villa 15, located between Villa Lugano and Mataderos^{9 10}.

It is curious that users of social networks emphasize the tone of the depiction. The production company’s own costumbrist style -which is assumed to be in the realist territory- is seen, in light of the environment and the themes chosen for the fiction, less as a style than as a provocation. That is to say, now it seems to become more irritating than when the themes and spaces focus on conflicts of the middle and upper-middle classes.

5. Highlights of the year

As mentioned in the Year’s Analysis section, the number of productions, episodes and broadcasting hours continues to fall, a fall that is also seen in the number of

⁷ Available at <https://www.lmneuquen.com/polka-presento-su-nueva-ficcion-la-1-518-y-le-llovieron-criticas-n815401>

⁸ “Basta de romantizar la pobreza”, “La cultura y la historia riquísima que tiene este país y no se les cae otra idea que seguir explotando la marginalidad. Qué flagelo, hermano”, “Un barrio donde son todos blanquitos y delgados. No comieron una torta frita en su vida”, “¿Que es esta moda de hacer series de hippies chetos de Palermo haciéndose los marginales?”

⁹ “Yo creo que lo que se ve en la serie no representa lo que pasa verdaderamente en el barrio. Las problemáticas de los barrios son totalmente diferentes, creo que ellos hacen la novela para un público determinado que no entiende o no sabe lo que pasa dentro de un barrio y aquellos que escriben la novela lo ven desde otra mirada, no la que uno tiene al estar adentro”.

¹⁰ Available at <https://www.lanacion.com.ar/espectaculos/fuertes-criticas-de-vecinos-de-barrios-populares-a-la-1-518-no-tienen-idea-de-lo-que-es-la-villa-nid30092021/>

viewers on the television screen. In view of this situation, productions made for VoD platforms are being re-released in on-air programming, such is the case of *Apache. La Vida de Carlos Tévez* and *Pequeñas Victorias*. These are short-lived series that have a very low risk from an economic point of view, since both made their commercial run first on the platforms that initially distributed them (Netflix in the case of *Apache. La Vida de Carlos Tévez* and Prime Video for *Pequeñas Victorias*). These second premieres strengthen the programming grids, offering quality programs to a screen ruled by live content (news and entertainment or reality programs).

Apache. La Vida de Carlos Tevez is a series initially released in 2019, which tells the difficult childhood of Boca Juniors football player Carlos Tevez. His childhood in the popular area of Fuerte Apache, in the Province of Buenos Aires, surrounded by gangs and dangers; the family and personal struggle to succeed in football. Throughout the eight chapters, the series narrates the player's tortuous and truthful path to success. The series is directed by Adrián Caetano, who stands out for his acclaimed filmography. The direction of *Apache. La Vida de Carlos Tévez* is not his first incursion; for some years he has been directing series for television on platforms such as *Puerta 7* (Netflix 2020); *Sandro de América* (Telefé 2018) and *El Marginal* (TV Pública 2016). The director already had a background of producing quality series, when in the early 2000s he made *Tumberos*, a series of great repercussion and the beginning of a stylistic that continues two decades later with *El Marginal*, for example. Already then, the quality of the camera and editing, the crude treatment of complex realities, stood out. Tévez's biopic retakes the successful experience achieved with the fictionalized story of the popular singer Roberto Sánchez, *Sandro de América*.

For its part, *Pequeñas Victorias* takes up the story told in the telenovela *Pequeña Victoria* (Telefe 2019). In its ten chapters, it updates the story of four women (one of whom is the trans mother who donates the sperm for the gestation in surrogate womb of the protagonist) who share the motherhood and upbringing of Victoria. The sequel advances on the conflicts of single mothers in raising their children, especially in infancy and during schooling, the tension between work and caregiving tasks. As in *Apache. La vida de Carlos Tevez*, *Pequeñas Victorias* is directed by a well-known film director, Daniel Burman¹¹.

This strategy of release on a second screen is complemented by another strategy in the relationship between national fiction productions on on-demand viewing platforms and open television, which is the agreement of the leading channels for the "preview" of series on platforms. This is the case of *Maradona Sueño Bendito* (Prime Video 2021) and *Terapia Alternativa* (Star + 2021) in the multiscreen premiere strategy, which places open television as a kind of bait for the subscription and viewing of series on other platforms. In the case of *Maradona...* the first episode of the series

¹¹ Among other films he directed *El rey del Once* (2015), *El misterio de la felicidad* (2013), *La suerte en tus manos* (2011), *El nido vacío* (2008), *Derecho de familia* (2005), *El abrazo partido* (2003).

that tells the life of Diego Armando Maradona in three stages of his life was broadcast (it picks up the narrative structure of Sandro's biopic) and in the case of *Terapia Alternativa*¹², El Trece programmed two of the 10 episodes of the miniseries that deals with a couple of lovers who seek to cut their affective bond to continue with their monogamous life. The difficulties of sustaining their marriages lead to a sort of dramatic comedy in the desperate struggle to abandon the clandestine relationship. While these crossovers between broadcast television and global on-demand viewing platforms are not new, it should be recalled that already in 2018 the release of series on broadcast television as a second screen had been reported¹³, in 2021 the strategy of capturing viewers from linear television to the platforms is added and extended, showing that, despite everything, broadcast television remains an economically interesting space where there are viewers to go looking for.

6. Theme of the Year

The presence in the media ecosystem¹⁴ of global on-demand viewing platforms¹⁵ in Argentina has, since its inception, expanded the menu of choice for reception. Thus, European, Asian and Latin American movies and series have appeared, complementing the usual and overabundant North American offer. Gradually and increasingly, national productions were included in these spaces (although they do not exceed 3% of the total offer). In this way, the catalog offered by the platforms through licensing contracts allows bringing new audiences closer to productions that otherwise would not be profitable, and building particular identity signs as in the case of Nordic psychological detective fiction or the hyperbolic style of Peruvian fiction. This availability of productions generated that in times of preventive and mandatory social isolation in Argentina, Colombian and Mexican narconovelas, a hit in the early 2000s, occupied Netflix's top ten for several months.

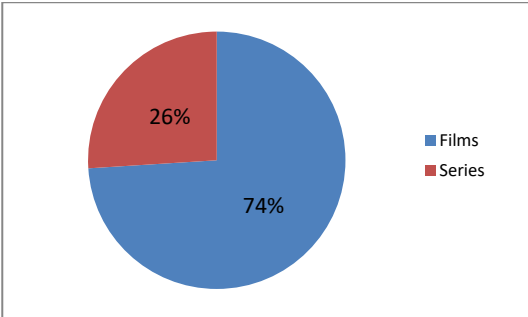
¹² See "Curiosidad. Un nuevo recurso multipantalla: El Trece dará sólo dos episodios de una serie del streaming" available at https://www.clarin.com/espectaculos/tv/nuevo-recurso-multipantalla-trece-dara-solo-episodios-serie-streaming_0_5xiCHjHfh.html

¹³ See Aprea, Kirchheimer and Rivero (2019).

¹⁴ See Carlos Scolari (2008 and 2015).

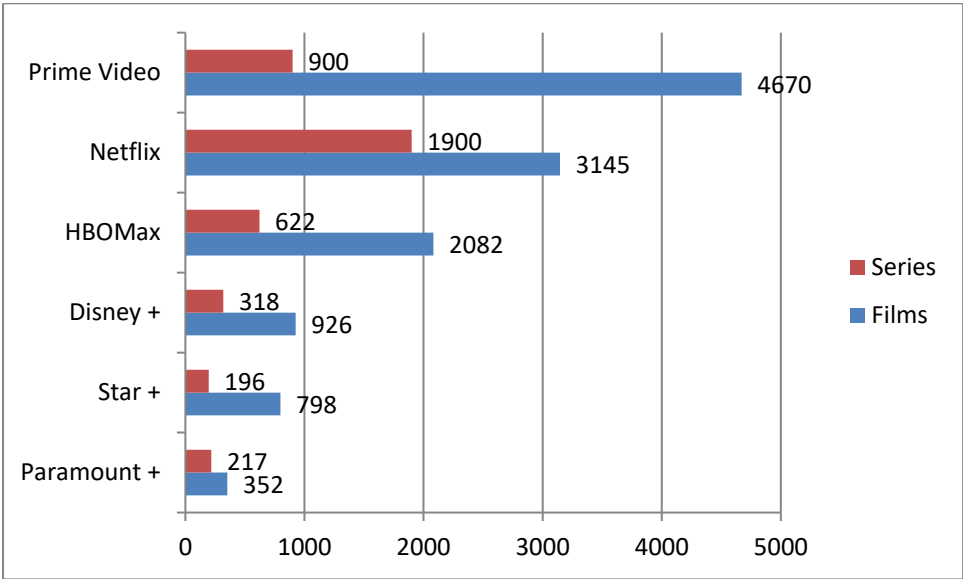
¹⁵ We refer only to global platforms, leaving aside national platforms such as Cinear or those that operate as platforms, even if they are managed by cable operators such as Flow.

Chart 3: Total supply of global VOD platforms in Argentina as of March 2022¹⁶



Source: Obitel Argentina with data from <https://www.justwatch.com/ar>

Chart 4: Total supply of content on six global platforms available in Argentina as of March 2022



Source: Obitel Argentina with data from <https://www.justwatch.com/ar>

In general, the global video-on-demand platforms present a greater number of feature films over serialized films, in the case of Prime Video close to 85% and in the case of HBOMax 77% are films, while Netflix is the platform that proportionally offers the greatest number of series (37.7%). This higher percentage of serialized titles accentuates Netflix’s role as a producer and co-producer of content, given that

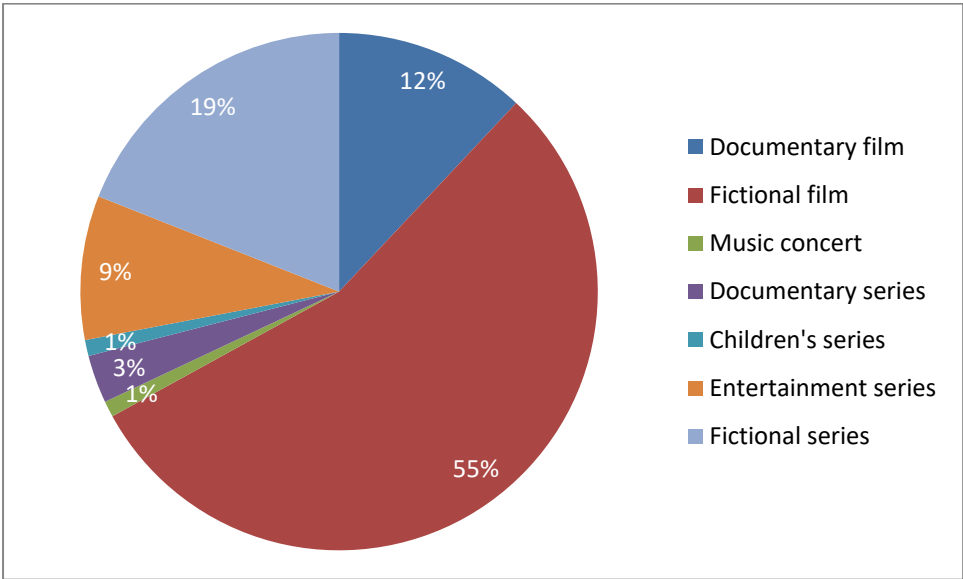
¹⁶ This and the following charts were made, among other sources, with data obtained from a survey conducted by Ornella Carboni (UNQ) and Ezequiel Rivero (UNQ) on the catalog of the main global platforms operating in Argentina as of March 2022: Prime Video, Netflix, HBOMax, Disney+, Star+ and Paramount+.

in many cases the series are made with local teams financed by the platform. Something similar had happened years ago with HBO’s film production.

If from the total offer, we keep the national production (let’s remember that in Argentina it is only about 3% of the total catalog), we will find titles currently licensed, but whose original production and release date back to the 1970s. Although this may seem obvious, it implies access to audiovisual libraries for audiences that are not contemporary with the releases. It is a sort of repository that allows platforms to expand the offer of national productions through the licensing of rights while offering new and old audiences productions that until their presence on the platforms were not easily accessible. The first impact of this catalog is that new audiences can browse old products. This availability is fed by the fantasy of total memory, which at the time was also presented by other spaces such as YouTube or specialized Internet sites.

Despite the fact that critics focus mostly on releases, and particularly on series, these are not the productions that occupy the first place in the platforms’ catalog, but rather feature films.

Chart 5: Formats on global on-demand viewing platforms by subscription of national production or co-production



Source: Obitel Argentina with data from <https://www.justwatch.com/ar>

As we can see, the global platforms present a strategy of linkage with the national audience, in which it operates more as a distributor than as a producer (approximately 75% of the supply is filmic).

The remaining third of the Argentine production catalog is destined to serialized titles. Very few of them are full-length telenovelas. Those included are very successful

telenovelas with very high ratings and of recent production: *Educando a Nina* (Telefe and Underground, 2016) *Loco x Vos* (adaptation of the American sitcom made by Telefe Contenidos and Sony Pictures Entertainment in 2016) both available on Paramount+; *Graduados* (Underground Contenidos; Endemol and Telefe 2012) and *Argentina, Tierra de Amor y Venganza* (Pol-Ka, 2019) in Prime Video's catalog. Otherwise, the series are not only fictional; a set of entertainment productions such as stand up shows or documentaries such as the series that recall the lives of Maradona, Bilardo or Sandro particularly stand out. Police cases are also serialized, such as the death of María Marta García Belsunce or the death of prosecutor Nisman. In this group, biopics have been gaining space in national production. Although it is not an unexplored genre, serialized documented fictionalization was usual in the co-production with cable signals dedicated to non-fiction such as Discovery or History. Another consequence of production for platforms is the incorporation in broadcast television of formats that until five years ago were unusual, such as miniseries, series or superseries. Fiction on Argentine broadcast television was ruled by long-running formats, nowadays practically disappeared. Given the Pandemic scenario, the only telenovela produced in 2020 was cancelled due to the restrictions imposed by COVID-19 and the impossibility to continue filming, and only resumed with the release of *La 1-5/18. Somos Uno* in September 2021¹⁷.

Only about 20% of Argentine productions on global video-on-demand platforms correspond to fiction series and in most cases they are strategic co-production partnerships between national companies in alliance with global platforms.

It is in these productions where the novelty effect that the platforms generate for the local audience seems to be focused, since it is what the critics review most stridently, the actors are recognizable. On the one hand, the novelty is given by the dissolution of a distinction of high and low, which governed the territory of the audiovisual, in which television was located in a space of lower quality and film in a space of quality. Platform production comes to combine cinematic quality with some of the television genres; the best of both worlds.

This distinction of high and low is what reproduces validated consumptions such as cinematographic and not validated for television; likewise happens with authorship, direction, acting, etc.: Film Actors (underlining with the capital letters the artistic nature of the production) and telenovela or sitcom actors (pointing out with the lower case letters the commercial and entertainment nature), directors with their own name for cinema and disdain, except in exceptional cases, for television fiction directors. And the reason for the decline of this distinction between cult and popular simply lies in the fact that personalities of the "High" (Caetano, Campanella, Burman, Carnevale, Stagnaro, etc.) turned to narrate in a serialized way for the platforms. These are less standardized products, which address different themes and

¹⁷ See Kirchheimer, M. and Rivero, E. (2021).

angles, which aspire to international circulation and therefore have a larger budget and a shorter work commitment than television serialized fiction.

However, as Rivero (2022) states, in many cases it is the National State who assumed the initial risk of the series, as in the success of *El Marginal*. This particular production and its success (this year the fifth season was released on Netflix) have taken up a set of themes in which the national production seems to have specialized: marginalized environment -especially prison-, political corruption, violence. It is a rather harsh treatment of the subject matter, in which the hyperbole of conflicts and the display of violence wins the scene. Thus, many series followed the path of the prison story as the more or less recent releases: *El Tigre Verón*, *Tu Parte Del Trato*, *Puerta 7*, *Un Gallo Para Esculapio*, *El Lobista*, among others. In 2021, a miniseries that gained a lot of visibility and continues the proposal of its predecessors was released: *El Reino* (Netflix).

As a preview. *El Reino* narrates the path to the presidency of the pastor of an unidentified church (although Christian and probably evangelical), Emilio Vázquez Pena, involved in a series of acts of economic and political corruption. This pastor has a family devoted to the church and a school where street children are rescued (where a young worker who performs miracles disappears). The inclusion of the pastor in the political race puts his church at risk, to the extent that, due to the prevailing corruption, secrets of all kinds begin to be revealed, including the rape of a minor.

It also portrays human trafficking, the ambition for prominence and independence of family members, the manipulative role of the mother, the judicial imperfection to prove a crime. As can be seen in this brief summary of the main plot, the miniseries does not stray far from the features we pointed out as typical of the national serialized export style. We are far from the white tales that once characterized the export production and that, perhaps, if we calmly search the catalog, reappear in the many films or the few telenovelas or sitcoms that -from a varied audiovisual past- are available among the thousands of products that coexist on the platform.

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