

COLOMBIA: THE SCREEN AS A SPACE OF REFUGE, LONGING AND HOPE

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Authors:

Borys Bustamante Bohórquez: <https://orcid.org/0000-0001-7986-1441>

Fernando Aranguren Díaz: <https://orcid.org/0000-0001-5565-4536>

Hernán Javier Riveros Solórzano: <https://orcid.org/0000-0002-1185-7603>

Team: Diana María Lozano Prat, María Teresa Garzón Carreño, Eliana Yiseth Sandoval Mora, Zulma Velandia Velandia

Introduction

The year 2021 presented an interesting and disturbing panorama at the same time, both in television fiction as in the country's reality. Colombia was torn between the final anguish of the pandemic and a national strike, which filled television screens with scenes that led to a complex and overwhelming social climate. In this context, with news and information as the main protagonists of the media, television fiction, similar to the year 2020, was filled with reruns, but at the same time with a few new productions, the appearance of the *remake* and experimentations on public television as conditions to become visible, on the small screen, a possibility of being the space of refuge, longing and hope in the midst of a convulsed panorama. This is explained since the fictions of days gone by allowed memory to combine with the imagination of new creations and the reinventions of productions from other times in order to be the protagonists of *Prime Time*, after the harsh images of the news and the incipient return of *reality shows*, without neglecting the importance of the Olympic Games and the Copa América as major sporting and television events of the year. And along with this context, a growing demand for VoD systems, now with new actors and products to accompany the days in a country crossed by the echoes of a social outbreak and daily reports of infections.

1. The Audiovisual Context of Colombia in 2021

1.1. Open television in Colombia

Table 1. National Broadcast Television Networks/Channels in Colombia

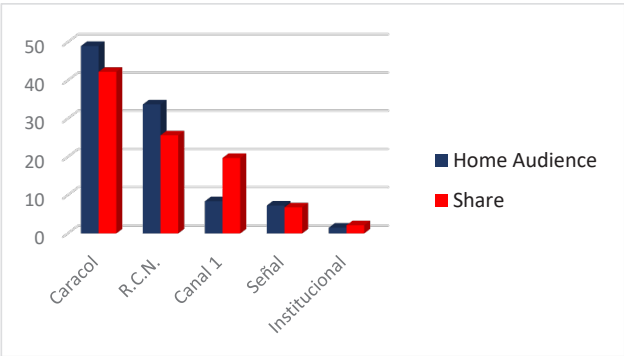
Private channels (3)	Public channels (2)
Caracol	Señal Colombia
RCN	Canal Institucional
Canal Uno	
TOTAL CHANNELS = 5	

Source: Obitel Colombia

In 2021 in Colombia there were the five national channels that have starred on national screens. Caracol and RCN were the protagonists again, although the way in which Señal Colombia has been venturing into the digital world cannot be denied, even with exclusive productions for its National networks of public television (RTVC) Play Video on Demand (VoD) system. Now, there are no new signals or *simulcasting* in the territory, but rather, alongside the national channels, it is also possible, through cable television systems, to tune in to regional channels such as City TV, Capital, Teleantioquia, Telecaribe, Telepacífico, among others and that, although they do not reach the national territory through an open signal, they do so thanks to the offer of private cable operators in Colombia.

Graph 1. TV rating and share by broadcaster (rating by household)

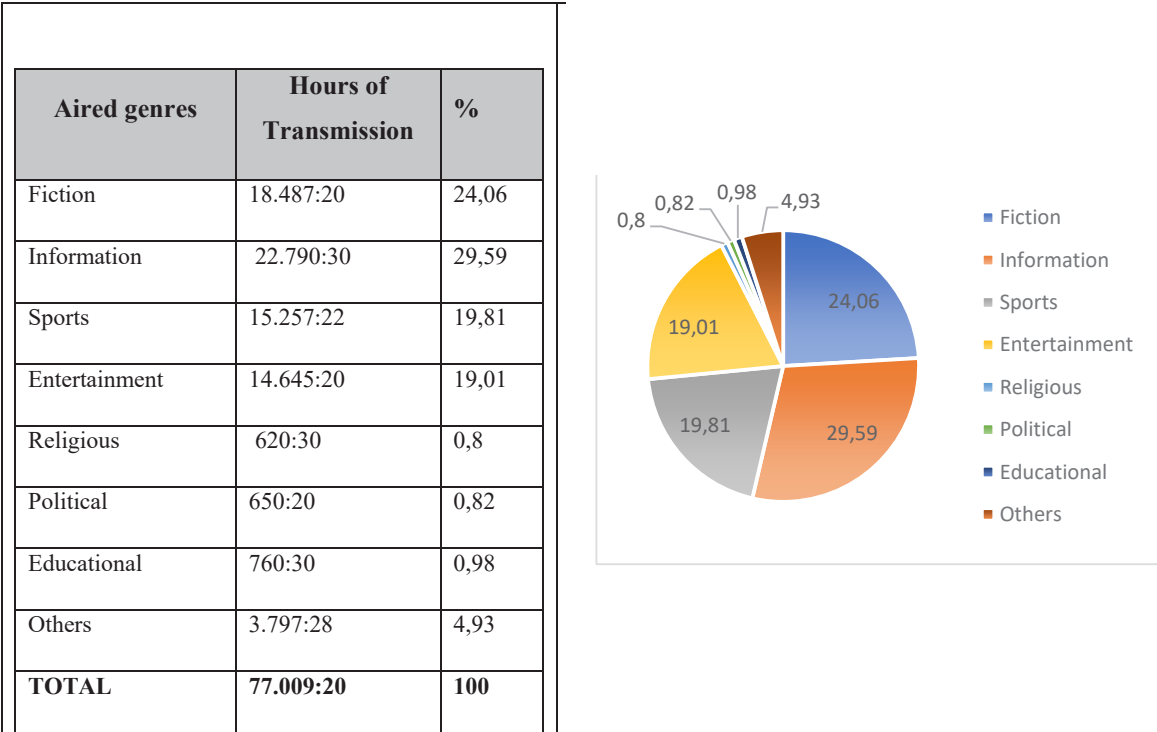
Broadcaster	Home Audience	%	Share (%)
Caracol	16,09	49,01	42,26
R.C.N.	11,08	33,74	25,65
Canal Uno	2,76	8,42	19,72
Señal	2,4	7,31	6,84
Institucional	0,5	1,52	2,16
TOTAL	32,83	100	96,63



Source: Obitel Colombia / Kantar Ibope Media Colombia

In 2021, Caracol is once again the channel with the highest *rating* in the country, surpassing RCN by five points. This is largely due to the transmission of sporting events, the centrality of news spaces and, in turn, the importance of fiction (mainly reruns) during the year. In the case of Señal Colombia, its growth is significant in representation of public channels in the nation.

Graph 2: Genres and hours aired in TV programming



Source: Obitel Colombia

In the case of the genres and hours of transmission, it is necessary to point out the preponderance of the sports and information genres during 2021, mainly due to the transmission of the Olympic Games (because of their schedule, they also filled the space of the newscasts) and the Copa América. Once again, fiction occupies a prominent place along with entertainment, fundamentally due to the appearance of *reality shows* during the year in the *Prime Time* slot.

1.2. Pay TV and VoD platforms in Colombia

In Colombia, the main player in the market, with regards to pay TV, is Claro, which has the largest coverage in the nation and the largest number of subscribers, doubling the number and percentage of UNE, DirecTV, Movistar, HVTV and ETB, which are the other operators in the country. In the midst of Claro’s preponderance, it is important to point out that this company registered 6.2 million subscribers in

the national territory. On the other hand, in the case of VoD platforms, during 2021 they increased their presence and number in the nation, also having more than 6 million subscribers between all of them during the last year. Thus, the nation has Netflix, Amazon Prime Video, Disney+, Star+, HBOMax, Paramount+, AppleTV, Starzplay, Win Sports+, added to the systems of each cable operator, as is the case of Claro Video and, additionally, the platforms belonging to national channels such as Caracol Play and RTVC Play. Thus, both pay TV and VoD platforms have become fundamental actors on the country’s television scene.

Table 2. Pay television channels in Colombia

10 most watched pay TV channels in Colombia			
Channel	Genre	Origin	Selection criteria
ESPN	Sports	United States	Sports channel that is broadcast in different meeting spaces in order to watch soccer and other international matches
FOX Sports	Sports	United States	Sports channel that is broadcast in different meeting spaces in order to watch soccer and other international matches
Win Sports	Sports	Colombia	Sports channel that is broadcast in different meeting spaces in order to watch national soccer matches
TNT	Fiction	United States	Series and movie channel that is broadcast in meeting spaces
Star Channel	Fiction	United States	Series and movie channel that is broadcast in meeting spaces
Cartoon Network	Children’s	United States	Children's channel that is broadcast in children’s meeting spaces
Disney Channel	Children’s	United States	Children's channel that is broadcast in children’s meeting spaces
AXN	Fiction	United States	Series and movie channel that is broadcast in meeting spaces
Discovery Channel	Information	United States	Documentaries channel that is broadcast in meeting spaces
CNN en español	Information	United States	News channel that is broadcast in meeting spaces

Source: Obitel Colombia

The most watched channels on pay television in Colombia were selected because they are the most remembered by the public and are the ones generally broadcasted in different meeting places such as bars, shopping malls, clinics and entertainment

establishments. It should be noted that national production occupies an important place in the case of sports with the Win Sports channel, which is dedicated to sports. In the case of fiction, national premieres during 2021 were absent on basic pay television, although Local production did have a presence on premium content channels, mainly in the case of HBO with the series *Mil Colmillos*, also distributed by the HBOMax *streaming* system. On the other hand, it can also be seen that, in the main paid channels, there is a similar place of origin: The United States, since most of the content belongs to large media conglomerates such as Disney, Warner and Sony, among others.

Table 3. VoD in Colombia

Top Active VoD Platforms in 2021
Netflix, Amazon Prime Video, Disney+, Star+, Claro Video, DIRECTV GO, HBO MAX, Paramount +, AppleTV, Starzplay, Win Sports+, Claro Play, ETB Play, Movistar Play, Tigo Play, RTVC Play, Caracol Play
TOTAL: 17

Source: Obitel Colombia

1.3 Independent production companies of television fiction

The production of audiovisual content in Colombia has found wide possibilities for development, after the implementation of Law 814 of 2013, from which the financing of cinematographic products and the expansion of benefits for production companies have been promoted. From this panorama, for the year 2021, the positive progress of this industry was notable, so that investments of more than 737 billion pesos have been registered and more than 4,800 jobs have been generated by the Government.

However, it has not only been the processes promoted by the Colombian government that have driven the progress of the Colombian audiovisual production industry, but factors such as the incentives offered, the locations in the country and the quality of work offered have also been highlighted. Thanks to these factors, the progress of the industry has been remarkable:

“during 2021 Colombia reached US\$ 38 million in potential business. Currently 22 Colombian audiovisual companies have novelties for the sector. Among them are: Cinemalab Studios, Dessu Productions; Telecinco; Teasered Company; Provideo; and Primetime Media. Also, Digitz Film; Metro TV; Dramax; Pulsar Studios; Punta Fina; CMO Producciones; Nuevos Medios; Bombillo Amarillo; Lulo Films and Centauro. Also, Rharyela; FOX Telecolombia; Caracol TV; Pilas Colombia; Salabi; and Opción Video Digital” (La Cruz, 2021)

It is expected that by 2022 the figure will continue to increase and the industry will maintain the export processes of audiovisual products, but also that Colombia will continue to be seen as a possibility for filming spaces and hiring of pre and post production services.

1.4. Sources of financing of the audiovisual sector

The Colombian economy in general was greatly affected by the conditions established as a result of the Covid-19 pandemic, this is reflected in the figures presented for the year 2020. However, 2021 was a year that can be considered positive for the audiovisual sector. This is corroborated by the data presented by the Data Flash of the Communications Regulatory Commission, which recorded that “the revenues associated with the subscription television service in 2021 reached \$3.4 billion, which represented a growth of 4.25 % compared to 2020. Subscribers reached 6.2 million, presenting an increase of 1.74% compared to 2020” (2022).

Now, within the data found in the Ibope report for 2021, advertising, one of the main sources of financing of the audiovisual sector, continues to be a highly important factor and for this year reached a total investment value of more than of five billion pesos, which means an increase of 15% compared to the immediately previous period. The *prime time* slot of Caracol Noticias continues to be the space where the greatest investment is received for this item, reaching a value of more than two hundred and sixty million pesos by 2021.

With the investment that the country maintains to advance in matters of the audiovisual industry, it is expected that the sector will continue with the growth presented and that the investments for the year 2022 will continue with the upward trend.

1.5. Communication policies

The first issue to take into consideration regarding communication policies in 2021 has to do with the economic reactivation that began in the middle of the year with Decree 580 of 2021, in which instructions were given for the care of the health and life of Colombians during the safe economic reactivation. These recommendations were extended to all sectors of national life, which made the reactivation of fiction recording and production processes feasible in the nation, taking into account all the biosafety recommendations established in this new phase subsequent to the confinements that starred in 2020 and half of 2021.

Now, in terms of connectivity in 2021, several national initiatives were presented such as Hogares Conectados, NavegaTIC, Zonas Digitales, and rural areas also began to have access to 4G mobile technology. The first of these programs consisted of offering low Internet access rates for the most vulnerable sectors; the second, to put into operation 2,638 free internet connection points in urban and rural public places; the third, in the delivery of 340,821 SIM Cards for students of official schools in grades 9, 10 and 11, public universities, educational institutions such as SENA, and Mujeres Emprendedoras. However, in terms of communication, the fundamental event was led by a scandal that was added to the conflicts typical of the causes of the social outbreak of 2021: the controversial case of the contract with populated centers, in which the Ministerio de las Tecnologías de la Información y la Comunicación (MINTIC) faced serious accusations in connection with public procurement for connectivity technologies in schools in rural areas of the nation.

1.6. Digital and mobile connectivity infrastructure

The country's trends continue to increase in terms of digital connectivity and the use of the different technologies employed for this purpose. According to the *Data Flash* of the Comisión de Regulación de Comunicaciones (2022), “in the third quarter of 2021, revenues from the mobile Internet service grew 6.1% and accesses 17.6%, compared to the same period of the previous year, while traffic increased by 94.5%”. Despite the arrival of the new operator WOM, the consumption trend is maintained by the three main companies dedicated to this work; Claro being the one that occupies the first place with 61.6%, a wide advantage over the other companies that occupy the second and third place, which are Movistar with 18.9% and Tigo with 16.4%.

In addition to these figures, it is important to note that “for the month of September 2021, the penetration rate for the mobile Internet service was 70 per 100 inhabitants, higher by 10 percentile points compared to the same month of the previous year” (Comisión de Regulación de Comunicaciones, 2022). This news is highly relevant because it not only demonstrates the progress that is being made in the sense of achieving greater coverage, but also shows the country's concern to meet the Sustainable Development Goals (SDGs) by 2030.

2. Analysis of the Year: National and Ibero-American Fiction
Premiere on open TV

Table 1. Fictions broadcasted in 2021

UNPUBLISHED NATIONAL TITLES 9 Titles Canal Caracol – 2 Titles 1. <i>La Reina del Flow 2</i> (Series) 2. <i>El Hijo del Cacique</i> (Telenovela) Canal RCN – 5 Titles 3. <i>Enfermeras</i> (Telenovela) 4. <i>Pa quererte</i> (Telenovela) 5. <i>La Nieta Elegida</i> (Telenovela) 6. <i>Café con Aroma de Mujer</i> (Telenovela) 7. <i>Lalas Spa</i> (Telenovela) Canal 1 – 2 Titles 8. <i>BJ el Propio</i> (Series) 9. <i>Libertador</i> (Series)	CO-PRODUCTIONS 1 Title Canal 1 – 1 Title 1. <i>Decisiones</i> (Series – Colombia- Unites States - Puerto Rico) UNPUBLISHED FOREIGN TITLES 11 Titles Canal Caracol – 5 Titles 1. <i>Nicky Jam el Ganador</i> (Series-Mexico) 2. <i>Sandro de América</i> (Series- Argentina) 3. <i>Imperio de Mentiras</i> (Telenovela- Mexico) 4. <i>Mi Marido Tiene Familia</i> (Telenovela- Mexico) 5. <i>El Dragón</i> (Telenovela- Mexico) Canal RCN – 3 Titles 6. <i>Te Doy La Vida</i> (Telenovela- Mexico) 7. <i>La Usurpadora</i> (Telenovela- Mexico) 8. <i>Quererlo Todo</i> (Telenovela- Mexico) Canal 1 – 3 Titles 9. <i>El Final Del Paraíso</i> (Series- Unites States) 10. <i>El Charrito Negro</i> (Series- Mexico) 11. <i>El Secreto De Selenia</i> (Series- Unites States) TOTAL UNPUBLISHED OBITEL TITLES: 20
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Source: Obitel Colombia

Table 1b. Broadcast of reprise titles during 2021

REPRISE NATIONAL TITLES – 13 Titles		REPRISE FOREIGN TITLES – 4 Titles	
Canal Caracol – 4 Titles		Canal Caracol – 2 Titles	
1. <i>Nuevo Rico, Nuevo Pobre</i> (Telenovela)		1. <i>Lo Que La Vida Me Robó</i> (Telenovela, Mexico)	
2. <i>Pedro El Escamoso</i> (Telenovela)		2. <i>Mar De Amor</i> (Telenovela, Mexico)	
3. <i>Pasión de Gavilanes</i> (Telenovela)		Canal RCN – 1 Title	
4. <i>Vecinos</i> (Telenovela)		3. <i>Soy Tu Dueña</i> (Telenovela, Mexico)	
Canal RCN – 9 Titles		Canal 1 – 1 Title	
5. <i>Francisco El Matemático</i> (Telenovela)		4. <i>La Rosa De Guadalupe</i> (Series, Mexico)	
6. <i>El Último Matrimonio Feliz</i> (Telenovela)			
7. <i>Betty La Fea</i> (Telenovela)			
8. <i>Chepe Fortuna</i> (Telenovela)			
9. <i>Rosario Tijeras</i> (Telenovela)			
10. <i>El Capo</i> (Telenovela)			
11. <i>La Hija Del Mariachi</i> (Telenovela)			
12. <i>A Mano Limpia</i> (Telenovela)			
13. <i>Pobres Rico</i> (Telenovela)			
TOTAL OBITEL REPRISE TITLES: 17 Titles			

Source: Obitel Colombia

In 2021, *reprise* titles outnumber national unreleased titles again.

Table 2 National Fiction Premiere

Year	Titles	Episodes	Hours
2017	9	810	608
2018	12	1080	810
2019	11	990	743
2020	8	720	540
2021	9	790	615

Source: Kantar IBOPE Media Colombia– OBITEL Colombia

In the last five years, particularly from 2017 to 2018, the trend of fiction premiere production was significantly growing. Later, between 2019 and 2020, there was a collapse in the number of fiction premieres, due to the confinements resulting from the COVID 19 pandemic, which, although it contradicts the growing trend,

is explained by limitations in the recordings given by the lockdowns. However, for the year 2021 a reactivation of the industry with a significant growth trend is observed.

Table 3. National fiction premiere formats

Formats	Titles					Hours				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Telenovela	3	1	4	4	7	202:30	67:30	270:00	270:00	472:30
Series	6	11	7	4	2	405:00	742:30	472:30	270:00	202:30
Miniseries	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Sitcoms	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Unitary	0	0	0	0	0	0:00	0:00	0:00	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: Kantar IBOPE Media Colombia – OBITEL Colombia

At a national level, there is a strong tendency to consume telenovelas, which are mostly seen in *prime time*, and correspond to *reprises*, although the new production is also positioned in this format, to the detriment of the preponderance of series in previous years.

Table 4. Premiere fiction in 2021: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	10	45	900:00	53
OBITEL COUNTRIES (total)	12	55	783:00	47
Argentina	1	5	67:30	4
Brazil	0	0	0:00	0
Chile	0	0	0:00	0
Colombia	9	41	832:30	36
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
USA - Hispanic	2	9	135:00	8
Mexico	7	32	540:00	32
Peru	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	1	5	67:30	4
CO-PRODUCTIONS (Totales)	2	9	120:00	7
National Co-productions	1	5	60:00	4
Obitel Countries Co-productions	1	5	60:00	4
TOTAL	22	100	1683:00	100

Source: Kantar IBOPE Media Colombia – OBITEL Colombia

This table makes Colombia’s opportunity visible, along with the rest of the Obitel countries, in terms of reactivating the television industry and therefore that of each country.

Table 5. National and Obitel fiction formats broadcasted in 2021

Format	Titles				Hours			
	National	%	Obitel Scope	%	Nationals	%	Obitel Scope	%
Telenovela	33	89	23	85	227:30	45,7	1552:30	85,2
Series	4	11	4	15	270:00	54,3	270:00	14,8
Miniseries	0	0	0	0	0:00	0	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	37	100	27	100	497:30	100	1822:30	100

Source: Kantar IBOPE Media Colombia – OBITEL Colombia

This table shows the preponderance of the telenovela, associated, of course, with the prominence of the *reprise*.

Table 6: 10 Most Viewed Titles

Titles		Channel	Producer (Country)	Format/genre	No. of cap/ep in 2021	Time slot	Rating	Share
1	<i>Pasión De Gavilanes</i>	Caracol	RTI TV Colombia	Telenovela	238	Prime	16,09	50,91
2	<i>La Reina Del Flow 2</i>	Caracol	TELESET Colombia	Series	90	Prime	11,45	36,39
3	<i>Pedro El Escamoso</i>	Caracol	CARACOL Colombia	Telenovela	397	Late	10,47	40,27
4	<i>Nuevo Rico Nuevo Pobre</i>	Caracol	CARACOL Colombia	Series	192	Prime	8,3	37,42
5	<i>Yo Soy Betty La Fea</i>	RCN	RCN Colombia	Telenovela	156	Prime	7,98	30,13
6	<i>Enfermeras</i>	RCN	RCN Colombia	Telenovela	180	Late	7,98	29,59
7	<i>Pa’ Quererte</i>	RCN	RCN Colombia	Telenovela	130	Prime	8,05	28,3
8	<i>El Hijo Del Cacique</i>	CARACOL	Caracol Colombia	Telenovela	80	Late	7,63	30,91
9	<i>La Nieta Elegida</i>	RCN	RCN Colombia	Telenovela	70	Prime	7,25	27,92
10	<i>Café Con Aroma De Mujer</i>	RCN	RCN Colombia	Telenovela	92	Prime	7	24,6
Total of national productions: 10				Original foreign scripts: 0				

Source: Kantar IBOPE Media Colombia – OBITEL Colombia

It is interesting to observe in this table that the most watched fictions at the national level are precisely produced in Colombia and are *reprises*.

Table 7: Audience profile of the 10 most viewed titles:
sex, age, socioeconomic level

Titles		Channel	Sex %		Socioeconomic level %			
			Female	Male	ABC1	C2	C3	D
1	<i>Pasión De Gavilanes</i>	Caracol	55%	45%	40%	30%	20%	10%
2	<i>La Reina Del Flow</i>	Caracol	60%	40%	60%	20%	10%	10%
3	<i>Pedro El Escamoso</i>	Caracol	57%	43%	58%	22%	12%	8%
4	<i>Nuevo Rico Nuevo Pobre</i>	Caracol	56%	44%	52%	25%	15%	10%
5	<i>Yo Soy Betty La Fea</i>	RCN	62%	38%	57%	23%	13%	7%
6	<i>Enfermeras</i>	RCN	70%	30%	53%	27%	12%	8%
7	<i>Pa Quererte</i>	RCN	56%	44%	56%	24%	11%	9%
8	<i>El Hijo Del Cacique</i>	Caracol	61%	39%	52%	26%	15%	7%
9	<i>La Nieta Elegida</i>	RCN	66%	34%	50%	23%	16%	11%
10	<i>Café Con Aroma De Mujer</i>	RCN	64%	37%	25%	35%	23%	17%
Title		Channel	Age range (%)					
			04 - 12	13-17	18-24	25-34	35-49	50-64
1	<i>Pasión De Gavilanes</i>	Caracol	2%	4%	0,6%	13%	39%	41,4%
2	<i>La Reina Del Flow</i>	Caracol	2%	4%	5%	16,3%	36,5%	36,2%
3	<i>Pedro El Escamoso</i>	Caracol	2%	4%	6%	16%	36%	36%
4	<i>Nuevo Rico Nuevo Pobre</i>	Caracol	2%	4%	4%	13%	37%	40%
5	<i>Yo Soy Betty La Fea</i>	RCN	3%	4%	5%	17%	35%	36%
6	<i>Enfermeras</i>	RCN	2%	5%	5%	14%	37%	37%
7	<i>Pa Quererte</i>	RCN	3%	6%	5%	17%	34%	35%
8	<i>El Hijo Del Cacique</i>	Caracol	2%	3%	5%	13%	38%	39%
9	<i>La Nieta Elegida</i>	RCN	2%	5%	4%	13%	38%	38%
10	<i>Café Con Aroma De Mujer</i>	RCN	7%	7%	8%	16%	31%	31%

Source: Kantar IBOPE Media Colombia – OBITEL Colombia

In this table it can be seen that it is women who consume fiction the most. According to the titles studied in this chapter, 6 out of 10 people who watch television fiction are women. In addition, the fictions that occupy the first positions of rating are observed,

for the most part, in homes of average socioeconomic level. Thus, it can be said that television was one of the main means of entertainment in the Colombian's process of returning to the in-person modality.

3. VoD monitoring 2022

VoD in Colombia offers a paradoxical scenario that makes it possible to account for the distance between the large private channels and public television. This is how, in the case of the private ones, it is produced for the big platforms (Netflix, Amazon and, recently, HBO), with projects in 2021 and a projection to be carried out in 2022 and, in addition, a long catalog of *reprises*. For its part, there is production, in the case of RTVC, a Colombian public media system, with a proposal that even tends to explore new technologies, although without counting on the wide audience of private media, as happens with the series *El inquisitor*, whose second season, planned for 2022, not only includes the bet of recording with mobile phones but also uses a concept of interactivity in its narrative.

3.1. VoD Platform Market in 2021

In the case of the VoD platform market, the national scene shows an exponential increase in supply, passing to a total of 17 providers, as previously indicated, with Netflix being the dominant platform and RTVC Play the innovative bet that emerges from public television. This is due to the arrival of offers such as those from Star+, Paramount+ and other actors, which, although they do not manage to count with the high number of subscribers as those with privileged positions in the market do, as is the case of Netflix or Amazon Prime, did allow a greater diversification of the offer for those who found on the platforms an entertainment space in the midst of confinement.

This is why 2021 was a year of significant growth for the platforms, reaching more than six million subscribers among the different offers present in the country, thus equaling the offer of cable television and even promoting mixed models in which the access to a cable operator also allowed access to a platform. In some cases, that access was initially free, with payments in months outside of the initial promotion; but, in any case, it offered the possibility of having both cable television and access to *streaming*, as in the case of HBO+ and pay television operators such as Claro. This, not to mention the projection that, in 2022, Star + will go off the air as a package of Premium channels and its access will be offered together with pay TV channels.

As for alliances, the trend established by the relationship between Caracol and Netflix is maintained, but RCN has also gradually joined, which has allowed the contents of both channels to circulate on the red platform. Rights have also begun to be transferred on Amazon Prime, which has allowed curious phenomena to occur such as, having a *reprise* like *Pasión de Gavilanes* simultaneously occupying a

position among the 10 most watched on Netflix in the same week as it was one of the most viewed in the open signal. On the other hand, with the arrival of *Mil Colmillos* in HBOMax as the first original production made in Colombia for this platform, national productions made for exclusive content of platforms or payed channels is also reset, as it happened with *Distrito Salvaje*; the first seasons of *Narcos* and other productions made in the nation, but destined directly for VoD systems.

Finally, it is necessary to point out the interesting bet made by public television with RTVC Play: a free platform; with an offer of premiere, cultural, *reprise* and children's content. Productions that revive successful products from other years stand out, such as *N. N.* and the creation of new formats, such as *El Inquisidor*, which was created as an initiative to produce with the use of cell phones and which is emerging as a completely interactive proposal for 2022. Likewise, in VoD, the effort of the public media system is something to be highlighted, since, although they do not monopolize the open *rating* and it is not possible to clearly access data on the number of subscribers given their free nature, they do account for being an example of the ways in which public television can constitute a valid offer and in which room is given to innovation and new creative proposals with free access to its audience.

3.2. Local VoD platforms offer in 2021

In the case of Colombia, the situation of the platforms has not notably changed. Netflix remains the most used platform, since, according to data from Diario Portafolio (2021), the percentages of *streaming* users are as follows: Netflix is positioned with 71%; Amazon Prime 12%; HBO Max 7% and Disney + 6%. These data allow us to identify that the trends that had been marked in previous years are maintained, that is, with a dominant operator in 2021. However, by the end of the year, the panorama began to change, both due to the appearance of new actors and platforms, (as is the case with the arrival of Star +, summing up to 17 platforms in the country); as with the new scenario that proposes the end of social distancing and the opening of the economy. In this way, it is envisioned that by 2022 the number of subscriptions will decrease, as well as cost increases or even a reduction in the quality of content due to oversaturation, without neglecting the increase in informality in access to services. such as the case of sharing accounts or, as it happens in some social sectors in the nation, the rental of subscriptions during certain times, outside the monthly subscription and with low prices.

That said, in Colombia, the case of RTVC Play is also relevant, a public information service platform that has gained strength thanks to the possibility of accessing its content for free and its variety of content which includes fiction series, documentary films and children's. For this reason, the use of this platform has been highlighted, since it has allowed to recall classic productions in the country, which users can access thanks to the care and recovery of this process carried out by the

public institution. Thus, a robust cultural offer is combined with *reprises* and new products that venture into formats or use of new technologies, as is the case of the production with cell phones, the possibility of interactive content or hosting trans-media initiatives.

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

Table 8. National and Ibero-American fictions
broadcasted in 2021 in VoD systems

NATIONAL PREMIERE TITLES - 3	CO-PRODUCTIONS – 0
Caracol Play – N° national titles 1 1. <i>De Levante</i> 3 (series) HBO MAX – N° national titles 1 1. <i>Mil Colmillos</i> (series)	
Total: 2	Total: 0

Source: Obitel Colombia

The television industry suffered during 2021 some of the typical consequences of the pandemic lockdowns, which led the offer on platforms to also be full of *reprises*. However, despite production difficulties, it is significant to point out as an important event the premiere of *Mil Colmillos*, the first Colombian series on HBO Max and the appearance of a new season of *De Levante*. In the case of RTVC Play, the phenomenon was the same, with *reprises* being the protagonists and the new season of *El Inquisidor* being waited for 2022.

3.4. Narrative features of VoD in 2021

In terms of narrative, the VoD in 2021 offered the significant presence of *reprises* combined with a set of fictions in which the presence of film formats or series was predominant. Documentaries were offered to a lesser extent, their relevance in terms of consumption being somewhat lower. Now, the case of sports is important, because although they do not mark a narrative trend, they are still a fundamental block in the case of platforms, occupying a privileged place in the audiences, but without approaching the universe of fictions. In these, on the other hand, agile narratives,

full of humor predominated, and, as in open signal, *reprises* were the protagonists of the largest number of views. This is why the first places are occupied by movies (in the case of Netflix, originals such as *Red Notice* and on Amazon, HBO Max and other exclusive and cinema-specific productions, such as *Godzilla vs Kong*), series such as *The Witcher* (Netflix), *The Boys* (Amazon Prime), *Loki* (Disney+), which share spaces of preference with *Yo soy Betty La Fea* and *Pasión de Gavilanes*, among others.

With regards to premieres, it is important to point out that the national original production is limited to only a few platforms, while the presence of reruns occupies a significant portion of the slots in all cases. Beyond producing new titles, what is found in 85% are productions from past years competing directly with products launched in 2021. Thus, one can find, for example, the launch of titles such as *Mil Colmillos*, the first series produced in Colombia on HBO Max and, at the same time, in the wide panorama of platforms, *Yo soy Betty La Fea* and *Pasión de Gavilanes* occupying the first places of audience on Netflix. On the other hand, it is important to point out that Caracol and RTVC continue to be the main providers of VoD at a national level, emphasizing the importance of how, in the first case, there has been a boosting of the format they call “web series” and, in the second, the bets placed on new technologies and narration processes and interaction with audiences. In general, then, it is a scenario that was dominated in 2021 by *reprises* and in which, although there was not an abundance of productions for VoD, the growth in the diffusion of these systems in Colombian homes was made visible.

4. Interactivity and audience participation in digital environments

In Colombia, interactivity strategies have been characterized for being on a border between the search for elements that allow a connection with the audience and the use of strategies linked to the analog universe. In this perspective, in recent years, the search to connect with audiences through various digital resources has been carried out alongside massive events. For the year 2021 and taking into account that the pandemic led to massive isolation, which did not allow events with a large audience to take place, it was the social networks which began to take a first-hand leading role. A phenomenon in which the most watched productions and, mainly, cases such as *La Reina del Flow 2*, made visible the possibility of generating spaces for the expansion of the narratives and for a greater approach of the public, both to what is told on screen as well as behind the scenes and issues such as the approach to other cultural products associated with fiction, such as the case of fictional music.

4.1 Digital expansion proposals

Digital expansion proposals for production in Colombia still contemplate very incipient strategies in the case of private television and some risky bets such as those

proposed by RTVC Play, which experiment with interactivity (as in the case of *El Inquisidor*) and with the intention of moving from its realization through cell phones to its own interactivity actions in 2022. Among the incipient ones, the cases in which the story that is narrated is complemented with other elements of the production process stand out, as in the case selected to be studied in this section.

Thus, in terms of digital expansion proposals, *La Reina del Flow 2* presented a set of characteristics which allowed it to establish a multidimensional relationship with users and viewers. This is a clear example of interactivity with the audience and expansion of what is narrated on screen. So, in addition to the chapters broadcasted daily, an important follow-up and dissemination was added on the official website of the channel, the management of multiple platforms and the use of elements derived from the production, in order to extend it and, additionally, add other ingredients for direct interaction with the public.

This is how, this story, which during the second season narrates the life of Tammy Andrade, who became a talented reggaeton singer for this new cycle after taking revenge on Charly Flow, is also complemented with music and different content on Caracol's official website. In this way, complements are offered so that audiences can access more information and details of the production, without neglecting the expansion towards networks in which it was possible, both to use content from what was seen on the screen, such as the songs used in the production and which allowed access to spaces such as *Spotify* along with the classics *YouTube*, *Facebook*, *Instagram* and *Twitter*.

With regards to interactivity promoted from the channel in the first instance, we find a web portal designed by Caracol TV, which has different resources to promote user participation. In the first place, we find “web exclusives” that consist of a set of contents organized as follows: initially, interviews in which users can learn about the life of the actors and even the development of the characters onscreen.

Secondly, there is the section dedicated to “behind the scenes”, which shows how this production was recorded in order to satisfy the need for knowledge on the part of the audience with regards to the lives of the actors and the actions that allow the development of the production. On the other hand, there are also in these “exclusive web” some clips or other elements that can be used by the audience to learn more about this performance and relate to it, the actors and the dynamics of recording the fiction.

To complement the offer made on the channel's website, due to the wide musical component of the production, the songs, which are not only hosted on the portal, are on other digital platforms such as *YouTube*, *Spotify*, *Claro Música*, *Movistar Music*, among others. All this allows other modes of access to the production and its components, expanding the narrative to a kind of strange relationship between fiction and reality, where the fictional singer becomes the protagonist of the musical success to listen to, something that

although it is not new (and in whose backgrounds curiously may be the case of Rosario Montes in *Pasión de Gavilanes* or the release in album of the songs of *Café con Aroma de Mujer* interpreted by Gaviota in its time), it does offer new mechanisms of access and interaction through the diversification of platforms that already amplify the contents and not only in the audiovisual itself. This is how the songs *Depredador*, *Reflejo*, *Amor Imposible*, *Colombia Style*, *Paz y Tranquilidad*, *Fijación y Calentura* and many more, have more than 19 million reproductions when adding the set of diverse platforms in which they circulate.

While managing networks, it is worth noting that the channel has strategically used its different platforms such as Facebook, Instagram, Tik Tok and YouTube to generate spaces of interactivity by posting small clips of the production, which have been shared with users through these networks. This, so that they can generate comments, know previews or synthesis of the production and have access to other content, as is the case of the songs of the production. Now, once *La Reina del Flow 2* is released on the Netflix platform, it should be noted that the distribution strategies entered into a certain diversification, due to the strategic use of the social platforms of this streaming system which approaches more public, although it maintained the same strategies in the networks of its channel of origin, Caracol.

4.2 Social participation

We find there's a use of different strategies, such as the design of memes, the construction of small reflections and the elaboration of discussions through social networks such as those that were raised by the ending of the audiovisual production, which became one of the topics that turn out to be a trend in social networks (mainly Facebook, Instagram and Twitter) with thousands of comments and shared content. But, along with the ending, users also created unofficial *fan pages*, which reinforced those created in the first season, open and closed groups about the production or, as an added value, about its music, and, in general, different options to approach the production, either by sharing the content offered by the channel as well as making criticisms, comments and even summaries of the chapters. It is worth pointing out that these strategies deployed by the audience are not far from the usual ones and those allowed by a system that is not openly interactive and where we find participation by the audience represented in comments in relation to narrative aspects. Although these strategies are not going to modify the content of the production, they are going to characterize the users' reactions to what happened on the screen: displeasure, approval or even proposals for alternatives to what was presented in each chapter.

4.3 Emerging fiction productions

As for emerging fiction productions, it is interesting what happened with the web series *Encuentros*, which was broadcast by the Fundación Tierra de Gracia and initially released in 2020. It is a fiction production that, although it contains a remarkable theme inclined towards the dissemination of a religious message, it had the participation of well-known actors on the Colombian small screen such as Juan Pablo Obregón, Carlos Posada or Chichila Navia. Also, series such as *Entre Panas* and other bets focused on products such as beers and others, did not have a greater role in 2021, although the existence of a project to be released in 2022 by the Federación Colombiana de Ganaderos (Fedegan) and Fondo Nacional del Ganado (FNG) also deserve mention, its entitled *Colombia: sabor y tradición ganadera (Colombia: flavor and livestock tradition)*. For its part, the aforementioned series *El inquisidor* also deserves mention, which, although it could be seen on RTVC Play, it's a project carried out under the concept of *Smart films*, that is, the production of audiovisual projects with cell phones.

5. Highlights of the year

In Colombia during the year 2021 a singular phenomenon was experienced in which, on the one hand, the telenovela returned as the dominant format and, on the other, *reprises* continued to be protagonists as productions that occupied the first places in the rating. In this sense, as it happened in the year 2020, in 2021 fictions which were important in previous years were protagonists again, this was the case of: *Pasión de Gavilanes*, *Pedro El Escamoso*, *Nuevo Rico*, *Nuevo Pobre* and *Yo Soy Betty La Fea* as main representatives; something that was combined, however, with the premiere fiction, which was also reflected in productions such as: *La Reina Del Flow 2*, *Enfermeras Pá Quererte*, *La Nieta Elegida* and *El Hijo Del Cacique*, this way the small screen offered an interesting dialogue between the past, the present and the renewal of the past through the *remake*.

This last phenomenon is interesting, given that, although it is not predicted as a trend at a national level, it does offer a panorama in which a central element stands out, which also largely explains the success of *reprises*: nostalgia. Like this, alongside the approach to the productions of yesterday, a way was also found to renew the narrative of the past and combine it with the present. They also highlight productions that returned over formulas from other years, such as melodrama, the handling of certain elements of suspense or directly humor as an element to complement the narration. All this without neglecting the continuation or consolidation of new seasons as in the case of *La Reina del Flow 2*, which retakes the story and gave it a certain air of a series, but with a seriality more in code than has been explored in the past in cases like *El Capo*, *El Cartel De Los Sapos*, *Las Muñecas De La Mafía* and other previous productions. Then, in any case, a production strongly connected

with nostalgia is presented, added to a fundamental presence of humor as a central narrative element to promote the productions that were protagonists in the year.

For this reason, among the most watched productions there are three products that are essentially humorous, while maintaining the stability of the *reprise* in the year as a dominant factor: *Pedro El Escamoso*, *Nuevo Rico*, *Nuevo Pobre* and *Yo Soy Betty La Fea*. Stories that were central yesterday and will be so again in 2021 (*Betty's* case is curious as it is her third year reappearing both in open signal and on Netflix) but that are nuanced by the joke, the ingenuity of its protagonists and the combination between melodrama and humor as a narrative engine. Something that occurs to a lesser degree in another *reprise* case: *Pasión de Gavilanes*, which, although it is above all a melodrama, also had some aspects of a humorous nature, such as the comic character of grandfather Elizondo and some somewhat crazy or directly absurd situations, these were the same ones that led to connect audiences with this type of product. So, then, the first issue that should be highlighted as a trend in 2021 has to do with the decisive weight of a humorous narrative, and that is connected with the need for entertainment on the part of the audiences and a relief to balance the melodrama.

However, it should be noted that it was not only a resource used in other times within the modes of narration, but also the creation of a space for entertainment and consumption that allowed the audience to forget for a few moments about those anguishes experienced both by the pandemic and by the social processes that the country went through during the year 2021. The year was marked by the pandemic; the national strike and the protests, which lasted for much of the year and even led to the cancellation of massive events, such as the Copa América. In this context, the small screen was positioned as a privileged space for entertainment. Television was then a turning point after the news spaces in *prime time*.

Now, along with humor, melodrama. And so, as it had become somewhat of a habit on Colombian television in 2020, the narratives that had a fundamental focus on the melodramatic aspect of everyday life reappeared this year. An example of this is *Pasión de Gavilanes*, which not only met the condition of *reprise* by appealing to nostalgia, but also offered a classic melodrama about the lives of the three Reyes brothers and their romance with the Elizondo sisters.

But not only in the *reprise* was the relationship between everyday life and melodrama latent. This narrative form was also at the core of products such as *Enfermeras* and *Pá Quererte*, which significantly recover the search for personal dramas and life stories of their characters, everyday problems and relationships that occur in different environments. Examples of this are *Enfermeras*, a story set in a hospital setting, and *Pá Quererte*, which tells stories of different families with an accent on the search for a single father.

A similar case, although with a narrative closer to mystery than melodrama, occurs in *La Nieta Elegida*, which recounts the life of a young woman who returns to her paternal family's house with the purpose of taking revenge, creating an atmosphere that recalls that subtle touch of mystery of productions from other times such as *Los Cuervos*, *Luzbel Está De Visita* and other fictions from previous times, an issue that, in this panorama, makes it necessary to once again emphasize the decisive role that nostalgia plays and how it is connected with two productions that complete the top ten in the country: in first instance, *El Hijo Del Cacique* recalls the presence and figure of Diomedes Díaz which seeks to make the processes that he experienced visible, not the singer, but his son. Secondly, the revived nostalgia, a fundamental aspect through which the narrative is rebuilt, as in the case of *Café con Aroma De Mujer* which, under the logic of the *remake*, and as would have already been done in 2020 with *Amar y Vivir*, tells the same story and presents it in such a way that it is made from the conjunction between the elements that at some point made it connect with a massive audience and current aspects, such as the use of technologies or modification of the dynamics of the characters. In this way, the cardinal narrative of the telenovela is recovered and adapted to the rhythms of contemporaneity.

In conclusion, the year 2021 was once again characterized by nostalgia and humor, but also by a set of very interesting phenomena in terms of the search for an update and conjunction of narratives. So the telenovela, it seems, returns with some validity, maintaining the tension and the melodramatic scheme, but also raising the question of whether the trend will continue or, rather, is the result of the ways in which television and, in the case of fiction, the melodramatic aspects were what allowed Colombians to live with the harsh realities they faced day by day in the midst of the pandemic and the social outbreak.

6. The theme of the year

The COVID 19 pandemic became a central issue of the media and social agendas of 2020. The different screens of contemporary media ecosystems were saturated with innumerable news and reflections from academics, experts and different thinkers in which a climate of anxiety and uncertainty were at center. Now, for 2021, with the growing presence of vaccination processes and, in the same way, a set of procedures to reopen and reactivate the economy at the global and local level, Colombia, like other nations, seemed to enter a path in which, one year after the confinement decreed in March 2020, it would lead towards the beginning of the long-awaited post-pandemic stage. However, in the Colombian case, 2021 would be marked by a process of generalized disagreement, which led to a national strike in which the screens would be protagonists again, not only with the figures of deaths and occupation of the ICU, but also with the image of the demonstrators and those mixtures between the creativity of the marches and actions of repression. All this revealed a

scenario of tensions in which television fiction became, as in 2020, a space for *reprise*, the transformation of narratives into premiere bets and, perhaps in tune with the climate of nostalgia associated to the productions that filled the time slots, the appearance of the *remake* phenomenon.

Fiction in Colombia for the case of 2021, to this extent, once again had *reprises* as its protagonist and with it the return of the dominant format of the late 20th and early 21st centuries: the telenovela. Once again, the melodramatic structure embodied in productions such as *Pasión de Gavilanes*, *Pedro el Escamoso* and the many times screened *Yo soy Betty La Fea*, now became protagonists of digital ecosystems and media convergence. The memes, the publications and the participation actions of the audiences then had as central elements to refer to the revisited events of the fictional stories, which perhaps accompanied the childhood and youth of the elderly and, in other cases, were the gateway to those ways of conceiving the world that accompanied national production at other times in history. Thus, in parallel to the stories plagued with intrigue, unexpected twists and a constant presence of humor as a narrative impulse mechanism, the screens became a refuge from a reality in which, on the one hand, the tension of the pandemic was maintained and the presence of possible new waves of the virus and, on the other, the social protest framed in confrontations in which concerns about respect for human rights even led to the presence of the Inter-American Commission on Human Rights in the most complex moments of the process lived in the nation.

Now, not only were the *reprises* protagonists, as in 2020, but also, with the gradual opening of national production processes, as well as the presence of digital platforms in the nation, continuity was given to that gradual transformation that has come produced in terms of the way of constructing narratives in Colombian television fiction and that tend mainly to a serial-type serial structure (Piñon and LaCalle, 2022). In this structure, aspects of the saga are combined, so that, in cases such as *La Reina del Flow 2*, a story is continued that is developed through the chaining between chapters and without any option of contemplating an episodic-type process. This way of structuring the series is also the one that characterizes *El Hijo del Cacique*, *La Nieta Elegida*, *Pá Quererte* and *Enfermeras*, who also manage a rhythm in which the chapters are chained in narrative terms. Such a way of conceiving seriality could be linked to the prevalence of *reprises*, since, by returning to the telenovela format on screen, a certain need for that rhythm could be established on the part of the audiences in which, beyond the episodic, the chaining of the serial structure allows us to follow stories in which it is possible to find entertainment and perhaps some hope in the midst of uncertainty.

Similarly, in cases such as *Café Con Aroma De Mujer*, this state of exploration and direct relationship with nostalgia seems to be reflected, not from the repetition of the original novel, but rather, as it happened with *Amar y Vivir*, passing to the

terrain of the *remake*, in which what has been called “residual content” (Jenkins, 2015), becomes a definitive source for the production of fiction. This, since if, as Jenkins (2015) points out, “the residual can remain in people’s memory, become an object of nostalgic longing, be used to give meaning to the identity and current life of the individual, be used as a criticism of practices or current institutions, and spark conversations” (p. 115), then, the serial narratives of the *remake*, by reconstructing the original story and bringing it closer to today’s contexts, could give new meanings to the communicative idea expressed by Martín-Barbero (1992), compared to the way in which the telenovela, at the time, made people talk and, with the *remake*, the conversation comes back to life both for comparison and nostalgia and to put new topics of discussion before of complexity of a panorama like the one that offered for 2021 a scenario of contrasts, conflicts and anguish.

The way of structuring the seriality brings with it a revitalization of the telenovela and at the same time the possibility of sharpening that kind of hybridization with the serial and the exploration that had begun to be carried out in the nation of the series. This way, parallel to the use of resources such as the appearance of seasons in the case of *La Reina del Flow*, it was also undeniable that its configuration corresponded, precisely because of the preponderance of the serial, more to the telenovela, even because of the strong presence of melodramatic elements that dialogue with the speed of the passing of events in the key of a possible tendency to define itself as a series, only with a telenovelesque soul. In the case of the *remake* and the *reprises*, as well as in *La Nieta Elegida*, it is evident that they are telenovelas and that, in cases such as *Pá Quererte*, *El Hijo del Cacique* and *Enfermeras*, the format is torn between its definition within this genre, but including the use of resources inherited from the series, such as the possibility of thinking of seasons or directly handling resources that dialogue with the melodrama, such as the speed in the conception of narratives and slight transformations in the face of the more conservative structure of the *reprises*. So, in national television fiction it was possible to see an x-ray of the transformation of the telenovela, from its most classic format, in the case of *Pasión de Gavilanes*, to the particularly diffuse limit established in the series *La Reina del Flow 2*, without neglecting the renewal embodied in the *remake* of *Café, Con Aroma De Mujer*.

Thus, 2021 offered a conjunction of narratives based on melodrama and explored in that mosaic made up of *reprises*, premieres and *remakes*, where the duration of chapters is maintained at times of approximately 40 minutes with extensions that generally exceed 40 broadcasts, with a daily periodicity that generally occupies the *prime time* slot as a complement to the *reality shows*, which for a long time have been the ones who govern this slot. So, in the midst of the tensions and crises of 2021, the attention on the screens and the connection with the public was established from a certain commitment in terms of Jenkins (2015), in which the audiences established

a kind of pact with the telenovela, no longer as a reflection of their daily life, but as an escape, a refuge and a door to hope launched from nostalgia, from that possibility that the screen was no longer a mirror but a portal. If, as Jenkins (2015) states: “the evolution of the television sector, from a model based on curating to one based on commitment, reflects the changes that are taking place in the media industries” (p. 166), in the case of Colombia, the model, at least in 2021, was based on the way in which rewatching *Pedro el Escamoso*, *Yo Soy Betty la Fea* and *Pasión de Gavilanes*, revisiting *Café con Aroma de Mujer* or entering the universes of *Pá quererte* or *Enfermeras*, were starting points for other conversations in the midst of the tension and anguish of a troubled year for the nation in which the telenovela once again led the country to communicate more than from its reflection on the screen, from the daydream that hope can provide given by the possible worlds of television fiction.

It is then, in the compromise between an audience with greater participatory potential and a production that can be extended in contemporary media environments. The themes of these plots were starting points for other conversations of people in their daily lives, in the midst of a national context of tension and anguish, in a convulsed 2021 for Colombia. And it was there where the telenovela, once again, led the country to communicate with its reflection on the screen, from the daydream that hope can provide by the possible worlds of television fiction. This can be evidenced in the presence of entire communities of fans, for whom, as Jenkins points out, the nostalgia factor becomes a connection engine with the universe narrated on screen which explains, to a large extent, the success of *reprises* still in 2021; but also, the appearance of new communities that do not emerge from the nostalgic, but from narratives in which the melodramatic is renewed and paths are explored in which it is possible to find topics of conversation, as happened with *La Reina del Flow 2* and the debates in social networks around the songs or the decisions of the protagonist. This title is an example of the creation of environments in which fiction allows people to communicate, to create on top of what is narrated and to expand the universes on screen. Thus, the trends in networks were debated between the names of the protagonists of the fictions, the convulsive panorama of COVID 19, and the so-called “social outbreak”. A horizon that marks, in this sense, new directions for television fiction, since not only are there changes in the formats based on the ways of narrating, but also a panorama of convergence between *reprises*, *remakes* and premieres, allows a glimpse that the screen is now a place for the creation of new commitments with the audience and their searches within the framework of dialogical, interactive media ecosystems thought from that universe “of many to many”, in which, as in the case of Colombia, the challenge is to turn the screen into a stage capable of making audiences speak again, now from the walls of the networks and make fiction the place to re-encounter, re-think and re-create .

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