

PORTUGAL

“GLORIA” THE FIRST NETFLIX PORTUGUESE SERIES¹

DOI: <https://doi.org/10.7764/obitel.22.E.11>

Authors:

Catarina Duff Burnay (<https://orcid.org/0000-0001-7730-1707>)

Pedro Lopes (<https://orcid.org/0000-0002-9283-6117>)

Marta Neves de Sousa (<https://orcid.org/0000-0002-8358-3189>)

João Félix (<https://orcid.org/0000-0002-3433-2877>)

Ana Lúcia Carvalho (<https://orcid.org/0000-0002-3942-6688>)

Introduction

2021 was a major year for Portuguese fiction production. Going against the trend, but still partly due to the pandemic, there was an observable increase of television ratings (FTA and paid), accompanied by a greater title offering and diversification. Concurrently, the first Portuguese series for Netflix premiered this year. After several years of negotiations “Gloria” paved the way, both symbolically and effectively, for new production opportunities and airing venues. While still immersed in the pandemic, this year also brought some news in terms of regulations with the approval of transposition the AVMSD (*Audiovisual Media Service Directive*) into national law. As it was enacted into law in the beginning of 2022, it is not yet possible to assess its real impact in the sector. The times ahead look promising, however the constraints still weigh heavy when considering the future at large. Simply put, one could claim that the market is made up of authors dreaming about series, audiences about telenovelas and international providers about maximizing revenue at the lowest possible cost.

¹ The Portuguese team would like to thank CAEM, GfK and Marktest-MediaMonitor for its cooperation in gathering and processing the necessary data.

1. The Audiovisual Context of Portugal in 2021

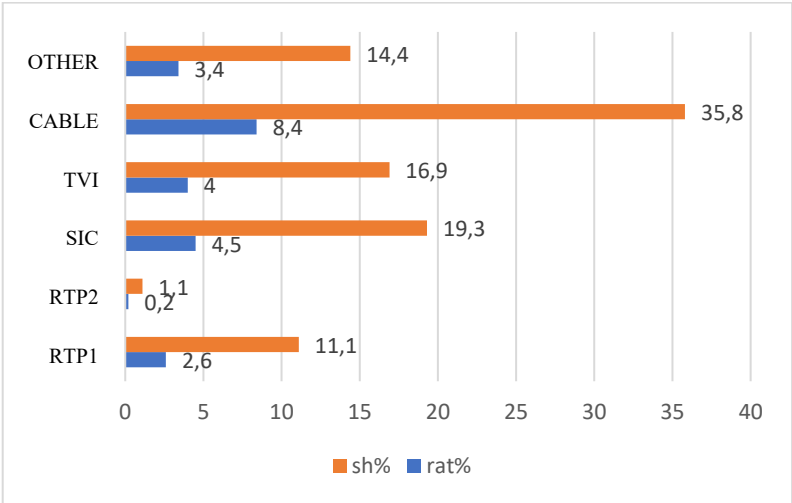
1.1 Broadcast television in Portugal

Table 1 National TV Networks/broadcast television channels in Portugal

Private networks/channels (2)	Public networks/channels (4+1)
SIC	RTP1
TVI	RTP2
	RTP3
	RTP Memória
	Canal Parlamento
Total networks =3	
Total channels= 7	

Source: Obitel Portugal

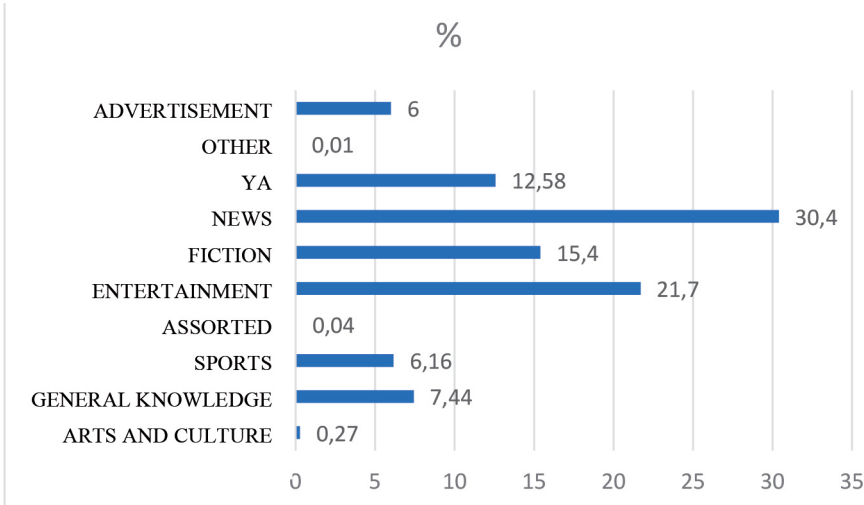
Graph 1 Rating and share by TV station (generalist)



Source: Obitel Portugal/ Marktest MediaMonitor

The overall increase of television consumption registered in 2020 had an impact in the numbers on 2021. As can be seen, the open signal generalist channels, Paid TV and Others (alternative screen usage and streaming) all saw their numbers rise, which attests to the prominence of television in Portuguese society when it comes to fulfilling the need for information and recreation. The private channel SIC maintained its lead by setting the competitive tone in the market with its diversified programming which, in turn, benefited viewers.

**Graph 2: TV genres and broadcast programming hours - %
(Generalist channels)**



Source: Obitel Portugal / Marktest MediaMonitor

The end of 2020 and the beginning of 2021 were marked by the third wave of Covid-19. The markedly low infection rates registered in previous months, commonly referred to as the “Portuguese Miracle” faded away and, in a short amount of time, the daily average infection numbers were 12.890 by the end of January 2021 and the hospital admission capacity was vastly exceeded. A new lockdown was put in place and education services and institutions closed down with the successive emergency periods, which lasted at least until April (Duarte *et al.*, 2022). This environment was conducive to a higher quantity of news offering, with constant updates on the situation in the country and worldwide, namely regarding infection/death rates, but also on vaccination, which gained momentum and emerged as the best course towards bringing things back to normal. Once more, entertainment was the second most aired type of program, with a special emphasis on daytime talk-shows, as well as weekend variety shows and game/talent shows on Sunday evenings. When aired live, these types of programs were a counterpoint to the monothematic offering present in the news in an attempt to make up for lost time and offer viewers some moments of leisure. Fiction also saw an increase from 2020, especially on RTP and SIC, which reflects a market that is leaning more towards the diversification of national fiction. Lastly, the expected increase of sports content is, nonetheless, noteworthy, with the gradual return of team sports as well as the 2020 Olympics.

1.2. Paid TV and VoD Platforms in Portugal

Following the trend that had been already observed during 2020, which reversed the growth in paid television ratings from previous years, this type of channels saw a decreased in total viewer share in 2021, which now represents 37,2%, or a

5,5% decrease from 2020.² Among these channels, CMTV increased its leadership by 0,2% in share from the previous year, now with a 4,4% share in 2021, followed by SIC Notícias with 2% share (less 0,2% than in 2020), Globo with 1,8% (less 0,5% than in 2020) and Hollywood channel with 1,7% share (less 0,2% than in 2020).

In terms of number of subscription television subscribers, according to data by the Autoridade Nacional de Comunicações (Anacom), there was a 3% growth from 2020, which, notwithstanding, represents the smallest growth since 2017.³

As for providers of this type of service in Portugal, MEO retains its lead with 40,1% of all subscription-based TV subscribers, followed by NOS with 37,8%, Vodafone with 18,3% and Nowo with 3,2%. Notably, of all these, MEO and Vodafone show an uptick in subscribers (0,4% and 0,6% more, respectively) from the previous year, while NOS and Nowo saw a decrease in subscribers (-1% and -0,3% respectively) during comparable periods. It is also worth mentioning that, according to projections made by Anacom, residential penetration for subscription-based television services reached, by the end of 2021, 93,4% of Portuguese families, or a 0,5% increase from the previous year. Of these, 56,9% was made through fibre, which represents a 13,3% growth from 2020.

Table 2 Pay TV networks in Portugal

10 Pay TV networks most watched in 2021
1) CMTV (Generalist), 2) SIC Notícias (News), 3) Globo (Generalist), 4) Hollywood (Fiction), 5) FOX (Fiction), 6) TVI 24 (News), 7) Fox Movies Portugal (Fiction), 8) TVI Reality (Entertainment), 9) FOX Life (Fiction), 10) Disney Channel (Kids)

Source: Obitel Portugal/ Dinheiro Vivo

² Dinheiro Vivo. Retrieved on April 18, 2022 <https://www.dinheirovivo.pt/marketing-pub/sic-lidera-audiencias-em-2021-pelo-terceiro-ano-consecutivo-14457450.html>

³ Anacom. Retrieved on April 18, 2022 https://www.anacom.pt/streaming/TVS_2021.pdf?contentId=1717841&field=ATTACHED_FILE

Chart 2 presents the TOP 10 for paid TV which, when compared to 2020, shows a slight shift in consumer preferences, leading to an increase in consumption of news channels and a drop in children’s channels. One should note that, even though the channel CMTV is categorized as generalist, it is predominantly a news channel that didn’t air ain fiction content in 2021. On the other hand, throughout this year, none of these channels premiered national fiction.

Table 3 VoD in Portugal

Top active VoD platforms in 2021	Total
Netflix, Prime Video (Amazon), Disney+ (The Walt Disney Company), HBO Portugal (WarnerMedia), Apple TV+ (Apple), RTP Play (RTP), TVI Player (TVI), OPTO (SIC), Mubi, Filmin, NOS Play	12

Source: Obitel Portugal

Table 3 shows the main VoD platforms in Portugal, not including official Youtube channels from any type of broadcaster. According to the European Audiovisual Observatory (EAO)⁴, six of the presented platforms have the largest presence across the 28 countries in the European Union - Netflix, Prime Video, Disney +, HBO, Apple TV+ and Mubi - and, to the exception of Globoplay, which entered Portugal in October 2021, the remaining platforms are associated to national open signal television channels (RTP Play, TVI Player and OPTO). Of these platforms, only two offer a free subscription service - RTP Play and TVI Player, the latter being paid for international users - and the remaining (10) are paid subscription services (with OPTO offering a free limited access version and a premium version).

1.3. Independent television fiction production companies

Following the trend from the previous year, the effects of the COVID-19 pandemic were particularly impactful for independent production companies which, due to the limitations imposed on taping, saw their production costs rise an estimated 5% to 10% as soon as they were able to resume work due to screening tests, assembling

⁴ European Audiovisual Observatory Retrieved on April 12, 2022 <https://rm.coe.int/trends-in-the-vod-market-in-eu28-final-version/1680a1511a>

cleaning crews for each project and staying full time on set and the creation of individual dressing rooms and other support facilities. They also had to increase the carpooling for actors and technical crew, purchase PPEs such as masks, face shields, gloves and hand sanitizer and reduce the scheduling on tapings, forcing them to extend production periods.

For the actors' safety, it was necessary to rewrite scripts that were already closed in order to avoid as much physical contact as possible. This had a particular impact in intimate scenes and those with a lot of actors and extras. Regular testing and the detection of positive cases led to a constant change of taping plans, with actors and crew who tested positive to be put in quarantine, as well as those who were in direct contact with an infected person. Companies also had access to a good practice manual published by Portugal Film Commission, made with the collaboration of several associations in the sector and approved by the Direcção-Geral de Saúde (DGS). This document allowed to establish uniform practices, which were only possible due to the fact that the main national production companies swapped experiences amongst themselves, thus promoting common solutions.

However, there is no information on networks revising their payments for any order, which may have had a significant impact in the results of the production companies, affecting their future ability to invest in developing new content, as well as technical updates.

1.4. Sources of funding for the audio-visual sector

In light of an extremely fragile situation, a business fabric composed of small and medium companies and the majority of professionals in the field working as freelancers with little social coverage, it was necessary for the government to intervene. On January 14, 2021, the government issued several programmes aimed at bolstering the set of aid packages with an added €1.440.000, which complemented some of the financial support programmes that had already been proposed in August 2020 by the Instituto de Cinema e do Audiovisual:² increasing funding available for the second call for applications for fiction feature films which allowed for one other fiction feature film to be supported (€600.000); increasing available funding for the call for short film productions which allowed for two other fiction shorts to be supported (€100.000); increasing funding available for the second call for applications for documentary features which allowed for two other documentary features to be supported (€180.000); increasing funding available for the production of audio-visual and multimedia productions which allowed for one other fiction series features to be supported (€500.000); increasing funding available for the creation of festivals in national territory (€60.000).

It was also established that the projects already supported which weren't able to conclude their production within schedule due to the pandemic wouldn't be penalized and would be allowed to wrap up until the end of 2021.

As for other sources of funding, the investment in digital advertisement in 2021 continued to increase, with an estimated 30% growth from 2020, or double the growth of the overall advertisement investment in the Portuguese market. But, in spite of these numbers, television still absorbed 50% of the investment, with cable growing at a greater rate than generalist television - 12% of the advertisement total concentrated on cable, while generalist channels absorbed 43% of investment.⁵

1.5. Communication Policies

This year was also marked by the expected transposition of the Audiovisual Media Services Directive (AVMSD) which regulates the investment of large streaming platforms in European media into Portuguese legislation. The Audiovisual Media Services Directive (Law nº 74/2020 of November 19), went through a long period of negotiations, which created a division among the Portuguese cultural agents, especially among the producers that devote themselves almost exclusively to cinema and television production. While the former defended the solution of having the platforms pay an amount that would then be distributed by ICA for the production of feature film and audio-visual works, the latter wanted to have legislation that expressively required platforms to invest in Portuguese-speaking European works.

AVMSD promoted changes in national laws, which, for Portugal, meant the Television Act (Law 27/2007 of July 30) and the Cinema and Audiovisual Act (Law 55/2012 of September 06) to be altered to protect producers. This happened after a wide public debate which led the assorted associations in the sector to be heard by a parliamentary commission on the eve of the vote by the parliamentary groups.

The offering of the on-demand audio-visual services such as Netflix, HBO or Amazon Prime Video now have to ensure a minimum quota of 30% of European works, at least half of which are required to be “creative works of independent European production originally spoken in Portuguese” and no older than five years. A fee was also created for subscription providers corresponding to 1% of their relevant profits, as well as direct investment obligations for national and foreign providers in independent production. However, platforms whose annual profits in Portugal are less than €200.000 or whose market share is less than 1% are exempt from this investment obligation.

This was an important step for the sector, but was short of the expectations, not the least due to the final wording of the legislation allowing for large international providers to circumvent payment. The lack of transparency in how the platforms operate, whether regarding their subscription numbers or their profits, clearly puts in question the ability of different countries to charge the appropriate taxes, as well as to enforce investment. While a safeguard was created where providers must pay

⁵ Dinheiro Vivo. Retrieved on May 23, 2022 <https://www.dinheirovivo.pt/opiniao/como-evoluuiu-a-paisagem-publicitaria-em-portugal-14420451.html>

a fine of one million euros in the event of the impossibility of obtaining their relevant annual profits, the industry points out that this formulation is lacking and will hinder the cinema and audio-visual sectors. In an interview to the “Público” newspaper, Luís Urbano, a cinema producer, states that the investment made by streaming platforms will never surpass the one million euros investment because “they either see that the 1% tax money is over one million euros and don’t report [their profits and pay the fine] or see that their profits are smaller than the fine after all and report them.”⁶

What the new legislation intends to accomplish is to bring a greater balance of obligations, but that cannot be achieved in practical terms and only time will show the actual results of the new legislation. Despite all issues associated with an investment obligation, as well as the contractual problems that compel authors and producers to give up their copyright and related rights, there is a glimmer of hope in establishing a new dynamic in the audio-visual sector, one in which cable never demonstrated any sort of initiative. After several years, Paid TV never had any obligation to produce locally, which is still true today, and legislation seems to leave the door open to have everything remain unchanged, as there are only production obligations for channels with significant ratings. Cable has a viewership of more than 30%, but as a whole of all the channels on offer by the provider, which means that the individual ratings for each channel do not directly compete with their free-to-air counterparts and, as a result, are able to not be under these obligations.

1.6. Digital and mobile connectivity infrastructure

According to the Action Plan for Digital Transition, approved by the Government on April 2020, a public consultation was made “regarding the coverage of high capacity public electronic communication networks on national territory and the existing options for installing, managing, exploring and maintaining these networks on “blank spots”, using public funding.”⁷ As a result of this study, an estimated 286 thousand family homes were identified as having no access to a high capacity landline. Even though this data is merely estimated, it is based on this consultation that the government is expected to implement measurements to improve fixed digital coverage.

Regarding mobile connectivity in Portugal, according to data published by the independent entity “Tutela”, even though the mobile internet traffic increased by 24,6% in 2021, there were still significant disparities among regions stemming from structural gaps that are yet to be resolved⁸. Therefore, in an attempt to mitigate the absence of mobile broadband coverage in less populated areas, Anacom renewed on July 2021 the use of frequency rights attributed to providers Meo and Vodafone under the condition that they insure a mobile broadband service to 90% of the population living in the 100

⁶ Público. Retrieved on April 29, 2022 <https://www.publico.pt/2021/08/30/culturaipsilon/noticia/directiva-europeia-streaming-inicio-caminho-resta-saber-onde-levara-1975553>

⁷ Anacom. Retrieved on April 22, 2022 https://www.anacom.pt/streaming/ConsultaPublica_05_01_2022_vFinal.pdf?contentId=1713768&field=ATTACHED_FILE

⁸ Tutela. Retrieved on April 23, 2022 https://www.tutela.com/reports/portugal-state-of-mobile-experience-2021?hs_preview=viXdteer-58399629130

less populated parishes.⁹ On the other hand, according to data gathered by “Tutela” regarding the quality of mobile experience in 2021, Portugal ranked 29th worldwide, with 71,2% of the tests demonstrating the existence of a sufficiently good connection to run applications such as video calls and high definition video streaming.

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

CHART 1: National and Ibero-American fiction premiering in 2021 (national and foreign under the scope of Obitel and co-productions)

PREMIERING NATIONAL TITLES– 42 RTP1 – 18 <i>Até que a Vida nos Separe</i> (series) <i>Conta-me como Foi</i> (series) <i>Crónica dos Bons Malandros</i> (series) <i>Doce</i> (mini-series) <i>Linhas de Sangue</i> (mini-series) <i>Por do Sol</i> (series) <i>Trezés - A Abobada</i> (telefilm) <i>Trezés - A Morte do Super-Homem</i> (telefilm) <i>Trezés - A Pereira da Tia Miséria</i> (telefilm) <i>Trezés - As Cinzas da Mãe</i> (telefilm) <i>Trezés - Fronteira</i> (telefilm) <i>Trezés - Miss Beijo</i> (telefilm) <i>Trezés - O Rapaz do Tambor</i> (telefilm) <i>Trezés - O Sítio da Mulher Morta</i> (telefilm) <i>Trezés - O Tesouro</i> (telefilm) <i>Trezés - Um Jantar Muito Original</i> (telefilm) <i>Trezés - Uma Vida Toda Empatada</i> (telefilm) <i>Vento Norte</i> (series) SIC – 18 <i>A Serra</i> (telenovela) <i>Amor, Amor</i> (telenovela) <i>Amor, Amor Vol.2</i> (telenovela) <i>Amor, Amor: A História de Ângela</i> (one-shot) <i>Amor, Amor: A História de Linda</i> (one-shot) <i>Amor, Amor: A História de Mel</i> (one-shot) <i>Amor, Amor: A História de Romeu</i> (one-shot) <i>Amor, Amor: A História de Vanessa</i> (one-shot) <i>Esperança</i> (series) <i>Golpe de Sorte IV</i> (series) <i>Golpe de Sorte: A Caminho do Fim</i> (one-shot) <i>Golpe de Sorte: Edição Especial</i> (series) <i>Nazaré</i> (telenovela) <i>O Clube</i> (series) <i>Patrões Fora</i> (sitcom) <i>Patrões Fora: Só Paródia</i> (sitcom) <i>Terra Brava</i> (telenovela) <i>Prisão Domiciliária</i> (series) TVI – 6 <i>Amar Demais</i> (telenovela) <i>Bem me Quer</i> (telenovela) <i>Festa é Festa</i> (telenovela) <i>Festa é Festa II</i> (telenovela) <i>Para Sempre</i> (telenovela) <i>Pecado</i> (mini-series)	PREMIERE IMPORTED TITLES – 3 <i>Eta Mundo Bom!</i> (telenovela– Brazil) <i>Totalmente Demais</i> (telenovela – Brazil) <i>Bom Sucesso</i> (telenovela – Brazil) TOTAL ORIGINAL OBITEL TITLES: 45
---	---

⁹ Anacom. Retrieved on April 18, 2022 https://www.anacom.pt/streaming/DecisaoFinal_RenovDUF_Vodafone_MEO.pdf?contentId=1673581&field=ATTACHED_FILE

In 2021 there was an increase of over 50% in the number of original premiering titles, comfortably surpassing the numbers from the last five years. This year proved plentiful in the offering of fiction content in assorted formats and genres, with identifiably different production strategies for each channel. Going against the trend, the commercial channel SIC officered the biggest number of titles (19), with an observable capitalization of telenovelas with the production of one-shots about the main characters (sometimes using existing material, which artificially increases the total offering), as well as content from their own streaming platform OPTO. TVI, which is also a commercial channel, maintained its offering of having two back-to-back telenovelas on primetime and made an incursion in the series format on Saturdays, a weak day in terms of programming. The public network almost tripled its offering from 2020 (17), with a particular emphasis to the original project “Trezes”, which premiered on December 2020. This was a series of thirteen telefilms adapted from short stories in Portuguese Literature, directed and acted by different directors each time. This initiative came as part of RTP’s strategy for fiction and allowed to simultaneously develop a format with few local examples (telefilm), give emphasis to the Portuguese cultural heritage as well as attempt to offer more work opportunities during a trouble time resulting from the Sars-CoV-2 pandemic.

TABLE 1b. Airing of reprising/rerunning titles during 2021
(national, foreign and within Obitel, co-productions) .

REPRISING/RERUNNING TITLES – 44
RTP1 – 14
A Espia (series)
A Herdade (series)
Conta-me como Foi (series)
Filha da Lei (series)
Miúdo Graúdo (series)
Os Nossos Dias (series)
Noite Sangrenta (series)
O Atentado (series)
O Sábio (series)
Ordem Moral (series)
República (series)
Sal (series)
Último Verão (series)
RTP2 – 5
A Rede (series)
Água de Mar (telenovela)
Lusitana Paixão (telenovela)
Os Nossos Dias (soap opera)
Quarenteens (series)
SIC – 10
A Hora da Liberdade (telefilm)
Camilo, o Presidente (sitcom)
Casal da Treta (sitcom)
Patrões Fora (sitcom)
Uma Aventura (YA series)
Nazaré: especial Natal (mini-series)
Viver a Vida (telenovela– Brazil)
Fina Estampa (telenovela – Brazil)
Tempo de Amar (telenovela – Brazil)
Orgulho e Paixão (telenovela – Brazil)
TVI – 15
A Outra (telenovela)
A Única Mulher (telenovela)
Campeões e Detetives Casos da Vida (one-shots)
Destinos Cruzados (telenovela)
Detective Maravilhas (YA series)
Doce Tentação (telenovela)
Fascínios (telenovela)
Festa é Festa (telenovela)
Inspector Max (series)
Filmes TVI (telefilm)
Mulheres (telenovela)
O Bando dos 4 (YA series)
Olhos nos Olhos (telenovela)
Os Batanetes (YA series)
Santa Bárbara - a série (series)
CMTV – 1
Alguém Perdeu (telenovela)

Source: Obitel Portugal / Marktest MediaMonitor

Regarding reprises/reruns, there is a reduction to 18 titles, TVI maintaining the lead (15) against the number of premiering titles (6), which put that channel in the last spot regarding those. This reduction is due particularly to a strong investment in new productions, relegating the available titles to schedules with less affluence such as late night. The CMTV channel (paid TV), which had invested on a Portuguese telenovela in 2019/2020, aired it as a reprise, with no record of any new investment in this regard.

**CHART 2: National fiction titles premiering in 2021
and its evolution over five years**

Year	Titles	Episodes	Hours
2017	23	2449	1292:50
2018	19	2613	754:40
2019	21	2613	1028:55
2020	19	1242	794:19
2021	42	1549	997:55

Source: Obitel Portugal / Marktest MediaMonitor

The number of titles on offer in 2021 is the highest in the last five years. The investment in less explored formats such as telefilms and one-shots prevent this fact from reflecting itself on a similar number of episodes and hours, nevertheless, it is still interesting and seems to indicate the emergence of a new dynamic in the national market.

**CHART 3: National fiction titles premiering in 2021
and its evolution over five years**

Format	Titles					Hours				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Telenovela	10	9	10	6	10	1171:55	652:15	877:56	709:10	801:05
Series	10	9	8	6	10	110:30	100:05	145:04	68:39	144:10
Mini-series	3	1	1	3	3	10:25	2:20	2:25	8:23	12:25
Sitcom	0	0	0	1	2	0:00	0:00	0:00	5:30	26:10
One-shot	0	0	0	1	6	0:00	0:00	0:00	0:57	4:00
Docudrama	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Other	0	0	1	1	11	0:00	0:00	3:30	1:37	10:05

Source: Obitel Portugal / Marktest MediaMonitor

The analysis of formats presented in the last five years enables to identify some trends: 1) **Telenovela** is the format with the most offering (a total of 45 productions) and always with high numbers per year. In 2020 there was a more dramatic decrease due to the constraints imposed by the pandemic; 2) **Series** rank second with a number very close to that of telenovelas (43) and a continued offering over the last five years and a very similar oscillation to that of the topmost format in Portuguese television. This reality gains particular relevance when public perception is unequivocally and repeatedly stated that open signal generalist channels only have telenovelas on offer and invest very little in other formats, namely series; 3) **Mini-series** were also offered during the last five years. With lower numbers (11 in total), these have been a choice to work on some historical themes or to capitalize on feature film titles that were co-produced by RTP; 4) Despite having only emerged over five years ago, the **one-shot** proved itself in a significant way in 2021 when the commercial channel SIC showed interest in producing spinoff specials for its more successful telenovelas; 5) Telefilms marked their presence during the last three years on account of RTP's investment. In 2021, this network produced a cycle of thirteen titles with assorted technical crew and artists, livening the format as well as the market itself.

CHART 4: Fiction premiere in 2021: Countries of Origin

Country	Titles	%	Hours	%
NATIONAL (total)	42	93	997:55	84
OBITEL COUNTRIES (total)	3	7	192:50	16
Argentina	0	0	0:00	0
Brazil	5	11	0:00	0
Chile	0	0	0:00	2
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
USA Hispanic	0	0	0:00	0
Mexico	0	0	0:00	0
Peru	0	0	0:00	0
Portugal	42	93	997:55	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (Total)	0	0	0:00	0
National Co-productions	0	0	0:00	0
Co-productions on Obitel Countries	0	0	0:00	0
TOTAL	45	100	1190:45	100

Source: Obitel Portugal / Marktest MediaMonitor

As can be seen, productions are, for the most part, national in origin, with the transmission of only three pieces of content coming from the Ibero-American space (Brazil) This fact shows the consolidation trend of a strong national production market, especially for primetime.

CHART 5: National and Ibero-American fiction formats aired in 2021

Format	Titles				Hours			
	National	%	Obitel Scope	%	National	%	Obitel Scope	%
Telenovela	10	23,8	3	100	801:15	80.3	192:50	100
Series	10	23,8	0	0	144:25	14.5	0:00	0
Mini-series	3	7,1	0	0	12:45:00	1.23	0:00	0
Sitcom	2	4,8	0	0	26:10	2.61	0:00	0
One-shot	6	14,3	0	0	03:45:00	0.4	0:00	0
Docudrama	0	0,0	0	0	0:00	0	0:00	0
Other	11	26,2	0	0	10:05:00	1.01	0:00	0
Total	42	100	3	100	998:25	100	192:50	100

Source: Obitel Portugal / Marktest MediaMonitor

The productions under the scope of Obitel and, as it is the case on a regular basis, come from Brazil: three telenovelas from Globo with two of them premiering in 2020. Apart from these titles, there are four more in rerun.

CHART 6: 10 Most watched titles in 2021

Title		TV Station	Producer	Format/Genre	Nº of ch./ep.	Time Slot	Rating	Share
1	<i>Amor, Amor</i>	SIC	SP Televisão / Portugal	Telenovela	202	Primetime	12.9	24.5
2	<i>Terra Brava</i>	SIC	SP Televisão / Portugal	Telenovela	50	Primetime	11.8	26.8
3	<i>Bem Me Quer</i>	TVI	Plural Entertainment / Portugal	Telenovela	246	Primetime	10.8	22.3
4	<i>Amor, Amor - Vol. 2</i>	SIC	SP Televisão / Portugal	Telenovela	62	Primetime	10.7	22.4
5	<i>A Serra</i>	SIC	SP Televisão / Portugal	Telenovela	201	Primetime	10.6	25.2
6	<i>Festa é Festa II</i>	TVI	Plural Entertainment / Portugal	Telenovela	204	Primetime	10.4	21.6
7	<i>Nazaré</i>	SIC	SP Televisão / Portugal	Telenovela	5	Primetime	10.0	25.1
8	<i>Patrões Fora</i>	SIC	Coral Europa / Portugal	Sitcom	20	Primetime	8.6	20.0
9	<i>Amar Demais</i>	TVI	Plural Entertainment / Portugal	Telenovela	193	Primetime	8.3	21.2
10	<i>Pecado</i>	TVI	Plural Entertainment / Portugal	Miniseries	6	Late night	8.0	20.6
Total National Productions: 10				Foreign Original Scripts 0				
100%				0%				

Source: Obitel Portugal / Marktest MediaMonitor

A standout from 2021 is the fact that the TOP 10 features only nationally produced titles, with SIC being the channel with the most inclusions and, as a result, leading the ranking with the first and second spots among a total of six of the most watched

shows by Portuguese audiences this year. TVI is the other channel featuring in the charts with four titles, the same as in 2019 and 2020. The telenovela *Amor, Amor* was the most watched by Portuguese audiences in 2021.

As in 2019, this year there were no non-national productions featuring in the charts, which demonstrates the value that Portuguese audiences put on their own productions, even if the public network remains outside the TOP10.

The telenovela format is still dominant in the viewer preferences (eight of the titles in review), with a prevalence of a more comedic tone in many of the featured productions, namely in the titles *Festa é Festa II* (TVI) and *Patrões Fora* (SIC), as well as on melodramatic telenovelas *Amor, Amor* (SIC) and *Amor, Amor Vol.2* (SIC), where the comedic plots were bolstered. This fact shows an investment in a more relaxed genre, which was well received by audiences in a (post)-pandemic period.

**CHART 7: Audience profile of the ten most viewed titles:
gender, age, socioeconomic status**

Title		TV Station	Sex %		Socio-economic bracket			
			Women	Men	AB	C	D	E
1	<i>Amor, Amor</i>	SIC	59.4	40.6	13.3	15.5	39.9	31.2
2	<i>Terra Brava</i>	SIC	61.0	39.0	14.4	15.6	41.3	28.7
3	<i>Bem Me Quer</i>	TVI	61.7	38.3	7.9	13.1	42.6	36.4
4	<i>Amor, Amor - Vol.2</i>	SIC	59.4	40.6	12.7	16.1	40.0	31.2
5	<i>A Serra</i>	SIC	60.4	39.6	17.7	16.4	40.7	29.4
6	<i>Festa é Festa II</i>	TVI	59.3	40.7	7.9	15.1	42.6	34.3
7	<i>Nazaré</i>	SIC	59.8	40.2	11.4	17.7	44.0	27.0
8	<i>Patrões Fora</i>	SIC	58.8	41.2	12.0	15.6	40.2	32.3
9	<i>Amar Demais</i>	TVI	62.4	37.6	7.0	12.5	42.8	37.7
10	<i>Pecado</i>	TVI	62.3	37.7	7.9	27.7	23.1	41.3

Titles		Age groups %						
		04-14	15-24	25-34	35-44	45-54	55-64	65-74
1	<i>Amor, Amor</i>	5.4	7.6	6.0	13.7	16.7	20.6	15.9
2	<i>Terra Brava</i>	4.4	7.7	6.0	12.4	16.0	22.5	16.4
3	<i>Bem Me Quer</i>	4.7	8.2	8.9	8.6	11.8	19.5	20.3
4	<i>Amor, Amor - Vol.2</i>	5.4	7.6	6.0	13.7	16.7	22.9	17.9
5	<i>A Serra</i>	4.0	5.9	5.3	13.1	16.3	23.6	16.5
6	<i>Festa é Festa II</i>	4.8	7.9	7.9	8.2	11.9	21.1	20.5
7	<i>Nazaré</i>	5.6	7.6	8.2	12.5	15.8	20.2	16.3
8	<i>Patrões Fora</i>	5.6	6.7	5.8	13.8	15.5	20.8	16.7
9	<i>Amar Demais</i>	3.4	7.3	10.0	7.3	11.2	23.3	20.4
10	<i>Pecado</i>	4.2	7.7	9.0	8.4	11.4	21.5	20.8

Source: Obitel Portugal / Marktest MediaMonitor

When looking into the Audience Profile, we can see that women remain as the biggest consumers of telenovelas, with *Festa é Festa II* being the title most preferred by men (40,7%).

In terms of socio-economic bracket, segments D and E are still the ones with a preference for primetime telenovelas, following the same trend from previous years with no significant difference among channels for this preference between segments. *Serra* (SIC) was the telenovela that set itself apart the most from others by being able to appeal to a larger number of viewers from Segment AB (17,7), which falls in line with the average consumer profile for this channel.

As a result of the analysis of the data regarding age groups, similarly to 2020, the telenovela format remains as the preferred one for family audiences. As in previous years, the best results can be seen among the above 55 years old age group. *Nazaré* (SIC) and *Patrões Fora* (SIC) were the productions that were best able to appeal to a younger audience. On the other hand, the series *Pecado* (TVI) was the title that attracted an older audience the most.

3. VoD Monitoring in 2021

3.1 VoD platform market in 2021

In line with the trend that has been observed in previous years, the new consumption models for fiction hold steady with a growth tendency in 2021 due to the increased offer of streaming services to a total of twelve (12) VoD platforms now operating in Portugal - as can be seen on chart 3.

According to a study by Bstream¹⁰ – Marktest's Streaming Platform Barometer – there was a reported 44,9% increase in subscribers for VoD platforms up to December 2021. In addition, over 32,3% of Portuguese viewers (2,7 individuals) subscribes at least one streaming service. Of the total number of subscribers, 70,6% are less than 45 years old and 21,5% are in the 15-24 age group. The above 65 age group is the one who less uses this type of platform, corresponding to a mere 6,5% of all subscribers. The TOP 5 for the most used platforms is led by Netflix which is the VoD service with the largest number of subscriptions (with a 6,1% increase during the last quarter of 2021). The following platforms also figure in this TOP 5: Disney+, HBO Max, Prime Video and NOS Play.

3.2. Local VoD platform offering in 2021 (national, regional within the country)

Based on Chart 3, where the main active VoD platforms in 2021 are presented, the platforms RTP Play, OPTO, TVI Player and NOS Play are particularly noteworthy, considering that the first three are associated to open signal TV channels (RTP, SIC and TVI) and the latter associate with a telecommunications network (NOS).

RTP Play has a free subscription service and offers mostly Portuguese content, even though it also has some foreign products available. The available genres and formats are varied and wide-ranging, from news content to fiction, cinema, sports, institutional, entertainment, interviews and debates, among others. Apart from the content on catalogue, it is possible to watch all RTP channels live through the platform (RTP 1, RTP 2, RTP 3, RTP Internacional, RTP Memória, RTP Madeira, RTP Açores and RTP África), as well as radio stations related to the public network.

Similarly to RTP Play, TVI Player is a free subscription platform with the ability to watch live broadcasts of the channels associated with the network (TVI, CNN Portugal, TVI Ficção, TVI Reality, TVI África and TVI Internacional). The offer is centred around national content, with some foreign content (namely fiction). The genres and formats available on catalogue are predominantly fiction, reality TV, entertainment and interviews, with no record of original fictional content.

Unlike the two platforms mentioned above, OPTO offers a mixed subscription service with free content but also with a paid subscription model. There is also the

¹⁰ Link To Leaders. Retrieved on April 2, 2022 <https://linktoleaders.com/plataformas-de-streaming-sobem-nas-preferencias-dos-portugueses/>

possibility to watch live broadcast, but only for the SIC channel and not any of the several others that are associated to the network. The catalogue features Portuguese and foreign content with a wide array of formats: fiction (telenovelas, series and movies), entertainment, news, interviews and cultural programmes.

NOS Play is a platform exclusive to clients of the provider NOS and with a catalogue that only offers fiction content - series, movies, and animation (not originals for the platform)

3.3. VoD Analysis in 2021: Premiering national fiction and co-productions

As shown on Table 6, 2021 saw an increased offer of national titles, totalling nine (9) Portuguese sows on premiere, two of them being co-productions with Spain.

CHART 8: National Fiction and Co-productions aired in 2021 on VoD

NATIONAL PREMIERING TITLES	CO-PRODCTIONS
Netflix – 1 1. <i>Glória</i> (series) OPTO - 3 1. <i>Prisão Domiciliária</i> (series) 2. <i>A Lista</i> (series) 3. <i>O Clube</i> (series) RTP Play- 3 1. <i>Barman</i> (series) 2. <i>5Starz</i> (series) 3. <i>n00b</i> (series) Total: 7	HBO Max – 1 1. <i>Auga Seca</i> (series – Spain, Portugal) Amazon Prime Vídeo – 1 1. <i>3 Caminos</i> (series – Spain, Portugal) Total: 2

Source: Obitel Portugal

3.4. Narrative characteristics on VoD in 2021

In a stagnant market, national platforms were seen by assorted parties as a possible solution to what had been a progressive degradation of the production universe running against the trend from the rest of Europe.

RTP Play and OPTO stand out as they are the only local VoD platforms with national premiering shows - with three fiction series each premiering in 2021 as exclusives to their respective platforms - even though this was content with a much lower investment value than the budgets for fiction aired on free to air channels.

Series aired by the two platforms have distinct formats, with series on RTP Play (*Barman*, *5Starz* e *n00b*) having been created within the scope of the RTPLab programme - a

creative and experimental laboratory that produces content designed for multiple platforms - and were composed by short episodes (12 to 20 minutes long). Generally speaking, these were series geared towards a teenage and young adult audience, looking at themes such as the use of social networks, the difficulty of finding a job and the career uncertainties going into adulthood. All three series had a single season, with no indication of a return.

The series on OPTO, on the other hand, (*Prisão Domiciliária*, *A Lista* and *O Clube*) have a wider target audience and set themselves apart from the series on RTP in their bigger production investment. They are also series with longer episodes (45 to 60 minutes) and narratives touching on themes such as human trafficking, corruption and sexual assault. The series *Prisão Domiciliária* had a limited run with a single season. *A Lista* had two seasons (of 10 episodes each) made available during 2021. *O Clube* had a total of three seasons (with 7 and 8 episodes each).

The biggest standout in 2021 goes to *Glória*, the first Portuguese series by the OTT Netflix, as will be further discussed on chapter 5.

4. Fiction, Interactivity and Audience Participation

In order to understand interactivity and audience participation, the first Portuguese series on Netflix, *Glória*, was chosen. Its premiere on November 5th, 2021 was preceded by a marketing strategy involving all the digital outlets for the streaming platform (Facebook, Instagram, Youtube) and the placement of billboards across the country. National press covered it extensively with interviews, articles and news covers, since the series featured an event in recent history: the existence of a broadcast station in southern Portugal built by the CIA in order to air western news and propaganda to the eastern bloc, thus showing the role that the country had during the Cold War. The series also portrays the Portuguese colonial wars (Guiné, Angola and Mozambique) which went on for thirteen years and marked a whole generation of Portuguese people, as well as the constraints of being a woman during a conservative and dictatorial regime. This made the series simultaneously local and global.

According to the *Impact Report* made available by the producer Spi, the series generated 1532 news pieces across 51 countries between September 2021 and January 2022 (before, during and after its premiere), corresponding to different media: tv, printed and digital press and radio. The TOP3 for visibility is obviously led by the Portuguese media, with 583 news pieces, closely followed by the USA with 232 and the UK with 113. The North-American media show a higher number of views than those from national media.

The Portuguese and international press alike had a very positive reception to the series, with *Forbes* magazine devoting an extended article with the title “Glória: Netflix’s First Original Series From Portugal is a Great Spy Thriller” or the British newspaper *The Guardian* including it in its article “The Unlike Murderer to Space Titans:

the seven best shows to stream this week”. But there were other headlines outside the English speaking press. The Italian newspapers *La Repubblica* and *Corriere della Sera* also published reviews, with the scholar and critic Aldo Grasso publishing a long piece on *iO Donna*, the Saturday magazine for the Italian newspaper *Corriere della Sera*. In Brazil, the newspapers *O Globo* and *Folha de S. Paulo* featured the Portuguese Cold War thriller, with Mathias Alencastro writing that “Glória performs the difficult mission to congregate the local, the national and the global in a single episode, avoiding the feeling of fragmentation that is recurrent in other shows.” and emphasises that the series “examines the scars of Portuguese imperialism”. The North-American newspaper *Houston Chronicle*, one of the largest national newspapers, mentioned in its article on media that “Netflix’s Portuguese series ‘Glória’ Is your new favourite binge. De nada”, while the biggest Indian newspaper in English – *The Tribune* – stated that “Portuguese series Gloria is a powerful tale that has it all – love, lust, war, abuse, suspense, mystery and history”.

This series was pre-nominated for the Platino awards for Ibero-American Cinema (Best mini-series or Television Series, Best Creator, Best Main Actor, Best Secondary Actress and Best Secondary Actor), arguably the most important Latin annual award attributed by the *Entidad de Gestión de los Derechos Audiovisuales* (EGEDA) and the *Federación Iberoamericana de Productores Cinematográficos y Audiovisuales* (FIPCA), which recognize the best works in cinema and audio-visual being produced in Ibero-American countries. “Glória” is also nominated for Best Series or Telefilm in the Sophia Awards by the Academia Portuguesa de Cinema.

It managed to accomplish the difficult task of joining critics and viewers alike, holding the first spot of national preferences on Netflix during several weeks with the streaming surveyor Flixpatrol, in the absence of data provided by Netflix, placing the series in 36th among the most watched shows on Netflix worldwide. Comcast’s *Rotten Tomatoes* website currently gives it an approval rating of 94% and Amazon’s Internet Movie Database (imdb) website, which serves as a reference to the audio-visual industry worldwide, has it as the third best historical series of all time, followed by *Vikings* and *The Crown*.

Beyond the information made available by the media, authors and cast gave talks on university lectures as well as Portugal’s ComiCon, which usually focuses on international pop culture content. In order to engage further with fans, the producer created a contest where participants would get a chance to go on a guided tour of the locations (RARET). With a follow-up on social media, the actor Miguel Nunes, who played the main character in the series, accompanied the tour alongside the engineer João Vidal. In 2022, seven months after the premiere, the show creator and author Pedro Lopes, together with Paulo M. Morais, published the novel “Glória”, banking on the love and interest shown by fans, but also as a way to garner new viewers.

The series is a good example of interactivity and organic audience participation, as it benefits from a marketing strategy and engagement conceived in three stages, making the most of a combination of curiosity and interest shown by audiences.

In terms of Social Participation by audiences, the telenovela *Amor, Amor* was chosen as the number one in the 2021 TOP10. Lasting a year and five months on air, this telenovela, unlike others, had a very active presence on social media, namely on Instagram. Two accounts were identified - an official one and a fan-made one for Vol.2 (second season). The first was created before the premiere (January 4, 2021) and was kept active during 74 consecutive weeks (the telenovela ended on June 4, 2022). With 997 posts and 94,6 thousand followers, it offers standalone pictures, carousels, videos and reels on a regular basis, garnering comments on almost every post and, for the most part, of a positive nature. The second account, 37 weeks old, has 988 posts (many of them are copied directly from the official account) and 10,6 thousand followers. The audience interaction for this account is therefore smaller than the one on the official account, while still garnering a predominantly positive and complimentary tone towards the production.

The most watched telenovela in 2021 will go on into 2022. *Lua de Mel* is a spinoff of sorts and a pet project by SIC that congregates characters from assorted titles aired on the networks during the past 10 years. The official Instagram account was created ahead of its premiere and included old posts from most of the titles. Due to this, in a short amount of time, the account amassed 632 posts and 112 thousand followers. Viewers are active in the comment section with positive opinions regarding the initiative, as well as the actors, the characters and the new plots they play their parts in.

In Portugal, the active use of social media, whether by the production team or by the audience, isn't as significant as in other Obitel countries. However, the endeavour made by the telenovela *Amor, Amor* was visibly different in the interest shown by audiences and seems to constitute as a new way of building up engagement.

5. Highlight of the Year

International platforms reached Portugal in 2015, but seven years needed to pass before the first national series to be produced - curiously both premiering on HBO and Netflix on the same day, November 5, 2021. The Portuguese and Galician series had been initially aired on RTP (Portugal) and TVG (Galiza) for its first season and later bought by HBO. This became the first national series to be made available on a streaming provider, even before a second season was greenlit by Warner Bros. The second season of *Auga Seca*, now a co-production by the public network RTP and HBO, had its first free-to-air window two days before being made available on the platform.

Netflix's series *Glória* was also made in partnership with the public network and had its first airing window on the platform, with its broadcast on the public channel over a year after it was made available on Netflix, which puts it at late 2022. Both series were produced by SPi, a production company in the SP Televisão group. *Glória* was made entirely by Portuguese creators, written Pedro Lopes, winner of an International Emmy Award (2011) and directed by Tiago Guedes, winner of the Bisato d'Oro for best director awarded by independent critics at the Venice Film Festival (2019).

And this is precisely the series that was chosen as this year's highlight, due to the fact that it was the first original to be included in the international catalogue of a platform and made available for over 190 countries simultaneously, along with the positive impact garnered by the national audio-visual industry, thus setting the tone to what could be a production (and quality) standard for future works.

But to what does this series owes its success? It is our view that it was fortunate to congregate several factors to its advantage by joining the strengths of television with that of film in a hybrid that has been increasingly defining and differentiating fiction on platforms that, thanks to their substantial budgets, allow for a larger attention to detail and stretched out periods for script development and episode taping.

Glória is an espionage story centred around RARET, Sociedade Anónima de Rádio-Retransmissão, the broadcast station for *Radio Free Europe (RFE)*, which was installed by America in Glória do Ribatejo in 1951 and used during the information war.

A huge radio complex was erected on a 484 acre field which continually broadcasted programmes aimed at seducing listeners behind the iron curtain so that they could get a glimpse of the "advantages" of the western world. These included censored news, readings of works forbidden by the communist regimes and recorded by political refugees.

The budget for the project Radio Free Europe was ensured by fundraisers such as "Crusade for Freedom" in the United States, towards which citizens were urged to contribute. Only in the 1960s did the CIA and the US government officially admit that they were sponsoring the project.

While, at first, RARET was made up of six lorries housing emission stations, generators and studios, by 1961 there were already 12 high-powered emitters supported by a huge complex and a significant number of staff. The main building had offices, electrical and mechanic workshops. There was also housing for American and Portuguese senior staff and barracks for unmarried employees, a tennis court, a pool, a bar with restaurant and a basketball court. The Republican National Guard, who was in charge of security, was stationed in another building.

The locals didn't appreciate the forced integration with the Americans, but RARET created jobs and better living conditions through its large investment on infrastructures, education and health. Americans and staff coming from Lisbon also

broadened the horizons of a predominantly illiterate and poor population, allowing the younger locals to study and have a way out of working the fields.

In the 1960s there was already a primary school, an industrial school (with courses for radio assembly technicians, electricians, mechanical operators), a health centre and a maternity. Everything was free of charge for workers and residents.

The population and most of the employees had no idea that propaganda was being broadcast to faraway countries such as Bulgaria, Czechoslovakia, Hungary, Poland, Romania and the USSR. The technicians were the ones with a better sense of the nature of the operations, even though they didn't understand the languages in which the programmes were spoken.

Set in Portugal during the 1960s (1968-69) in the final years of the Portuguese dictatorship, this series shows how a village in Ribatejo turned into an unlikely stage for the Cold War where the American and Soviet forces faced each other in dangerous manoeuvres of sabotage in order to maintain their foothold in Europe. At the centre of this story is João Vidal, a young man from a family with ties to the fascist regime that was in place in Portugal. He is recruited by the KGB after becoming indoctrinated during the war in Africa.

The prominent historical events happening in Portugal and worldwide during the 1960s are present not just as a backdrop, but as a driving force for the story, with a particular emphasis on Martin Luther King Jr.'s assassination. - the murderer had been in Portugal with the knowledge of the Portuguese police and travelled to London where he would eventually be arrested - the invasion of Prague by the troops from the Warsaw Pact, which would put an end to the attempt to establish a socialist power outside Moscow's control and Salazar's removal from office by the Council after a stroke that left him incapacitated. Salazar never learned that he had been replaced until he died, as his former ministers kept pretending to be in office in a theatrics for his benefit.

With the fall of the Berlin wall, the progressive dismantlement of the station began. The final shutdown took place in 1996 with Radio Free Europe settling in the Czech Republic, where it still remains in operation to this day.

The expectation that was created for the Portuguese market after this Netflix series premiered wouldn't come to fruition, as there weren't announced any other investments in Portuguese original productions apart from the series *Rabo de Peixe*, a story about the drug trade in the Azores, which had been presented in a script contest promoted by the Instituto do Cinema e do Audiovisual (ICA) in partnership with Netflix. In spite of the impact that the series *Glória* seemingly had in the general public, as there is no other way to assess this due to the fact that platforms do not reveal the number of subscribers or viewers of their series, the small size of the market negates any strategic relevance, even though the Portuguese language is spoken by 265 million people worldwide.¹¹

¹¹ According to data by Unesco in: www.unesco.org

The platforms' strategy of bolstering their catalogue translated into their continued investment in having Portuguese co-productions with other more enticing markets for big international corporations, such as Spain or Brazil, as well as the purchase of series, documentaries and fiction films that have already been produced and shown in cinemas or aired on national networks. HBO was the first to employ this strategy with an investment in a number of national fiction products, with 45 national works on catalogue presently, none of which being an original exclusive to the platform.

Regarding cable channels, as previously noted, there was no investment on national fiction. The free-to-air channels maintained their strategies with the public network investing on short-running series and telefilms while the private networks SIC and TVI kept on heavily investing in telenovelas, with each station airing three original telenovelas after the evening news (primetime, second primetime and late night).

In short, the national market remains heavily dependent on daily fiction, even though there is a tendency towards reducing the initial order for episodes in telenovelas, dividing them in seasons as a way to close up narrative arcs and refresh the cast. Series remain as an investment by the public network or, in the case of the private network SIC, relegated to its platform, even if some of them are eventually reused at a later date on open signal and at a late hour. As for platforms, their investment is expected to remain low, in accordance to the limits defined by law, which will hardly contribute to the development of the audio-visual industry and the internationalization of national talent.

6. Theme of the year

The content distribution model has influenced the nationally produced fiction in the past year on multiple levels. In terms of themes, it allowed to explore new subject matters that didn't previously have airtime on generalist channels always looking for traditional products - generalist TV remains invested on an old recipe of popular melodrama and comedy, which still brings in ratings. The themes are ever more conventional and go directly towards their natural audiences, who still consume television as a family, with little to no room for experimentation.

The distribution of fiction through the internet by national providers also has opened new opportunities for small scale production companies to get into a highly competitive market. Still, due to the low budgets enforced by national platforms, it has become of little appeal to leading production companies to invest, which opens the way for a new group of players to enter the market.

As for the large international groups that control the streaming corporations, there has been no interest in investing in the Portuguese market for a number of reasons, such as the lack of requirements by Portuguese law to do so as well as the small size of the national market. These resulted in a single example of investment in

an exclusively national series - *Glória* - by Netflix, the two other series on HBO and Amazon Prime Video being co-produced with Spain and Portugal having a minor share.

However, the existence of two national platforms - RTP Play and OPTO, has led to the increase in production of short-running works, with series under 10 episodes per season and slim budgets that hinder their competitive ability. Still, there are rare exceptions where the budgets for series on national platforms are superior to those on free-to-air television, as is the case for the series *Vanda* on OPTO. Equally rare are the cases where works migrated from platforms to free-to-air, which is why it is important to emphasize the exception in the series *O Clube* on OPTO, which aired on late night on generalist SIC, more as a marketing strategy for the platform than a distribution paradigm to use second airing windows. Still, none of the national platforms is positioned as a direct competitor to the larger distributors, assuming instead a subsidiary position in the media landscape.

For open signal generalist networks, serialized fiction remains the norm, with horizontal programming schemes on private networks SIC and TVI and mixed on RTP, which has allowed to establish weekly schedules for series and even to recover the telefilm format in a clear counter-programming strategy against the private networks.

In spite of all of this, the immobility in the free-to-air networks is merely an illusion, as long running fiction present on primetime such as telenovelas has been suffering a reduction in the number of episodes, which is clearly influenced by the growth of platforms, who compete during primetime and invest on narrative arcs that are developed throughout several seasons which are, in turn, renewed in case they prove to have successful ratings. Therefore, telenovelas have been reinventing themselves into a hybrid format that closer resembles the North-American prime-time soaps like *Grey's Anatomy*, *Empire* or *This Is Us*.

Works Cited:

Duarte, R., Lopes, F. et al. (2022) *Covid-19. A estratégia*. Minho: Universidade do Minho Editora.