COMPARATIVE CHAPTER: THE SHIFT TOWARDS INDEPENDENT AUDIOVISUAL PRODUCTION COMPANIES AND PLATFORMS

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This first chapter of the 2023 yearbook of the Ibero-American Observatory of Television Fiction (Obitel) seeks to be a synthesis and transversal look at the contents of the 11 national chapters that compose it, but in no case to substitute its reading. Only through them is it possible to appreciate the particularities of the television fiction phenomenon in each country. However, there are dimensions of the phenomenon that only become visible when viewing the whole.

Each national chapter follows the same structure: a general overview of the audiovisual panorama; a survey of the offer of television fiction of Ibero-American origin broadcast in 2022; an overview of the state of *Video on Demand* (VoD) in the country and the creation of serialized fiction for platforms; an exploration of forms of interactivity and digital appropriation of contents by audiences; one or more topics that each country chooses to highlight; and a topic to be developed transversally by all countries. The theme chosen for this year was: Independent production companies and the internationalization of television fiction production in Ibero-America.

The first three sections of the national chapters are more quantitative in nature, which makes it possible to work on their results in an aggregate and comparative way, seeking to highlight aspects that are not evident when reading an individual chapter. The themes of the other three sections are more qualitative and flexible in the way they are approached in each national chapter, so this comparative chapter seeks to identify those common elements and to highlight, by way of example, some elements that show the uniqueness of the findings in each of the countries.

1. Obitel countries and free-to-air television

In the Obitel area, television systems with different characteristics can be observed. They differ in the number of signals, the level of state participation in their ownership, the degree of progress in the implementation of digital terrestrial television, their fragmentation among the political units in which the territories are organized or the relevance of actors other than free-to-air television, among many other differences. Obitel's basic definition is to study the television fiction of free-to-air television signals of national scope. But to account for different realities requires adapting the definitions to preserve their meaning. This is the case of the United States, where not all free-to-air television is monitored, but only that specifically aimed at the population of Latin American origin and, consequently, the reference made to the country is to the Hispanic United States (EUH). It is also the case of Spain (ESP), where the volume of high-standard production of the territorial autonomous regions is comparable to that of the nationwide channels, and to disregard them would greatly underestimate the level of fiction production in Spain, so they are also included in the counts in section 2 of this chapter.

Table 1 takes the information from Tables 1 and Figures 1 of each national chapter. In most countries, digital terrestrial television is already in operation, so it is necessary to specify that what is shown, in those cases, are the first signals of each one, which tend to be the generalist ones and where television fiction is hosted. There is also an exception here. In the case of Spain, La2 is the second signal of La1. However, it is a station with its own identity and its existence long before the implementation of digital terrestrial television, so it is treated as if it were a first signal. With these definitions, Table 1 shows the number of private and public signals of national scope available in each country, indicating the audience share of public signals among those shown in the table.

Among the countries where the information is available, the first distinction is the relevance of the public sector in terms of audience levels. Thus, in some countries such as Argentina, Brazil or Uruguay, public signals have a marginal weight. In the case of the Hispanic United States, there is no public television, while in Chile, Spain, and Portugal, TVN, La1 and RTP1, respectively, are competitive players against private television.

Table 1. Free-to-air television channels with national reach in Obitel countries in 2022.

Country	Private	Public	Audience share of public channels among free-to-air TV signals with national reach (%)
Argentina	6	2	5%
Brazil	5	2	2%
Chile	6	1	18%
Colombia	3	2	9%
Ecuador	7	3	s/d
Spain	4	2	24%
U.S. Hispanics	5	0	0%
Mexico	9	4	s/d
Portugal	2	5	27%
Uruguay	3	2	4%
Venezuela	9	13	s/d

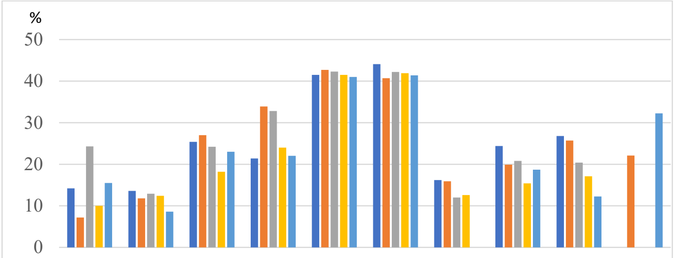
Source: Obitel

Although Table 1 summarizes the above-mentioned aspects, it is insufficient to appreciate the differences in television systems between countries. These contextual elements help to understand the different systems. At one extreme are countries such as Uruguay or Chile, with relatively simple systems. The channels referred to in the table cover the national territory and the weight of local television, when it exists, is minor. At the other extreme is the United States, where Hispanic television is just another piece in a picture dominated by the English-speaking world, and where there are also local television stations, with audiences that are also audiences of the larger system. In all cases, broadcast television coexists not only with pay television, in general declining, but also with a robust offer of *streaming* services that have their greatest strength in fiction.

Fiction is an important genre in all countries, but it is only one within the set of genres offered by broadcast television. The importance of information is also transversal, although in Venezuela it occupies 50% of screen time. Entertainment, not always with the same name, occupies a very significant amount of time in Argentina, Chile, Spain, the United States, Portugal and Uruguay, while in Brazil, religion is second in airtime, behind information, and in Colombia, sports has a much larger space than in the other countries.

As a way of dimensioning the space occupied by fiction within television programming, Figure 1 shows the proportion of screen time occupied by fiction content in the different countries. In this case, it refers to all forms of fiction: national or foreign, premiere or reruns, live action or animation, television or film. The data are taken from the Figures 2 of the chapters of each country for the last five years.

Figure 1. Fiction airtime share on open television[1]



	ARG	BRA	CHI	COL	ESP	EUH	MEX	POR	URU	VEN
2018	14.2	13.6	25.4	21.4	41.5	44.1	16.2	24.4	26.8	-
2019	7.2	11.8	27	33.9	42.7	40.7	15.9	19.9	25.7	22.1
2020	24.3	12.9	24.2	32.8	42.3	42.2	12	20.8	20.4	-
2021	10	12.4	18.2	24	41.5	41.9	12.6	15.4	17.1	-
2022	15.5	8.6	23.0	22.0	41.0	41.4	-	18.7	12.2	32.2

Source Obitel

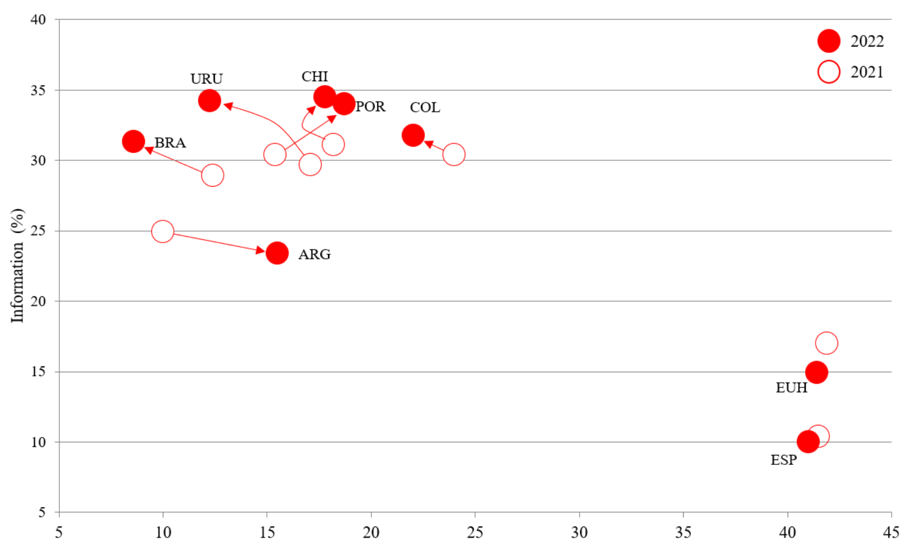
[1] The content classification criteria differ from country to country. For graphs 1 and 2, regroupings were made to make them more comparable. This explains some minor differences that can be seen when comparing these figures with those shown in the respective national chapters.

Visually, the Uruguayan case shows a drop in fiction participation. When analyzing the linear trend of each of the countries in Figure 1 (without considering Argentina and Venezuela, where the data are erratic), a decreasing trend of fiction participation in the programming as a whole is verified in all of them. The linear trend is decreasing in all countries, even if the years 2020 and 2021 are not considered, when many behaviors changed as a result of the pandemic. This decline in fiction is probably attributable both to production costs, in a context in which broadcast television decreases its share in advertising investment, and to the fact that the fiction offer faces strong and consolidated competition from platforms.

Together with the participation of fiction on the screens, Figures 2 of the national chapters also show the participation of other content genres. Among them, information is transversally relevant and one of the most structurally linked to free-to-air television, due to its necessary link with contingency. [2]

Figure 2 shows the screen time shares for the last two years for both fiction and news for the countries where this measurement is available for both years.

Figure 2. Fiction content vs informational content in television programming.[1]



Source: Obitel

The Figure 2 shows two groups of countries. On the lower right, the Hispanic United States and Spain, with a high proportion of fiction on the screens and, at the same time, a low proportion of information. In the opposite corner, with a lower share of fiction and a higher share of information, are the rest of the countries. In order to find an explanation for such a marked differentiation, it is probably necessary to

[2] Classifications differ from country to country. Here, news and other journalistic programs, political programs and documentaries have been grouped under Information, although the volume of the latter is smaller.

look into the characteristics of news programs and the relevance for the audience of the news context other than broadcast television.

Figure 2 also shows the evolution of the relationship between fiction and information between 2021 and 2022. In the Hispanic United States and Spain, what is observed is a slight decline in both content genres. They are the only countries where this occurs. In both Argentina and Portugal, the participation of fiction grows, but while in Argentina this means a setback of information, in Portugal the participation of both genres increases, at the expense of other categories, such as sports and youth. However, the most frequent evolution, verified in Brazil, Chile, Colombia and Uruguay, was a decrease in fiction and an increase in information.

2. Television fiction in Obitel countries

Unlike the previous section, which when referring to fiction does not make any distinction on its type or origin and is based on secondary sources in each country, in the second section of the national chapters there is a survey and classification of premiere television fiction, both national and Ibero-American, exhibited in each of the countries. Television fiction shall be understood as that made for television, that is, excluding that intended for theatrical cinema and also animations. Likewise, the notion of premiere refers to the fact that a title has been exhibited for the first time in the country during that year, regardless of whether it has been previously exhibited in other countries.

Table 2. Supply of hours of national fiction premiere on free-to-air television (2018-2022). [3]

Year	ARG	BRA	CHI	COL	ESP	EUH	MEX	POR	URU	VEN	Total
2018	526	1.299	722	390	1.742	933	1.807	755	16	60	8.250
2019	372	1.307	747	518	1.451	512	1.166	1.029	3	35	7.140
2020	62	416	274	271	1.217	366	906	794	47	3	4.356
2021	104	419	587	953	1.036	420	853	998	13	360	5.743
2022	144	1.297	477	315	912	216	1.333	912	0	240	5.846

Source: Obitel

The table above shows the number of hours of national premiere fiction shown in each country. Using the number of hours, rather than titles or episodes, is better as it is a more representative measure of the productive capacity of the national audiovisual industries.

The production of fiction for broadcast television is usually intended for local consumption and eventual export to other countries, but it is usual for the works to be exhibited first in their country of origin, at least partially, and only then exported.

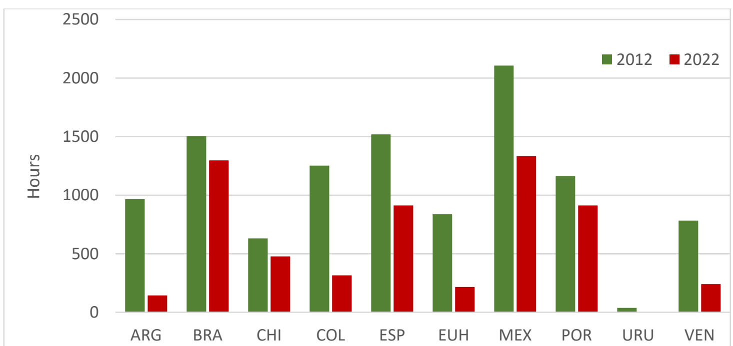
[3] In the case of Spain, this includes the productions of both state and regional channels.

For this reason, the exhibition of premiere national fiction is a good approximation of the amount produced.

The previous section showed how fiction (all fiction) followed a declining trend in its share of screen time. Something similar occurs with premiere national television fiction. The linear trend is declining, even if the years 2020 and 2021 are not taken into account.

Probably the most eloquent indicator of the decline in production is that, added together, the same countries produced 54% in 2022 of what they produced in 2012. Figure 3 shows the declines in each country.

Figure 3. National TV fiction premieres in each country: 2012 vs 2022



Source: Obitel

At an aggregate level, production levels in 2012 are similar to those of 2017, but from there begins a decline that worsens during the pandemic, partially recovers in 2021 and falls again in 2022. In addition to the factors already mentioned as some of the possible causes of the drop, the decrease in advertising investment and the shift to platforms, two other factors can be considered that point to substitution: the already consolidated presence of Turkish *telenovela*s and other incipient origins, and also the self-competition from reruns. The gap in the visual quality of the productions from the late 90s onwards, with respect to the current ones, is low. Historical *telenovela*s such as *Terra Nostra*, *Betty la Fea* or *Pasión de Gavilanes* are reprogrammed and are consumed in a similar way to the current ones. A recurring element among the national chapters of this report is to highlight the importance of the repositioning of material already shown.

The exchange of audiovisual content between Ibero-American countries has been present for decades, but there are strong differences in the quantities of productions that each country imports or exports. Likewise, there are also differences in the variety of origins from which content is imported.

The national chapters show the number of titles and hours of Ibero-American premiere television fiction exhibited in the country during 2022. Viewed individually, they show local consumption. However, when combined, they reveal the flows of production exchanges between countries. This is what is shown in Table 3, using hours as unit of measurement.

Table 3 can be read vertically and horizontally. Read vertically, it shows the origin of premiere television fiction exhibited in each country. Horizontally, it shows the different countries in which television fiction originated in a country was exhibited.[4] Therefore, the horizontal sum, in the 2022 column, is a measure of the premiere fiction exported by each country during that year. For comparison purposes, the totals of the two previous years are added.

Table 3. Ibero-American fiction premieres shown in each country in 2022

		Country in which it is broadcasted										Total exported[5]		
	Hours	ARG	BRA	CHI	COL	ESP	EUH	MEX	POR	URU	VEN	2022	2021	2020
Country of origin	ARG	144	-	13	-	-	-	-	-	-	-	13	68	86
	BRA	136	1.297	507	-	-	-	202	345	494	361	2.046	1.242	1.705
	CHI	-	-	477	-	-	-	-	3	99	-	102	195	37
	COL	342	-	-	315	-	27	73	-	-	283	726	1.719	288
	ESP	-	-	4	-	912	-	-	-	33	-	36	8	32
	EUH	314	5	-	-	47	216	7	-	-	-	373	715	288
	MEX	35	259	308	128	192	1.394	1.333	-	144	885	3.346	2.999	2.013
	POR	-	49	-	-	-	-	-	912	-	-	49	75	141
	URU	-	-	-	-	-	-	-	-	-	-	-	-	-
	VEN	-	-	-	-	-	-	-	-	-	240	-	68	-
Total broadcasted		972	1.610	1.309	443	1.151	1.638	1.615	1.260	770	1.769			

Source: Obitel

The content exported to the different countries was not necessarily produced in the same year, but since it is only counted once in each place where it is exhibited, the sum of them is a good measure of a country's exports of original content. [6]

Table 3 shows that the main exporter of television fiction in Ibero-America is Mexico, as in previous years. In 2022, it sold content to all countries except Portugal, being also, with the exception of the Southern Cone, the main exporter to each of

[4] Two considerations in the construction of table 3. Given the definition of premiere used, what is a premiere in one country is not necessarily a premiere in others. If an old title, already seen in other countries, is shown for the first time in one country, it is a premiere in that country. The important thing is that it is counted only once for each country, so there is no duplication over time.

The hours of the co-productions - the amount is minimal - are distributed vertically among the countries involved, unless the country in which it is exhibited participates, to maintain consistency with the national chapter tables. This may cause duplications in the horizontal sum, but the number is marginal.

[5] Totals for previous years include only the countries included in this table.

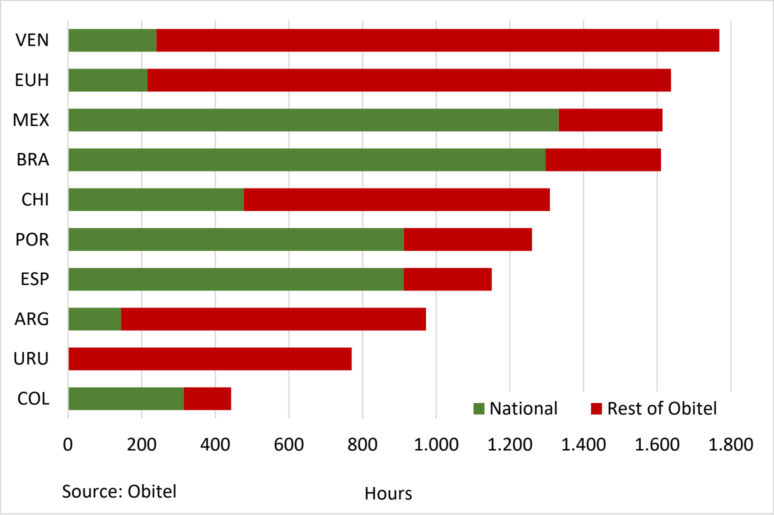
[6] It does not include, therefore, exports of second or additional exhibitions.

the countries in the region. In second place, both in terms of volume and number of countries to which it exported, is Brazil. A striking case is Colombia: not only did it reduce its exports by almost 60%, but its production fell by 53%, mainly due to the reduction in the production of *telenovela*s.

The cases of Spain and Portugal are interesting in 2022 for the same reason as they were in 2021. Their production volume places them only below Brazil or Mexico and well above all other countries. The invoice of their realizations is of high standard. However, their export levels do not reach 5% of what they produce.

Figure 4 takes from Table 3 the own production and imports in each country. The purpose of this is to represent the level of consumption of premiere Ibero-American fiction and the degree of autarky to satisfy those consumptions.

Figure 4. Ibero-American fiction premieres broadcasted during 2022

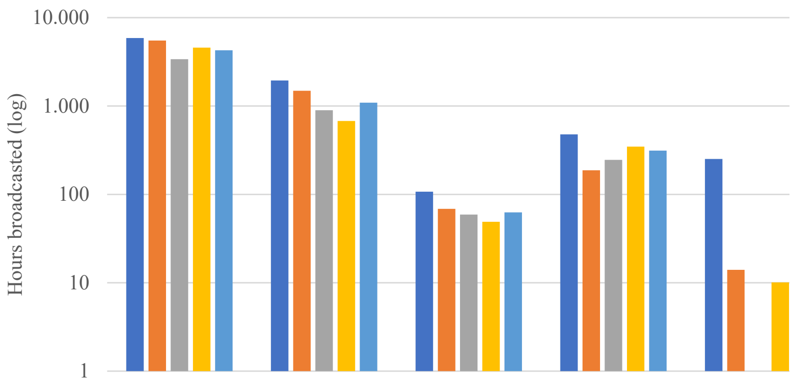


Venezuela and the Hispanic United States appear as the largest consumers of first-run television fiction, depending in more than 85% on imported contents to satisfy this consumption. With a consumption of first-run television fiction similar to that of the Hispanic United States appear Mexico and Brazil, but with the origins reversed: more than 80% of their consumption is satisfied with their own fiction. In this figure, Mexico and Brazil are shown as large consumers of premiere Ibero-American television fiction. However, in Figure 1, at the beginning of the chapter, they were the countries with the lowest proportion of (general) fiction on their screens. It would seem, then, that the fiction they privilege is their own and premiere fiction, but that the interest in the rest of fiction is lower.

Up to this point, the focus has been on television fiction as a whole, without making distinctions among formats. Figure 5 shows the evolution of the presence of the main television fiction formats. For this purpose, it uses the sum of the hours of national fiction exhibited in its own countries, taking the information from tables 3 of the national chapters. [7]

It should be noted that the vertical axis of Figure 5 is on a logarithmic scale in order to see trends in different formats whose number of hours of exhibition may be 50 or 100 times more than those of other formats.

Figure 5. Hours of national fiction premiere in the Obitel scope according to format in 2022.[8]



	Telenovela	Serie	Miniserie	Unitario	Docudrama
■ 2018	5.875	1.944	107	478	252
■ 2019	5.514	1.487	69	187	14
■ 2020	3.384	895	59	246	-
■ 2021	4.580	678	49	347	10
■ 2022	4.270	1.090	63	313	-

Source: Obitel

Of the five formats shown, the docudrama seems to be one on the verge of extinction. Even those 10 hours that appear in 2021 correspond to an almost scatological exercise. It was a new season of a Chilean docudrama, very successful in the early 2000s, but which had stopped airing in 2009.

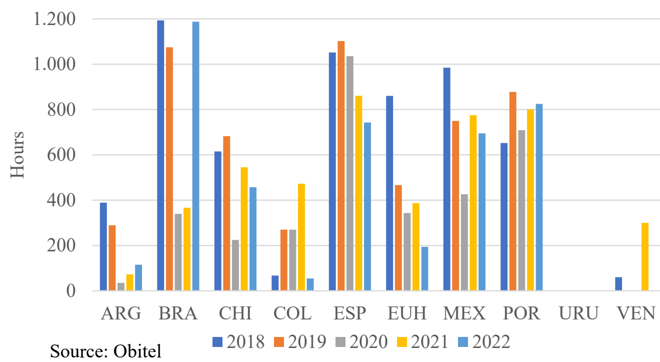
The *telenovela*, although it is by far the dominant format, evidences a clearly declining trend. As for *unitarios*, little can be said because there does not seem to be a clear trend. However, in series and miniseries there seems to be a possible change in behavior. Without the 2022 data, the judgment would have been similar to that of *telenovela*, but 2022, with the growth of these formats, opens the possibility of a change in trend.

[7] The formats shown, in addition to being those with the greatest presence, are accounted for in the same way in the national chapters. Sitcoms and telefilms are not always treated in the same way. For the purposes of this comparative chapter, the *telenovela* and European serial formats have been homologated.

[8] For the five years considered, the countries included in Figure 5 are Argentina, Brazil, Chile, Colombia, Spain, USA Hispanics, Mexico, Portugal, Uruguay and Venezuela.

When opening the *telenovela* data by country, Figure 6, what as an aggregate is a clear trend with a smooth curve, is shown here to be random and with abrupt changes. However, two movements are clear and consistent. While in Spain the *telenovela* (or serial) decreases, in Portugal it grows. Between two of Obitel's most similar countries, the trends seem to be completely opposite.

Figure 6. Showing hours of premiere national *telenovela*s in each country



Source: Obitel

3. VoD Monitoring

Until not many years ago, Ibero-American serialized fiction premiered almost exclusively on broadcast television, with a few exceptions on cable television. However, since Netflix launched *Club de Cuervos,* its first original series produced in Spanish, in 2015, the scenario has changed significantly. It is no longer just a matter of changes in the way fiction is consumed and the changes in the forms of narration that this could bring about, but of shifts in what, how and where it is produced. The *telenovela*, the type of format that generates more hours of production per title, continues to be hosted mainly in broadcast television. However, measured as the number of premiere titles, this yearbook reports 146 titles on broadcast television and 175 on *streaming* platforms, 14 of them as co-productions between different countries in the region.

Historically, except for productions led by Telemundo or Univision, which targeted the Latin market in the United States, the co-production of television fiction between Ibero-American countries was a rare phenomenon. The flows of productions between countries were due to productions intended for domestic markets that were then put into circulation. Production for *streaming* platforms does not replace, but expands the model by providing space for simultaneous exhibition in the different countries covered by the platform. In the 14 co-production titles shown in Table 5, the number of participating countries is, on average, 2.6, always with Brazil, Spain or Mexico present.

Cross-country co-production is only seen in platforms that have a significant presence in multiple countries, such as Netflix or Prime Video. But not all global platforms follow this model. Disney+ and HBO Max, which have productions in multiple countries, have them only with one country at a time. Among the platforms with multinational presence, the one that departs in its behavior is Movistar: with nine titles in 2022, all of them were produced in Spain.

Table 5 is a synthesis of the tables 8 of the national chapters, which list the productions of each country, refined by cross-referencing the reported co-productions, in order to eliminate duplications. The criterion for inclusion of titles in tables 8 is that the season (if more than one) has released episodes during 2022. In the case of productions shown both on broadcast television and on a *streaming platform*, they are considered premieres in both windows if the distance between the premieres is less than one year.

A slight transgression of the standard criteria for attributing a production to a country should be noted. Considering that the principal production house is usually the *streaming* platform and that many of them are of North American origin, all the productions of Netflix, Prime Video, HBO Max and others are strictly speaking North American productions, but considering them as such would make the production capacities of the countries invisible. In the construction of Table 5, the country of origin of the audiovisual production companies involved in the production has been considered, but not the platform. In the case of the Hispanic United States, in order not to include all the production of the platforms, a production is considered as a national production if their target audience is the Latino audience in the United States.

Table 5. Number of serialized fiction titles released by each country on platforms during 2022. Co-productions that include the country are in parentheses.

Platform	ARG	BRA	CHI	COL	ESP	EUH*	MEX	POR	URU	VEN	Total[9]
Netflix	3 (2)	8 (5)	2	4 (2)	16 (3)	(3)	12 (6)				45 (8)
Play Balloon		34									34
Prime Video	4 (2)	1 (1)	1 (2)	3 (1)	6 (2)	(1)	4	(1)			19 (4)
HBO Max	1	2			2	1	3				9
Movistar					9						9
Star+	5 (1)	2 (1)		(1)			(1)				7 (1)
Atresplayer					7						7
Disney+	1	1			1		2				5
OPTO								5			5
Vix+							4				4
RTP Play								4			4
RTVC Play				2							2
Lionsgate+			(1)		1 (1)						1 (1)
Apple TV					1	1					2
Of course							2				2
TNT					2						2
PlayZ					1						1
Paramount		1									1
Hulu						1					1
Peacock						1					1
Total	14 (6)	49 (7)	3 (3)	9 (4)	46 (6)	4 (4)	27 (7)	9 (1)	0 (0)	0 (0)	161 (14)

Source: Obitel

As a number of first-run titles, 2022 represents a 22% growth over 2021.[9] But a more significant change can be seen in the number of co-productions. In 2021 there were only two co-productions, both between Spain and Portugal, while in 2022 this number reached 14, involving eight countries, which seems to reflect a change in the strategy of some platforms.

Viewed by country, Table 5 shows that the country with the largest number of titles is Brazil, with 56 productions, 49 individual and 7 as co-producers. This is followed by Spain and Mexico, with 52 and 34 respectively. Two countries appear without any productions for platforms. One is Uruguay, which in 2022 did not premiere fiction titles on free-to-air television either, and Venezuela, which had only one title on free-to-air television. However, the case of Uruguay shows a peculiarity. Although there are no titles whose production can be attributed to Uruguay, there were at least three series that were shot in its territory and using local professionals. These were productions of foreign production companies that found technical or economic advantages to film there.

In the case of the platforms, the growth in the number of Netflix titles was explosive In the case of the platforms, the growth in the number of Netflix titles was

[9] For comparative purposes, in 2021 we are discounting production from Peru, which is not included in this yearbook, but was included in the previous one.

explosive. It went from 28 titles in 2021 to 53 in 2022, well ahead of the second platform with the most titles released in 2022. With 34 titles, Globo Play even increased the 33 titles that placed it comfortably in first place the previous year and increased its distance from Prime Video, which fell from 29 titles in 2021 to 23 in 2022. Regarding Globo Play, a fact that should not be omitted is that all its production is made in a single country and that only at the end of 2021 it became available from Portugal, the only country with which it shares a language in the region.

4. Fiction, interactivity and audience participation

The study of audience interaction and participation with fiction content is essential to understand the dynamics of production and reception. In an era of overabundance of supply, the channel or platform uses communication strategies before, during and even after broadcasting/availability, in order to extend the life of products and monetise them. In recent years, the online environment has come to the fore in this task, especially with the use of digital social networks and transmedia experiences that combine online and offline.

The production and reception contexts in OBITEL countries are different, so while there are very dynamic markets, there are others that use digital only as a way to make their presence felt, without a clear investment in building engagement and, consequently, in creating consumer communities. Uruguay was such a case: with no national premieres, the country chose, as an example, the imported telenovela *Si nos Dejan*. The presence in digital social networks was limited to a propagation strategy with anticipatory and catch-up content, which resulted in very little social interaction. In the case of Venezuela, due to political instability and constant power and internet outages, audience interaction and participation with television content is very limited. In addition, channels encourage engagement with national content and not with foreign content, so, having premiered only one (1) national title in 2022, the results are very unimpressive. Instagram and Twitter are the most used platforms and the data shows that most of the comments on (foreign) fiction were not about the content itself, but about the suspension of telenovelas for the World Cup broadcast.

Although Argentina has national productions, during the year there were few premieres and minimal interaction in the official commentary spaces (Facebook, YouTube, Twitter and the channels' official sites). *El Primero de Nosotros* (Telefe) was the plot chosen to illustrate audience participation in the digital space, especially because it gave rise to the celebration of the love encounter that had not occurred in *Chiquititas* in 2006. This led fans, now adults, to post photos from then and now, as well as to comment on the relationship between the characters played by the actress and the actor in the two productions.

Brazil has been very active in using digital social media to engage audiences. In 2022, TV Globo's remake of *Pantanal* - a 1990 telenovela by TV Manchete - also generated a lot of activity from the fan community. The media group planned a communication campaign well in advance, not only on the networks, but also in other programmes (news and entertainment), capitalising on cross-promotion and enabling continuous engagement with the content. Beyond private use, WhatsApp in Brazil has already acquired the status of a public network and, in the case of *Pantanal*, led to the creation of stickers of the characters' facial expressions, which were widely shared. Once again, the serious issues addressed in fiction, such as identity representation and human rights, have gained space on the networks, encouraging internet users to tell their experiences and thus enabling public debate.

The strategy of "going back to the past", appealing to the audience's nostalgia, was also seen in the Hispanic United States. Telemundo announced the 2nd season of the telenovela *Pasión de Gavilanes* (the 1st season aired in the early 21st century), involving the original cast with young actors; scheduling a rerun of the telenovela; creating an app; giving a space on the institutional website and feeding digital social networks. The impact and interaction prior to the premiere was more interesting than afterwards, which led the channel to reduce the number of episodes planned (from 90 to 73). Anticipation as a way to generate curiosity and early engagement with the content was also a strategy in Chile. The Mega channel used the different digital platforms to show behind-the-scenes images, interviews with the cast, technical meetings and locations that led, in the case of *La Ley de Baltazar*, to the small town of Cochamó becoming a tourist attraction. In this case, and unlike in the Hispanic United States, the number of followers was compatible with the rating, in a clear demonstration of the role of digital social networks, not only for dissemination, but also for loyalty and continuous participation.

Mexico and Portugal chose similar examples of a strategy to promote audience participation through digital channels, based on content innovation/disruption and autonomous dissemination of songs and soundtracks. *Papás por Encargo*, an original Disney+ production in Mexico, used networks to generate public debate on updated visions of the family; some of the most emblematic songs from the soundtrack were simultaneously released on Spotify and video clips circulated, with great interaction on YouTube. The Mexican chapter also referenced the *María Félix miniseries, La Doña*: a Vix+ production, a platform originated by the TelevisivaUnivisión merger. The highlight was, in addition to the use of networks such as Twitter, the subsequent premiere on a FTA channel, an extra possibility that international streaming platforms do not have and that allows capitalising on local content.

In the case of Portugal, the series *Pôr-do-Sol* (RTP) stood out. Using humour, the public service channel, which does not broadcast telenovelas by editorial choice, presented a parody of the format. This innovation/disruption generated a great deal of interaction on digital social networks, especially Twitter, and the subsequent release on Netflix (as licensed content), led to the series becoming a cult series, with two seasons and, already in 2023, a feature film released in the cinema. In addition, there were other unusual initiatives in Portugal that encouraged social participation, such as the live broadcast in nine movie theatres of the last episode of season 1 and the participation of the cast and creative team in ComiCon Portugal 2022. As happened in Mexico and as has already happened in many markets, the musical group created in the series, *Jesús Quisto*, left the small screen, filled concert halls and one of the themes was adapted into an anthem in support of the national football team, in the context of the 2022 World Cup. This transmedia path, which combines digital and analogue strategies for dissemination and interaction, has also been followed by Colombia and Spain.

Colombia identified several titles to show the interactivity strategies used by channels and platforms, but placed special emphasis on *Arelys Henao: Canto para no Llorar* (Caracol Televisión) and *Nación Rebelde* (RTVC and Señal Colombia). The former, a biographical telenovela, was later premiered on Netfilx and had great activity on the networks, especially through the protagonist who used the digital medium to echo the issues addressed, such as feminicide, machismo and violence. At the same time, numerous concerts and events were held with the presence of the actress, creating fan communities with their own networks and interactions. The second title, in addition to a website with additional clips and profiles on digital social networks, gave rise to a series of podcasts and a documentary editorial project, made available free of charge.

Spain has been one of the most active markets in the construction of transmedia universes, with the offer of microsites dedicated to each fiction, videogames, special episodes in virtual reality and immersive and gamified experiences. In 2022, there was some disinvestment, particularly due to the fast-moving nature of consumer goods and the normalisation of binge watching that transform consumption into less committed, but two titles were still identified (Atresmedia): *Historias de Protegidos* and *La Edad de la Ira*. The first title was accompanied by the launch of a virtual escapism game and a podcast and the second title by a weekly podcast with 12 teenagers aged between 14 and 17 who share experiences and reflections on issues of concern to their generation, an interactive map and a mockumentary, performed by the cast of the series and expanding on the story of a character.

5. Highlights of the year

The World Cup, non-fiction genres, remakes, some disinvestment in fiction and the consequent increase in imports marked the year for free-to-air TV channels in many OBITEL countries. This was the case in Argentina, with TV Pública reaping high ratings thanks to live football matches and a new edition of *Gran Hermano* and all the generated satellite programmes dominating programming grids. The same happened in Uruguay, where news services even included moments dedicated to entertainment formats and spin-off programmes emerged that continue and develop the narratives, causing a standardisation effect on screens around the world and emphasising the idea of transnational television.

The US Hispanic United States also pointed to the World Cup as the television event of the year, which allowed the rights-holding networks to reach audience figures far higher than those currently achieved by free-to-air television. The creation of the Vix+ platform, the result of the Televisa-Univisión merger, was also highlighted, as was by Mexico. Both countries highlight the investment in original productions, as well as the expansion of the catalogue with content from other entertainment and sports companies, which enables 60% of viewers (Mexico and the United States) to be covered. Mexico also highlights the Netflix premiere of *Donde Hubo Fuego*, an original creation about the city's fire service that became the first telenovela among the most watched titles in streaming in the country and in other markets. They also draw attention to the penetration and uptake of Turkish content. As the OBITEL yearbooks have attested year after year, Turkish productions have been gaining a strong following in the Ibero-American space with their narratives. There seems to be a consensus in the tendency of these productions to recover the melodramatic roots of the format, presenting telenovelas very similar to the traditional telenovelas of the 1980s, in contrast to contemporary telenovelas, markedly inspired and contaminated by genres of other formats of global reach and taste.

The Hispanic United States also uses nostalgia through the remake for prime time. So does Brazil with the case of *Pantanal*. To promote this telenovela, TV Globo developed the biggest campaign in history, even presenting the first episode inside the *Big Brother Brazil* house, using immersive sound and 8K technology. Many of the themes were updated and developed, allowing for a broad and informed public debate, constituting, as noted, a true media event. The remake was also identified by Colombia as one of the highlights of the year, allowing, as in Brazil, updated plots and themes, and offering the possibility for viewers to watch the two versions, programmed consecutively. Also highlighted in the Colombian report is the recurrent use of biography (telenovelas and series) and music as a central theme, allowing the extrapolation of the screen with the offer of music videos on the platforms and live shows.

Chile marks the return of Asian fiction (South Korea) as the highlight of the year. If these contents were previously hosted on streaming and web platforms and aimed at niche audiences, in 2022 they became part of the offer of public broadcaster TVN (Televisión Nacional de Chile) and private broadcaster Canal 13. This resurgence also resulted in the support and broadcasting of a K-Pop music festival, as well as the prime time programming of the Oscar-winning Korean film *Parasitos*. This dynamism of international fiction is also cited by Spain as a reason for disinvestment in national production. The decline in supply and demand has led to debate about the sustainability of the national production industry for free-to-air channels in the face of the proliferation of titles on the platforms, many of them Spanish, and new forms of consumption. Venezuela also reports a decrease in investment in fiction production, in particular due to the country's multifactorial crisis, but also to the fact that audiences are now opting for content offered by streaming platforms. However, Venezuela considers that three strategies prevailed in 2022: i) the presence of fiction supported by public funds; ii) the production of alternative serialised fiction (e.g. webseries) and iii) fiction produced by the margins.

Spain, however, refers to some state television productions in 2022, namely the series *Cuéntame Como Pasó* (La1), now in its 22nd season, and the Spanish-Portuguese series *Séquia* (RTVE). Co-productions are, in fact, the most prominent feature of 2022 for Portugal. This model, which allows for greater financial investment and greater reach in terms of audience, has been widely explored by the national public media service, especially with the region of Galicia. The geographical, cultural and linguistic proximity that has guaranteed productions since the 1990s has allowed the offer of four series in 2022, highlighting the role of RTP in supporting independent production, but also in identifying strategic alliances as a competitive factor in a market saturated with supply.

6. Theme of the year: Independent production companies and the internationalization of television fiction production in Ibero-America

In 2022, OBITEL sought to map the action of independent production companies in different countries, taking into account their size, employment opportunities created by platforms and internationalisation strategies. In general, despite the differences in geographical size and economic potential between countries, there is a homogeneous understanding of what an independent production company is and a common trend towards its evolution, driven by the entry of new players in the market, increased competition, opening to the outside world and the development of regulatory frameworks and local support, favourable to the growth of the market on the global stage, despite the different weaknesses of each country.

Independent production in Argentina is not new. For decades, the country has had a structure in place that is recognised locally and globally, especially through state (film) and private (television) funding. The arrival of streaming platforms has allowed an increase in production, a diversification of themes and a more ambitious distribution, however, several drawbacks have been identified for the operation of independent producers: formats become shorter in duration, not allowing for a sustainable growth of employment; the times and forms of production do not always comply with labour agreements and regulations, leading companies and professionals to depend on the programming space, pace of production and production cycles imposed by the platforms.

In the last 15 years, Brazil has witnessed important changes in the independent production market, marked by the decentralisation of public calls for entries, the Pay TV Law (12 485/11) and the arrival of new players in the market. These frameworks have allowed for sustainable growth, resulting in a higher volume of works produced by small producers, diversifying the offer and showing the importance of, for example, large platforms. Internationalisation is a hallmark of Brazilian fiction production and already started in the 1970s, however, this more varied ecosystem has enabled the emergence of new business models, allowing for the addition of production values to each work, such as the hiring of global artists, and capitalising on success and recognition beyond borders.

The case of Colombia seems paradoxical: on the one hand, there are few independent production companies with the capacity to produce fiction for free-to-air channels and platforms; on the other hand, there are many small producers who cannot access the big production stage, limiting themselves to the production of institutional videos, videocasts and advertising. Film predominates and state aid does not always cover television productions. There is also a growing tendency to experiment with new formats and techniques.

Chile began producing television fiction continuously from the 1980s onwards and, as a result of market growth and competitive dynamics, the industry has expanded its activities. New schedules for national fiction were created, new dramatic areas were developed in different and innovative genres and formats, and the outsourcing of production to seek new financing grew. This step allowed the consolidation of the practice of using independent production companies to create television fiction, leading to the fact that, today, production companies dedicated to the production of telenovelas are more dependent on the channels and that production companies dedicated to the production of series can have a more diversified set of clients, including streaming platforms.

Since the 1990s, Spain has had a television fiction production industry. Competition and the dependence of small production companies on networks and programmes led to the creation of an oligopsony served by a scattering of micro-producers whose size and capacity made them ephemeral. The advent of OTT (over the top) platforms has changed the system, allowing a greater diversity of work opportunities for more producers, as well as an increase in external co-productions. At the same time, there has been a movement of alliances and mergers between local independent production companies that have consolidated the position of the Spanish industry both internally and externally.

In the case of the Hispanic United States, independent production companies have become a key player in entering local, national and regional markets thanks to their knowledge of culture and customs. This has allowed the construction of content that is recognised by both the Ibero-American population and the Latino communities within the United States. At the same time, the type of stories and aesthetic approaches have also ensured international and global appeal, successfully circulating the content in many markets. The competitive environment has led to the diversification of indie profiles, as small and medium-sized indies continue to exist, but larger and more responsive companies are also emerging, especially at a time when multiple niche audiences need to be reached.

Mexico has always been a centre of audiovisual production, particularly fiction. For more than a decade, it has been a Latin American production hub, marked by the presence of major transnational brands of North American origin and from other Latin American geographies. The OTT market, through contracting and co-productions, has guaranteed a high flow of work, with a very large financial investment, which has led to an increase in the diversity of narratives, formats and genres.

The incorporation of the Audiovisual Media Services Directive (AVMSD) into national legislation has not yet allowed Portugal to increase work for independent producers. The market is vast, characterised by a multiplicity of companies with very different sizes and capacities and, although the obligation to invest by OTT has already allowed some work to develop, as mentioned above, it has not yet proved to be the hope it promised. The public media service, in articulation with state support, has been responsible for energising the sector, ensuring that more independent production companies can work, and in different formats and genres, contributing positively to the development of the audiovisual sector in Portugal. In addition to commissioning or buying content for broadcast, RTP has opted for co-productions as a privileged production model, both with other foreign producers and with distributors and even international platforms. Thus, internationalisation has been the result of this public service action, which has been followed by initiatives from private channels, especially SIC, given the creation of its own platform with original content (OPTO SIC).

The entry of international streaming platforms in Uruguay has guaranteed some work for independent producers, but these are not original national productions, but content signed by Argentina, Brazil or Chile. In fact, fiction production is decreasing and many of the production companies, although they show that they are also dedicated to this type of productions, do not present a concrete catalogue. The internationalisation movement is marked, above all, by the import of fiction and initiatives to promote own production through the Uruguay Audiovisual programme.

In Venezuela, although the definition of independent producer is identified in the law and regulations, the expected independence has not always been achieved: there has been diversification, but a strategy of control over what to produce, how to produce, when to broadcast and where to broadcast has emerged. At the same time, Venezuela's multifactorial crisis has not allowed the market to develop, which has led to the fact that by 2022 no independent production company has produced fiction, nor are there dynamics of internationalisation. There is no investment, no strategic vision, which means that the production companies that still exist do not consider it profitable to work in the area.

In 2022, Ecuador rejoined OBITEL, allowing, with some limitations, to present some monitoring results on national television and audiovisual fiction. As for independent production, it is clear that, by legal imposition (Ley Orgánica de Comunicación, 2019), indies are resorted to in order to meet quotas. The promising market in this field has faced the effects of the Sars-Cov-2 pandemic, so state support and some private aid have been essential, as in most markets. Despite this favourable environment, it is noted that the greatest investment by television channels is in the area of information and that there is still a long way to go in the area of professional training (technical and artistic). Furthermore, the country identifies a lack of innovative content creators in line with international trends, as well as a lack of development of the dramatic tradition.