

COLOMBIA: INDEPENDENT PRODUCTION AND INTERNATIONALIZATION, BETWEEN SUCCESS AND EXPERIMENTATION

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Introduction

The year 2022 was decisive for Colombia. After the events of 2021, particularly the tension of the social unrest and the broad mobilizations and protests the government and the reforms presented to Congress, the new year brought with it an electoral contest that became the focus of the small screen and, in general, of public opinion in the nation. Thus, together with the faded hope of participating in the sporting event of the year, that is, the World Cup, it was the elections that filled all the reports and interest of the audiences, both in the spaces destined to the debates between pre-candidates and presidential candidates, as well as the results of the 2022 electoral contest in which both the new president of the nation and the members of the congress (senate and house) were elected. After the elections and with the triumph of Gustavo Petro, the country showed an important change in political and governmental tendencies. This was evidenced because in the second round, the current president faced an emerging and unknown figure: Rodolfo Hernandez, who managed to manage a strong presence in social networks (particularly TikTok) as his greatest strength to attract voters. Then, at least until August, the elections became a focus of interest since new scenarios for communication and television fiction appeared, in such a way that a gradual transition towards the environments of social networks began to appear. This generated an interesting contradiction in the panorama of national audiovisual production: being between the possibility of experimentation in independent or public television circuits or being able to seek the visibility of large media platforms and private distribution channels, confronting,

on the one hand, the success in digital scenarios, and on the other hand, the bet for experimental independence or production in the public sector. This would show the tension between a robust and free public media system versus the strong presence of the platforms, being in both the strength and possibility of development of national production, between the experimental and the commercial.

1. The audiovisual context of Colombia in 2022.

1.1. Open television in Colombia

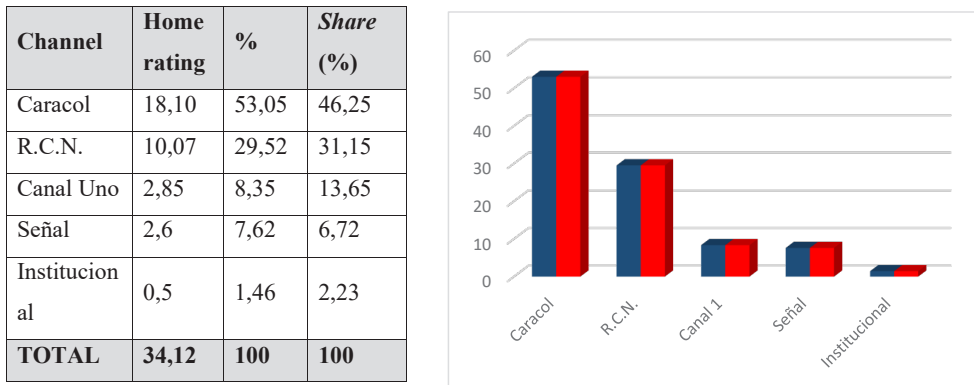
Table 1. National open television channels in Colombia

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

Source: Obitel Colombia

The most open television channels continued to be those of a private nature. Although 2022 began with a wide range of new productions and high expectations on the part of these channels, in the last quarter of the year their ratings declined. However, Caracol was once again the most watched channel, followed by RCN. In the face of this low rating situation, Señal Colombia continues to be a public television alternative that presents interesting, diverse, and different proposals to the programming of the private channels, in addition to making use of the digital offering exclusive content in its VoD system, RTVC Play. On the other hand, no new free-to-air television signal has been reported in the country. It should be recalled that, in view of this scenario, Caracol, RCN, Channel 1 and even regional and local channels continue to offer content as open television, considering that Internet access reaches only 60% of the Colombian population.

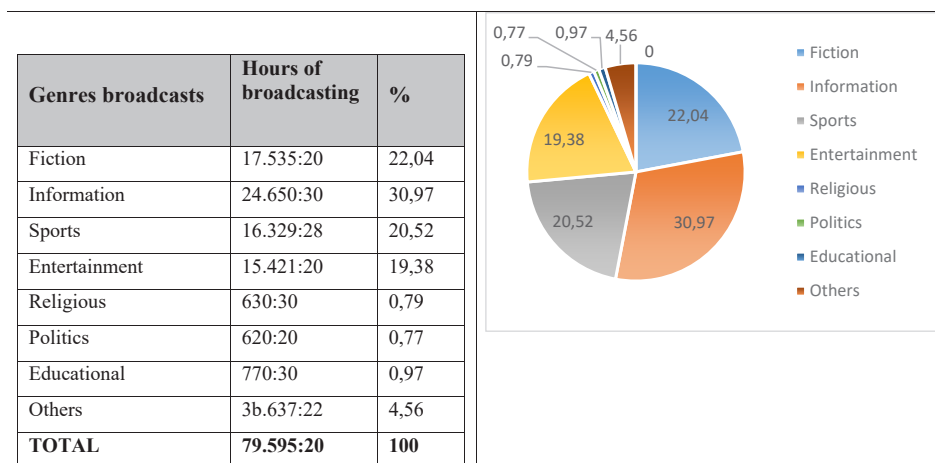
Chart 1. TV share and rating by channel



Source: Obitel Colombia

In 2022, the constant that has appeared in the country’s television in recent years is presented again, with Caracol obtaining higher ratings in relation to what is presented by RCN. This first place is the result of broadcasting strategies and approach to viewers in which events and other modes of contact with audiences were carried out in fiction productions. In the broadcasting of sports events and the World Cup, Caracol was the channel that most successfully connected with viewers, mainly due to its tradition of broadcasting soccer matches. In public television, Señal Colombia continued to grow with its more experimental content and its ability to explore new formats and narratives.

Chart 2: Television genres and hours broadcast by TV programming.



Source: Obitel Colombia

In terms of genres and hours broadcast, which also include the signals of regional channels, it is important to take into consideration the preponderant place that news

programs had throughout the year, as well as those with political themes. This is because the electoral process became the main source of viewers consumption. Fiction occupies, together with entertainment, an important place, so that it is possible to point out that it is a space that was combined with a look at the results, polls and, in general, all the excitement of the election season. In turn, events such as the soccer World Cup showed the importance given by audiences to sports in the country.

1.2. Pay TV and VOD platforms in Colombia

According to the Communications Regulatory Commission (CRC) in Colombia, 54% of people claim to watch subscription television as a priority, 24% do so through analog television and 22% through DTT. In addition, it is noted that the number of subscribers has presented a growth of 4.77%, with 6.3 million as of June 2022, compared to June 2021; therefore, a greater reception in households in the first half of 2022 is evidenced. According to Data Flash (CRC, 2023), by this date the revenues associated with the subscription television service had a scope of almost US\$400 million, which evidenced a growth of 0.46% economic with respect to the same semester of 2021.

The most contracted channels are Caracol Premium, DirecTV and Movistar, in addition to WIN sports, TNT and Fox sports. It is also necessary to mention that in Colombia there are platforms that belong to national channels such as Caracol Play and RTVC Play. For the first half of 2022, 43.3% of the revenues associated to the pay TV service, concerned CLARO, 24.4% to DIRECTV, 18.1% to UNE-EPM, 8% to MOVISTAR, 2.3% to ETB, 1.3% to HV TELEVISIÓN, and the remaining 2.6% is contributed by the other operators.

Table 2. Pay TV Networks in Colombia

The ten most viewed pay TV channels in Colombia		
Channel	Genre	Origin
ESPN	Deportes	Estados Unidos
WIN sports	Deportes	Colombia
Fox sports 2	Deportes	Estados Unidos
TNT	Ficción	Estados Unidos
HBO	Ficción	Estados Unidos
Star Chanel	Ficción	Estados Unidos
AXN	Ficción	Estados Unidos
Disney Channel	Infantil	
Cartoon network	Infantil	Estados Unidos
CNN en español	Información	Estados Unidos

Source: Obitel Colombia

Regarding VoD platforms in Colombia, the most recent reference on the year 2022, in terms of measurement cut-off, was found for the month of June, with data among which it is evident the growth of the supply of services in the country (finding more than twenty options for access to content of different nature, both in the field of large producers and in cases of anime content and other audiovisual offerings). Thus, in Colombia there are approximately 28 video streaming services, including: Netflix, Amazon Prime, Disney+, Star+, Paramount+, Hulu, MUBI, HBOMax, Apple TV, Starzplay, Win Sports+, Claro Video, Crunchyroll, Acorn TV, Dazn, Pluto TV, Free TV, Vix, Plex TV, Tubi TV, Rakuten Viki, Retina Latina, Caracol Play, RTVCPlay, Directv Go, Claro TV+, ETB Play, Movistar Play TV and whose content ranges from a combination of television and film offerings to specialized production in anime and other formats, without leaving aside the services belonging to free-to-air television channels and cable operators. It is important to note that a survey of 3,313 Internet users between 15 and 75 years of age confirmed that 57% of them have changed the traditional way of watching TV, being fundamental the access to offers that are given in multiple systems and, particularly, other forms of audiovisual consumption that include issues such as live streaming and the series format as the preponderant in terms of consumption trends. In terms of consumption in general, it is found that 78% of consumers have a subscription to some Streaming platform. Netflix is the most consumed platform, registering 67% of views, as it offers the possibility of having several screens under a single payment, although it is expected that by 2023 this possibility of shared access will change. It is followed by Primevideo, Disney + and HBO Max, Star+ and Paramount+ respectively.

In the case of VoD in Colombia, in addition to the systems associated with national free-to-air television channels such as Caracol and its Caracol Play platform and the services of cable television providers such as Claro TV, owned by the operator Claro, there is a growing group of more than 15 different platforms, among which RTVC Play deserves a special mention as it offers different programming, since it is not a pay system, but free, and also allows experimentation with genres and formats. Therefore, the offer in terms of public television becomes a content alternative that, although it does not occupy the first places among audience preferences, it does present an important possibility of access to alternative content and that connects with new creative possibilities such as interactive television or production with cell phones, as was the case of the two seasons of *El Inquisidor*.

1.3 Independent TV fiction production companies

In 2022, the audiovisual sector in Colombia faced the challenge of strengthening the way of producing fiction to maintain its number of consumers. Thus, in 2022, the demand for audiovisual content and the number of companies with creative content purposes increased. Colombia has become an attractive place for audiovisual

production, due to the quality of producers and human talent invested in the entire audiovisual process, its geography and landscapes, and the way of narrating local stories with the potential to become universal. Another factor is the support of state laws that stimulate audiovisual production in the Colombian territory, both for national and foreign producers, strengthening the audiovisual industry in Colombia. The growth of the audiovisual industry in Colombia has also been due to the consolidation of public-private institutions that work together to promote the production, promotion, and distribution of projects. Likewise, the training of new talents has been encouraged, which guarantees the continuous progress and success of the industry in the country. Colombian companies such as CMO have achieved a breakthrough for 2022, such as the production of the second season of *Pálpito* for Netflix. According to this production company, its success is because Colombian stories have a local essence, but their characteristics can be recognizable at a global level. It should be noted that the diversification of storytelling and production is an important point for the growth of these independent production companies such as *Mamá Sur*. It is possible to affirm that Colombia has become a sought-after territory for audiovisual production since Colombian stories attract much more international audiences.

1.4. Funding sources of the audiovisual sector

Fiction audiovisual production in Colombia depends mainly on funding resources. In 2022, the call of the Ministry of Information and Communication Technologies (MinTic) “Abre cámara” was highlighted, which granted US\$ 6 million to produce 86 productions in six categories, among which different series to be broadcast on the Señal Colombia channel stand out. These categories included production companies with resources in excess of US\$4 million for 42 projects on different topics, micro, small and medium-sized production companies with resources in excess of US\$741 thousand for 15 products, indigenous communities with resources of US\$250 thousand million for 13 contents, black, Afro-descendant, Raizal and Palenquero communities, and Rom communities with resources of approximately US\$250 thousand million for 6 projects, non-profit television service operators with resources close to US\$200 thousand for 4 documentary series, and community television service operators with resources of almost US\$200 thousand for 9 documentary productions and transmedia products related to peace issues.

A relevant aspect is the existence of the Film Development Fund (FDC) in Colombia, which is financed through a parafiscal fee paid by exhibitors, distributors, and producers of cinematographic works. These resources are reinvested in the film sector and are of a public nature, subject to the supervision of state control agencies. The FDC was created under Law 814 of 2003, known as the Film Law, and during 2022 offered 4.5 billion pesos in incentives for the creation, production, and distribution of fiction audiovisual content.

Television channels obtain financing from various sources, including advertising. Almost 40% of companies allocate part of their budget to advertising. Most of the advertising investment, 77%, is made through digital media, while the remaining 23% is directed to traditional audiovisual media. Among the digital media most used by companies for advertising are Facebook, used by 62% of companies, followed by Instagram with 58% and YouTube with 16%. However, this does not indicate a decrease in funding, since, although many large companies have directed their resources towards digital media, it is the younger or smaller companies that use advertising on platforms, so investment in traditional media has not varied significantly compared to previous years.

1.5. Communication policies

The main purpose of Law 2213 of 2022 is to improve the justice system in Colombia through the implementation of information and communication technologies, resulting in the consolidation of both audiovisual and digital processes. This law establishes the permanent validity of Legislative Decree 806 of 2020 and aims to streamline judicial processes, facilitate attention to users and address child protection issues more efficiently. In the second quarter of 2022, a review and simplification of the specific aspects related to child protection was carried out, considering the update of the existing regulation on viewer protection and the results of a study on children and audiovisual media.

The Ministry of Information Technologies and Communications Information and Communications (MinTIC) issued the Decree 1263 of 2022, which sets guidelines and standards for the Public Digital Transformation. The objective of this decree is to strengthen the efficiency and proactivity of public entities using information and communications technologies (ICT). In addition, it is framed within the update of the Digital Government Policy, with the purpose of achieving a modern and competitive Colombia through the digital transformation of the State, to improve the provision of services to citizens.

1.6. Digital and mobile connectivity infrastructure.

In 2022, there was growth in connectivity figures in Colombia compared to 2021. Internet access covered 770 thousand more people, representing an increase of 2.2%. Likewise, mobile connections increased by 4.4 million users, equivalent to a 4.4% growth. In addition, the population active in social networks increased by 2.8 million people, an increase of 7.2%.

As for the devices used to access the Internet, 93.9% of users did so through mobile devices, while 80% used laptops and PCs, and 89.2% used smartphones. There were also other devices used, such as tablets, which accounted for 26.4%, and consoles, which accounted for 13.9%. In addition, 30.6% of people connected from laptops or work PCs, while 74.9% did so from personal computers. Regarding

the most visited websites, Google led as the search engine par excellence. It was followed by YouTube in second place and Facebook in third place, these being the most popular social networks.

These data demonstrate the continued growth of connectivity in Colombia in relation to 2021, as presented above, with a significant increase in Internet access, the use of mobile devices and participation in social networks. This has important implications in terms of communication, access to information and the use of various digital platforms.

2. Analysis of the year: national and Ibero-American premiere fiction on broadcast TV

Table 1. Premiere fictions exhibited in 2022

<p>UNRELEASED NATIONAL TITLES – 7</p> <p>Canal Caracol - 3</p> <ol style="list-style-type: none"> 1. <i>Arelys Henao: Canto Para No Llorar</i> (Serie) 2. <i>Las Villamizar</i> (Serie) 3. <i>El Rey, Vicente Fernández</i> (Serie) <p>Canal RCN – 4</p> <ol style="list-style-type: none"> 4. <i>Leandro Díaz</i> (Serie) 5. <i>Te la Dedico</i> (Telenovela) 6. <i>Dejémonos de Vargas</i> (Serie) 7. <i>Hasta que la Plata Nos Separe</i> (Telenovela) 	<p>COPRODUCTIONS – 0</p> <p>UNRELEASED FOREIGN TITLES – 2</p> <p>Canal Caracol – 1</p> <ol style="list-style-type: none"> 1. <i>La Desalmada</i> (Telenovela-México) <p>Canal RCN – 1</p> <ol style="list-style-type: none"> 1. <i>Te Acuerdas De Mi</i> (Telenovela- México) <p>TOTAL UNRELEASED TITLES: 9</p>
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Source: Obitel Colombia

TABLE 1b. Reruns Exhibition in 2022

<p>NATIONAL RERUNS – 7</p> <p>Canal Caracol – 4</p> <ol style="list-style-type: none"> 1. <i>Nuevo Rico, Nuevo Pobre</i> (Telenovela) 2. <i>Vecinos</i> (Telenovela) 3. <i>Los Briceño</i> (Serie) 4. <i>Las Hermanitas Calle</i> (Serie) <p>Canal RCN – 3</p> <ol style="list-style-type: none"> 3. <i>Ecomoda</i> (Serie) 4. <i>Café con Aroma de Mujer</i> (Telenovela) 5. <i>Lady, la Vendedora de Rosas</i> (Telenovela) 	<p>FOREIGN RERUNS – 2</p> <p>Canal 1 – 1</p> <ol style="list-style-type: none"> 1. <i>La Rosa de Guadalupe</i> (Serie, México) 2. <i>La Usurpadora</i> (Telenovela, México) <p>TOTAL RERUNS: 9</p>
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Source: Obitel Colombia

In 2022, there is an equal situation in terms of the number of premiere fictions and re-runs. It is also worth highlighting 2 premieres, typical of the wave of Turkish productions that mainly occupy the afternoon programming in Colombia: *Hercai* and *Kizim*.

Table 2 Premiere National Fiction

Year	Tittles	Episodes	Hours
2018	12	1080	810
2019	11	990	743
2020	8	720	540
2021	9	790	615
2022	7	429	315

Source: OBITEL Colombia

In the last year, national premiere fiction has marked a process that fluctuates between growth and reduction in the number of episodes and times. This is due to the importance of the series format as the preferred format for new productions released in 2022.

Table 3. Formats of national premiere fiction

Format	Tittle					Hours				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
Telenovela	1	4	4	7	2	67:30	270:00	270:00	472:30	54:30
Series	11	7	4	2	5	742:30	472:30	270:00	202:30	260:30
Miniseries	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Sitcom	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Unitary	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Docudrama	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Others	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Totals	13	11	8	9	7	810:00	742:30	540:00	675:00	315:00

Source: OBITEL Colombia

In the national case, the year presents a turn towards the series format as the preferred format in the case of premiere fiction.

Table 4. Premiere fiction exhibited in 2022: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	7	72	315:00	71
OBITEL COUNTRIES (total)	2	28	128:00	29
Argentina	0	0	0:00	0
Brasil	0	0	0:00	0
Chile	0	0	0:00	0
Colombia	7	72	315:00	36
Ecuador	0	0	0:00	0
España	0	0	0:00	0
EE.UU. Hispanic	0	0	0:00	0
México	2	28	128:00	32
Perú	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
COPRODUCTIONS (Totals)	0	0	0:00	0
National Coproductions	0	0	0:00	0
OBITEL Countries Coproductions	0	0	0:00	0
TOTAL	9	100	443:00	100

Source: OBITEL Colombia

The table above shows how national production played a leading role in the 2022 releases in Colombia.

TABLE 5. National fiction formats and Obitel exhibited in 2022

Format	Titles				Hours			
	Nationals	%	Obitel	%	Nationals	%	Obitel	%
Telenovela	2	16	2	100	54:30	18	128:00	100
Serie	5	84	0	0	260:30	82	0:00	0
Miniserie	0	0	0	0	0:00	0	0:00	0
Sitcom	0	0	0	0	0:00	0	0:00	0
Unitary	0	0	0	0	0:00	0	0:00	0
Docudrama	0	0	0	0	0:00	0	0:00	0
Others	0	0	0	0	0:00	0	0:00	0
Total	7	100	2	100	315:00	100	128:00	100

Source: OBITEL Colombia

The table above shows the importance of the series in television consumption in Colombia, continuing with the trend presented in recent years.

TABLE 6: 10 Most watched titles

Title		Channel	Producer (Country)	Format/genre	No. de cap/ep en 2022	Time Zone	Rating	Share
1	<i>Arellys Henao: Canto Para No Llorar</i>	Caracol	Colombia	Serie	65	Prime	20,02	52,01
2	<i>Las Villamizar</i>	Caracol	Colombia	Serie	72	Prime	19,35	38,41
3	<i>Hasta que la Plata Nos Separe</i>	RCN	Colombia	Telenovela	88	Prime	15,61	35,89
4	<i>Leandro Díaz</i>	RCN	Colombia	Serie	63	Prime	15,18	31,35
5	<i>El Rey, Vicente Fernández</i>	Caracol	Colombia	Serie	32	Prime	14,81	32,26
6	<i>La Desalmada</i>	Caracol	México	Telenovela	56	Tarde	5,21	11,35
7	<i>Te la Dedico</i>	RCN	Colombia	Telenovela	107	Prime	5,17	10,56
8	<i>Dejémonos de Vargas</i>	RCN	Colombia	Serie	70	Prime	4,02	9,16
9	<i>Te Acuerdas de Mi</i>	RCN	México	Telenovela	77	Tarde	4,14	8,96
Total of national productions: 7				Original foreign scripts: 2				

Source: OBITEL Colombia

The most watched of the year present a particularity, since, although the table shows this distribution, in which 2 foreign productions appear, their ratings are below other titles with high ratings in the year, since reprises continue to represent a predominant place among audience preferences, a phenomenon that, to a certain extent, is also registered in platforms. Thus, beyond the places indicated in the table, the most outstanding phenomenon is precisely that, in terms of total rating for the year, all of them correspond to Colombian productions, including premiere fictions, 5 reprises: *Nuevo Rico*, *Nuevo Pobre* (17.89), *Vecinos* (17.12), *Las Hermanitas Calle* (16.32), *Café con Aroma de Mujer* (13.56), *Los Briceño* (11.21) and a remake: *Hasta que la Plata Nos Separe*. Once again, Caracol is ahead of RCN in terms of total audience ratings for the year, although in terms of premieres the issue is more even between the two national networks.

**TABLE 7: Audience profile of the top 10 most watched titles:
gender, age, socioeconomic status**

Titles		Channel	Sex %		Socioeconomic Status %			
			Women	Men	ABC1	C2	C3	D
1	<i>Arelys Henao: Canto Para No Llorar</i>	Caracol	55%	45%	40%	30%	20%	10%
2	<i>Las Villamizar</i>	Caracol	60%	40%	60%	20%	10%	10%
3	<i>Hasta que la Plata Nos Separe</i>	RCN	70%	30%	53%	27%	12%	8%
4	<i>Leandro Díaz</i>	RCN	56%	44%	56%	24%	11%	9%
5	<i>El Rey, Vicente Fernández</i>	Caracol	45%	54%	50%	25%	14%	11%
6	<i>La Desalmada</i>	Caracol	65%	35%	58%	27%	12%	3%
7	<i>Te la Dedico</i>	RCN	70%	30%	55%	28%	13%	4%
8	<i>Dejémonos de Vargas</i>	RCN	55%	45%	52%	31%	15%	2%
9	<i>Te Acuerdas de Mi</i>	RCN	65%	35%	50%	26%	18%	4%

Title		Channel	Age (%)					
			04 - 12	13-17	18-24	25-34	35-49	50-64
1	<i>Arelys Henao: Canto Para No Llorar</i>	Caracol	2%	4%	16%	25%	40%	13%
2	<i>Las Villamizar</i>	Caracol	2%	4%	5%	17%	35%	37%
3	<i>Hasta que la Plata Nos Separe</i>	RCN	2%	4%	11%	20%	38%	25%
4	<i>Leandro Díaz</i>	RCN	2%	4%	14%	21%	38%	21%
5	<i>El Rey, Vicente Fernández</i>	Caracol	2%	3%	5%	13%	38%	39%
6	<i>La Desalmada</i>	Caracol	3%	3%	3%	12%	39%	40%
7	<i>Te la Dedico</i>	RCN	2%	5%	5%	12%	34%	42%
8	<i>Dejémonos de Vargas</i>	RCN	2%	7%	3%	11%	37%	41%
9	<i>Te Acuerdas de Mi</i>	RCN	2%	5%	3%	13%	20%	57%

Source: OBITEL Colombia

It is important to consider that some of the most watched productions, particularly the first ones, also had a presence in VoD platforms. It could be considered that the profiles could be susceptible to modification towards a wider audience with specific interests, as in the case of *Arelys Henao, Canto Para No Llorar*, which was not only a success in open signal and platforms, but also in live shows and concerts organized by Caracol.

3. VoD 2022 Monitoring

The offer in audiovisual content with the advent of the Internet has been changing over the years, and today it seems that traditional media are lagging their biggest competitor: the Internet and VoD platforms. There are opposing data regarding the competition for the number of consumers between traditional television and VoD platforms. The Commission for Regulatory Communications (CRC) indicates that the TV is the device with the most presence in Colombia, as 4 of each 10 households have a Smart TV and 54% of those households mentioned that pay the TV service by subscription, while the remaining percentage have the analog TV services and digital terrestrial television (2023).

In contrast, the global consulting firm BB Media (Andina Link, 2023) in its periodic report “Forecast 1Q-2022 Colombia” presented results that indicate that television consumption has already been surpassed and now the most used media to watch audiovisual content are VoD platforms, this is proven in the report, which states that Colombian users consume an average of 13.6 hours of connected video, compared to 8.1 hours of traditional television per day, on average per family. Although the growth of VoD platforms continues to increase, the acquisition of these services lags when compared to the numbers reported by countries such as Brazil or Argentina (Rincón, 2023). It is essential to consider that, according to DANE, the number of Colombian households with Internet access reached only 60.5%, therefore, it may be one of the complications that consumers have when hiring the service, adding the economic reality of many citizens, therefore, it is more affordable to continue with traditional television.

3.1. VoD platforms market in 2022

The VoD platform market faces several competitors, which bring together a variety of formats. It is worth noting the great prominence of traditional media in countries such as Colombia, where 89.5% of households have at least one television set. Its importance increases given Claro’s control in the sector, being the cable TV operator with the largest number of subscribers, with a total of 46.6% of consumers of the service, an indicator that decreased in the June 2022 report, compared to the June 2021 report. UNE-EPM and DIRECTV complete the top of the pay TV companies with the highest number of subscribers in the country. It is worth noting that 43.21% of subscribers are concentrated in only 4 cities: Bogota, Medellin, Barranquilla and Cali. This is in contrast with departments such as Putumayo, Vichada and Guajira, where there are few users, a structural problem caused by the distance to these cities. An interesting case is that of public television with RTVC Play: a free platform with an offer of premiere, cultural, reprises and children’s content. It is worth mentioning productions that revive successful products from other years, such as *N. N.* and the

creation of new formats, such as *El Cubo*, *El Inquisidor II*, which was created in the first season as an initiative to produce with the use of cell phones and was developed as a fully interactive proposal in 2022, for which it is necessary to register on the page to approach a police story narrated in linear mode as interactive through the use of clues to build the story told in the series. In VoD, the effort of the public media system is something to highlight, since, although it does not monopolize the open rating and it is not possible to clearly access data on the number of subscribers given its free nature, it is an example of the ways in which public television can provide a valid offer and in which there is innovation and new creative proposals for free access to the audience.

3.2. Offer of local VoD platforms in 2022 (national, regional within the country).

Local VoD platforms in 2022 offer a set of elements to be taken into consideration, which again go through the disadvantageous situation between private and public in terms of supply and, despite the interesting experimentation and creative possibilities of national production companies, the little interest and investment in production and content development at local level for VoD systems other than those belonging to large companies dedicated to this model of distribution and content creation. This offers a panorama in which the main alternative offers are agglutinated by RTVC and the public media system, whose platform, as already mentioned, is characterized by its free nature and openness to new formats and experimentations in transmedia, interactivity and renovation of narrative structures, without leaving aside, as has been a trend since 2020, offering contents plagued by nostalgia and referring to telenovelas of the past such as *Los Pecados de Inés de Hinojosa* and series such as *N.N.*

It is not possible to point out that, in the national case, apart from the VoD offer of public television, with RTVC Play as leader and the offer of content on YouTube or on their own portals by regional channels such as City Tv (private), Capital, TeleAntioquia, TelePacífico, (public) which is restricted to clips or chapters of their productions on screen, but not in specific productions for streaming as in the case of RTVC, there are other bets beyond some independent productions uploaded to YouTube by small production companies more as a free exhibition of content or reel of their products. This happens, to a large extent, due to the existence of multiple offers of foreign and international origin, as well as the existence of possibilities of access to content through shared account systems, offers of access to VoD with pay TV subscription and even some less conventional options such as the sale of accounts to use for days in some stores in the most popular sectors in the country. Likewise, given the growing interest of independent production companies to access the spaces of large platforms, it has not allowed joining efforts to build alternative initiatives in VoD at national or regional level.

3.3. VoD analysis in 2022: national premiere fiction and co-productions.

In national premiere fiction there is a growing offer in which, alongside two of the large global streaming platforms: Netflix and Amazon Prime, there is also the offer of the public media system, which is responsible for contributing projects in which experimentation with the possibilities of handling new narratives and relationships between audiences and television production become the elements to be highlighted as part of a new framework of relationships between consumers and contents. Thus, together with a higher percentage of premieres on pay platforms, the effort made by national public production is important. It should be noted that possibilities of co-productions with production are also beginning to be explored, as is the case of *Noticia de un Secuestro* and, although it does not correspond to fiction, it should also be mentioned that both Prime Video with the series *Mi Selección Colombia* and RTVC with *Nación Rebelde*, have also begun to launch the documentary series format as an alternative for the consumption of contents in VoD systems.

TABLE 7. National fiction and co-productions screened in 2022 on VoD systems

PREMIERE NATIONAL TITLES	COPRODUCTIONS
<p>Netflix – N° National Tittles 3 1. <i>Arelys Henao</i> (serie) 2. <i>Palpito</i> (serie) 3. <i>Ritmo Salvaje</i> (serie) 4. <i>El Rey, Vicente Fernandez</i> (serie)</p> <p>Prime Video - N° National Tittles 2 1. <i>Primate</i> (serie) 2. <i>Cochina Envidia</i> (serie) 3. <i>Leandro Díaz</i> (serie)</p> <p>RTVC Play– N° National Tittles 2* 1. <i>Reportera Y</i> (serie) 2. <i>El Cubo. El inquisidor II</i> (serie/interactive experience)</p>	<p>Prime Video– N° Tittles 1 1. <i>Noticia de un Secuestro</i> (miniserie – Chile - Colombia)</p>
Total: 9	Total:1

Source: Obitel Colombia

3.4. VoD narrative features in 2022

In this aspect it is necessary to highlight the way in which, as in other years, the public media system RTVC offers narrative explorations that must be taken into consideration, because although it is not clear how many subscribers it could count on due to its completely free nature, RTVC Play has presented an example of innovation with the series *El Inquisidor*, which went from the technical exploration in

the use of cell phones as recording device in its first season, to the construction of a bet of interactivity in the season titled *El Cubo. The Inquisitor II*. Thus, for 2022, the proposal consisted of offering, on the one hand, a registration system for access to the narrative experience and, on the other hand, to present two modes of content consumption: the linear, with a chapter structure and the interactive, in which through a system of clues, the viewer is led to discover the mystery narrated in the series, so that an interactive process is achieved, in which the viewer can move freely through the narrative and not only present a new structure of consumption and relationship with the audience, but also a new way of narrating in which there is an alternative to the episodic linearity. It is important to note that the VoD series format is an important trend, with short seasons, miniseries or web series in which synthesis and speed were characteristics of the format, without leaving aside the use of humor, as in the case of broadcast television productions.

4. Interactivity and audience participation in digital environments.

Interactivity strategies in Colombia have continued to be characterized by connecting the audience under both digital and analog mechanisms. The biographical telenovela *Arelys Henao: Canto para no Llorar* (2022) produced by Caracol Televisión is a clear example. The actress and singer who played the artist was Mariana Gómez, who at the time expressed through social networks how excited she was to be part of the project. The singer-songwriter Arelys Henao, meanwhile, took advantage of the circumstances to pay tribute to all Colombian women, being a story that speaks about the struggle and denunciation against femicide, machismo and violence, generating that both the artist and the producer Caracol Televisión lead the campaign “#HagámonosEscuchar”, to invite Colombian women not to remain silent in the face of violence. The initiative was supported by 170 female citizens, positioning both the denunciation issues and the telenovela. Another strategy used by Caracol Televisión was to upload to its YouTube channel the artist’s songs interpreted by Mariana Gómez, achieving both a greater interaction with the audience and a better appropriation of the content. In addition to this, the telenovela was presented on Netflix, having a great reception on the platform.

In August 2022, the interpreter Mariana Gómez posted on her Instagram a concert to which she was invited by the singer Arelys Henao, who sang several songs. The audience’s participation in this event was noticeable, as more than twenty-six thousand users interacted with the publication, not counting the people who attended the concert. The musical anthology telenovela was one of the most successful productions in 2022, so much so that a second installment is rumored for 2023. Now, the exploration of social networks has also left series of famous characters on digital platforms, which proposes new dynamics in which, based on the reception

of the character, audiovisual content is produced that even before its release on VoD platforms are already trending due to the recognition of its protagonists. This is the case of the series *Juanpis González: la Serie*. It stars Alejandro Riaño, who plays Juanpis, a character who has his own talk show, which is attended by major national and international figures, has more than 2.7 million followers on Instagram, 1.9 million subscribers to his YouTube channel and more than 2.4 million views in several of his videos, making him one of the most successful youtubers in the country, which is why Dynamo Producciones in company with Netflix turned this comedy referent into the star of one of the most watched series not only in Latin America, but also in the United States and Canada.

RTVC and Señal Colombia generated interactions with audiences thanks to the series *Nación Rebelde*, premiered in 2022, which not only has the advantage of being free but also includes a web platform with additional clips and a series of podcasts that complement the narrative, which reveals its multimedia nature, showing the openness of the platforms and television to new proposals in terms of content, form and channels used, taking advantage of new technologies. As a result of the publication of the series, *Nación Rebelde* developed an editorial project, which materialized in a 14-episode book, available for free and which, despite not being fiction but documentary, offered an interesting framework for interaction with audiences through the creation of a relationship environment with consumers in different social networks. A separate point is also the case of *El Cubo. El Inquisidor II*, whose commitment to participation was determined even by the very structuring of the narrative and its presentation on screen, through subscription.

Prime Video has also been betting on Colombian products that have generated millions of interactions on the platform, including the adaptation of Gabriel García Márquez's book, *Noticia de un Secuestro*. A co-production that was a boom not only in Colombia, but also in Latin America and proof of this has been the reception of the public, in addition to its nominations in the tenth edition of the Platinum Awards in four categories: best series, best creator of a series, best actress and best supporting actress. In addition, the series *Primate* was very well received in the country, so much so that a new season is planned for this year. In these cases, as in the previous ones, the creation of spaces for dissemination in social networks was fundamental, with spaces dedicated to the productions and which achieved many followers and comments.

In relation to strategies on the part of audiences, it should be noted that, in cases such as *Arelys Henao: Canto para no Llorar*, given the exposure of the fiction and its almost simultaneous premiere on open television and Netflix, not only was it able to impact a large number of audiences, but with the combination with more analog strategies such as concerts and events with the presence of the actress, it also made possible a growing proliferation of fan sites in different social networks, but at the

same time the proliferation of shared content, mainly on Instagram and YouTube (and to a lesser extent TikTok) in which people began to upload their experiences at the artist's concerts and to intertwine them with the viewing of the fiction. Thus, along with the fan sites, content also began to appear that was not precisely focused on the narratives, but also on the artist's music and life, generating a kind of trans-media scenario mediated by the story but at the same time by the experiences of the participants in other scenarios such as the concerts.

5. Highlights of the year

Las The most watched productions in Colombia during 2022 were led by telenovelas and biographical series. These include *Arelys Henao: Canto para no Llorar*, *Leandro Díaz*, *Las Hermanitas Calle* and *El Rey, Vicente Fernández*. In addition to their biographical nature, these series share the theme of music. Here, this issue is raised as an attraction for audiences, where popular music genres are used to capture the attention of the public that identifies with these styles.

This strategy has been employed in national productions for some time. It is worth remembering *Escalona*, *Amor Sincero* and *El Joe, la Leyenda*. It is evident then, the success of using the figure of singers appreciated by the general population to tell stories that audiences like. Although these telenovelas are based on life stories, they also play with a mix of fiction, generally related to melodrama. With this, a more striking narrative is created, which uses emotionality to make sense of the story.

In a second step of popularity, there are productions such as *Café con Aroma de Mujer*, *Vecinos* and *Nuevo Rico Nuevo Pobre*, which can be categorized, in the case of the last two as reprises and the first as a remake. These were very popular telenovelas at the time and were seen again during 2022, both on television and VoD platforms. The use of this type of programs has become very common in Colombia during the last years. The most successful case is *Yo Soy Betty La Fea*, which is the one that ends up tracing a path where it appeals to nostalgia to get the public to watch them again.

However, the situation that arose with *Café con aroma de mujer* is very particular. This is because in 2021 a remake of the original 1994 novel was made. Therefore, both versions, the modern and the original, are presented to the public. In relatively short periods of time and where both are seen by a massive audience. This suggests that, in Colombia, the public enjoys the telenovelas of yesteryear, reinforcing the idea of nostalgic delight.

As for *Las Villamizar*, this novel recovers a story that had already begun with *La Pola*. It tells the story of women who played a leading role in the process of the struggle for independence. These stories emerge from discussions of gender equity and are important to address in the Colombian context, where there is still a patriarchal tendency in certain sectors of society.

Finally, it is necessary to refer to one of the few VoD exclusive productions that had an outstanding reception. This is the case of *Pálpito*, a series that premiered in 2022 and was one of the great successes in terms of novels that year. Presenting a story that touches on themes intertwined with moral dilemmas, and which uses a relatively more complex script than those normally used. These two characteristics made this series so popular during its premiere and, as a result, it was approved by VoD platforms for a second season almost immediately.

This is how the year 2022 was dominated by biographical productions and reprises. Taking popular music and nostalgia as a narrative basis to attract the attention of different audiences and generate identification in them. Without leaving aside the humorous situations and like everyday life, telenovelas show a reflection of Colombian society. The drama, inequalities and love relationships make these productions well received by the Colombian public.

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

In Colombia, the issue of independent production companies and internationalization presents a tension between the possibilities of success and experimentation in terms of narratives, formats, and options for audiovisual creation. This is largely explained by the growing number of training spaces in the field of film and television, as well as the growth of the national offer for digital platforms and the possibility of impacting open television channels nationwide. It is important to point out that the development of different independent production companies has been boosted, both within the national production itself and through the stimuli provided at governmental level and the growing interest in the development of filmmaking in the nation. In the specific case of television fiction, it is important to state that the greatest spaces for development are found in the opening towards digital and VoD platforms rather than towards private national channels and at the same time the interaction and exploration of other spaces such as social networks and public channels as spaces for the growth of national independent production.

However, although it would seem that this is a favorable scenario, with ASO-CINDE (Association of Independent Film and Audiovisual Producers) and a large number of production companies participating in film and television projects, such as Dynamo, 64 A Films, Rhayuela Films, Dago García Producciones, Oso Films, Alibi Films, AG Studios Colombia, Laberinto Cine y Televisión, Lulo Films, Dramax and CMO Producciones, among others, at the national level, there is a complex paradox between the possibilities of making audiovisual products that can effectively become part of national grids or VoD screens and the eternal experimentation in VoD platforms, among others, what we find is a complex paradox between the

possibilities of producing audiovisual products that can effectively become part of national grids or the screens of VoD platforms and the eternal experimentation in which, before going to the international market, audiovisual production ends up being destined to smaller works and even with a certain tendency towards the institutional and strictly commercial market. Independent production in Colombia presents both strengths and opportunities, but also weaknesses and crises in which, although it is possible to produce series and telenovelas for open signal (in which production companies such as CMO stand out) as well as productions for Netflix or HBO (as is the case with Rhayuela Films and Dynamo), at the same time there is a wide offer of production companies that are limited to works more associated with institutional video, commercials in different formats and the filming, transmission and recording of events, without ignoring the growing number of professionals for whom the path is not always given by the participation in international productions, but in the communication assistance to companies and other areas away from the dynamics of the audiovisual sector.

In the first instance, a look at independent production in Colombia is paradoxical, since, on the one hand, there is the capacity and experience to produce multiple productions in which the possibility of narrative, technical and resource innovation is visible, as well as the management and exploration of multiple creative resources; but, on the other hand, there are several independent production companies that do not have access to the scenarios of large productions but are restricted to markets such as video clips, commercials or institutional productions for government entities and companies. A paradox that also reflects the contradiction between the ample guarantees at the level of legislation for audiovisual production in Colombia and, beyond the competitive nature of the audiovisual sector, the difficulty in accessing production circuits in which opportunities for participation are scarce and, sometimes due to the same technical requests, become complex spaces for small or incipient production companies. In other words, although Colombia has a good number of independent production companies and an important offer of training in film and television, the possibilities of internationalization or participation in large productions are restricted to a few actors in the sector, with the vast majority remaining in smaller productions or in the aspiration to win national calls for proposals from governmental entities for audiovisual producers.

Such a paradoxical situation cannot deny the country's production capacity and, due to the very presence of image and production professionals in the nation, as well as the tradition built in recent years at the level of television fiction and film production and the current legislation on audiovisual matters, the possibility of participation in spaces such as platforms and VoD systems in which, as in the case of Netflix, Prime Video and HBO, participation has been achieved in different productions that, as in the case of the first seasons of *Narcos*, the series *Mil Colmillos*,

and specifically in 2022 bets such as *Primate*, *Cochina Envidia*, and, in the case of co-productions, the award-winning *Noticia de un Secuestro*, make visible the capacity of national production to, as in other times when telenovelas were exported, now it is possible through the capacity of independent production companies or through participation in co-productions, generate the conditions to continue making a presence at the international level. In this aspect, the way in which the large national open television channels, Caracol and RCN, have also established agreements and audiovisual production relationships with streaming giants such as Netflix is also decisive, which also opens possibilities for filmmakers who, from the independent sector, have supported the growth of the audiovisual industry in the country. In this aspect also highlights the support of the public sector, both with legal support and with the existence of calls for incentives to filmmakers, and the possibility of being a space for the realization of productions in which audiovisual creativity prevails.

In television fiction, however, it is necessary to take into consideration that it is not the scenario of greatest interest for the realization of independent production, being widely surpassed by the interest in filmmaking and experimentation in transmedia possibilities or in scenarios such as the fliminuto, Smart films and, as happened at the time with Dynamo, participation in Hollywood productions, as was the case of *Barry Seal* and *Mile 22*. This brings to the narrative panorama an interesting question and it is that, precisely, the rhythms of realization and construction of audiovisual narratives in the case of the series, is connected in a deeper way to the techniques of cinema than to the conditions of television, in such a way that, as Lipovetsky and Serroy (2017) announced at the time, cinema is the basis for the construction of ways of recording, editing and even configuring the fictions that appear in VoD systems, so that rather than episodic or seasonal series, what we find are small films made in installments. This is the case of series such as *Mil Colmillos*, whose aesthetics, audiovisual structure and way of organizing the story corresponded more to a cinematographic bet than to an inheritance with the rhythms of telenovelas from the end of the last century and the beginning of the current one, which although they are still part of the most watched programs in open signal and in streaming, as it happens with *Yo Soy Betty la Fea*, they are quite far from the fast-paced speed, the technical exploration and the use of narrative mechanisms similar to those used in cinema for the creation of tension in the configuration of series and fictions in VoD systems.

The inclination towards the film industry once again puts as a present point the tension existing between the possibilities of experimentation in formats, realizations and explorations of creation of audiovisual productions and the limitations, even budgetary of the smaller production companies in the nation and, as has been pointed out, they have their radius of action in the realization of music videos, institutional, commercials and, in some occasions, the participation in festivals, mainly

of short films or experimental or brief productions, such as those corresponding to formats like Smart Films (short films made with cell phones). In this way, it is undeniable that the nation also has an audiovisual sector full of a large number of production companies, which, for this reason, restrict the conditions of participation in the sector to a few, leaving the challenge of innovating and seeking new expressive possibilities to the production companies that, although equally independent, do not have all the conditions of the more traditional and well-known ones. However, this condition also makes visible those other possibilities for independent production in the country, which lie both in the participation in governmental calls and in the exhibition at festivals (in the case of film projects) and the exploration of other scenarios for the dissemination of audiovisual works, as is the case of social networks such as YouTube and Vimeo, where different kinds of productions by production companies such as Indiana Films and others have circulated.

In the country there are different calls for the realization of audiovisual projects with government funding that allow both small production companies and filmmakers to access financial conditions for the materialization of audiovisual ideas, although all of them within the framework of the themes and searches of the stimulus programs of entities such as the Ministry of Culture. These spaces allow creators, directors and, in some occasions, small production companies, to have access to possibilities of generating contents that, although not specifically in the field of television fiction, become productions with a social and cultural sense of growing importance for the nation. At this same level are also community projects, initiatives led by the academy and other audiovisual production processes that do not go through either the private or public sector, but emerge as spaces for the creation or visibility of productions, as in cases such as the Ojo al Sancocho festival, which has not only been a space for the promotion of alternative film productions, but also becomes a scenario for the encounter with independent production companies, which are not in the more commercial spectrum but, from the communities, also generate content (primarily in film) and reflect other possibilities of creation in the independent sector and that, before the commercial scheme, also seek internationalization through the path of commitment to the social and cultural groups in which their audiovisual proposals emerge. In this aspect, it is also important to point out the way in which, in the case of the public media system RTVC, and mainly in the VoD system, experimentations such as the interactive series *El Cubo*, *El Inquisidor II*, are becoming more frequent.

Independent production in Colombia is therefore a growing scenario that, although it presents a contradiction between the possibilities of internationalization of the production companies with more tradition and screen presence since the times of the preponderance of open television and the smaller production companies restricted to promotional, musical and institutional productions, continues to

show the ample possibilities in Colombia to create narratives, experiment with new formats, achieve international presence in spaces such as VoD and generate other possibilities in areas such as festivals where, as in the case of Smart Films and Ojo al Sancocho, other conditions for audiovisual production appear, whether from technical innovation or community commitment.

In this way, independent production in Colombia offers a condition of growth and expansion that is debated between the success given by the participation in productions for large national networks or streaming companies with international visibility and innovation and experimentation for new narratives and possibilities of realization in which cinema is a starting point and, at the same time, it renews that creative nature and production capacity that characterizes the country since the times when the telenovelas were translated into other languages in other parts of the world, at the same time, it renews that creative nature and production capacity that characterizes the country since the times when telenovelas were translated into other languages in other latitudes and that now, with independent production companies, is making its way again in spaces such as Netflix, Primer Video and HBO. Colombia could not be considered a powerhouse of independent production, but it is possible to point out that it is a growing space in the country, with new horizons to explore and the conditions to build the possibilities to be a reference in audiovisual production and experimentation of new formats and techniques such as the use of cell phones or the creation of transmedia, non-linear or directly interactive narratives.

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