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***The Origins of Premium Television Fiction in Spain.
Canal+ and Its Evolution Towards New Ways of Production and
Distribution as Movistar+***

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The transformations that the Spanish audio-visual market has experienced in recent decades find in Canal+ España an example that, given the growth of the company, illustrates two of the most significant changes occurred. The first concerns technology itself; the second refers to the increase in the production of original fiction, which has been referred to as the “boom” of Spanish productions. Although paid television was launched in Spain back in 1990, Canal+ Spain invested little in original fiction since. In 2015, Canal+ was taken over by Telefónica, a leading telco, and now, renamed Movistar+, is the undeniable leader in the pay television market. The chapter spotlights how all these changes have affected the main titles of fiction produced and planned by this platform. The entry of new competitors in Spain since 2015 triggered the commission of new abundant original production, branded as “Originales Movistar+”. Through a description of the main characteristics of its “prestige” fiction between 2017–2019, the chapter details how this national case is a prominent example of the transition towards a new global market for the production and circulation of top-quality original fiction.

1. Introduction. Movistar+ in the current context of digital change in the production and reception of fiction in Spain

The transformations that the Spanish audio-visual market has experienced in recent decades find in Canal+ España an example that, given the growth of the company, illustrates two of the most significant changes to have occurred on the Spanish television panorama. The first concerns television technology itself; the second refers to the increase in the production of original TV fiction, which has been referred to as the “boom” of Spanish productions, serving up notable examples including *La casa de papel* (*Money Heist*) and *Las chicas del cable* (*Cable Girls*), worldwide hits thanks to streaming platforms such as Netflix. Both events are

deeply embedded in the logic of the transformation of the television industry into an international business during the first two decades of this century, where the globalization of national productions is commonplace, and where pay television (in its multiple forms) is gaining ground on the consumption of content broadcast by traditional free-to-view television operators¹. As mentioned, the case of Canal+ España illustrates these two changes (technology breakthroughs and the increase in the production of original Spanish television fiction). This evolution also exposes the changes introduced in the actual concept of the production of television fiction: from being a practically non-existent activity, to now doing all of the heavy lifting in enticing its telecommunications users to subscribe to audio-visual content.

Tech and corporate changes have, unquestionably, shaped the context that has made this transformation possible. Canal+ España, the first Spanish state pay television operator, initiated its operations in 1990 and now, thirty years down the line and rebranded as Movistar+, it has become the leading player on the pay television landscape. From the 1990s until the present time, Canal+ has transitioned from being the first Spanish state pay television channel, broadcasting content by satellite, into what is now a wellknown brand. This operator, owned by a telecom company with a huge subscriber base, is the leading pay-to-view service in Spain as well as the most popular among Spanish viewers, thanks to the strong penetration of fibre optics (broadband Internet). In 2019, all the pay television options available in Spain (IPTV, cable TV, satellite TV and online TV) have broken the record for television consumption in Spanish households. Pay television is watched in 6.7 million households, while the total number of potential viewers is 18 million. Broken down by the type of distribution of pay television, IPTV represents 67%, cable television 19%, satellite television 9% and subscriptions to online television represents 4% (Barlovento 2019, 29-31). In terms of overall television consumption, in 2019 pay television channels obtained 25.7% audience share as opposed to 74% for free digital terrestrial television channels. It is important to note that these paid-for services also include free channels, which still pull in the greatest number of viewers, even within the offer of subscription-based platforms.

Be that as it may, Movistar+ is the undeniable leader on the pay television market, since it reaches some 4,100,000 Spanish households, representing a 60% penetration in the pay television market (Barlovento 2019, 30). To a great extent, the upswing in the consumption of pay television in Spain since 2016 has been triggered by offers that combine audio-visual and telecommunication services delivered by Telefónica-owned Movistar+. It is also important to note how OTT subscription-based platforms have soared. Official data for 2018 provided by García-Leiva, for example, reveal that 12.5% of Spanish households subscribed to Netflix to watch online content, whereas on-device consumption of Movistar+ (not IPTV-based viewing) represented 13.4%, while Amazon Prime represented 4% and HBO 2.9% (García-Leiva 2019, 78-79). Fiercer competition over the last five years has accelerated the shift to pay television and on-demand content. Netflix started operating in Spain in October 2015, HBO España rolled out its services in

November 2016, Amazon Prime Video entered the market in December 2016, Sky España (until September 2020), Apple TV in November 2019 and Disney+, launched in early 2020.

Given the growing number of competitors, operators have focused on producing original and exclusive television fiction. This is in addition to the fact that platforms such as Netflix have decided to set up production hubs in Spain, alongside the first slate of original productions for HBO and other operators, including Movistar+, which together have fuelled the increase in Spanish productions of television fiction. Consequently, whereas 38 original Spanish shows premiered in 2015, this figure rose to 50 in 2018. The predictions for 2019 ramp the total up to 78 original Spanish fictions (57 new shows and 21 new seasons), with Netflix, HBO and Amazon accounting for 22 of the totals (García-Leiva 2019, 91).

It is worth noting that Canal+/Movistar+ has experienced the ebb and flow of the production of scripted series in Spain (Lacalle, Sánchez-Ares, 2019). Before the contemporary model of diversification, between 1990 and 2017, the production of series in Spain, primarily for broadcast television channels (RTVE, Atresmedia, Mediaset España), focused on comedy and drama as the prevailing genres, with drama taking the lead in 2010. Furthermore, genres involving intrigue (police dramas and thrillers) also saw a significant increase over the latter period. In addition, the evolution over these three decades revealed a tendency to gradually reduce the number of episodes per series and the running time of the episodes on both pay TV and free-to-view channels. These two aspects have also characterised the current environment, generated by the competition from digital platforms.

It comes as no surprise that, as some authors have already noted (Cascajosa 2018), the recent prominence of the Movistar+ brand linked to the production of “prestige” television fiction has followed the path of already familiar strategies. As a result, the interest in creating or consolidating a brand associated with these “premium” productions, as opposed to content produced by traditional channels, emulates the approach implemented by HBO. Furthermore, by adapting the strategy used to roll out series, with gradual premieres and releasing all the episodes in one block for non-linear consumption, it replicates the game plan implemented successfully by Netflix around the globe.

2. From Canal+ to Movistar+: a long technological and corporate evolution with barely any original fiction production

On launch, following in the footsteps of the French channel of the same name (created in 1984), Canal + was introduced as a subscription-based satellite television, owned by Spanish media group PRISA. Canal+ España was launched in 1990 and focused mainly on broadcasting film content, sports (mostly football), bullfighting and talk shows. Canal+ started out as a single channel network that required a set-top box and a monthly subscription, which later gave way to Canal Satélite Digital (1997), a platform that tapped into new digital technology to offer a wider catalogue of channels, competing with another similar pay box, Vía

Digital, owned by the leading telecom company in Spain, Telefónica. Both brands merged in 2003, giving rise to the platform “Digital+”, which included the former Canal + as one of the channels in its catalogue. In 2011, this multichannel platform (which did not involve the merger of both companies, since Telefónica continued to develop other telecom products) was once again renamed Canal+. Thanks to the advances made in the field of digital technology and the widespread availability of internet connections in households, this new iteration of Canal+ launched a new service included with the traditional multichannel package: “Yomvi”. This was the first on-demand online video service, that was made available online and which could also be accessed using the platform’s revamped set-top boxes.

Over time, the development of television technology based on broadband internet (IPTV) led Telefónica to introduce, in parallel, a major competitor, which it rolled out under the brand Movistar TV, i.e. their own multichannel television platform. December 2014 saw the launch of the channel Movistar Series, which focused on content created in the US. Finally, in 2015 Telefónica acquired the original platform Canal + (satellite), which alongside Movistar TV (IPTV), gave way to the current Movistar + that launched in July 2015. In 2016, the platform rebranded as Movistar+, which became the denomination used to refer to all the services the platform provided, both for watching online (internet) and via television (IPTV). The former brand and the channel Canal+, whose rights belonged to the French group Vivendi, disappeared as such. In its place, the platform launched another television network called “#0,” which premiered in February 2016. That same year, “Yomvi” services were rebranded as Movistar+.

In terms of original fiction content, during the period from 1990 to 2005, neither Canal+ nor its subsequent rebrandings as a multiplatform focused on the production of series as a strategic line of business. It pioneered many technological changes and certain broadcasting formats but did not innovate in the production of fiction. Even Canal+ Series, a channel for fiction that the platform introduced in 2013, did not broadcast Spanish shows, programming mostly US productions. Nevertheless, Canal+ España did produce a couple of examples of original content for television, which made waves among specialists and garnered critical recognition. One was the mini-series *¿Qué fue de Jorge Sanz?* (2010), a comedy about the trials and tribulations of a former child star now pushing forty years old. The show consisted of six 35-minute episodes and it had two added specials which broadcast in 2016 and 2017. However, the show that most stands out from that lean period of Canal+ is undoubtedly *Crematorio* (2011), directed by José Sánchez-Cabezudo. One of the most-acclaimed productions in the history of Spanish fiction, and based on a novel by Rafael Chirbes, the series was the first to address the issue of political corruption. Canal+ also participated in some European co-productions, such as *Falcon*, and occasional mini-series, but original fiction was very scarce, even after merging with its main competitor. These experiences, alongside minor productions from the platform’s secondary channels (including the art house series *Todas las mujeres* on TNT), served as a foretaste to

the initiative to embrace prestige Spanish fiction, launched halfway through the last decade.

3. The first step to actively focus on producing premium fiction series

The entry of new competitors onto the pay television market in Spain triggered the commission of new original fiction, which Telefónica subsequently branded as “Originales Movistar+.” Furthermore, as noted by Cascajosa, since 2015 the mission of Movistar+ has been, on the one hand, to tap into their ability to provide on-demand video via the services of the fibre optics carrier and, on the other, to add audio-visual production value to the Movistar+ brand, which did not have a name in that field, unlike the former Canal+ brand (Cascajosa 2018, 58). As a result, a determined effort was made to increase the loyalty of Spanish subscribers based on exclusive television fiction content. The first announcement of Movistar TV focusing on series dates to early 2015, just before merging with Canal+. Executives announced then the production of a big budget period piece called *La Peste (The Plague)*, directed by a renowned filmmaker Alberto Rodríguez, (who helmed the acclaimed film *La Isla Mínima [Marshland]*). The production of this period thriller set in 16th century Seville was pushed back, and the first season finally premiered in 2018, followed by a second season in 2019. Cascajosa, compares Movistar+’s strategy of embracing fiction production and the worldwide journey embarked upon by both HBO and Netflix. Namely, it focuses on a different distribution and operating model (the goal is not exclusiveness, in contrast with the approach used in the 1990s with Canal +), as well as on brand positioning based on the concept of quality productions as the differentiating factor to compete with broadcast television networks. The initial effort was backed by an investment of €70 million. The head of fiction for Movistar+, Domingo Corral, who formerly worked at Canal+ and the Turner Group, advanced that “original productions and quality content creation is an essential part of Movistar strategy moving forward and of our focus on value and quality.” (*Fórmula TV*, 2015). This decision started to bear fruits, mainly, as of the 2017-2018 season.

3.1. The 2017-2018 season: the focus on Spanish fiction starts to produce solid results

So, what happened when the new platform flexed its muscles and promoted the “Originales de Movistar+” brand to produce quality content and flaunt their ambition in the face of the growing threat from international platforms? We can draw several conclusions from Cascajosa’s detailed analysis (2018) on the number of premieres in the first season (2017-2018) of television series created under the new Movistar+ production banner:

a) A solid focus on productions co-created with production companies that did not always have a background in television fiction, since projects were chosen based on the originality of the stories. Therefore, there was a notable presence of film production companies or companies with no experience in television during the initial stages.

b) From the creative point of view, the executive producer for fiction at Movistar+, Domingo Corral, became the common link between the productions based largely on the “screenwriter-director” approach. “The biggest challenge is being different from the rest and making something relevant. That is the hardest part. And to do so, it will become increasingly important to spend time developing the story,” Domingo Corral said about this point (Zárate 2019). As Cascajosa points out in her detailed analysis, it was not about adapting “the model of the creator-writer-producer in the manner of the US showrunner,” despite the emphasis placed on the authors (Casajosa 2018, p. 63).

c) No new ground was broken in terms of genres, where drama was favoured over comedy and suspense was also an element common to many productions. But there was some creative innovation, at least in the treatment of issues and locations, with a depiction of Spain which, as opposed to the representation on broadcast TV networks, ventured “beyond Madrid” to film in other Spanish cities (which had already happened with *Crematorio*).

d) As regards the number of episodes and the running time of each episode, Cascajosa also notes that Movistar+ decided to “abandon the standard 70-minute episode time for television fiction (for drama and comedy)” (Cascajosa 2018, 65). This shift was particularly notable for comedies, which cut running times drastically (down to 25 minutes per episode), three times shorter than comedies airing on broadcast networks, while maximum running times of 55-60 minutes were allotted to dramas and thrillers.

The first season of premieres of original productions saw Movistar+ roll out eight fiction series, two comedies and six offerings in the genres of drama (4) and suspense (2). Both comedies were a critical and commercial success and, although there are no audience ratings available, the operator lists them among the most watched shows. The first comedy *Vergüenza (Shame)* (2017), is a dramedy about the romantic, family and work relationships of an unhinged male character. Directed and created by Álvaro Fernández-Armero and Juan Cavestany, the show presents an absurd take on the challenges faced by a middle-aged man that sees his job and his relationship fall apart. Equally successful was the comedy *Mira lo que has hecho* (2018), created by and starring Berto Romero, a stand-up comic who got his big break on late-night shows aired on Spanish broadcast networks. Presented in the manner of a sitcom, the comedy focuses on a thirty-something couple confronting parenthood for the first time and assessing how the new arrival will affect their relationship and their life together. Filmed in and around Barcelona, the platform stated that *Mira lo que has hecho* is also one of the most-watched shows on Movistar+.

As regards dramas, it is important to note that the study will exclude the special experiment *Velvet Colección*, a “spin-off” of a series that aired previously on a broadcast network (Antena 3, Atresmedia), and was picked up by Movistar+ for a sequel. The audience of the show (produced with Bambú Producciones) on free-to-air television followed the show over to the pay television channel, making the *Velvet Colección* one of the best-received series (according to the platform). The

other three dramas launched during the 2017-2018 season were *La Zona* (2018), an unusual combination of science fiction and suspense surrounding a nuclear disaster, filmed in the north of Spain as a limited 8-episode series; *Matar al padre* (2018), a four-episode drama filmed in Barcelona with a tongue-in-cheek take on family relationships; and *El día de mañana* (*What the Future Holds*) (2018), possibly the most traditional production, similar to the shows created for free-to-air channels. Directed by filmmaker Mariano Barroso, who had created content (*Todas las mujeres*) back in the days of Canal+, before the merger of the platforms, *El día de mañana* is a six-parter about a man who moved from the countryside to Barcelona hoping to make it big, spanning the period from the 1960s until the mid-1970s. Based on a novel, the critics applauded it as “almost” network-like, “which doesn’t mean that it is entirely mainstream. The show is still *arty* but it is not weird or for minority viewing” (Marín, 2018).

With rave reviews for the acting and the setting, and one newspaper claiming that “*El día de mañana* is a Movistar series for normal people,” the show contextualised the image that Movistar+ wanted to convey with its first foray into the production of fiction: “Free-to-view channels try to appeal to every age bracket, from the grandparents to the kids. HBO focuses on adults. Netflix claims not to have a target audience. Movistar seems to favour quality over ratings. That is neither good nor bad, but its catalogue seems more like a luxury showcase than a display of a channel hoping to break ratings records. The trend becomes evident upon studying the selection of creators, most of whom are filmmakers” (Marín Bellón, 2018). Finally, rounding off the list of premieres, are two suspense stories or thrillers, which are also quite unusual. The most relevant show launched during the first season was what was announced as the platform’s flagship premium production: *La Peste* (2018). According to data from the operator, the series had a €10 million budget for the first season, averaging a €1.6 million budget per episode (Fernández 2019). *La Peste* is set in 16th century Seville, during one of the worst epidemics of bubonic plague to hit the city, one of the wealthiest and largest in Spain at the time.

According to the platform, the premiere of the first season broke several records: in the first four days after launch, the average ratings for the first episode exceeded the previous record by 40%, held by the launch of the seventh season of *Game of Thrones*. In addition, 90% of viewers watched on-demand, which proved that airing the shows on the platform’s general pay channel #0 barely attracted viewers, and that they benefited from on-demand availability (Movistar 2018). The show’s success led to it securing a second season order almost right away (released in 2019), and international distribution, with the broadcast rights being acquired by the BBC for the UK and by Sky for Germany. The second unusual thriller was called *Félix* (2018), a 50-minute six-episode mini-series filmed in the Principality of Andorra, directed by filmmaker Cesc Gay, combining romantic storylines with comedy and suspense. The series was the only Spanish production to participate in the 2018 Canneseries Festival. In fact, being selected for a range of national and international festivals, and picking up professional awards, has endorsed the quality policy embraced by Movistar+ in their venture into premium fiction

production. Nevertheless, this first period also stands out for the lack of female directors or women involved in projects in other creative capacities (only one of the productions [*Matar al padre*] was helmed by a female director, Marta Coll). Subsequent productions have aimed to correct these statistics and they have also opened their slate of projects to attract younger viewers, whilst remaining true to their core goals.

4. Movistar+'s TV fiction slate for the 2018-2019 season: new nods to young audiences and a wider range of topics

The 2018-2019 season greeted subscribers with a new slate of original fiction, available on-demand and for linear scheduling on the channel #0, replicating the trends embraced in previous productions, albeit introducing some notable innovations. In some cases, the operator branched out into new genres in an attempt to broaden their catalogue and also, to target audiences that had been overlooked by the “Originales de Movistar+” brand, setting their sights specifically on younger audiences and female viewers. As for original fiction, Movistar+ released eleven productions during the 2018-2019 season. The head of production for the platform has explained that their goal was to maintain the “slowly but surely” policy for releasing content at a steady rate, so as not to overwhelm viewers and keep up the quality: “We are not about volume. Each platform has its strategy, and we have our own values” (Zárate 2019a). In the eleven fiction productions that premiered in 2018-2019 (7 dramas or thrillers and 4 comedies) once again more relevance was given to drama or suspense series, but diversifying original nuances, improving storylines to make the plots more dynamic, bringing in new perspectives or appealing to new viewers by addressing a wider range of topics.

4.1. New dramas for all audiences, with a focus on young viewers

Dramas and thrillers covered a wider assortment of genres than the content released during the first season analysed. The most ground-breaking idea was a Spanish adaptation of an international hit series. The first season (12 episodes) of the Spanish remake of Norwegian teen show *Skam* was released in September 2018. The scripts for *Skam España* were adapted to Spanish reality, while maintaining the essence of the original and the core story. “Scripts were not simply translated literally, since that would have crippled the show. The life of youths in Spain is not the same as in Norway, and we wanted to find authenticity. The plots are very much adapted to Spain, although both shows share the same DNA,” explains the head of fiction for Movistar+ (Onieva 2018). The show —the first foray into the world of young adult viewers— was so successful that a second season premiered in 2019 and picked up orders for two more seasons. The second season of *Skam España* made the show a fixture on the platform and became a hot topic on social media (particularly on Instagram). The profiles of the lead characters in the Spanish remake have the most followers among all international adaptations of *Skam*. *Skam España* does seem to “mirror the growth and coming-of-age process experienced by a generation of young women” (Cascajosa 2018b).

In addition, women also played an important role as writers and directors (Estíbaliz Burgaleta and Begoña Álvarez, among others).

Moving on to the thrillers, after a long production process, October 2018 saw the release of *Gigantes* (Giants), a two-season series (12 60-minute episodes) from action film director Enrique Urbizu and Jorge Dorado. In this case the fiction followed in the footsteps of an urban show focusing , on drug trafficking in Madrid, adding a rush of adrenalin (Montoya 2019). That frenzied pace was possibly the main innovation, since according to a critic, “Series as notable as Movistar+’s *La Peste* and *La Zona* had a clear weak spot in that, despite creating bold fictional universes, they were unable to move the plot along at the pace needed to keep the viewers’ attention. In other words, they were a bit boring. Compared to sister shows, *Gigantes* hits the ground running and makes for very enjoyable viewing” (Onieva 2018b).

Another of the platform’s big bets, the suspense show *Hierro*, which proved to be a big winner, barely got any bad press in specialised media. Part thriller, part drama, the show was released in June 2019. As a co-production with French-German channel ARTE and French company Atlantique Productions, the show garnered rave reviews, among other reasons, for repeating the platform’s common practice of filming on site in locations that are not usually featured in fiction produced by broadcast networks. A critic considered it was “One of the best Spanish series this season for several reasons: the script works, the exterior locations are extraordinary and the acting by the cast is equally good” (Harguindey 2019). Filmed on the island of the same name in the Canaries, the leading actors Candela Peña and Darío Grandinetti, received critical praise and recognitions at award shows. According to information from Movistar+, the show became the second-most viewed of its original production releases and the channel has ordered a second season. which is currently in production. In the words of a Spanish critic, this “thriller is not breaking new ground, but it does have everything you can ask of good television fiction” (Zárate 2019b).

Back in January 2019, the platform released *El embarcadero* (*The Pier*), an eight-episode drama about intrigue and personal relationships. Álex Pina and Esther Martínez Lobato, creators of the worldwide success *La casa de papel* (*Money Heist*) were in charge of the show, filmed in Valencia. Whilst Movistar+ had increased the platform’s international co-productions with *Hierro*, *El embarcadero* was co-produced with Spain’s Atresmedia Studios (which created very successful fiction productions for broadcast network, including the aforementioned *La casa de papel*, the first seasons of *Velvet* and *Vis a Vis*). The collaboration agreement went a step further after the announcement of the establishment, in September 2019, of a joint creative venture between Atresmedia Studios and Movistar+ to co-produce Spanish fiction productions for the international market. The cooperation between the two production companies produced solid results, and *El embarcadero* was picked up for a second season, released in 2020. On this occasion, the reviews applauded the introduction of a storyline that could have aired on network television. “Pay television operators can learn a lot from network televisions, who bring decades of experience to the table

and work with creators who are now highly sought after by the main international platforms. Movistar+ should not limit productions to high-brow content for discerning viewers, since the platform can reach a much wider audience with products such as *El embarcadero* and *El día de mañana*” (Cortés 2019).

Movistar+ once again joined forces with Spanish production powerhouses with a solid background in free-to-view television fiction on the co-production of the mini-series *En el corredor de la muerte* (*On Death Row*) (released in September 2019), about Pablo Ibar, sentenced to death in the US, trying to prove his innocence. Starring Miguel Ángel Silvestre (*Sense 8*), the fiction was co-produced on this occasion again with Bambú Producciones (*Velvet Colección* for Movistar+ and *Las chicas del cable* for Netflix). Those four episodes were very well received, unlike the erotic thriller *Instinto* (2019), also produced with the company for Movistar+. Reviews were mostly negative: “The show is nuts, mixing thriller, family drama and psychology and hypnosis manuals. All wrapped up with a ribbon-shaped S&M whip” (Fernández-Santos 2019). Nevertheless, the head of fiction for Movistar+ refutes the bad reviews and states that the show was created for a niche audience and does not see it as a mistake (García 2020). Movistar+’s last release in 2019 also focused on younger viewers. It was an innovative spin-off of the show *Merlí*, which became a hit on a regional channel (TV3, public network of Catalonia) and then on Netflix. In this case, the Movistar+ iteration was called *Merlí: Sapere Aude* and, whereas the original was set in a high school, the spin off saw the characters heading off to university. Once again, the plot combines philosophical concepts and sentimental relationships. The production, the first show in Catalan by the platform, appeals to younger viewers, as noted by critics reviewing the show (Harguindey 2019b).

4.2. New and successful comedies

Recent academic research carried out in Spain has proven that some programmes broadcast on Movistar+’s network channel #0 have a big fanbase among young Spanish viewers. One such programme is the late-night show *La Resistencia*, which also has a channel on YouTube with over one million subscribers. Whilst the linear consumption of fiction television on #0 should not be considered in absolute terms to estimate ratings, these entertainment and comedy programmes do showcase the platform’s productions and attract younger audiences. In this trend, and in terms of the historical comedy genre, the most notable example is the show *Justo antes de Cristo*, set in times of the Roman Empire. This absurd comedy, directed by Borja Cobeaga and Pepón Montero, is inspired by the storylines of Asterix and Obelix, Monty Python and classical Roman authors. Besides the series of sketches or gags called *Capítulo 0*, and albeit they are not top-tier productions, these offerings do continue the trend to branch out to other audiences, which started back in 2016 when Movistar+ produced a remake of the sitcom *Web Therapy* (2016). In this genre, however, during 2018-2019, two of the best-received series (apart from new seasons of *Vergüenza* and *Mira lo que has hecho*) were comedies. *Arde Madrid* is one of the biggest bets in this genre and the Spanish production most viewed of the platform. Released in November 2018, the show was unique in that it delivered 8 25-minute episodes

filmed in black and white and set during the end of Francisco Franco's dictatorship, using a comedic approach to portray the years when Ava Gardner filmed movies in Spain. The director and male lead, Paco León, is a well-known Spanish actor and director who for many years starred in one of the most popular sitcoms broadcast recently on Spanish network television (*Aída*, Telecinco, Mediaset). However, *Arde Madrid* was the complete opposite to that traditional sitcom. The experiment garnered rave reviews for its high-end production values, and for the historical approach to Spanish society during Franco's regime, casting an ironic view over the star system of that time to address the hardships among the lower classes and the strict moral values that the Dictatorship applied to relationships and the role of women. The series premiered at the 2018 San Sebastián Film Festival and received awards as the Rose d'Or for Best Drama Comedy 2019, the Platino Prize for best 2019 Ibero-American mini-series, and the Feroz Prize (Spanish film and TV critics) for best male actor. However, the creators decided to limit the series to one season, despite having announced a second run. The sitcom *Vida perfecta* (*Perfect Life*) was equally or even more successful. Movistar+'s latest production is a bittersweet mini-series, with a limited number of episodes (8) and running time (30 minutes). The director and creator, actress Leticia Dolera, puts a spin on the dramatic situations of a woman who is forty years "young" and has romantic and family issues. The series was named best comedy by the Spanish critics, picking up best series and best cast at 2019 Canneseries, and it has already secured broadcasting in other countries including France and Germany (Montoya 2019b). The good results of this series also helped Movistar+ gain ground regarding an issue where it was still lagging promoting women as creators and directors of their productions.

5. Conclusions: future creative and production challenges in a highly competitive context

By providing an overview of the changes implemented as Canal+ became Movistar+, this report has looked into how the production of premium fiction in Spain has evolved from an asset exclusive to free-to-view channels to being embraced in recent years by pay television. Based on the experience of network channels, Movistar+ has bet on large- and small-scale productions, keeping their sight on bringing an original take to stories, approaches and perspectives. Movistar+ has clearly achieved the goals it set out: on the one hand, continuing to venture into uncharted creative territory, increasing the comedy slate and diversifying plots and genres in the drama/thriller offerings. Furthermore, the company has explored new paths to connect with audiences that may not have related to their initial productions. These new paths focus mainly on local or absurd humour, comedies set in different historical periods, thrillers or female-centric stories with strong women protagonists. Also commendable is the limited number of seasons, even in the case of hugely successful shows. The productions that have been renewed for more seasons have implemented changes and adaptations to improve audience reception. For instance, in late 2019 Movistar+ released the second season of their most symbolic, challenging and upscale bet: *La Peste*, which garnered even better reviews than the first season.

Movistar+ claims they will uphold their double mission of attracting larger audiences and offering original shows, despite the growing competition from international platforms. Among their plans, the platform will continue to support local productions, with an eye on internationalisation beyond Latin America, where Movistar+ brand already has a strong presence. At the same time, it has launched a new OTT called "Movistar Lite", targeted to younger audiences and that competes in price with platforms as Netflix or HBO, giving limited access to its contents. There will be plenty of other ambitious original series. Alongside new seasons of *Skam*, *Vergüenza*, or *El Embarcadero*, new productions will address issues that have not featured frequently in Spanish fiction productions, such as terrorism. The creators of *El día de mañana* have released in 2020 *La línea invisible* about the origin of the terrorist group ETA in the late 1960s (Zárate 2019). 2020 will also see the premiere of *Dime quién soy* (*Tell me who I am*), the first big production created for an international audience. Based on Julia Navarro's bestselling novel, the series follows a female character experiencing key events of the 20th century that take place in different European countries. Among other recent releases, one of Movistar's biggest bets for 2020 has been *La Unidad*, an anti-terrorist police thriller. The company hopes their first foray into the police genre will fulfil the audience requests revealed by rating studies (Zárate 2019), also with *Antidisturbios*, another expected police thriller directed by Rodrigo Sorogoyen. Quite possibly, the success of the fiction productions from Movistar+, alongside other content in its catalogue and other factors relating to the offer of their telecom services (landline, mobile phone and Internet) keep Movistar+ at the top of the list of subscription audio-visual services in Spain. Nevertheless, the platform will continue to support high-quality original productions to keep ahead of the competition. "We don't see Netflix and similar platforms as competition. In fact, Netflix has been integrated as a service that we offer our clients. We are not going to stop producing the content that gives us our edge" (G-Palencia, 2019). Only time will tell if the fierce competition between all the pay television offers will lead to a continuation of this focus on quality Spanish fiction, which has taken production values to another level in Spain, and has contributed to improving the prestige and creative aspirations of Spanish series.

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