TURKISH TELEVISION DRAMAS: THE ECONOMY AND BEYOND

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Abstract
Following the break-up of the state monopoly on audiovisual media in Turkey in 1990, the commercial television industry quickly became aware of the audience's demand for domestic productions and home-made dramas. Throughout the 2000s, a television drama sector emerged, supplying a substantial amount of dramas not only to the domestic market, but also to a regional audience in the Middle East, Central Asia and Balkan countries. Although the lively market fosters an expanding "drama economy," it still has some structural problems and weaknesses. Yet, the actors of the sector and the authorities are becoming more aware of what the market promises, culturally and politically, in addition to its economic value. Now, the drama industry is often assessed in terms of its "geo-cultural" significance or "soft-power." Big producers even argue that the sector has become a global actor competing with Hollywood and Bollywood. It is a fact that Turkish dramas affect masses in neighbouring regions, reinforcing the "image" of the country and stimulating regional tourism. However, the claim that Turkish drama industry has become a competitive power in the international media market needs further and thorough research.

After the early 2000s, a local television industry in Turkey emerged, supplying a substantial amount of television dramas to the lively domestic and foreign markets. Our paper aims to present and discuss the dynamics of this emerging industry. Firstly, we set a brief history to show the relevance of such an emergence with deregulation and commercialization of the audio-visual media in Turkey starting in the 1980s. Our analysis is then followed by an overview of the television drama sector, using available facts, figures, and its main actors, structuring, inter-sectoral relations, impacts and problems. The concluding remarks are on the regional nature of the market and its political, cultural and diplomatic dimensions, where we stress the need for deepening the analyses on the industry's various dimensions. A survey of the still limited literature as well as in-depth interviews with different actors of the industry is conducted for the purpose of this study.

History and overview

The history of television in Turkey dates back to the early 1950s. A university based television station, İTÜ TV (İstanbul Technical University Television) began transmitting from its campus in İstanbul in 1952.[1] It was a local station, programming once a week for a few hours in the evening, to a very limited number of viewers in the city and to curious groups visiting the studio to watch the programs. Its purpose was predominantly to educate students at the electronics department in "new" television technology. Thus, İTÜ TV not only served to raise the first generation of television staff, but also introduced television and its culture to the middle-class. This service lasted for almost 20 years, until the public broadcasting corporation TRT (Turkish Radio and Television) was founded and its television broadcasts became widespread in the early 1970s. In the meantime, İTÜ TV offered the first studio programming formats such as talk shows, quiz shows, entertainment programs, films and dramas, in addition to occasional live transmission of sports events. However, dramas were live studio replays of popular stage plays and were not in a serial form within the early period of Turkish television.

For another 20 years until the end of the 1980s, television broadcasting remained under the public monopoly of the TRT. The corporation was established in 1964 and started its trial television broadcasts in 1968. However, in the 1970s television increased its reach and became a popular and national phenomenon. The single black and white television channel in the 1970s was embraced by the public while it quickly matured and enriched its programming. Besides usual formats such as news, sports, documentaries, children programs, talk shows and entertainment, television dramas began to appear on the screens. Imported serials such as *Star Trek*, *Mission Impossible*, *Shirley's World* and *The Fugitive* were followed by the first domestic TV drama *Hayattan Yapraklar* (Pages of Life) in 1973, and in 1974-1975 by several others, some of which were adapted from Turkish classics by leading Turkish film directors.[2] Among them, *Aşk-ı Memnu* (Forbidden Love), directed by Halit Refiğ, is particularly significant in Turkish television history: the six episode drama was massively popular, remembered for decades, and also was the first drama that the TRT managed to sell in the foreign market, in 1981.[3] A re-adaptation of the classic novel, this time taking place in the modern-day İstanbul instead of the original 19th century setting, was broadcast on a commercial TV channel for 79 episodes between the years 2008-2010, making another success story in terms of domestic viewing and exports.

The 1970s were characterized by right-left ideological conflicts and unstable governments whereas in the 1980s, the neo-liberal policy and its stronger governments were in dominance. In any case, the TRT has always been subject of political struggle and pressure. Nevertheless, by and large the corporation stayed in line with the principles and quality standards of the public service broadcasting during its monopoly (1964-1990). The TRT television also switched to colour transmissions and added a second channel in the 1980s. Although the majority of film and drama programming was dependent on foreign and heavily on American sources, the TRT itself produced a rich variety of TV plays, films and dramas.[4] A strategic move towards commercializing broadcasting came from the government in the second half of the 1980s, with amendments to the TRT law, weakening its public monopoly vested on transmission, programming and production monopolies.[5] In accordance with the amendment, the TRT could begin to buy or commission independently produced programs, which lead to the emergence of a commercial production sector.[6]

Eventually, some larger producers from this sector became associates or program providers of the private broadcasters soon to become operational.

The neo-liberal media policies of the late 1980s quickly resulted in a flourishing of commercial television (and radio) stations by the beginning of the 1990s. Tens of national and hundreds of regional or local television channels (together with thousands of radios) filled the airwaves within a few years. A new law abolishing the monopoly of the TRT and legitimizing and regulating the *de facto* situation eventually came into effect in 1994. In the meantime, and for a couple of years after the law, an unregulated and spontaneous commercial market set up its own rules and mechanisms. In terms of programs other than news and sports, and less costly studio programming, the new channels mostly turned towards cheap imports from the American film market and even cheaper old Turkish movies. It would be possible to argue that the production infrastructure and experience was not compliant with the rapidly growing commercial television sector in these years; however it is hard to claim that there was a substantial demand from the sector for domestic drama productions. The commercial broadcasters preferred the ready-made and safe in the 1990s immature market of strong competition and lower profits. Nevertheless, larger channels screened some popular serial dramas too, some transferred from the TRT and some commissioned to independent or affiliated production companies. These dramas were pretty much reapplying the formulas of the old Turkish movies, especially the "family comedies" of the Yeşilçam era.[7]

In compliance with the cultural proximity theory[8] the Turkish audience preferred national or regional programming over imported competing programs, and the commercial sector became aware of this soon. The warm welcome from the audience for countless screenings and re-screenings of Yeşilçam movies together with the local dramas enabled the television broadcasters and producers to set strategies for reaching the masses in the following decades. The result was quickly obtained: the average number of television dramas broadcast on mainstream national television channels in one week rose from 10 in 1998 to 36 in the year 2000.[9] Throughout the 2000s, this figure stayed between 40 and 50, climbing up to 60 in 2008. Yet by 2010 it was again in the range of the 40s, due to the cost cutting strategies adapted by the channels after the global economic crisis.[10]

On the other hand, the "new" Turkish cinema which started to rise up by the late 1990s after a long-time crisis, referred to old formulas. Serkan Altuniğne, screenwriter of some recent blockbusters produced by Aksoy Film, underlines the Yeşilçam's influence on their work: "The formula is right, and it is not us who found it… We used the same formula. So there wasn't such an invention. We grew up with the old Turkish films. The profile of the Turkish cinema audience, his point of view haven't changed a lot."[11] Actually, the drama producers borrow heavily from Yeşilçam as well, at times going beyond simply making use of the formulas: a recent trend is to produce the serial drama versions of some Yeşilçam classics, mostly of the melodramas. Programs in this category, namely *Fatmagül'ün Suçu Ne?* (What is Fatmagül's Fault?, 2010-2012), *Acı Hayat* (Bitter Life, 2005-2007), *Al Yazmalım* (The Girl with the Red Scarf, 2011-2012), *İffet* (Chastity, 2011-2012) proved to be very successful. A similar strategy is evident on the other end since the early 2000s, the movie business has adapted many popular TV dramas to cinema in order to attract loyal audiences to movie theatres. It started with the movie version of *Deli Yürek* (Crazy Heart) in 2001 and continued in the following years with the movies of beloved dramas such as *Asmalı*

Konak (The Grapevine Mansion) and *Kurtlar Vadisi* (Valley of the Wolves). These films also had a remarkable box office success.

All of the above examples point at the ever growing symbiotic relationship between television and cinema following the proliferation of commercial television channels in the early 1990's, which mutually shapes the developments in both sectors. The TV drama crews gained experience through advertising, television and cinema sectors, and the technical sophistication of the domestic TV dramas increased considerably, particularly throughout the 2000s. A number of production companies that were initially affiliated with the advertising sector, have produced highly popular movies and/or TV dramas. Zeynep Çetin Erus, in an analysis of the top grossing films between 1996-2005, counted that companies operating solely in the cinema sector could produce only 3 of the 17 most popular films.[12] For instance the movie *Eşkiya* (The Bandit, 1996) which heralded the new era of Turkish cinema was produced by Filma Cass, a company that was mainly operating in the advertisement sector. Casting has been the site for the highest amount of interaction between cinema and television since the 1990s. Stars born on the small screen often take part in feature films in the further stages of their career. Melis Behlil surveyed 192 Turkish films released between 2006 and 2009 and found out that the percentage of acting personnel in cinema who often work for television varies between 76% and 85%.[13]

Facts and figures, problems and prospects

The Turkish television audience is watching television over 4 hours a day on average.[14] The two most preferred program formats, almost on equal terms, are news bulletins and domestic dramas. This explains the dominance of the two over prime time television. Almost all of the larger mainstream channels prefer to broadcast a television drama episode following the evening news almost every week day. The exceptions to television dramas in certain days may be some reality, talent or quiz shows. Daytime dramas or daily soaps are rare, and some of the existing ones are the re-screenings of older productions or repetitions of the prime time series. A gradual decrease in daytime/daily dramas is mainly relevant to audience and advertiser choice: the Turkish audience seems to have internalized a "serial culture" in time, based on a certain level of quality, production value and star glamour, besides "dramatic" expectations. The local television dramas matching such criteria qualify for prime time and naturally for more advertising income. In recent years, the duration of an episode in prime time has increased considerably, reaching up to 90-100 minutes, and the screening durations can be elongated even to twice of that including a long "summary" of the previous episode and advertising breaks. Actually, longer episodes are demanded from the producers by the broadcasters themselves, since they mean more breaks for advertising. Another advantage of longer episodes for broadcasters is avoiding the need for scheduling a second drama afterwards, to fill the prime time slot. Thus, a single episode usually scheduled to start at eight-nine o'clock in the evening, following the news, and ending at around eleven at night, meets the broadcasters' needs as well as satisfying the audience's expectations.

However, such a broadcasting practice affects to the sector in the form of endless working hours, severe production conditions and a mad rush for weekly schedules. Above all, the sector never had a good record of providing social security rights and fair payment. This receives criticism from the sectorial, artistic and academic circles, and even prompts protests from actors, writers and crews lead by professional organizations like the Turkish Screenwriters Association or the Cinema Workers Union.[15] The regulating body RTÜK (Radio and Television Supreme Council) is also criticized for monitoring only the advertising side and not intervening in the scheduling and duration of the programs. The conflicting parties appear to be the powerful advertiser/broadcaster/producer alliance on one side and weaker employee teams on the other. Both the audience and the regulating bodies prefer to "watch" the outcome for now.

According to a sector-based research, the number of people employed in TV drama production reached up to 150.000 in 2008, and was about 100.000 in 2010 due to the economic turbulence.[16] Although the working force in the sector is substantial and continues to increase, it is very sensitive to economic conditions. Fluctuations in the economy result in sudden adjustments of advertising budgets and thus in the revenues of the broadcasters. Total advertising spending in the first decade of the 21st century reached its peak of 3,3 billion Turkish lira[17] in 2007 and dropped to 2,7 billion in 2009, afterwards managing to recover with 3,6 billion in 2010 and 4,3 billion in 2011.[18] This is good news especially for television, since it gets the lion's share from the advertising pie, with over 50% every year, up from 53% in 2007 to 56,6% in 2011. Also given the persistent demand from the audience, one can expect further increase in the number of productions and level of employment in the drama market, yet whether there will be a recovery in working conditions and fees (apart from well-paid stars) remains to be seen.

Sponsorship and product placement agreements are also major sources of income for broadcasters and producers. Although sponsorship is quite an established practice now since it has been regulated by law since 1994, product placement was legalized recently by the amended radio-television law of 2011. The long awaited amendment lead to a rush of brands towards the popular dramas and larger broadcasting companies instantly establishing their product placement divisions. Media planning and emerging product placement agencies also help to manage the traffic. It is now popular opinion that the initial enthusiasm of the market resulted both in over-pricing and unsound placements; and the brands are now becoming more selective with their integration strategies and spending.[19] Undoubtedly, product placement is a very promising business, however the market still needs more experience.

Forbes Turkey, in its latest annual report of "richest producers," counts 39 production companies providing dramas to television stations and a total turnover of 655 million lira.[20] The first ten of them, namely Ay Yapım, D Productions, Tim's Productions, Pana Film, Süreç Film, Focus Film, Mint Productions, Avşar Film, Adam Film, and TMC, generate almost 400 million of the total. The second ten receive a total of 173 million and the rest share the remaining 85 million.[21] Hence the top companies nominate for the above mentioned powerful alliance more than the rest. The top companies are more privileged and advantageous in their agreements with the broadcasters, which usually impose severe clauses to producers such as rating guarantee/payment according to ratings or holding the post-screening/sales rights of the programs. The bigger producers are powerful enough to produce several projects simultaneously to spread the risk, or to convince the broadcaster to share the possible exporting revenues or to hold some secondary rights.[22] Above all, established producers of highly rated television dramas have the highest negotiation power for their prices and contracts whereas the smaller or newer production companies have to make concessions in terms of their agreements.[23] According to screenwriter/producer Zehra Çelenk, it is almost impossible for small or medium size businesses to sell their projects to national channels without becoming partners with bigger production companies or intermediary agents.[24] Nevertheless, the lively market still makes some room for newer, untried and "unusual" content (i.e. absurd, fantastic, crime) occasionally find airtime besides popular genres. Such dramas are targeting younger generations, who are positioned out of the traditional family viewing and inclined to different programs. In this sense, production companies refer to American television dramas which are followed eagerly by young Turkish viewers. When the reference to American TV dramas is in question, one has to underline the fact that global formats or familiar soaps or sitcoms are the major references of domestic productions. On the other hand, imitating the popular/successful within the domestic market is a sectoral reflex, which often leads to seasonal trends for certain formats.

New horizons: Exports, drama-tourism and tele-power

The local television drama exportation started by the early 2000s, soon after the domestic commercial television market matured. The pioneering program was *Deli Yürek* being sold to Kazakhstan in 2001. It is an action drama produced by Sinegraf and was broadcast in Turkey between 1998 and 2002. However, it was not until 2005 that the exportation of Turkish television dramas increased considerably. Three dramas, *Yabancı Damat* (The Foreign Groom), *Binbir Gece* (Thousand and One Nights) and *Gümüş* (Silver) are often cited as turning points for Turkish drama exportation.

Yabancı Damat, produced and distributed by Erler Film with 106 episodes in total, ran in Turkey between 2004-2007. It portrays the problems and especially the prejudices encountered in an intercultural marriage of a Greek man to a Turkish girl. Its comic tone and references to historic Greco-Turkish antagonism made it a huge hit both in Turkey and Greece, turning the leading actors into stars. The Greek channel Mega TV started broadcasting it in 2005 with great success, under the title of *The Borders of Love*. It is also aired in Bulgaria with the title *Marriage with a Foreigner* and on MBC+Drama, an Arabic channel offering various Turkish dramas, with the title *Al-Gharib* (The Stranger).

Binbir Gece, a melodrama produced by TMC Film, was originally broadcast on Kanal D between 2006-2009 in Turkey. It is the story of an architect, Şehrazat (Shahrazad) who reluctantly agrees to sleep with her boss, in exchange for the money she needs for the operation of her fatally sick son. The show was aired in Azerbaijan, Bulgaria, Croatia, Kuwait, Romania, the Republic of Macedonia, Serbia, Greece, Montenegro, Bosnia and Herzegovina and Slovenia, ranking the top in rating lists. "The new Turkish mania" has become so widespread in Greece that it beat the opening match of the World Cup, being the first time that a soap opera surpassed the ratings of a soccer match in Greece. In Serbia, travel agencies offered trips to Turkey dubbed "Down Shahrazad's Paths." Newborn babies in Bulgaria were given the names of characters from the series, and Bulgarian tourists travelling to Turkey to see the places where TV dramas are shot increased by 40%. In Croatia, retailers, tour operators and even Turkish language courses cashed in on the show's popularity.[25]

Gümüş, known as *Noor* in Arabic speaking countries, was another program which became a social phenomenon, and whose popularity increased the demand for Turkish dramas, particularly in the Middle East. It was produced by D Yapım, on air in Turkey from 2005 to 2007, and was not a success. The show, dubbed in an Arabic dialect, started to be broadcast in 2008 on the Dubai-based, Saudi-owned pan-Arab broadcasting network Middle East Broadcasting Center (MBC). It became "an immediate sensation and one of the highest-rated television shows in the world."[26] *Noor*'s final episode attracted a record 85 million Arab viewers, close to one third of the population of the Arab world from Morocco to Iraq. It was also aired by Romanian, Bulgarian, Albanian, Macedonian and Greek channels. The marriage of the modern couple living in a luxury Bosphorus residence together with a multi-generational, upper class family apparently fascinated millions, but also irritated some. The show became the subject of angry Friday sermons in Saudi Arabia and the country's chief cleric issued a fatwa calling it "decadent and sinful to watch."[27] Yet, *Noor* propelled more than 100,000 Saudis to travel to Turkey in 2008, up from about 40.000 the previous year. Moreover, the fictional residence in İstanbul was converted into a museum which was visited by 70,000 people just from Saudi Arabia the same year.[28]

Whatever the reason, be it the cultural similarities, quality, glamour, stars, plots, it has become a fact that Turkish drama sector emerged as a "geo-cultural market."[29] Turkey has become the major exporter of TV dramas in its region, comprising Central Asia, Middle East and the Balkan Peninsula. The shows have reached even farther, such as New Caledonia, Niger, Vietnam, Burkina Faso, Ivory Coast, Senegal, Somalia, and Singapore, and the Turkish Ministry of Culture and Tourism reported that a total of 35.675 hours was exported to 76 countries between 2005 and 2011.[30] They generated an export market of 60 million US dollars in 2011, which is eagerly pushed to expand not only by the broadcasters/producers/distributors but also by the authorities. The minister responsible for foreign trade has been active in providing export incentives and relaxing regulations for the film and television sectors in recent years. On the part of investors, aggressive strategies have been on the agendas, as explained by the chief executive of major network Doğan TV:

> *At the beginning, we used to sell each episode for 300-500 US dollars. Sometimes we'd even pay them to buy the series – for promotional purposes. Now we have some productions that sell to the Middle East for more than 100,000 US dollars. There's nothing to stop us becoming a so-called Bollywood. We have the potential.*[31]

Naturally, higher export prices require higher production value. The production cost of a Turkish drama episode may vary from 150,000 to 600,000 US dollars, as well as the export prices.[32] According to a Syrian television owner, there exist parties in the Middle East market who are willing to pay up to 40,000 dollars per episode, which could have been bought for 600-700 US dollars several years ago;[33] a sensational period drama like *Muhteşem Yüzyıl* (Magnificent Century, 2011-) may cost even more. *Muhteşem Yüzyıl* represents the state of the art: with a pre-production budget of 2 million US dollars and roughly half a million spent per episode, the show is featured as being the most expensive Turkish television drama ever made.[34] It proved to be a huge success first domestically, being transferred for 1,2 million US dollars per episode by Star TV for its second season from the initial broadcaster Show TV, carrying with it an advertising revenue of 3 million US dollars.[35] Abroad, it has already been sold to 45 countries.[36] Following the footsteps of the "Süleyman the Magnificent," the Ottoman emperor whose glorious lifetime and loves are treated in the program, the public broadcaster TRT decided to spend around 5 million Euros on *Bir*

Zamanlar Osmanlı: Kıyam (Once Upon A Time In The Ottoman Empire: Rebellion, 2012), a TV drama whose story unfolds in another period of the Ottoman Empire.[37]

Besides their commercial success, *Muhteşem Yüzyıl* and the like are seen by many to be the means of spreading "Turkey's values and lifestyle through the Middle East and North Africa, exerting a sort of 'soft power' that is to the advantage of Ankara's neo-Ottoman diplomacy."[38] While the idea is obviously provoking reaction in nationalist and/or radical circles in the region, it is generally treated positively by the Turkish public opinion. The prestigious *Time magazine* describing the export of Turkish soap operas as the "secret weapon of Turkish Prime Minister Recep Tayyip Erdoğan"[39] or *Newsweek* arguing "the programs are [...] bringing in their wake a renaissance in Turkey's soft power and ushering in a low-key social revolution among the housewives of the Arab world,"[40] are often taken as a confirmation of Turkey's "rise" by the Western world. However, that is not to say that the programs receive unanimous acclaim in the country. They do get various and contrary reactions from conservative, nationalist, liberal, radical, intellectual and other groups. Ironically, Prime Minister Erdoğan was himself among the critics of *Muhteşem Yüzyıl*, calling the series "an attempt to insult our past, to treat our history with disrespect and an effort to show our history in a negative light to the younger generations."[41] As a matter of fact, criticisms do not disrupt the market mechanism, they may rather serve for smoothing some "extremeness" in the content. For instance, *Kurtlar Vadisi*, a heavily criticized show for its violent, nationalistic and hatred content is still on air in Turkey since 2003, after a few interruptions and repositioning in various television channels. The struggle of the Turkish agent Polat Alemdar and his men with mafia, terrorist organizations and secret agencies, continue to fascinate people at home and abroad, and to be a (not that soft) power of Turkish diplomacy. A Jordanian tourist, summarizes the case: "He [Polat Alemdar] made a great series about Palestine. I consider him a hero."[42] The words of *Kurtlar Vadisi*'s screenwriter Bahadır Özdener can be cited here as a generalization of what the sector and probably the public think about the local television drama scene:

> *We write here a drama, our people watch it, and 200 million people everywhere in the world watch it sharing the same feelings. Nobody would dream of this ten years ago. […] Turkish movies and TV dramas give an outstanding chance for Turkey's promotion.* Kurtlar Vadisi *sells to 30 countries today. […] Turkish film industry is now competing with Hollywood and Bollywood. In terms of technical infrastructure, directing, acting and screenwriting quality, it ranks the third following the two global giants. We strive to outstrip.*[43]

Conclusion

The sectoral rise of Turkish television dramas hand in hand with the cinema sector brings out an economy that necessitates a thorough analysis. Production is a complicated process: from casting agencies to dubbing studios, post-production and animation houses to music studios, catering and transportation firms to real estate offices, designers to copyright agencies, it is multifaceted. The industry is multidimensional: it comprises not only the producers, but broadcasters, networks, distributors, advertisers, sponsors, brands, and all of their integrated activities. It has advantages: a big and eager demand from the domestic market, and even a vast and passionate demand from the neighbouring countries. So passionate that it attracts people culturally, effects politically, mobilizes socially. Nevertheless, it has a soft belly: it is vulnerable to economic turbulences and global crisis. Although it is dynamic, it still has some structural problems to solve. As such, what is in hand is a complicated case which requires more concrete and comparative data to be fully analysed and understood. Stating that the sector has become a global actor competing with Hollywood and Bollywood is remarkable but the argument needs further elaboration, of which this paper is a first attempt.[44]

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