

ISTANBUL BILGI UNIVERSITY  
INSTITUTE OF GRADUATE PROGRAMS  
FILM AND TELEVISION MASTER'S DEGREE PROGRAM

EXPLORING ALTERNATIVE DISTRIBUTION MECHANISMS IN THE  
FILM INDUSTRY IN TURKEY

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İSTANBUL  
2019

Exploring Alternative Distribution Mechanisms in the Film Industry in Turkey

Türkiye Sinema Endüstrisinde Alternatif Film Dağıtım Modelleri Üzerine Bir Araştırma

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Tezin Onaylandığı Tarih : 23.09.19

Toplam Sayfa Sayısı: 111

Anahtar Kelimeler (Türkçe)

- 1) Türkiye Film Endüstrisi
- 2) Dijital Yayın Platformları
- 3) Film Dağıtım Yöntemleri
- 4) Netflix
- 5) Kültür Politikaları

Anahtar Kelimeler (İngilizce)

- 1) Film Industry in Turkey
- 2) SVOD Platforms
- 3) Film Distribution Methods
- 4) Netflix
- 5) Cultural Policy

## ACKNOWLEDGEMENT

I would like to thank my thesis supervisor Ayşegül Kesirli Unur for her contribution to my research. She supports me with her very fruitful feedbacks and invaluable suggestions. I specifically want to thank her in my first language; *danışmanıma bu süreç içinde sektörle ilgili bir kısmı doğru çıksa da bütün komplo teorilerime katlanıp sakinliğini koruyarak beni bilimin emin kollarına çektiği için ayrıca teşekkür ediyorum*. I would like to thank Ebru Çiğdem Thwaites Diken for her seminar course during which I manage to wrap up my mind and create a thesis from the cloud of dust. I would like to thank my beloved friends, my family, and my dear mom. They have always believed in me. I would like to thank Özgür Çiçek for her brilliant ability to organize my thoughts whenever I am on the edge of suffocating. I would like to thank Sultan Duranay, Şenay Aydemir, Suzan Güverte, Kıvanç Sezer, Senem Taşdemir and Savaş Doğan for their substantial contribution to the research. The research would not be completed without their insight into the film industry in Turkey. I would like to thank Kazım Öz for his way of filmmaking and endurance to fight for his own ideas. Last but not least, I would like to thank all the people with whom I distribute Zer (Kazım Öz, 2017). Their belief in their own roots and stories inspire me to write this thesis not to stay in vain but to spread the solidarity and struggle for our own stories.

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## **ABSTRACT**

The film distribution in Turkey has been in a crisis of monopoly in recent years after MARS Group bought AFM movie theatres. The monopolistic market hasn't left any room for the rest of the players in the industry since this merger. After Mars Group was sold to South Korean conglomerate CGV Group in 2016, the vertical business model of this company seizes the whole film distribution market with its production, distribution, exhibition, and marketing divisions. Today, as the box-office numbers indicate, South Korean CGV Group dominates the whole film distribution sector with its 43% market share.

In this thesis, I embark on a journey to explore alternative film distribution methods that are used by independent filmmakers to reach out to the audience in such a monopolistic market. In the film industry in Turkey, independent films are not supported by direct subsidies for film distribution. That's why, the distribution strategy of independent films is limited to film festivals, TV channels, and SVOD platforms. The results bring out that online streaming platforms, festivals, and organizational self-distribution might be positioned as alternative distribution models, nonetheless, cultural and industrial politics in Turkey have a significant power to shape the creative industries. In closing, I deduce that the industry conditions are to be designed according to the insight of filmmakers, artists, and representatives of the film industry to regulate the politics of film distribution in Turkey. Otherwise, the independent cinema of Turkey will be brought to an end due to the absence of plurality, diversity, and equity of opportunities.

Keywords: Film Industry in Turkey, Digital Platforms, Film Distribution Methods, SVOD (Subscription based video-on-demand), Netflix

## ÖZET

2018 yılının son aylarında yaşanan dağıtım krizinin gösterdiği üzere Türkiye Sinema Endüstrisi'nde film dağıtım sektöründeki tekelleşme, bağımsız sinemacılara yaşama şansı bırakmayacak duruma gelmiştir. Özellikle 2016 yılında MARS Group'un Güney Koreli CGV şirketine satılmasından sonra CGV grup film dağıtım sektöründe bir tekel haline gelmiştir. Bu çalışmada bağımsız sinemacıların sinema izleyicisi ile bulaşabilmek için denediği alternatif dağıtım yöntemlerini araştırdım. Hollywood tarzı stüdyo çalışma sistemine sahip olan şirket kendi bünyesinde bulundurduğu yapım, dağıtım ve reklam şirketlerinin yanı sıra bir de sinema salonlarının işletmeciliğini yaptığı için dağıtımıcılar arasında rekabeti ortadan kaldırıp serbest piyasa koşullarını dahi geçersiz kılmıştır. 2018 yılı itibari ile %43 oranında Pazar payına sahip olan şirket, küçük bütçeli bağımsız filmlere ve kendi bünyesindeki filmler dışındaki yapılara yaşama şansı bırakmamaktadır. Dağıtım sektöründeki bu tekelleşmeyi araştırırken, sinema endüstrisinde yapımdan, dağıtıma, birçok alanda görev yapan sektör çalışanları ile görüşmeler yaptım. Bu alanda yapılmış akademik çalışmalara ek olarak bu çalışmada sinemacıların filmlerini kendi organize etmeleri, dağıtmaları, dijital platformlara başvurmaları ve film festivalleri ile filmlerini dağıtmaları alternatif yöntemler olarak karşımıza çıkıyor. Araştırmanın sonucunda bulguların gösterdiği üzere alternatifler yöntemlerin potansiyellerini gerçekleştirilmesi için yaratıcı endüstri, kültür ve sanat politikaları ile birlikte sinemanın ekonomi politığının sektörün ihtiyaçlarına göre hazırlanması gerekmektedir. Aksi halde Türkiye sineması içinde bulunduğu çok sesliliğe kulak kapayan, fırsat eşitliğinin olmadığı ve çeşitliliğin bulunmadığı bu durumda çorak bir toprak parçası gibi verimsiz bir hale gelecektir.

Anahtar Kelimeler: Türkiye Film Endüstrisi, Dijital Yayın Platformları, Dağıtım Yöntemleri, Netflix

## INTRODUCTION

In the past decade, the organization and operation of the media and contents production in virtual platforms in many countries has undergone enormous change, as a result of the technological revolution (Crisp, 2015, p. 56). One of these platforms is cinema. With digitization, its delivery to audiences also happened to change. Along with globalization, which is swaying the whole world, no area might be able to bypass this technological change, nor remain stable without having undergone said change first. Evidently cinema has also undergone this transformation, a process of continuous innovation that is maximized with the availability of all sorts of content on the Internet (Crane, 2014, p. 365). This substantial (if not necessarily conspicuous to the viewers) change has basically impacted the very practice of film production, projection and distribution (Kandar, 2018, p. 3).

The global cinema industry has gone through a highly fluctuating period with the digitization of the media's distribution. It is now merely naive nostalgia to recall the days of screenings allegedly organized by the Lumière Brothers in Grand Café on 22 December 1895, as the first intimate way of reaching to the audience (Arslan, 2010). So, this technological revolution requires a totally new workflow in the film supply chain.

In this thesis, I will focus on one of the less studied fields in the film industry; namely distribution, and work on how distribution methods have changed irreversibly in Turkey. During the transition period, with radical transformation in film supply chain, distribution-the last circle of this chain begins to take a different and more standardized shape with the dominant market share of universal big media conglomerates who have been dominating the whole global cinema industry outside of the United States. At this point, independent filmmakers search for alternative methods to these standardized conventional ways of distribution, so that they can make their voices heard.

Until one year ago, in 2018, I was also one of these independent filmmakers who are desperately looking for an opportunity to show their film to an audience. I decided to write this thesis, upon witnessing more than 500 audience members shouting, yelling and crying support slogans for director Kazım Öz, after the latter refused to censor his own film and share the oppression of the Turkish government with his audience in Atlas Cinema during the world premiere of his film *Zer* (2017) at the İstanbul Film Festival in April 11, 2017.

Before I present the current distribution crisis in all its aspects in the course of the thesis, I should share the motivation behind writing this thesis: the peculiar experience of distributing *Zer* to show that filmmaking in Turkey has been a way of struggle for a while. I was responsible for the film's screening and exhibitions as an assistant producer. Before *Zer* was released in Turkey, the film was censored by the Ministry of Culture and Tourism. After the document<sup>1</sup> for registration of *Zer* was revoked by the Ministry, it became almost impossible to even get in touch with the movie theaters with which we had agreed upon screenings. The case slowly reverses while audiences watch the film in a small number of screens across the country.

When the audiences want to watch the film, they begin to follow it on social platforms and demand to see *Zer* in their hometowns. Whenever I called a local cinema manager to schedule a series of private screenings on the basis of the rental fee, Cinemaximum refused to make appointments in their malls. Their stance towards independent cinema and films is totally based upon their financial gain-based logic. And regardless of the city, Cinemaximum dominates the distribution market everywhere in the country. The company has also production houses, an affiliated media agency, and distribution division; hence they are self-sufficient in terms of content production and management. Moreover, Cinemaximum has always

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<sup>1</sup> Registration document is asked by the Ministry of Culture and Tourism from producer of the film so that the ministry can classify the films in terms of their producers, directors, and genres. According to the new cinema regulations acted in January 18, 2019, the registration document is compulsory for all films that are going to be released in movie theatres in Turkey.

prioritized films co-produced by their own production houses or Beşiktaş Kültür Merkezi (Beşiktaş Culture Center) (BKM) and other big producers such as Cem Yılmaz, Şahan Gökbakar, and Mahsun Kırmızıgül. In such an in-breeding environment of the production and distribution sector, independent films such as *Zer* and *My Father's Wings* (dir. Kıvanç Sezer, 2016) do not have enough room to be screened, even as there is a demand from the audience to watch these films. At one point I listed Facebook messages sent by audiences to ask for addresses in their cities to watch films. Unfortunately, out of 81 cities in Turkey, *Zer* was released only in 10. In 2019, I decided to conduct a research on how filmmakers are solving these kinds of distribution quandaries, in order to share it in a constructed way with other filmmakers. Hence, it is so important for me not to wait in vain, but fight for the rights of independent filmmakers and cinema to reach their audience. Even after this thesis has been completed and defended, I want to continue work on the distribution of independent films and their different way of production, in how they differ from commercial cinema.

Indeed, it is important to specify that the independent films being subject to this study are films produced with public funds, co-productions, and festival funds rather than major film studios or commercial branding campaigns. It is a fact that the monopoly in the industry benefits popular and blockbuster films that are seeking to recoup their investment and make a profit. Popular blockbuster films are the core of the film industry in Turkey because cinema admission rate is rising up due to the success of such films as the *Recep İvedik* (2008 – 2019) series (produced by Şahan Gökbakar), the *A.R.O.G.* (2004 – 2016) series (produced by Cem Yılmaz), and all family comedies produced by BKM (owned by Necati Yıldırım and Yılmaz Erdoğan).

In short, popular films are more than ever dominating movie theaters in Turkey compared to independent films. As a consequence, independent filmmakers want to be involved in this transition and start to try alternative distribution models to overcome current distribution problems.

In this thesis, my focal point is the alternative distribution methods to conventional distribution mechanisms, which include cinema releases via distribution companies and exhibitions, festivals, DVDs, and television purchasing. With the help of the technological developments and social changes that I will analyze with a theoretical basis later on in the thesis, filmmakers begin to break this chain of distribution in a more fruitful manner by enhancing their engagement into the exhibition circuits. Thus; they venture to use alternative ways of distribution models such as digital/online release, distribution of the film via Video-On-Demand (VOD) and Subscription-On-Demand (SVOD) streaming systems, developing communities with local groups of audiences. Hence, alternative mechanisms are used in a kind of inclusive manner in this thesis so that I can clearly define different film distribution mechanisms other than conventional ones. Before presenting my arguments about alternative distribution mechanisms, it will be a good starting point to present an introductory overview of conventional distribution models.

As I articulate above, my starting point is to indicate how a movie distribution mechanism is institutionalized in Turkey. But I need to emphasize that this is not my focal point. Instead, I venture to explore alternative distribution mechanisms in Turkey that have been used between 2010 and 2018. While exploring this issue, I will also present how neoliberal state policies, which open the Turkish cinema market to foreign distributors, have brought the distribution industry in Turkey to the current level (Çetin-Erus, 2007). It is necessary to present this impact in the historical context of the cinema industry of Turkey so as to point out to the causal relationship between conventional and alternative distribution mechanisms. While analyzing the economy politics of the cinema and the cultural politics of Turkey in this period, I will look into causality between cultural politics and monopolization in the country's film industry. The basic problems of the distribution market and how the foreign capital with the CGV Group changed the distribution dynamics in the domestic market also need to be analyzed from the historical perspective. Thus; I will start by defining conventional distribution

mechanisms to differentiate them from alternative ones in such an unstable distribution market in Turkey so that the main research point of the research is to be read in a well-shaped theoretical and historical framework.

The current conventional distribution system presents an obstacle to the distribution of some films; the most significant proof is that the market share of domestic films is gradually shrinking from the total market share (Boxoffice.com) and this situation is getting crucial for the cinema industry in Turkey. Still, while most of the domestic films are not distributed theatrically, the number of produced films is on the rise (IKSV, 2016). The critical analysis of the historical progress of the cinema industry of Turkey shows that the country's political economy has a great role in this current crisis because of the way in which fluctuations in trade regulations and cultural politics without any kind of control mechanisms have contributed to the inequality of opportunities in the market. This has left the industry to the hands of big corporations whose monopoly prevails on all small distribution companies taken together.

The reason why I chose to cover the period 2010-2018 for my study is that the Turkish government has since increased its neoliberal cultural politics, causing the cinema industry to be controlled by free market dynamics, regulated by capitalist parameters. While in 2010 there were numerous small distribution companies to break off the control of these foreign companies, cinema admission rates show that said foreign companies have been stifling the domestic market irreversibly. From 2010 to 2018 there have been many ground-shattering developments in the cinema industry of Turkey, such that the alternative distribution company KenDa had to close down. Later, the AFM was taken over by the MARS entertainment group (Yüksel, 2018).

In July 2016, Turkey was impacted by a failed military coup, which has adversely affected the cinema industry because of the long-run state of emergency that this coup attempt provoked. One year later, one of the biggest corporations of the Asian entertainment market, the South Korean cinema chain CJ CGV, bought

the MARS entertainment group, putting Cinemaximum into a very important position in the cinema industry because As Şenay Aydemir states that it is more difficult to find a common ground to communicate with foreign capital owner (Ş. Aydemir, personal communication, January 2, 2019). As I analyze later in detail, this conglomerate merger is actually at the heart of the current film distribution crisis in Turkey.

## **Methodology**

*Not everything that can be counted, counts,  
and not everything that counts can be counted*

Albert Einstein

(Curry, 2015)

Before going through the topics that I have covered in the thesis, I want to reveal how I conducted my research to systematically collect the necessary data. The first thing I did was to define my research questions, which led me to characterize and identify what I problematize in my research. I come up with certain related themes, such as conventional distribution mechanisms, domestic market affairs in the cinema industry of Turkey, cultural politics in Turkey, and monopolization in the cinema industry in relation to the neo-liberal cultural politics of Turkey. Once I bring forth these themes, I present salient factors that motivate the current situations and have enlightening predictions about the sectorial bounds in the industry which then make me come up with appropriate research methods.

Defining my research questions leads me to understand the limits of my research: when considering the problems addressed by this research, qualitative methodology has served as the main research tool to analyze and interpret the data collected from the field research, interviews and field observation. After I researched the methodology, I saw that there wasn't any absolute single research

approach superior to other ones. As a result, the choice of research tools depends completely upon what the researcher needs to find out with this method (Jong & Jung, 2015).

As Silverman points out, qualitative methodology includes a variety of qualitative methods and specific research techniques such as observation, analyzing texts and documents, interviewing, recording and transcribing (Silverman, 2000).

Regarding these definitions, the following qualitative research techniques have been selected as the methodology of this study.

- Literature Review

Initially, a review of the present problems and debates on the movie distribution industry of Turkey is presented here to understand ongoing debates about the topic and to characterize the gap, which I will pursue to fill with this study. Present academic studies, official documents including cinema policy regulations put in action by the Ministry of Culture and Tourism, box office reports and annual cinema industry reports released by different legal organizations are the basic materials of the literature that I have reviewed during the research stages of this study.

- Interviews

This qualitative method is very useful to be able to get a first-hand account of subjects, because it makes it easier to reach out hidden parts of the distribution chain in the industry (Patino, 2015, p.35). Among different types of interviews as the main tools of qualitative research models, I chose in-depth interviews. As Jong and Jung cites from Lofland, an in-depth interview is pretty much like *guided conversations* led by the interviewer (2015). It is not always possible to see where the conversation is going to end. For that reason, before the interviews, I have conducted short conversations with potential participants before starting to decide on appropriate methods, and have seen that participants need to be guided so that I can get insightful data about their experiences without being so interfering about the issues. After these short conversations, I have decided to set the boundaries of analysis and

made up the question set. In this type of interview, questions play a role to guide not to be at the core of the interviews. .

In the interviews, I proceeded to explore individual experiences and perceptions to reach more details. While designing my research and analyzing interviewing as the main qualitative research methods, I saw that in-depth interviews would provide me with not only individual perspectives and experiences but also industrial concerns that professionals have like marketing bases, recent cinema law regulations that they need to follow while making up their programs, impact of recent state of emergency which continued for almost 3 years since the 15th of July, 2016.

The complexity of the research question more or less determines the size of the research (Somekh & Lewin, 2011). Hence, initially, a good well-framed structure of the related terms is needed so as to address the right questions to the right person in the right methods. In the scope of this thesis, the focal point of the research is not only alternative distribution mechanisms in Turkey but also the use of digital distribution mechanisms as alternatives to conventional distribution methods. It thus bears a critical significance to lay down key informants who are not familiar with two different areas in the cinema industry.

The first group of potential informants consists of people experienced in both conventional and digital distribution mechanisms, which enables to negotiate the differences and similarities in the analytical perspective.

The second parameter scrutinized in this thesis is the digital revolution that renders a series of platforms like iTunes, Netflix, MUBI, and YouTube alternative film distribution areas. Thus, I selected potential interviewees who have experience in these areas. That's why I decided on 5 professionals who are experts in the different divisions of the movie distribution sector in Turkey. Key informants from different backgrounds helped me to deepen the understanding of the focus of the research. One of them is Sultan Duranay, marketing and purchasing director of The Moments Entertainment Film (T.M.E.), one of the main distribution companies of Turkey's distribution market. On digital distribution platforms, I have talked with Senem Taşdemir and Savaş Doğan who are the heads of Purchasing in D-Smart,

one of the best known and powerful Internet Protocol Television (IPTV) brands of Turkey, owned by the biggest media corporation Demirören Media. I also talked with producer Suzan Güverte from Güverte Film and film critic Şenay Aydemir from Gazete Duvar, a national digital news platform to discuss distribution issue in the cinema industry of Turkey with professionals from different divisions of the film supply chain.

- Case Study

*“At the end of the day, it only counts what is written on paper and nothing else. Researchers come and go, the findings remain.”*

(Diefenbach, 2009, p. 875)

The third qualitative research method used in the research is the case study. Along with the in-depth interview method, the case study method enables me to blend the outputs of the interviews and data analysis with the individual stories in the example of two cases. While designing my research, I avoid conducting qualitative research which is biased by my and interviewees' implicit assumptions, interest and worldviews. I instead endeavored to diversify my point of view to the interest of the research questions (Collins, 1992, p.182). While determining the subject of the case studies, I was concerned about equal representativeness of the whole cinema industry. As a result, this study is based upon different parts of the cinema industry of Turkey. I take the fundamentals of the selection of interviewees and subject of the case studies into account while deciding on the cases. As Diefenbach points out, most of the case studies or interviews are done with a limited and certain number of agents just because they accept the interview request or because they are living in the same region as the researcher is living and non-scientific reasons (2009). However, I prepared a detailed research outline so that no one's voice is neglected, allowing me to come up with a fair debate/discussion on the research topic

Regarding the discussion on the case studies and design of the interviews above, I ensure the real and rational criticism in the research without exclusion of some parts by leaving the other parts of the industry outside of the debate (Diefenbach, 2009). Two case studies are closely engaged in what is discussed throughout the

research. One of them is Kurdish director Kazim Oz, whose films narrate working class, minority groups, revolutionist students, and folks of Kurdish-Alevi people living around the Dersim province. I analyze the distribution of his last film; *Zer* (2017). The second director is Kıvanç Sezer, who is one of the young directors of contemporary cinema of Turkey whose films deals with issues like power relations, the routine of everyday life and individual understanding of life. I analyze his debut feature *My Father's Wings*. Both cases are distinct in terms of their peculiar distribution methods, production ways, and audience engagement. Both directors follow different distribution models together with conventional distribution models, such as working with a distribution company. I employ these case studies because in-depth interviews with professionals from the industry would not be enough to represent independent filmmakers, or to understand and define their concerns and situation in the industry. Thus, it will be more inclusive to analyze overall behaviors and dynamics of the cinema industry with the help of in-depth interviews from professionals from the sector and combine their experiences and perspectives with practices of the subject of case studies to bring about more revealing under-explored sides of the cinema industry of Turkey.

### **Preview**

I would now like to introduce the thesis with divisions on the bases of three different chapters:

In the first chapter, I mainly explore how the distribution industry has been evolved and why there is a need for alternative distribution mechanisms. I dwell upon three subsections in this chapter to structure my thesis on a theoretical base. The first of these subsections is the ‘distribution in the cinema industry’ in which I present briefly how distribution is institutionalized in the cinema industry in Norway, France, and Spain, as well as Turkey. The purpose of this comparison is to outline differences between the institutionalization of the distribution sectors in these countries so as to contextualize the reasons why the need for alternative mechanisms arose, and in what ways these countries managed to use these mechanisms for their cinema industry and where Turkey stands in terms of global cinema industries.

In the second subsection, I focus on the reason why independent filmmakers need alternative distribution methods. I figure out the conditions when filmmakers resort to alternative distribution mechanisms. I refer to outputs of interviews that I conducted with producers, filmmakers, and distributors in Turkey to be able to insightfully position the country in the global cinema market. In the third section, I will focus on discussion on conventional distribution models from 2010 to 2018.

In the second chapter, I analyze formal movie distribution methods in detail in relation to three different points. First, I try to deepen the analysis of conventional distribution mechanisms in the cinema industry of Turkey in a historical context. I specifically start by giving a complete panorama of the current industry's operation system, between 2010 and 2018. Secondly, I try to analyze how the cultural policy of the state led the cinema industry to the dominance of foreign distribution companies. Independent filmmakers position themselves in a different place in the industry while distributing their films. They follow different treaties and agreements with distributors. In the last part of this chapter, I touch upon relations between the digital age and movie distribution.

In the third chapter, I comment on what my field research reveals about the industry. I attempt to strengthen the discussion with two case studies of independent films and distribution strategy of these two films. Here, directors Kazim Öz and Kıvanç Sezer share their unique experience of self-distribution journeys. Both cases are helpful examples to understand why independent filmmakers try to create their own distribution mechanisms, in collaboration with their audiences.

In closing, I try to accomplish a complete and insightful portrayal of the distribution sector in the cinema industry in Turkey, with its viable alternatives brought up by political, economic agenda of the country and developments in exhibition technology. In this final section, I get a chance to articulate difficulties and suggestions coming to the surface during interviews so that these discussions can generate a solution or a different way of thinking to proliferate current barriers

in from of the development of distribution in Turkey, and hopefully inspire further research on the subject.

## **CHAPTER 1**

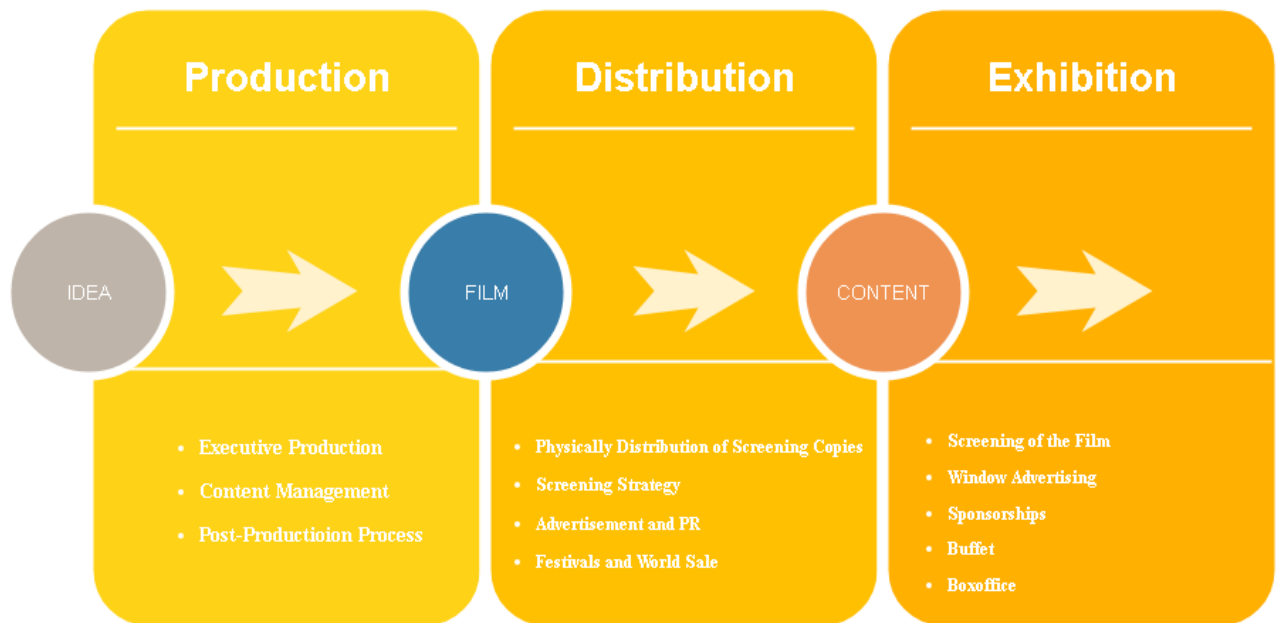
### **DISTRIBUTION IN FILM INDUSTRY**

#### **1.1. WHAT IS DISTRIBUTION?**

Distribution is often the least talked and researched phase of filmmaking because producers and directors are more visible in all phases from pre-production to exhibition process while distributors are not seen. Nonetheless, they play a great role in films' achievement (Sin, 2018). Distribution might be essential to the cinema industry because films start to live on the moment when an audience catches a glimpse of it on the big screen. Hence, the distribution process plays quite an important role in the journey of the film, both in financial and cultural aspects from the editing table to the screen.

After I have worked as an assistant producer in the cinema industry, I observed that there is not only one method to distribute a film effectively. In each film, you are supposed to offer a distinctive distribution strategy which is particular to that film. While drawing your strategy map, you have to consider certain features of the movie like its director, producer, points that the film intends to make, potential audience, and the year and time when the film will be released. It is one of the biggest four elements of film supply chains together with production, exhibition and promotion/marketing as seen in the diagram (Figure 1). Without completing effectively these processes before and during distribution, a film might not be distributed in full capacity as it is expected.

**Figure 1.** Basic Processes of the Cinema Industry



Source: (Sayak & Öcal, 2018)

Apart from these four basic processes, distribution is itself made of licensing, marketing, and logistics. (Sin, 2018) These three stages and their operation may change from country to country. While the UK distribution model includes and focuses more on marketing and logistics, American studios offer all elements together without any outside interference to the workflow. The American film industry has been highly developed in terms of distribution. It follows a kind of vertical business model which entails all phases in one corporation, or in two. This situation contributes a lot to the institutionalization of American cinema as an industry because production, distribution, and exhibition have been operated together in a centralized manner for all films produced by American companies

such as Walt Disney, Twenty Fox Century, and Warner Bros. These companies have managed the whole process internationally and nationally from the establishment of the studio system until the current moment (McDonald & Wasko, 2008).

### **1.1.1. Institutionalization of Distribution in Cinema of Turkey (1940s-2010s)**

Production, distribution, and exhibition processes are fundamentals of the supply chain of the cinema industry with their particular crucial importance and impacts on the whole industry. They differentiate with each other in that they have structural characteristics making each of the three of these processes distinct from each other (Atakan, 2012). However, sustainability and profit are two crucial backbones of the economy of the cinema industry; thereby distribution turns out to be the most important process among these three basic stages. Distribution companies are always masterminds behind determining the parameters of the film industry all around the world. This is the same case in Turkey. That's why distribution is probably a locomotive part of the industry because distribution is the stage where filmmakers can earn back for future projects with a successful distribution strategy. A critical approach to institutionalization of film distribution in Turkey is a necessity to gradually open up the unraveled history of the film industry in a compiled analysis so that the current crisis on the film industry would be understood clearly.

Till 1949, distribution was controlled by cinema managers and big production houses based in İstanbul, but their representatives were generally scattered around the country in the Yeşilçam<sup>2</sup> period in Turkey. Cinema owners and producers were deciding on the projects together. Generally, these projects depended on audience demands. In the 1950s, film exhibitions were managed by a

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<sup>2</sup> Yeşilçam is the brightest period of Turkish cinema with theatrical release of almost 250 new films per year. The period is covering 1950s till the end of the 1970s. (Arslan, 2011)

regional distribution system in Turkey. Producers would come to an agreement with certain movie theatres in order to schedule the whole season with a certain number of films, thereby everyone would know the place and screening date of particular films from the beginning of the year or the season (Arslan, 2010, pp. 80-81). The producers distributed not only local films but foreign films, as well. Most of the film producers were working with certain regional distributors which were located in the cities that they were actively controlling the exhibitions, ticketing and advertisement of the film (Arslan, 2010, p. 79).

After colour film was introduced to the cinema, the cost of the colour filmmaking arose in 1967. So, ticket prices increased. With television broadcast starting 1968, cinema began to lose its popularity in the social realm. At the end of these developments, the cinema industry inevitably was in crisis of primarily audience, production and distribution (Arslan, 2010, p. 106). In the 1970s, the film industry that was based on stardom and regional distribution system collapsed due to the economics roiled with political fluctuations. The failure of the star system resulted in the high rate of inflation, the rising cost of filmmaking with the coming of color film, and the popularity of television (Midilli, 2016). Özen Film only continued to be the most powerful distributor that distributed local and foreign film until General Agreements on Tariffs and Trade (GATT) signed in 1987 paved the way for foreign companies to distribute films in Turkey (Behlil, 2010, p. 8).

In the 1980s, the film industry in Turkey lagged behind global economics and cultural developments because the business model of Yeşilçam was being settled without any providence shaped by financial strategies. The post-military coup<sup>3</sup> period was stigmatized with the deterioration of the cultural atmosphere of the country, thus the cinema industry had also adversely been affected by this period (Midilli, 2016). Economic strife and the military coup in 1980 permeated the whole

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<sup>3</sup> In 1980, headed by the Chief of General Kenan Evren, Turkish Military Service took over the government. After the coup, social and political atmosphere in Turkey underwent a radical change (Behlil, 2010, p. 2). There was immense repression on political culture, art and every part of the life. Universities are shut down and students were arrested because of their ideologies.

system so adversely that many movie theatres could not maintain to stay on business. The film market was invaded with video-cassettes which led sex films and arabesque films to cover most of the local film production (Arslan, 2010: 84).

Behind the Yeşilçam crisis and the coup, the Turkish government had passed on more liberal cultural and economic policies in the late 1980s. This is followed by intruding of big American studios and their subsidiaries to the Turkish film market as a result of the GATT. This GATT allowed foreign distribution companies to start business affairs without any need for local intermediates or aggregators. Beginning with the penetration of the big corporate studios such as United International Pictures Turkey (UIP) and Warner Bros, partial and uncontrolled liberalization of the film industry showed its effect so adverse that foreign companies started to dominate the market (Çetin-Erus, 2007, p. 10-11). This oligopoly continued till the mid-2000s, when Turkish domestic films hit the local markets with their gross ticket sales. Afterward, foreign distribution companies begun to distribute domestic films to earn back their position in the national market.

Different from the filmmaking and distribution in Yeşilçam period, at the time this thesis is written distribution companies are more engaged with cinema ownership/management and more involved in film-production by giving direct monetary incentives or being co-producers of the films in Turkey as depicted in the Table 1. This vertical business model is dominant in the cinema industry of Turkey. It is seen that many of these top ten distribution companies have Hollywood studio work flow when their business model is analyzed.

**Table 1: Top Ten Distribution Companies in 2010**

| Rank | Distributors | Total Gross (TL) | Market Share (%) | 2010 Movies | Movies Tracked |
|------|--------------|------------------|------------------|-------------|----------------|
| 1    | UIP          | 115.464.884      | 30.12%           | 53          | 68             |
| 2    | Warner Bros. | 73.673.034       | 19.22%           | 36          | 42             |
| 3    | Tiglon       | 67.922.020       | 17.72%           | 76          | 128            |
| 4    | Pinema       | 49.864.529       | 13.01%           | 19          | 29             |
| 5    | Özen Film    | 43.082.431       | 11.24%           | 19          | 37             |
| 6    | Medyavizyon  | 22.563.113       | 5.89%            | 19          | 38             |
| 7    | Cinefilm     | 9.425.964        | 2.46%            | 6           | 8              |
| 8    | Duka Film    | 549.807          | 0.14%            | 4           | 6              |
| 9    | Chantier     | 410.643          | 0.11%            | 4           | 8              |
| 10   | Nar Film     | 158.557          | 0.04%            | 1           | 1              |

Source: (Boxoffice.com, 2010)

Turkish cinema legislation plays an important role in this point because there is a lack of equity of opportunities in the market which is caused by the deficiency of the competition authority in Turkey. In 2010, the film industry of Turkey was still dominated by foreign international corporate companies such as UIP and Warner Bros. Moreover, two companies had almost half of the gross ticket sales. The distribution industry was dominated by certain companies and this oligopoly did not give a release chance to many art-house films with commercial concerns (Akkaya, 2016, p. 6).

The milestone moment of the cinema industry of Turkey was that the MARS group which owned most of the movie theatres in Turkey was sold to South Korean CGV groups in 2016 and this led the industry to face with irreversible results. Labour organizations of the cinema industry including Sinema Eseri Yapımcıları Meslek Birliği (Film Producers' Association of Turkey) (SE-YAP) and Sinema Salonu Yatırımcıları Derneği (Turkish Cinema Exhibitors Association) (Sİ-SAY) announced their concerns about this purchase, acclaiming that sectorial business dynamics can be jeopardized because MARS groups would turn out to be a monopoly in the national cinema market (Ş. Aydemir, personal communication, January 2, 2019). However, the MARS (Cinemaximum) group continued to aggressively expand its domain and at the time this thesis is written it has 903

screens across Turkey, 106 of them are now being managed by the Group. Mars Cinema Group is an exact replica of Hollywood studios whose business model includes production, financing, distributing, marketing, and exhibition.

In such a vertically developed cinema industry, filmmakers are now experiencing the long-lasting adverse effect of the deficit of legal sanctions against monopoly and the lacking equity of opportunities in the film industry. Thus, most of the filmmakers are now beginning to search for alternative distribution opportunities in local and international film markets. While developing new ties with different industries and sectors, filmmakers break traditional distribution models which might be listed as national theatrical release, TV purchasing, DVDs/Blu-Ray, and film festivals. Domestic politics and cultural politics have profound effect on this breakage from conventional models to alternative ones. As a result, filmmakers started to search for alternative ways of distributing their films without being limited with the politics of distribution in cinema industry of Turkey. How politics of the distribution contributes to the development of the industry is the main research topic in the following section. I try to figure out how conventional distribution mechanisms are shaped through politics of culture and art in different national cinema industries.

### **1.1.2. Global Examples of Conventional Film Distribution Policy**

While analyzing global cinema markets and policies, I present a rounded view of policy by surveying exhibition sectors, legal interventions, direct state measures such as subsidies, levies, quotas, and indirect state aids such as incentives, credits, and loans. I combine these primary sources of film policy information to have a comparative analysis of national film distribution policies which are in general about formal/conventional distribution mechanisms. Before mapping out an alternative strategy for the future of film policy in Turkey, I want to underline various politics exemplifying different frameworks to position ideal work of distribution. This part of the research focuses on Norway, France, Spain, Germany,

Sweden, and New Zealand. While presenting the scheme of the national politics of these countries on distribution, I structure the architecture of the discussion on the bases of state-market relation so that I can measure up the effect of the politics on the distribution and development of the local distribution market.

As for structuring comparison of film distribution policies from around the world, I use the concept of cultural policy of Nicholas Garnham which was profoundly studied in Harris' last article - *Film Distribution as Policy* - (Harris, 2018). While Harris examines numerous approaches towards film policy, she categorizes them into three different titles. The first one she lists is *the most interventionist* approaches which are direct investments to distribution and exhibition sector. The second title is *the most free-market approaches* which are lack of government investment. The last one is *the mid-level approaches* which are managed in balance and supported by private sector bounds and public policies.

#### **1.1.2.1. France**

When it comes to France, it is important to underline that France is the most resilient country against the circulation of Hollywood films in the domestic market, resulting in the highest production/distribution numbers of local films among European countries. Harris (2018) refers to Danan to elaborate on how public initiative plays an important role to recuperate domestic film production in the local market:

While 75% of films circulating in France were foreign and mostly the US in origin, the cultural exception has stabilized the national industry, with early policy efforts in the 1920s expressly intended to unite 'European cinemas in order to resist Hollywood's economic hegemony.' (p. 240)

Funding is provided by the reallocation of the levies that are collected from the sold tickets. This type of indirect subsidies has a significant role in the distribution industry. Harris underlines that France protected its national cinema with its *cultural exception policy* which is the cultural policy of France against pushing of free-trade and invasion of Hollywood.

In addition, the French Association of Art-house Cinemas (AFCAE) was established in 1955. Theatres were prioritized with tax incentives in exchange for the screening of approved list of films including recommended experimental, art-house, and local French films. However, this trustful structure was doomed to be broken up with the challenges of globalization. The effect of the globalization leads the French film market to develop closer industrial bounds with the international film industry.

France is now much more open to international English language co-produced films with governmental monetary support. The country has adopted an international distribution strategy that is keen to have more heterogeneous profiles (Jäckel, 2007, p. 32). Inner distribution policy is also made of multiple options to highlight independent, small budget French films. There are regulations that provide tax exemption for local cinemas that do not sell more than 5000 tickets per week or allocate subsidies for the construction and operation of cinemas which aim to screen more selected films. Besides production, broadcasters are also involved in this supportive system, they are supposed to invest 0,2% of their turnover in theatrical distribution while government applies an automatic distribution support scheme which is paying direct grants to distributors and movie theatres of up to 200.000 tickets of selected, independent and local films were sold (Harris, 2018, p. 242). Jäckel (2007) pointed out that

automatic support goes to all distributors and exhibitors in France, regardless of the nationality of the films they distribute. Among selective aids, one specifically helps distributors and exhibitors of films originating from countries whose films are little known in France. (p. 24)

What Jäckel suggests regarding the cinema policy of France reminds us of the lack of this kind of a well-shaped and diversified cinema policy in Turkey. In other word, France does not apply an unyielding national cinema policy. Instead, it gives away for underrepresented cinemas of other countries to ensure a pluralistic film environment for people living in France (Jäckel, 2007, p. 32).

#### **1.1.2.2. Norway**

In reference to Harris' categorization, it can be said that the Norwegian approach is state-supported but not merely out of state incentives. It is not statist. There are municipal cinemas founded in 1932 with the help of direct subsidies and funds provided by Municipal Films Center, which was founded in 1919 to concretize the national film industry. Municipal cinemas established a production company, Norsk Film A/ S. With this company, the municipal system builds a concrete link between different phases of film supply chains, production, distribution, and exhibition sectors with local films. After the beginning of TV broadcasting, the Norwegian Cinema and Film Foundation brought massive state subsidy to increase the quality and the number of local films (Harris, 2018, p. 238).

There are current debates on contemporary municipal cinema systems in Norway that are ignited by the combination of neoliberal ideology and pressure of *extra-theatrical* competition. The main arguments of these debates are the maintenance of the current cultural protectionist approach to help independent, experimental, domestic, and small budget films to make them survive in a film market that is occupied by non-cinematic and commercial films. In the case of Norway, questions of distribution and exhibition are political because these kinds of choices could be made depending on the trade policies of particular countries.

Norway has a mixed system of cinema policy. This policy is executed in the context of the market economy which is supported by a decentralized structure. As it is in Turkey, the execution of the policies is not regulated on a regular base to give a brief structure of the developments in the market. State intervention might be a key element in that point to balance dynamics between the free-market economy and the quality of films /local films produced, distributed in the country. Like many other countries Norway also financially supports the production of domestic films but distribution is a key factor to stabilize the next generation of local films because filmmakers have to earn money so as to shoot their next films. The inevitable result is viable in Norway, as well. The share of local films in gross box office takings is behind Hollywood films (Harris, 2018, p. 239).

### **1.1.2.3. Spain, Germany, Sweden, and New Zealand**

The examples I have mentioned so far are two different approaches to cinema and film-distribution policy that are mentioned in Harris's classification of cultural policies, varying from more state interfered policies to more liberal ones. The last examples dovetail with both categories in some ways while contrasting in other ways. The key examples of mid-level approaches to film-distribution policy can be listed as Spain, Germany, Sweden and New Zealand (NZ). In these countries, governments are not supporting their national cinema via direct intervention to distribution. Instead, they are sharing the burden with market players.

For instance, in Spain, distribution is regulated by quotas. Movie theatres are required to show domestic films for 73 – 91 days in a year (Harris, 2018, p. 245). In addition, New Zealand provides direct subsidies for theatrical releases granting different amounts of up to 25% of marketing cost to domestic distributors via the NZ Film Commission. To keep up with developments in film distribution technology and support the local films, NZ Film Commission also sells films directly on its own Films on Demand streaming service (<https://ondemand.nzfilm.co.nz>).

In Germany, the current distribution market is dealing with release of so many films to the market although the total admission rate is not in tune with tracked films. The German Federal Film Board (FFA) provides interest free loans to distributors for publicity and advertising (P&A) cost to certain amount of the budget (Harris, 2018, p. 243). The film politics are partially fixated on production in Germany. Federal government provides different funding schemes for film production; in contrast film distribution is handled by the big distribution companies.

In Spain and Sweden, the state applies quotas and subsidiary programs for the distribution. In Spain, movie theatres must show local films for 73- 91 days of the year. The Government of Spain provides 50% of the distribution budget to

producers in the form of grants. In Sweden, there are also grants for marketing which are provided to any distributor who launches Swedish films in to the Swedish market. Furthermore, broadcasters make contribution to Swedish Film Institute to distribute local films (Harris, 2018, p. 246).

Distribution policy shapes the national cinema market in particular to the future of the national film cultures. I see that most-interventionist film policies uses the state apparatuses and means to tamp down fluctuations over the course of economic recessions, while liberal markets that are free from state subsidies oriented schemes are compelled by the dominance of the big distribution companies. In this sense, I will continue with alternative film distribution models launched by filmmakers from different part of the world to break the barriers of these distribution politics of conventional distribution models.

## **1.2. WHY ALTERNATIVE DISTRIBUTION MODELS ARE NEEDED?**

*“The work of independent storytellers can challenge and possibly change the culture, illuminating our world’s imperfections and possibilities...”*

(Redford, 2017)

*“There is no way back”*

(Patino, 2016)

For a long time, film policies only addressed to film production. However, distribution is as important as production. First of all, distribution enlarges the target audiences of the forthcoming project of the same director, producer or film-house while ensuring the budget for future films. In this part, I focus on global examples and cases to portray the necessity of alternative distribution models. I aim to answer why alternative methods are needed in film distribution. In which circumstances are filmmakers looking for alternative mechanisms to distribute their films? Do these filmmakers have common grounds with each other? What factors are playing

a role in the emergence of alternative distribution models? I will search for the answers to those questions.

### **1.2.1. What is “alternative”?**

Before going through different layers of alternative distribution models on a global scale, the meaning of the alternative has to be discussed. As pointed out earlier, there are conventional distribution channels in the cinema industry. These channels are theatrical exhibitions, TV sales, DVD/Blu-Ray sales, and film festivals. Online streaming platforms such as Netflix, iTunes, Amazon and Google Play have been added to this list later. Although these online platforms are available in many countries the extent of their content is different from each other and their market shares are different as well. Hence, streaming services might not be categorized as conventional distribution models, because they are also included in alternative methods in some countries such as Turkey where conventional methods are shaped with unyielding cultural politics (Vitrinel, 2019).

Referring to alternative models in this research, I propose distribution methods applied by filmmakers who could not find equal and fair competitive opportunities at domestic cinema markets via conventional distribution mechanisms. Alternative distribution methods here refer to film-distribution methods which are alternative to main and conventional distribution methods in particular cinema industries. These alternative methods become the main focus due to certain motivations including inevitable intrusion of the digital age as well as lack of inclusive and sustainable cultural politics of the countries.

In this section, I would like to lay down controversial - debatable- and non-conventional distribution frameworks in order to explore the defiance of current distribution models to develop sustainable and pluralist industry model in Turkey. A close look at academic research and theories on the influences of new technologies and the Internet might be a good starting point in general. Studies have conducted to emphasize that developments in technology play a disruptive role in

reversing power relations by paving ways for more 'democratic activism' as well as participation and competition (Bennet, 2003; Kellner, 1990; Picard, 2000; as cited in Cannon, 2011). The disruptive role is generated with the challenge of 'concentration of ownership' and media power by opening a room for more horizontal distribution networks which is blurring the line between 'mass and self-communication' for newcomers to the industry (Cannon, 2011, 4). Other studies are more hesitant in terms of that new technology and the Internet can bring out change, freedom and "democratic empowerment" (Garnham, 1994; Baker, 2007; as cited in Cannon, 2011). In his dissertation Cannon (2011) points out that:

These accounts refocus upon the ways economic and social power relations and market dynamics primarily determine how new technologies are introduced and developed and how, historically, they typically lead to a greater concentration of ownership and power (Golding and Murdock, 1997; Mansell, 1999). There is evidence of Hollywood's progress towards creating a closed sphere of innovation regarding Internet distribution (Currah, 2007; Lessig, 2008). (p. 6)

In the following part, I intend to divide the alternative methods which come to the forefront in the digital age into different sub-sections so that I can construct contextual relations between each other. Regarding alternative mechanisms of film distribution, I look at initially which distribution methods have emerged as screening platforms different from theatres, and then make an analysis of current platforms and mechanisms to which filmmakers resort as alternatives to conventional film distribution. As I make it clear before in the research, I refer to both digital and different business models as the alternative. It is not strict digital platforms only.

#### **1.2.1.1. Rising of Digital Distribution as an alternative: Netflix Effect**

Despite the contradicting approaches to new technologies, one of the main reasons that trigger alternative distribution methods is the Internet. The Internet is devising an alternative system on which almost all kinds of contents are broadcasted without being halted by any subtle intervention like an official state-ban on the streaming and Netflix has a crucial role in this since its launch as an online

streaming platform in 2007 (Patino, 2016, p. 257). Virginia Crisp defines Netflix's impact on the film market with the idiom *disruptive innovator* but this is not only for Netflix (Crisp, 2015, p. 12). This conception is valid for all online streaming services which do not only distribute feature films but also produce their own original content.

Leading Latin American producer and distributor Pascale Dillemann states that the theatre model has steadily been changed to the online model for accessing audio-visual content and "*there is no way back*" (Patino, 2016, p. 208). On a global scale, this change has begun to show its effect for a long time.

In the past ten years, the developments in the digital world have led leading companies to manage to combine digital circulation of film and television contents together with conventional distribution methods. This has been accompanied by a turmoil and transformation for even big corporations of the global industry like Disney, Pixar, and Marvel that are now targeting the spectators with all-in-one Disney Plus (Hayward & Leger 2019). They have to reconsider already settled maxims of content creation, circulation and consumption of this content in a very novel and radical way (Curtin et al., 2014).

Netflix is probably the pioneer of this approach. In 2013, the company, which is the leading SVOD platform across the world was accessible in 70 countries with more than 139 million global subscribers, showed a great success in nominating two of its original contents- *Arrested Development* (2013) and *House of Cards* (2013) - for Emmy Awards. This move shook the ground for its counterparts because Netflix was expanding its share without any sign of industrial mercy on them. In 2016, Netflix added more 130 countries to its *Netflix-zone* and reached out over 190 countries excluding North Korea, Syria, Crimea, and China due to the governmental restrictions in these countries on American companies.

**Figure 2:** Netflix-zone



Source: (Netflix.com)

Meanwhile, Amazon Prime, and Hulu are other big counterparts of the SVOD market (Curtin et al., 2014). They are now challenging dynamics of the market with announcements on their original contents (Curtin et al., 2014, p. 30). For a long time, the distribution industry and its market politics had been managed by Hollywood but digital platforms pull the strings differently and more independently that even big entertainment “giants”, such as Disney and Warner, which are expected to launch their online stream platforms not to miss their share from the digital pie in 2019 (Vitrinel, 2019). Hence, it is a fact that online SVOD platforms are now alternatives to conventional distribution mechanisms. For instance, film producer Paco Arriagada could not find a fair deal with the distribution companies in Mexico and decides to distribute his film on the Mexican digital platforms and local TV channels: Channel 22. Arriagada’s film *Chalan* (2013) was watched more than 30 thousand viewers on these platforms, which is likely to be more than the total amount which he could have possibly earned from the theatrical release (Patino, 2015, p. 118).

Gradually, widespread technological innovations have made traditional ways of screening look obsolete. That’s why now most of the successful producers

and market strategists advise launching an online release of films at the same time with the theatrical exhibitions in order to reach as many audiences as they can in different platforms and markets. Currently, the most innovative and successful competitors are Amazon, Apple, and Netflix. Apple is different in the sense that subscribers can buy or rent only one film without having a package although its Apple TV also seems to be a challenging rival in the market. However, these digital platforms are now playing their roles as disruptive innovations in an aggressive and highly competitive market-game alongside the entertainment giants of Hollywood. On this point, Michael Curtin, Jennifer Holt, and Kevin Sanson argue that:

These transformations are largely due to the fact that the distribution business has long been the linchpin of Hollywood's creative strategies and financial success. Since the early days of the major studios, distributors have relied on a sequential release pattern, or "windowing," to fully exploit the value of the content they control. By making content available in different markets for discreet periods of time, distributors have been able to wring the most revenue out of each market without sales from one window (e.g., digital video disc [DVD] sales) "cannibalizing" the profits from another (e.g., domestic theatrical exhibition). (2014, p. II)

Together with SVOD and VOD's ambitious rise in the market, further consideration must be given to independent distribution platforms and Internet service providers (ISPs), which are holding the delivery line of digital contents and also providing infrastructure to the digital revolution. However, as indicated above, some companies have foreseen the near future and moved forward. Comcast which is the most notable and biggest conglomerate in the U.S. among the Internet service providers ISPs market is a viable example to reveal that digitalization enables filmmakers to open new platforms and provide more pluralist cinema industries while capitalist strategies by nature of things can eradicate this environment (Curtin et al., 2014). This is actually now happening in the U.S, where Comcast owns both content and conduits in the new digital ecosystem. But its expansion remains a politicized question at this point to ask how much it will expand in the future.

Concluding this part on the digital revolution in distribution, I would like to set forth that alternative mechanisms are produced as an escape from oligopoly,

monopoly and capitalist market standards for some filmmakers to reach out to more audiences or just audiences. Nevertheless, some of these digital platforms are also looking after box office numbers to purchase films. Therefore, SVOD, VOD and Pay-TV as well as online streaming televisions seem to be alternatives to conventional distributions mechanism but actually, they are collaborating with the main distribution mechanism as an addition or extension of it.

Although these Silicon Valley outputs have the potential to control the film industry in the future there is still a long way for SVOD markets to substitute for theatrical release in both financial and cultural terms because most of the money being made is still coming from the old-fashioned way: in theatres and advertisement on linear television broadcast. Still, there is no way for filmmakers to be paid by Netflix as much as they would earn from conventional theatrical exhibitions (Curtin et al., 2014). For that reason, in some countries, filmmakers are trying to find out other alternatives to conventional mechanisms in a formal or informal way depending on market conditions of the country in particular. The following part includes some of them.

### **1.2.2. Re-Creating what is the Alternative**

Innovative minds are always finding alternative ways to reach their goals. What *Exodus Entertainment* did is a great example of being a pioneer in the film distribution. The brand is an example of digital platforms based in Nigeria. This is a new distribution structure for the entertainment industry in Nigeria. The idea of the system is proposed by economics Professor Pat Utomi. Company's chief executive officers, Paul Ikhane, who states that:

*Exodus Entertainment* as an online and mobile platform where a consumer orders all kinds of local audio-visual content, sometimes even films or audio recordings that have not been released. It also involves two sales periods; pre-release date sales and post-release date sales. The first one allows consumers to order content that is delivered by four of the biggest multi-national courier companies in the world and remains active for a period of three to five weeks, allowing content owners to sell to the same market that pirates target and as effectively as they do. The second one becomes active after the release date

and it is done mostly to ensure that the content remains always available and the structure of the system remains solid. (Patino, 2016, p. 213)

However, despite the fact that Internet has been perceived as an alternative model for distribution, it also evokes different kinds of challenges depending on the national context. As Patino states in the example of Colombia, time will tell if the Internet will provide alternative distribution models to filmmakers because, for developing countries, internet access is a big problem in some parts of the society (2016, p. 201) due to financial reasons and lack of technological infrastructure. In addition, Patino observes that deficit in regulations on internet copyrights leads people to use informal ways to distribute films like pirated DVD sales, multiplying free copies of downloaded films. She lists many reasons for informal alternative distribution models but she categorizes pirated DVD sales as alternative distribution models to traditional models in regard to Latin American case. That's why it should be highlighted that what is to be accepted as the alternative is mostly shaped by the particular conditions of every country. As Patino (2016) states

the example of *Exodus Entertainment* demonstrates if a trusted company offers the right choices to their customers, at reasonable prices and makes it easier for them to access and pay for the content in the way they want, according to their financial means, they will resort to using their services instead of recurring to piracy. (p. 216)

Apart from digital power, there have been many different alternative ways to continue to distribute films. LARED is another example of this kind of alternative distribution efforts. LARED is roughly a network of independent Latin American distributors whose business model is based upon purchasing of joint purchase of film rights to be distributed only in the member cinemas of LARED. Although they could not profit during the foundational period, they began to have support from Europe Cinema - a French-founded network system - to support European films' distribution. *Başka Sinema* is also a member of the network from Turkey which is going to be explained in detail in the following part.

With LARED, filmmakers enlarge their ties with the global market. They have two initial motivations; firstly they reduce several costs such as the acquisition

of audio-visual materials, marketing, and distribution. Secondly, they work in a network that is associated with global markets, which means that they train themselves together with their international audiences about their cinemas. At the end of the day, they become pioneers of these unexplored territories in Latin American cinema industry (Patino, 2016, pp. 212-213).

Both the Exodus Entertainment and LARED are pioneers in their markets because they show that another way is possible rather than following conventional ways. Although infrastructure of internet, economic development and national politics of the film distribution play a significant role in succeeding these kinds of innovative business, filmmakers learn how to overcome these problems by being creative. Distributing their own films directly without mediation of distributors is also one of these solutions. In the next part, I look at how filmmakers step down to the field to reach to the audience.

### **1.2.3. Self-Distribution**

The dramatic increase in production and distribution of independent films around the world over the last two decades shows that new technology empowers filmmakers because it reduces the production cost (Cannon, 2011, p. 3).

Self- distribution is the business model which requires that filmmakers execute the distribution of their films at first hand. In this model, producers might personally deal with distributors with their offers for each film or they manage the whole distribution process by organizing and planning the physical distribution of the film. Outside the film festivals, producers are theatrically distributing their films in three ways: the film can be booked by the theatre or cinema chain and tickets sales are split with theatre and producer; filmmaker can rent out the cinema for a fixed rental fee or film is shown in alternative venues such as institutions, museums, universities, convention centers in charge of a screening fee (Cannon, 2011, p. 27).

For instance in Turkey, filmmakers venture to distribute their films with their own efforts. They can work both distribution companies or they can distribute

the films themselves. Onur Ünlü, for instance distributed his film *Sen Aydınlatırsın Geceyi* (2013) with its four copies. After he released the film he announced that he would send the copy of the film whoever (as an organization or an institution) wants to watch the film. It is an anecdote that I can mention here, I and my friends from literature club in Boğaziçi University organized a screening of the film by demanding the film from the producers in December 2013. It was literally a kind of self-distribution. At this point, it seems necessary to define self- distribution with its two different practices: The first one is the more involvement in marketing. In this category filmmakers work with a distribution company, yet they still collaborate with the audience to reach out more audience like in the case of *Zer* and *My Father's Wings*. In the second category, filmmakers distribute their films without intermediary of the distribution company. Although these two categories intermingle with each other depending on the each film, it is important to analyze the self-distribution process from these two perspectives.

By working with cinema owners directly, filmmakers can get rid of aggregators (intermediates) and costs related to intermediary agencies. In that way, they can compensate a little of revenues with the reduction of expenses but there is a financial risk that involves marketing and advertisement. It is important to explicitly state that filmmakers distributing their films are facing with challenges and most of these challenges are not only struggling with monopoly market but also having a well-shaped distribution strategy without having the support of a giant distribution company. Thus, it is still early to say that self-distribution is a big alternative to the settled and anti-fair competitive environment that international distribution industries create.

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Concluding this subsection on why alternative models are needed and what they are, I see that there are common grounds on which filmmakers are building their new business models to embrace audiences. While searching for alternative models in countries that I presented in the previous section regarding their policies

regulating conventional distribution systems, I see that countries having Harris's middle and most interventionist film policies are presenting pluralist and fair opportunities (Harris, 2018).

In Latin America, there is a suffocating market domination of Hollywood similar to what cinema industry in Turkey is passing through nowadays. Both examples are now suffering from a lack of all-inclusive cinema policies which are compiled regarding the nature of the political economy of the film industry. In this section, it is apparent that local endeavours are really fundamental to change something on these monopolist systems to take a step further. In the following part, Turkey is my focal point to examine alternative film distribution models and their place in the future of the cinema industry of Turkey.

### **1.3. EMERGING ALTERNATIVE FILM DISTRIBUTION MECHANISMS IN TURKEY**

After presenting conventional and alternative film distribution mechanisms around the world with different examples, I would like to dwell upon the case in Turkey. In this section, I question if there are any alternative film distribution systems in Turkey. At the time this thesis is written, it is not possible to make a list of alternative models properly, because it is so early to bring a comment on the issue. This research is just an attempt to structure film distributions channels which have the potential to challenge conventional distribution methods in the film industry in Turkey.

Filmmakers, specifically the ones who do art-house films do not have much chance to release their films in theatres for a long time now, especially since 2016. This research intends to understand how these filmmakers fight against the conventional and monopolized theatrical release practices in Turkey. During my research, I noticed that some conventional ways are still in use because they have managed to catch up with digital developments while others are losing their impacts

for different reasons. In 2005, the Internet, IPTVs, VODs and pay-TV's entered into the Turkish market. This constant change has expanded its control zone till 2010 when the pace of the change hit the target with a destructive power.

### **1.3.1. Digital Alternative Mechanisms in Turkey**

#### **1.3.1.1. IPTVs and Pay-TV**

Defining digital platforms for film could be a good starting point to introduce digital content platforms in Turkey. Since the 2000s, Turkey has encountered with industrial use of the Internet. Turkish spectators have access to digital platforms at the same time with the world, because fiber infrastructure provided by telecommunication companies plan to boost their benefit and advertisement area via IPTV platforms (Çalışır, 2016, p. 44). Introduction of Digiturk (1999), D-Smart (2007) and Tivibu in 2010 created a very vibrant market for filmmakers to show their films on these platforms.

All of the three platforms are the very first digital platforms which might be categorized as the first example of IPTV in Turkey. This is based on cable subscription and subscribers are buying a particular online network to have special and catalogued content. There is a need to differentiate IP services from SVOD platforms such as Netflix, Amazon Prime or Blu TV in Turkey because IP television requires a settled and a well-organized infrastructure with the subscription of a certain network while SVOD is available on any network of the Internet which is supplied with any sources (Çalışır, 2016, p. 44).

IPTV's or Pay-TV's including Turkcell TV+ is not extensively used to be accepted as alternatives but there is a rising amount of subscription for these platforms. Nonetheless, these platforms generally purchase blockbuster or popular films. Not many art-house films are included in their catalogues. Vitriuel (2019) supports this argument by saying that IPTVs are not as popular as they were in the

1900s and 2000s because other digital game players like Netflix, Amazon, Blu TV, and Puhu TV were launched in Turkey.

On why IPTVs could not compete in the audio-visual service provider market with other digital platforms, İbrahim Çalışır (2016) says:

The motivation of content providers, advertisers and publishers was high during the IPTV system installation stage in Turkey but they understand that the system's expectations could not be met due to the arrangements on advertisement incomes and internal dynamics of the market. In addition to these groups, television and set-top device manufacturers have also preferred to provide content through their own portals with smart televisions as a result of the advantage of developments in technology. (p. 45)

As Çalışır points out that market conditions in Turkey are not prepared to the income models of IPTV to boost the advertisement rates. Although interactive advertisement are started to be applied in IPTVs, there is still a recession in the IPTV market in recent years.

### **1.3.1.2.Domestic Video on Demand Platforms: Puhu TV and Blu TV**

Regarding digital platforms as alternatives to conventional film distribution, Turkey is far from that level of internet usage because using these kinds of digital platforms is still being categorized as a luxurious consumption in Turkey (Vitrinel, 2019). Thus, it might be said that these platforms might have the potential to be alternatives to movie theatres but the long-lasting effects of the digital platform are still unpredictable (Patino, 2016, p. 81). After pay-TV examples, the digital content market has encountered with different local digital VOD platforms which are Blu TV and Puhu TV. These new generation TV platforms brought up a more dynamic viewing experience to Turkey because they started to launch TV content. VOD platforms are non-linear online distribution platforms. Non-linear means that audiences are not expected to watch in a traditional session. They can watch all the contents at the time chosen by consumers.

Puhu TV was launched by one of the biggest media corporations of Turkey; Dođuř Media Co. in Nov. 2016. Puhu TV basically emerged from a need to collect Turkish TV series on conventional TV channels which are generally scattered to different websites of every production company. What Puhu TV brings to the table is to gather all TV series broadcasted on conventional Turkish TV channels in the same digital platform which is accessible to any time in any size of the screen with a basic Internet network. The platform is free of charge and its finance is based upon advertisements – co-works with brands.

Puhu TV’s alternative, Blu TV, is a subsidiary digital platform of another big media corporation Dođan Media which was later overtaken by Demirren Group in 2017 but Blu TV still belongs to Dođan Media Co. Blu TV includes original contents and programs about lifestyle, fashion and health. In comparison to Puhu TV, Blu TV has more variety in terms of content.

The race between national and international platforms began with the launch of Netflix in Turkey. With the other 130 countries, Netflix started its streaming in Turkey in 2016. In one hour, it was reported that it reached 7000 (dijitalpazar.com) individual visitors to its page. With its first original Turkish content, *Protector* (2018), it reveals that Netflix is addressing more global and Middle Eastern market with its original content. There is a large and steadily growing Turkish TV series market specifically in the Middle East and North Africa which is pretty attractive to Netflix, so the company enlarges its domain in these regions.

Netflix’s ambitious involvement in the region and its great presence in the domestic market in Turkey bring its own controversies, especially for the film industry. For instance, on February 2019, Netflix announced that *Organize İřler: Sazan Sarmalı* (Yılmaz Erdođan, 2019) which is expected to be a blockbuster film produced by BKM is online in Netflix (Milliyet.com.tr, 2019). However, *Sazan Sarmalı* has premiered three weeks ago in national theatres in Turkey. This is the first case in which a film being screened at movie theatres was sold to a digital platform. Most of the movie theatre owners protested this sale because they have

already booked the next week for the same film. Beforehand, they were not informed about it. Sİ-SAY which is the labor foundation of cinema investors in Turkey announced to bring the case to the court due to the lack of transparency in business (Sputnik, 2019). While all these things happening, Blu TV announced that all contents and originals are now available on Amazon Prime Video. The fluctuations and developments are now on their ways and they are so current to make comments on them.

In summary, it can be said that digital platforms are not as effective and profitable as theatrical release yet. But this assumption is not limited to Turkey. The theatrical release is the most profitable distribution model around the world for now (Croft, 2011, p. 10). This is the first reason that most filmmakers still do not resort to digital platforms as alternatives. However, digital distribution models are here to stay. A dramatic increase in take-up in recent years has been triggered by the constant transition pace of technology. Although a detailed analysis of the digitalization of the film industry of Turkey is scrutinized thoroughly in the second chapter, it seems that digital platforms need some more time to be all-pervading for the film industry in Turkey. Apart from digital alternatives, there are also some real experimental options for distribution of the film which are resorted by some filmmakers to distribute their films in an efficient way. The next sub-section is self-distribution or organizational-collective distribution.

### **1.3.2. Self-Distribution**

After looking from a holistic point of view to the cinema industry in Turkey, there are some acute problems needing to be discussed so that filmmakers distributing their films might be understood. Apart from the dominance of Mars Group, movie theatres are getting stuck into the shopping malls ending up as an entertainment center rather than a cinema where there is a solemn expectation of seeing movies from different categories. Additionally, the cinema industry is lack of basic, all-inclusive well-drafted public support designed in tune with current technological and digital developments around the world (Dağtaş, Aydın, Yılmaz,

2018). Creativity rarely waits for conditions to get better, thus what some filmmakers are now trying to do is to adapt to the compelling film industry in Turkey.

Generally, filmmakers distributing their films might work with a distribution company, as well. Nonetheless, the national theatrical release does not return the investment to the filmmakers because there are no cultural policies that would secure the revenues from theatrical releases to financially support the upcoming art-house film projects of the directors. This means that distribution companies may not convince cinema operators that art-house films are also paying back at the box-office. Thus, art-house films do not seem dependable for movie theatres to secure audiences (Midilli, 2016, p. 29). Filmmakers begin to organize screenings of their films with their producers. There are several cases in Turkey. As a pioneering example, Özcan Alper endeavors to distribute his film *Autumn* (2008) with co-working with NGOs, local small cinema clubs and activists (K. Sezer, personal communication, February 15, 2019).

In addition, Kıvanç Sezer had also distributed his film *Babamın Kanatları* (*My Father's Wing*, 2016) with his own network although he worked with *Başka Sinema* for its national distribution. He worked with Eğitim-SEN (Education Labour Group), art and culture centers, museums, and Unions of Turkish Workers and many other alternatives groups. Besides, Sezer suggests that the distribution of his film also gave great hope about the future; he implied that he couldn't have made his second film if he hadn't distributed his first film in a collective and intimate connection with audiences (K. Sezer, personal communication, February 15, 2019).

Moreover, self-distribution is started to be accustomed as a protest against the current state of film distribution in Turkey after Kurdish filmmakers began to distribute their films in collective organizations mostly organized by Kurds (K. Öz, personal communication, March 20, 2019). However, I am not approaching self-distribution from a perspective based on difference of race and ethnicity, albeit, I

lean to emphasize that segregated or marginalized filmmakers incline to distribute their films themselves because generally, their films focus on political issues regarding minority groups in Turkey. However, it seems that working with labor unions, culture centers are not sustainable methods to emerge as the alternative to conventional film distribution either. In that sense, it is of critical importance to be aware of a need for an alternative network enabling or supporting art-house films (Aydemir, 2019).

### **1.3.3. Başka Sinema (Another Cinema)**

*Başka Sinema* is more or less officially a distribution company founded by Kario & Ababay Foundation and supported by Europa Cinemas which was founded by the European Union. Filmmakers who have close ties with business entrepreneurs and investors put this alternative and festival-like network into practice in 2013. *Başka Sinema* is different in many peculiarities from other distribution companies in Turkey. Firstly, its former director was Azize Tan who is quite engaged with international art-house filmmakers and organizations. She was also the former festival director of the International İstanbul Film Festival, which means that festival traditions are linked to the very basis of the network during its foundation. The motivation behind foundation of *Başka Sinema* is to attract festival audiences to the cinemas.

*Başka Sinema* has challenged the traditional film viewing experience in movie theatres by cancelling session-breaks during a film, as if the spectators were watching a film in a film festival. Also, it presents many specific screening categories to raise demands for art-house films. While using art-house and festival traditions, they have not been able to enlarge the numbers of theatres that are affiliated with them in order to catch the attention of different audience profiles than regular film-goers (K. Sezer, personal communication, February 15, 2019). Filmmakers distributing their films with *Başka Sinema* rarely earn their expenditures back. *Başka Sinema* works with producers with very little distribution rates but their box-office intake is not enough to pay back to producers. Despite all

of these challenges, *Başka Sinema* has potential and it launched the first edition of International Ayvalık İstanbul Film Festival which hosted national and international independent films in 2018. With the light of the right marketing strategies and business development, *Başka Sinema* might fulfill the expectations of independent filmmakers.

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In conclusion, what I refer to as the alternative here is a very mediatory term to build a kind of dialogue between different types of film distribution methods emerging as an escape from the one-sided and barren trap of the market economy of the film industry in Turkey. The pervading adverse effect of monopoly has a profound impact upon the industry whereas there are problems with censorship, categorization, and classification of documentaries and films in film legislation passed in 2019<sup>4</sup>. Under these ongoing problems, the whole global film industry has been passing through a very rapid and radical digital change and transition. Some filmmakers are trying to run over these difficulties by altering conventional distribution ways and by coming up with new methods to find a way of leading a freer and plural film industry.

I divided this sub-section into four categories to analyze what is alternative and in which forms filmmakers are resorting to these alternative methods. It may not be quite surprising to indicate that digital platforms are playing a great role in expanding the limits of audience profiles by reaching a various range of users. However, there are some developments to catch to improve the quality and popularity of digital platforms. In Turkey, most of the digital platforms are not at such level to be considered an alternative model to conventional models. As of other alternative methods not motivated by a digital cause, there are two of them;

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<sup>4</sup> New cinema legislation was accepted in Jan. 18, 2019. The Ministry of Tourism and Culture introduced different amendments in the registration document, theatrical release, shooting legacy and funding schemes. This new legislation brings out censorship discussion due to the fact that registration document is made compulsory for the theatrical release.

organizational self-distribution is a good example of collective endeavours to step against the destructive power of cinema chains. The second one is alternative film distribution network *Başka Sinema* which is supposedly a distribution company but it is specified in art-house film distribution in Turkey. Along with the second chapter where I focus on developmental processes of alternative methods with the light of political economy of film distribution in Turkey, I entail each of these cases with more examples and details.

## **CHAPTER 2**

### **ECONOMICS AND POLITICS OF CINEMA, AND ALTERNATIVE DISTRIBUTION MECHANISMS IN TURKEY**

In this chapter, I analyse the conventional movie distribution methods in detail under three different sub-categories. In the first sub-heading, I analyse the impact of cultural policy of the state on cinema industry and dominance of foreign distribution companies. In the second part, I focus on the ‘conventional distribution’ in Turkey so as to deepen the analysis of distribution mechanisms in the cinema industry. After I elaborate and give detail about current trends and problematic issues in distribution sector beginning from 2010 to 2018, I continue with the historical background of distribution in cinema of Turkey. During this period, distribution sector has gone through certain critical developments, which will be visited later in the thesis.

While analysing the monopolization of the distribution in the third subsection, I realize that independent filmmakers position themselves differently in the industry in comparison to filmmakers of mainstream commercial feature films (S. Duranay, personal communication, March 15, 2018). They follow different treaties and agreements with distributors. Popular films have a distributor before it is produced while art-house films may not be released at all.

In the last part of this chapter, I touch upon relations between digital age and movie distribution. During my research, I see that some mechanisms like VOD and OTT platforms might be categorized as conventional ones in global film distribution market while Turkey has just been introduced to them. Digital impact is at its pinnacle now in all around the world but cinema industry of Turkey has still way to take in this particular issue.

Before coming to the point, I would like to draw the frame of this part by introducing interviewees who contribute a lot to the research with their insights. I interviewed with professionals from different part of the film industry. Sultan Duranay who is the head of marketing in distribution company TME Films, provides a complete picture of the current situation with her observations and experiences. She contributed a lot to the project because she has witnessed the transformation of the industry to its current digital situation. I interviewed with the head of purchasing of D-Smart Senem Taşdemir and the deputy manager of the purchasing Savaş Doğan about Pay TV and development of digital platforms in Turkey.

To get the essence of what is going on in the production process and the influence of digitalization, I talked to Suzan Güverte, the owner of Güverte Film and the former director of Antalya Film Forum that is the co-production market in the industry section of Antalya Golden Orange Film Festival. On economics and politics of film industry in Turkey, I interviewed with the film curator, editor, and critic Şenay Aydemir to present a critical paradigm of cinema industry. Based on the selected scholarly works and the interviews, I try to set a proper structure on distribution sector in Turkey.

## **2. 1. POLITICS BEHIND FILM DISTRIBUTION POLICY IN TURKEY**

In this section, I make a critical analysis of the film distribution sector from a socio-cultural and critical perspective. I focus on the function of culture and art policy for distribution industry in Turkey and ask questions such as: how do these policies effect on distribution mechanism in the film industry? What is the situation in Turkey now? Which factors do play a role in the monopolization in the industry? After trying to answer these questions in the light of the scholarly works on this topic, I refer to the comments of the industry professionals on the subject.

While answering these guiding questions in this part, I list up three problems of the current distribution sector in Turkey or three debate points to ask why politics of film distribution policy in Turkey make filmmakers search for alternative film distribution methods.

The first problem is that cultural policies of the country are not fulfilling the necessities of the distribution sector in Turkey (Ş. Aydemir, personal communication, January 2, 2019). Although the Culture and Tourism Ministry processes a new legislation on financial supports, this new amendment was not seen complete by filmmakers for a long time. The second problem is that high concentration rate in the market prevents new platforms and investments from entering the market which poses a great risk of monopoly (Sayak & Öcal, 2017, p. 14). The third problem, not a problem but an inevitable consequence of technological developments, is that digital developments urge filmmakers to demand new legislations which regulate the management of emerging digital platforms.

### **2.1. 1. The Politics of Film Distribution**

As the first problem of politics of film distribution policy, the absence of complete film legislation appears as the first point to be discussed. Starting point of this problem is different approaches to film as a material which is to be categorized as a commodity or a piece of art. As Ece Vitrinel states in her commentary article

on European Audivisual Observatory Report on Cinema Industry of Turkey written in 2014:

Unlike pieces of arts such as literary works, sculptures, pictures which are turning to commodity just in distribution systems, film production is created in industrial discourses from the beginning and the absence of appropriate material conditions hinder filmmaking process. That absence of opportunities feeds creativity is a romantic discourse. However, strong national cinema having a continuity has been possible not via romantic discourses but a compound industrial network, a well-organizational structure, and cultural politics which are concerning for cultural diversity. (2015, p. 193)

The point underlined in this quotation reveals that cultural politics might not be compound on their own to bring solutions to the distribution problems of the sector because what is understood from a film differs from producers to distributors and the Ministry in charge (S. Güverte, personal communication, April 5, 2019, 6).

In this sense, what Nicholas Garnham says on film as a piece of art or as a content explains why different point of views have a critical importance to shape the politics of the distribution. He says that “most people’s cultural needs and aspirations are being, for a better or worse, supplied by the market as goods and services” (1987, p. 24; as cited in Harris, 2018). Namely, a film distribution policy which is not given into capital disposition of the industry has to be prepared.

In 2004, the Turkish state, for the first time, offered financial supports to the production of local films, which contributed a lot to raising the number of local films. It is decided that there will be two application sessions to select projects which are to be supported once a year. In this public grant, the source of the grant is shown as an entertainment tax which is 10 % of the ticket prizes.

There are three types of grants: for feature films, documentaries, and short films. However, all these grants which are executed by ‘General Directorate of Cinema’ in accordance with the law number 5224 are for film production, script-writing, and project- development. There is also a co-production program which is operated by TRT (Turkish Radio and Television). As of distribution sector, there are no incentives, grants and public fund in Turkey. There are some private awards

which are granted in film festivals by sponsorships and corporate partnerships<sup>5</sup>. At this point, films are left to competitive market conditions of distribution sector, because these grants do not have contribution to the distribution of the film. Toby Miller's statement on this one-sided incentive program of policies explains that:

When discussing options for creating an inclusive film sector, it is conceptually easy and publicly palatable to support production as opposed to other sectors of the industry. Why is this? Because making movies is easily articulated to the idea of building local, national and regional culture through the work of art, and because small firms and large corporations like the idea of what they call 'free money' from the state to subsidize their productions. By contrast, other parts of the cycle – circulating, promoting and showing movies – lack glamour and artistry even as they are extremely profitable. (Miller et al., 2012, p. 197)

What is underlined here leads to understand that not only production but also distribution, exhibition and marketing support the structure of film industry. Thus, it has to be supported by national cultural policies which are not one-sided, narrow, nationalist, and exclusive but pluralist, digitally catchy and fulfilling the expectation of sophisticated cinema culture.

Besides, distribution phase including exhibition of the film is the substantial way of profit for filmmakers to turn their films into a source of income to ensure their next films. Ercan Akkaya lays down theoretical basis of the disagreement in political economy of the commodities at this point:

Film as a commodity, and film budget as capital, requires me to define and establish a more nuanced analytical set of relationships between production and distribution. As Moran (1996) and Cones (1997) propose, film distribution determines the profit reaped from exhibitions. A commodity needs to be sold in the market and thus turns itself in capital again to be used as an input to the production process of future commodities by the producer. Marx (1990, 1993) explained this as an inevitable component of the production of a commodity. Circulation in the market makes a product what it is in a capitalist relationship, which is a commodity. Thus, distribution is an integral part of film production. This is also the case in Turkish independent film production circles even though a film is produced using state funding and does not seek any profit from the market (2016, p. 20).

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<sup>5</sup> On the Bridge offers *Başka Sinema* distribution awards in İstanbul International Film Festival.

These differences also shape expectations from the Ministry of Culture and Tourism to solve distribution crisis which is particularly deteriorating for independent filmmakers because mainstream commercial feature films and independent films, and documentaries are subjected to the same classification and assessment procedures to be released in any public screenings (Ş. Aydemir, personal communication, January 2, 2019). Thus, independent filmmakers have been struggling to change the present cinema legislation to find a solution to the distribution crisis in the industry.

On distribution crisis, Suzan Güverte changed the focal point and proposed that the problem of film policy in Turkey is not about the distribution system but about the audience. She argues that a strong and sustainable cinema industry might be developed if the country has a core number of audiences from every part of the society. Distribution companies are by their nature looking for commercial comedies and blockbuster films to make profit, having concerns on independent films are not their responsibilities. To have such expectations is flat and romantic and they do not propose any solutions to the problem in the sector. What is to be done is to evaluate how audiences are educated and brought up for the cinema culture (S. Güverte, personal communication, April 5, 2019). About distribution of independent films, Sultan Duranay also states that she distributed art-house/independent films with no profit expectations like social responsibility projects. She said that she can distribute these films because TME is a big distribution company but the conditions are not the same for other companies (S. Duranay, personal communication, March 14, 2019).

### **2.1.2. The High Concentration Rate in Distribution Market**

The second source of problem of the distribution sector in Turkey is high concentration rate in the market. This concentration rate is caused by the absence

of regulations that control market business movements and ensure conditions of equal competition. However, there are now five big distribution companies in the sector. The share of them has waxed and waned over time but only one of them started to dominate the sector since 2012 (boxoffice.com) together with other four companies: TME Films, CJ Entertainment, Warner Bros., and UIP.

Following the increase in the admission of local films and local film productions from 2004 to 2014, European Audiovisual Observatory has published an industrial report which is crucially important to locate cinema industry of Turkey in a global context. As Vitrinel points out the risk of monopoly in the market is also highlighted in the report (2015, p. 196). Film industries analyst, Kanzler wrote on high concentration level in its report saying that:

In contrast to other European markets, distributors generally only play a booking and collection function in Turkey, i.e. they generally do not take any financial risk by acquiring distribution rights, paying minimum guarantees or entering into presale agreements. In this business model distributor fees are accordingly lower than in most other European markets and generally amount to about 10% or even less for popular films. Generally speaking the Turkish film industry is less regulated than many of its European counterparts. Following market dynamics the Turkish exhibition as well as the distribution markets are highly concentrated, showing some of the highest concentration levels in all of Europe. The market leading exhibition chain, Mars Entertainment (Cinemaximum), accounted for 52% of the Turkish box office and 85% of the screen advertising market in 2013, operating 26% of all screens, almost two out of three digital screens as well as all of the IMAX screens in the country. This represents the highest concentration level among the ten largest European exhibition markets (2014, pp. 8-9)<sup>6</sup>.

There is also another on-going discussion in the sector: the dominance of some production companies. This oligopoly of production companies such as BKM owned by Yılmaz Erdoğan, Fikir Sanat owned by Cem Yılmaz well-known Turkish comedian-actor, and Çamaşırhane owned by Şahan Gökbakar has also affected distribution crisis in the sector because the feature films produced by these production houses, some of them are also co-produced by CGV, are booking up the most of the screen. As Şenay Aydemir says, there is an oligopoly of some production companies at the moment. After the mergence happened in 2012, CGV

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<sup>6</sup> I keep grammar mistakes as they are.

has now executed production, distribution, exhibition, and marketing steps of the film distribution sector. He argues that particularly independent films do not have any chance to meet with the audiences in different cities because the films that are co-produced with the biggest distribution companies are circulated through the same distribution companies that are already collaborating in the production (Ş. Aydemir, personal communication, January 2, 2019).

The situation is not very promising for documentaries, either. Distribution companies do not approach in a positive way to distribute documentary films (S. Güverte, personal communication, April 5, 2019). At this point, I need to specify that monopoly crisis in the distribution sector is not associated with a particular capital owner or distribution company. The scope of the issue is drawn by the lack of inclusive film industry policies which regulate the market in the light of justice, equality and diversity. This type of all-in-one management leads monopoly in the market because CGV as a distribution company has two third of movie theatres in the country. When they produce a film to distribute, they book almost half of the movie theatres across the country, thus the half of the box-office revenue is produced by CGV at the end of the financial year (S. Duranay, personal communication, March 15, 2019). In such a monopoly in the market, independent films do not find as many options as mainstream films. Nevertheless, independent filmmakers are excluded from mainstream production, distribution and exhibition mechanisms (Akkaya, 2016, p. 9). So, these filmmakers who are cast out from mainstream mechanisms try to figure out this problem by creating their alternative methods.

### **2.1.3. Digital Revolution in Film Industry in Turkey**

After I discuss two points for distribution crisis, I want to continue with digital revolution that has belatedly come to Turkey (Kanzler, 2014, p. 10). Technology has changed film production, exhibitions, and screening platforms

while new discussions are brought up during these novelties in screening technologies. These discussions are the use of digital platforms like VPFs, digital platforms including OTT services, and VOD platforms. Combination of digital platforms with previous conventional screening mechanisms needs to be re-regulated and officially organized because there has been ambiguity in the operation of these platforms. Turkey has a cinema industry for twenty years but now it is obvious that cinema industry has more vibrant and dynamic, and growing film market (Kanzler, 2014, p. 6).

Together with the trend of growth, technological developments compel digital distribution in the film industry. However, political economy of film industry did not catch up with these technological developments in art and cultural political amendments. As Duranay indicates that there is no regulation to control conditions of release on digital platforms as well as theatrical release and this situation has worsen the conditions of free market economy. (S. Duranay, personal communication, March 15, 2019). She mentions the release of *Sazan Sarmali* (Yılmaz Erdoğan, 2018) on Netflix while the film has been on movie theatres for two weeks as the violation of absence of the legislation that regulate use of digital platforms.

As Kanzler (2014) points out, the lack of public support and financial schemes, spreading of digital practices in the film industry is drastically lagging behind European cinema industry. He states that:

Turkey has clearly been lagging behind the rest of Europe - by about four years - when it comes to digital cinema. Digital conversion only gained momentum in 2013 when the number of digital screens more than quadrupled and digital screen penetration jumped from 11% to 48%. Though a big year-on-year increase, digital screen penetration is still significantly lower than in the EU, where an estimated 87% of all screens in the EU had been digitised as of December 2013. The slow adoption of digital cinema is closely linked to the limited availability of financing options particularly through VPF schemes and the lack of public support. Even though VPF schemes seem to have become more readily available in 2014, according to producer's association SE-YAP there is still no industry wide agreed VPF system in place and VPF obligations may vary between films and cinemas (p. 9).

The third point that I elaborate on is digital revolutions in screen technologies. The foundational cinema regulation was issued in 2004 when public funding started to help local productions with public support. This regulation has been used for the same industry for fourteen years in spite of the coming of wild and heartbeat fast digital age with VPFs, DCPs and emergence of OTT platforms. Thus, cinema industry in Turkey is doomed to solve its entire crisis within the old-fashioned cinema policies for a long time (Çakarar, 2019). As Duranay states, it has been a long time that film industry has regulated release dates between different platforms without any written rules but it is necessary to regulate digital film distribution across digital platforms. Otherwise, theatrical returns of the films are exploited by digital platforms due to the absence of regulations (S. Güverte, personal communication, April 5, 2019).

In January 2019, the Ministry of Culture and Tourism has enacted a new legislation but there are not amendments and regulations to administer different screening methods in digitally developing exhibition sector. Although independent filmmakers has struggled to make new cinema legislations in concert with new freedom of speech, digitally changing industry and pluralist cultural environment, the recently approved cinema law schema only offers temporary solutions to the problem in the film industry without proposing any fundamental resolutions and approaches to organize digital platforms in terms of operational process with theatrical exploitation. Recent cinema legislation is executed on July 1, 2019 but there is no article of the legislation to know about the details of the regulations (Ş. Aydemir, personal communication, January 2, 2019).

In sum, cinema industry in Turkey has waxed and wined in terms of admissions and box-office revenues but it has a steadily grown dynamic film market which has a potential to enlarge its effect-zone (Vitrinel, 2015, p. 196). As Kanzler points out in the report, there are three lingering problems which are to be solved with inclusive cultural politics to regulate and not hinder the growth rate in local film market in the film industry. Political economy of the film industry should address what the industry needs, hence politics of film policies should be discussed

with cinema labour organizations, independent industry researchers and all cinema industry workers to create an overarching film policy which will fulfil basic expectations of the market such as conditions of equal opportunities, availability of independent public supports, and supply of transparent information in the industry, and amendments for digital platforms.

As of funding, the government has subsidized the film industry by supporting only film production but this is not enough because box office returns count for the most part of film distribution revenue in Turkey. Outside of Turkey, Turkish films do not have any chance to pay off in theatrical exploitation (Kanzler, 2014, p. 20). There are also concerns about the increasing monopoly in the market which turns the film industry into the playground of a few production houses and one distribution company. In such a barren market in terms of diverse filmmaking experiences, Duranay warns that different film genres other than family comedies are cast out from movie theatres, hereby, audiences are tamed to consume the same type stories like mass productions commodities (S. Duranay, personal communication, March 15, 2019).

While ending this part here, I need to repeat that filmmakers are compelled to employ alternative distribution mechanisms to distribute their films under these conditions. In the next parts, I focus on conventional distribution methods which are shaped in the light of politics that I lay down above in details.

## **2.2. CONVENTIONAL / FORMAL DISTRIBUTION MECHANISMS IN TURKEY**

In this section, I will give the historical background of the conventional film industry in different categories so that discussion on the current distribution crisis can be managed with a full understanding in course of the thesis.

Cinema industry of Turkey goes through a hard time in recent years because theatrical release of films is getting harder and harder because of the high concentration rate in the distribution market (Sayak & Öcal, 2018, pp. 4-5). Although what is conventional is in dispute, there are basic conventional distribution mechanisms in Turkey. In 2019, theatrical release, festival screenings, Pay TV, DVD releases, and digital platforms are on-going conventional distribution mechanisms. Before I elaborate on these distribution models in Turkey, it is important to underline that conventional is also partially digitalized now because technological progresses make theatres to convert their facilities and equipment into digitally shot films. At this point, I need to define digitization processes here to make the point clear.

### **2.2.1. Digitalization in Cinema and Virtual Print Fee Crisis**

There are two different digitalization definitions in cinema: the first one is of production and the other is of exhibition. Digital production of film simplifies filmmaking and converts the material which film is made of. As computer technology and full-digital cameras improve, filmmakers started to shoot their films with digital cameras with high resolution options rather than 35mm or film. This transition to digital cameras put down the cost of production and post-production in a great deal, so shooting films got to be easier and doable with small amount of budgets.

The second meaning of the digitalization is the format in which filmmakers deliver their films to theatres on hard drives instead of film reels. This format is called Digital Cinema Package (DCP) which needs to be exhibited via DCP server to screen the film. These both ways of digitalization do not necessitate each other, namely a film shot on film can be distributed in DCP or vice versa. These kinds of developments are well-accepted in the film industry (Akkaya, 2016, p. 59).

In global cinema industry, this inevitable and urgently needed technological change radically transformed the conventional distribution mechanism into a new phase. Starting from Hollywood, the convert to DCP gets started in Europe and in Turkey, too. However, this transformation gets problematic for the sector in the case of Turkey.

Digitalization of the screening equipment has a great impact on distribution costs, delivering of the prints and resolution of the film. However, to be able to show digitally shot films in DCP, theatres need to have a different technical infrastructure of exhibition which is a different projector with a more sophisticated sound systems. The rollout of digital distribution is being discussed across the globe because it is so expensive and there is not a certainty about how the expenses of this transformation is going to be handled by the producers or movie theatre owners who are expected to convert the film formats from Blu-ray and DVDs to DCP or to prospective formats for every countries. At this point, every country regulates this process of transformation in tune with their political economy of their industries (Crofts, 2011, p. 94).

When it comes to make investment in theatres to digitalize their exhibition systems, the things get complicated in global scale. Cinema owners must invest a great deal of amount to digitalize their theatres. Especially small independent movie houses would not adapt to this transformation period and face being shut down gradually. Hence, Turkish government and industry agents decide that theatres will be renovated so that the producers' films can be screened but in this prospected plan, the producers should also contribute to this investment. It is decided that digital transformation expenses will be covered by producers as Virtual Print Fee (VPF). As Duranay indicates, VPF turned out to be a great deal of burden on distributors and producers because there is no way to survive for indie films with this amount of VPF. These materials are paid in dollars and this just increases the cost of distribution with each DCP copy of the film. A film which has 200 screens to be shown in cinemas has 200-300.000TRY of VPF. (S. Duranay, personal communication, March, 15, 2019).

Since October 2013, VPF has been paid by producers. However, there is no consensus in the industry regarding to the payment of this fee. Some producers pay VPF while some of them do not. As Zeynep Atakan, the producer of Nuri Bilge Ceylan's films, points out that some distribution companies agree with producers and do not ask for VPF from producers if the released film has a great potential of admission (2019). These kinds of ambiguous discussion points will probably end in this year because VPF agreements' deadline is due the end of 2019. There will be no VPF for DCP copy because almost all movie theatres are turned to digital servers and the new ones are already equipped with ultra-digital facilities. Duranay points out an important and critical side of VPF crisis by urging that lack of incentives and subsidies in payment of VPF heaped the burden on producers. There should have been public funds or subsidies and government should have contributed to the transition process (S. Duranay, personal communication, March 15, 2019).

Additionally, it has to be underlined that *Başka Sinema* ventures to a new distribution model in film distribution regarding this VPF payment problem in the industry by paying the digitalization fee of movie theatres that shows films distributed by *Başka Sinema*. *Başka Sinema* gives priority to European films and releases them in their selected movie theatres and contributes to the renovation of these movie theatres (Midilli, 2016).

### **2.2.2. Theatrical Release – Motion Picture Cinemas**

While ending discussion on VPF here, I want to change the focal point to current conventional mechanisms. The first leading conventional way of film distribution is theatrical release. Theatrical release was the first address of film distribution because distributors believed that movie theatres offered an enchanting watching experience due to their picture quality (Arslan, 2010, p. 104). However, this perception started to change because high resolution quality is not only accessible on big projection screens in movie theatres anymore. It is available in even every mediocre smart phone. Hence, prime mechanism of distribution is being

reordered (S. Güverte, personal communication, April 5, 2019). Although producers start to think of online-release as premier platform for their films, conventional theatrical release is still the leading distribution method because it is still not easy to earn from the digital distribution on digital platforms or DVD releases (S. Duranay, personal communication, March 5, 2019).

Free market conditions apply for film distribution industry in Turkey with no subsidies, distribution funds or incentives (IKSV, 2016). There were 18 active distribution companies in 2018 while at the time of this thesis is written 16 of them are active, among which CJ Entertainment (CJ), CGV MARS D. (CGV), UIP, Warner Bros., and TME Films are five leading companies. However, there is a big difference between the first two companies and the rest in the list because CGV's admission rate is 43% while its closest follower has 18% admission rate (Boxoffice.com). So, CGV group is dominating the distribution market now. The second essential problem is that four companies out of five leading ones are foreign distribution companies.

As I depict institutionalization of cinema industry in Turkey, I observe that there have been good and challenging times in the cinema history of Turkey. I primarily focus on distribution phase of the cinema exhibition chain in this chapter among other issues. It might not be so wrong to say what is categorized as distribution had been based in 1950s in the industry in Turkey. The 1950s and the 1960s are categorized as the transition period in cinema of Turkey because educated filmmakers started to produce their own films contributing to the industry and paving a new path to employ more people in filmmaking. As film industry had been profitable for many people, investors started to put money in filmmaking. As the number of local films increased, the cinema industry followed a rising growth trend in these years. These developments in production structure were felt in distribution, as well. In these years, regional distribution agencies started to compose main income of the distribution together with other companies distributing foreign films (Yavuz & Uğur & Bozdağ, 2018).

In the 1980s, following the coup, military pressure applied more censorship in filmmaking and political films arose in number. During this recession, with introduction of private television channels, many production companies were shut down. In 1987, with the trade agreement which allowed foreign companies to enter the domestic distribution market, Warner Bros and UIP allied with Paramount, Walt Disney, and Universal studios started to distribute American films in Turkey. With these newcomers to the industry, market dynamics of the distribution has radically changed because before that there were regional distribution companies in Yeşilçam (Çetin-Erus, 2007, p. 6).

In a short period, UIP positioned as the leader company of the distribution sector, so this change coerced distribution market to a much higher concentration ratio in comparison to the previous state of the industry. Entering of foreign companies to the market and their dominance on it rendered local market more vulnerable to foreign films' invasion. In such a market with high concentration, it is difficult for new companies and initiatives to enter the market, which results in increasingly shrinking with a high risk of monopoly (Sayak & Öcal 2017, p. 4).

**Table 2:** Three Major Distribution Companies' Market Share

| Year        | Market Share (%) |    |      | Local Films Distributed By |    |      |
|-------------|------------------|----|------|----------------------------|----|------|
|             | UIP              | WB | Özen | UIP                        | WB | Özen |
| 1993 -1994  | 38               | 35 | 25   | 0                          | 4  | 2    |
| 1994 -1995  | 40               | 37 | 21   | 0                          | 2  | 0    |
| 1995 - 1996 | 45               | 31 | 23   | 1                          | 1  | 2    |
| 1996- 1997  | 34               | 43 | 19   | 0                          | 4  | 3    |
| 1997 - 1998 | 31               | 34 | 28   | 0                          | 3  | 2    |
| 1998        | 32               | 31 | 26   | 1                          | 4  | 2    |
| 1999        | 29               | 46 | 21   | 1                          | 4  | 6    |
| 2000        | 31               | 38 | 25   | 1                          | 6  | 6    |
| 2001        | 28               | 45 | 22   | 0                          | 3  | 11   |
| 2002        | 26               | 46 | 18   | 0                          | 4  | 4    |
| 2003        | 24               | 52 | 16   | 2                          | 7  | 3    |
| 2004        | 23               | 51 | 19   | 2                          | 6  | 6    |
| 2005        | 24               | 26 | 34   | 4                          | 4  | 12   |

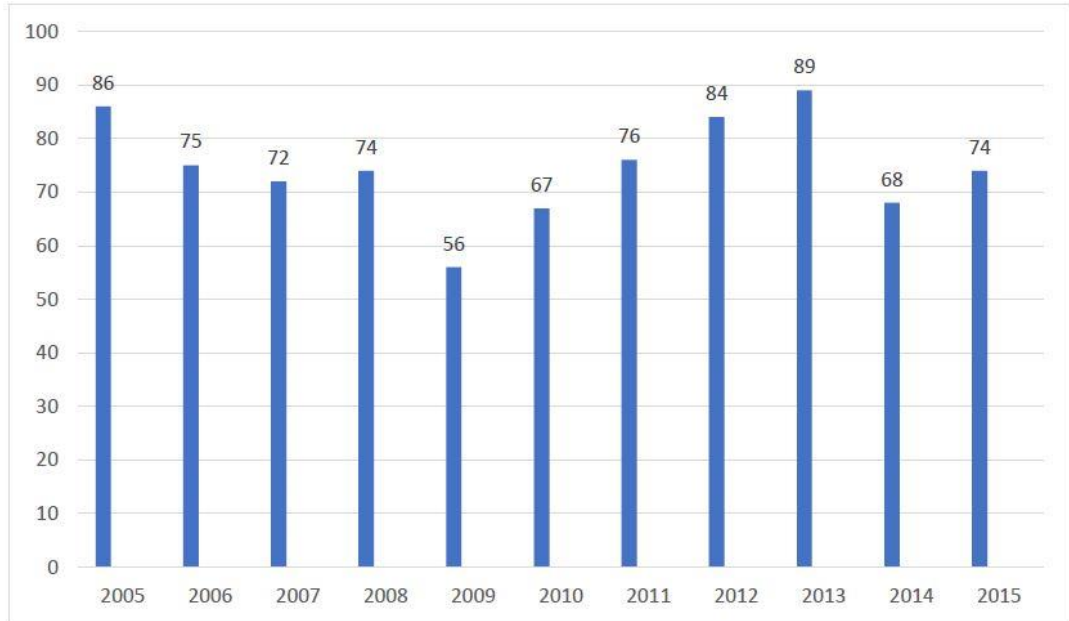
Source: (Kalemci & Özen, 2011)

Between 1990 and 2005, distribution sector was dominated by three major companies with small differences in their ranges. As seen in the table 2, these

companies were Warner Bros, UIP, and Özen Film which was a local company that distributed local films and import Twentieth Century Fox's films to Turkey. When it was 1994, the share of local films was down to 16% in the total ticket revenues (Kalemci & Özen, 2011). In time, production of local films have gone through different changes such as changes in resolution quality and in screening technique with the rising number of new movie theatres. Especially after 1995, local films' success at box-office caught interest of foreign distribution companies, and they started to distribute local films. Among these companies, only Warner Bros. distributed local titles while UIP still did not venture to distribute any of them in those years (Çetin-Erus, 2007, p. 10).

Another important development was foundation of Ken-Da which was a distribution company founded by four big production companies such as AFM, BKM, Plato Films, and Energy Production in 2004. The primary goal of this supra-foundation was to distribute local films of these production houses. The share of local films in the box-office arose. There had been 7 local films in the top-grossing movies in 2005 (Çetin-Erus, 2007, p. 11). Although Ken-Da gave a bit of dynamism to the market, it did not succeed in distribution of local films because Hollywood allied foreign companies were dominating the film distribution as seen in the Table 2 and Ken-Da demands less distribution share than other big distribution companies and tries to distribute only local films (Arslan, 2016, p. 245). But it was not easy to schedule the annual program of the movie theatres with only local films because the number of the local films was not enough for annual booking. Therefore, it was dramatically important to bridge a compound sectorial bond with local film production and distribution so that distribution companies could get enough local films to schedule full year (Çetin-Erus, 2007, p. 14). Liberal politics allowed foreign companies, especially the American ones, to directly invest in creating their own distribution network and this leads to an increase in the distribution of foreign, mostly American films (Kalemci & Özen, 2011, pp. 74-75).

**Table 3:** The most earned three distribution companies: UIP, Warner Bros. and Tiglon (2005-2015)



Source: (Sayak and Öcal: 2017: 4)

From 2005 to 2010, there were numerous small distribution companies to break off the control of these foreign companies. However box office numbers as indicated in the Table 1 show that foreign companies paralyze the domestic market irreversibly. From 2010 to 2018, there have been many ground shaking developments in the cinema industry of Turkey as such that the alternative distribution company Ken-Da was closed in 2008. In 2011, The Mars Entertainment acquired its biggest competitor in management of movie theatres. AFM group was taken over by MARS entertainment group (Yüksel, 2018, p. 341). MARS attained market domination with this purchasing (Akkaya, 2016, pp. 53- 54). During this acquisition period, The Turkish Competition Board investigated the impact of this process on market monopolization. After scrutiny, the Board announced that this purchase has a risk of monopoly in five micro geographies out of 38 locations in Turkey and the Board delivered its verdict that there is no actual risk of monopoly in nation-wide. The buy off was concluded and legally approved in 2012 (Akkaya, 2016, p. 54).

**Table 4:** The Total Admission and Market Share in 2015

| Distributors | Total Admission | Market Share | Local Films (2015) |
|--------------|-----------------|--------------|--------------------|
| CGV Mars     | 18.207.453      | % 30.23      | 58                 |
| UIP          | 17.116.125      | % 28.42      | 36                 |
| TME Films    | 6.807.255       | % 11.30      | 46                 |
| Pinema       | 6.699.204       | % 11.12      | 34                 |
| Warner Bros. | 6.692.731       | % 11.11      | 34                 |
| Chantier     | 1.586.380       | % 2.63       | 20                 |
| Bir Film     | 1.291.671       | % 2.14       | 41                 |
| Cinefilm     | 726,273         | %1.21        | 4                  |
| M3 film      | 592,513         | % 0.98       | 68                 |

Source: (Boxoffice.com)

MARS established its hegemony in terms of controlled seats/screens and market share further with its leading rank in box office in 2015 as Table 4 indicates. When it came to 2016, one of the biggest corporates of Asia entertainment market, Korean CJ CGV purchased MARS entertainment group.

According to the mergence report between two companies, 174 cinema theatres across Turkey owned by AFM were purchased by MARS Group. As mentioned in the report, all of these 174 cinemas serve under the Cinemaximum brand. Before the mergence, MARS Group had only 58 cinema theatres, 4 of which were only managed by them, while the rest of the theatre were owned by them. After this mergence, the total number of MARS' cinema theatres was exactly 232 (Mars - AFM Merge Report, 2014). Some filmmakers and producers, particularly independent filmmakers, warned responsible institutions as such the Ministry of Tourism and Culture, presidency of the competition agency about the risk of monopolization (Alphan, 2016). Furthermore, Kaan Müjdeci directed a documentary *Kapalı Gişe* to draw the public attention to this concern in 2016. After screening of the documentary in International İstanbul Film Festival, MARS Group was taken by CJ-CGV.

**Table 5:** 2018 annual box-office numbers

| Distributors            | Total Admission | Market Share | Local Films (2018) |
|-------------------------|-----------------|--------------|--------------------|
| CGV Mars                | 30.644.318      | 43.52 %      | 73                 |
| UIP                     | 13.029.297      | 18.50 %      | 39                 |
| TME Films               | 8.791.204       | 12.49 %      | 47                 |
| CJ Entertainment Turkey | 7.490.601       | 10.64 %      | 12                 |
| Warner Bros.            | 6.812.049       | 9.67 %       | 25                 |
| Bir Film                | 1.546.129       | 2.20 %       | 52                 |
| Chantier                | 644,13          | 0.91 %       | 24                 |
| Derin Film              | 340,285         | 0.48 %       | 27                 |
| Başka Sinema            | 329.461         | 0.47 %       | 48                 |
| Pinema                  | 252,886         | 0.36 %       | 10                 |
| Özen Film               | 219,726         | 0.31 %       | 21                 |

Source: (Boxoffice.com)

After South Korean CJ CGV bought MARS with \$800 million in 2016, the largest share of the market began to be controlled only by this foreign company. As the South Korean company announced, they were leading the distribution market with 29% share of total admission. The case was still viable when it came to 2018 with 43% of total admission. At this point, in the first four months, the leading rank of CGV is lost because, from January to April 2019, CJ Entertainment leads the market with 33% market share, which is supposedly thanks to the release of the big blockbuster film *Sazan Sarmalı* by Yılmaz Erdoğan in 1<sup>st</sup> Feb, 2019 according to Sultan Duranay. She states that CGV dominates the current film distribution sector because they are following an aggressive enlarging policy (S. Duranay, personal communication, March 15, 2019). Furthermore, they are now operating in 36 cities with 848 cinema screens within 97 movie theatres which they are managing across Turkey (<https://www.cinemaximum.com.tr/hakkimizda>) when this thesis is written. CGV is the biggest distribution company that is producing films, managing marketing and co-producing with other major production companies in Turkey.

In theatrical release, many filmmakers first communicate with Mars Group about distribution of their films because they know that Mars Group can secure more screens than any other distribution companies, at first hand (S. Duranay,

personal communication, March 15, 2019). This concentration raise concerns about variety on genres in cinemas, emerging of new production houses and directors to survive in the film industry. This hardship is specific to independent films because securing a screen from distributors becomes much more difficult year by year for independent filmmakers due to the low rate of admission of independent / art-house films (K. Sezer, personal communication, February 15, 2019).

Distribution in motion picture theatres is in a deep and mutually ignored crisis in Turkey because almost 70 % of the market is operated by TME, CGV and CJ Entertainment (Boxoffice.com) In sum, as Şenay Aydemir states most of the film market is left to foreign capital and filmmakers do not have any bound to reach and negotiate on their problems and demands (Ş. Aydemir, personal communication, January 2, 2019). One of traditional distribution methods is almost totally controlled by this foreign capital which is quite aggressive on earning back its investment on the film market (S. Duranay, personal communication, March 15, 2019). The real point is the gap between CGV Group and the rest of the distribution market. CGV has almost 50 % of seats in the theatres while the others have to share the other half of the market as five different theatre management companies such as Pink, Prestige, and Avşar as seen in the Table 6.

**Table 6:** Top three movie house management companies in Turkey (July 2019)

| <b>Movie Theatre Companies</b> | <b>Window/Screen</b> | <b>Location</b> |
|--------------------------------|----------------------|-----------------|
| CGV /MARS Group                | 903                  | 106             |
| Pink                           | 188                  | 27              |
| Avşar                          | 160                  | 19              |
| Total (Turkey)                 | 2747                 | 469             |

Source: (TME Films Archive, 2019)

### **2.2.3. Film Festivals**

Film festivals have a very deep impact on film industry of Turkey especially for independent films. Independent films which are not produced with

the investment of big corporates or film studios like Warner Bros, Disney, UIP, or FOX try to find the necessary funds for distribution by getting awards in film festivals before their theatrical release. While mainstream films target the box office, independent films circulate in a great number of film festivals (Akkaya, 2016, p. 4). As a result of this binary categorization, theatrical exhibition is left to and dominated by blockbuster slapstick comedies in recent years in market. In Table 7, the top-grossing movies are mostly local comedies which have almost the same plot resolutions and narrative techniques. This situation has created a perception as if independent films are only made for artistic purposes without any expectation to have financial gain whereas the commercial films are only made to get profit (Kandar, 2018, p. 32). In such environment, it is very important for film festivals to have an independent status in Turkey because they are seen as an alternative platform by filmmakers of independent films. Additionally, it is seen that the admission rate of the top grossing movies constitutes almost % 10 of the total admission (Table 7) and it showcases the harsh conditions of the market in which both independent and commercial films are distributed in Turkey.

**Table 7:** Top Grossing Movies List (2010 – 2018)

| Year | Top-Grossing Movie     | Top-grossing Movie Admission | New Movie | New Domestic Movies | Total Admission | The Admission Rate |
|------|------------------------|------------------------------|-----------|---------------------|-----------------|--------------------|
| 2018 | Müslüm                 | 6,474,173                    | 436       | 173                 | 70,406,259      | % 9                |
| 2017 | Recep İvedik 5         | 7,437,050                    | 394       | 151                 | 71,188,594      | % 10               |
| 2016 | Dağ 2                  | 3,600,000                    | 360       | 139                 | 58,287,316      | % 6                |
| 2015 | Düğün Dernek 2: Sünnet | 6,073,364                    | 402       | 136                 | 60,228,409      | %10                |
| 2014 | Recep İvedik 4         | 7,369,098                    | 359       | 112                 | 61,245,258      | %12                |
| 2013 | Düğün Dernek           | 6,980,070                    | 326       | 88                  | 50,295,757      | %13                |
| 2012 | Fetih 1453             | 6,572,618                    | 290       | 60                  | 44,339,549      | % 14               |
| 2011 | Eyvah Eyvah 2          | 3,947,988                    | 291       | 75                  | 42,294,040      | % 9                |
| 2010 | New York'ta Beş Minare | 3,474,495                    | 247       | 66                  | 41,534,146      | % 8                |

Source: (Boxoffice.com)

The independence of the film festivals in Turkey has been recurrently discussed in Turkey since 2014. The first event that exhilarated these discussions was the censorship that applied to Reyan Tuvi's documentary titled as *Yeryüzü*

*Aşkın Yüzü Oluncaya Dek* (2014) that focuses on the Gezi Occupation happened in June 2013. After Antalya Golden Orange Film Festival's line up was announced, the documentary was removed from the festival programme saying that showing the film may commit the crime of insulting Turkey's President Recep Tayyip Erdoğan. After preliminary jury - Ayşe Çetinbaş, Seray Genç and Berke Baş-announced that they choose the film to be included in the competition, festival did not take the film back and all preliminary jury members announced their resignations. Furthermore, the foreman of the documentary competition Can Candan also resigned from his post. Following that, 15 directors withdrew their films from the National Documentary Competition. As a result, the festival announced that the competition in that category would not be held in 2014 (Başyiğit, 2016).

The second event was the last- minute cancellation of the screening of *Bakur (North)* (2015) a feature documentary by Kurdish director Çayan Demirel and veteran journalist Ertuğrul Mavioglu at the 34<sup>th</sup> İstanbul Film Festival in April 12, 2015. The documentary that is about the everyday routine of PKK (Kurdistan Workers' Party that is accepted as a terrorist organization by Turkish state) guerrillas was cancelled by the festival after it was announced that they received a notice from the Ministry of Culture and Tourism "reminding them that all films created in Turkey must have obtained a registration document to be shown at the festival" (Başyiğit, 2016).

In 2014, the protest against the censorship was limited to the documentary section but in 2015, after IKSŞ film festival cancelled the screening of *Bakur*, all the films in the feature film competition were temporarily withdrawn. After filmmakers came together to show solidarity against the ban of the film, they announced that they withdrew their films from the festival. IKSŞ announced that they had cancelled the National and International Golden Tulip Competitions and National Documentary Competition. During the press conference of the jury members, director Pelin Esmer stated that "I condemn the mentality that consent to get rid of such films that are produced with hundred cinema workers. We all have

to be united against the censor” (Kural, 2015). National Golden Tulip Competition Jury President director Zeki Demirkubuz associated the incident with the censorship decision with the approaching national elections. He said that “they could not find any reason to ban the film and they made up the absence of the registration document” (Kural, 2015).

These two examples just brought the issue of censorship to the public agenda and gave filmmakers a platform to debate how they are subjected to systematic pressure by the AKP government in recent years. After *Bakur* and *Yer Yüzü Aşkın Yüzü Oluncaya Dek*, there have been many films and documentaries that are censored and removed from the festivals like Selim Yıldız’s *Bîra Mi’tetîn* (I Remember, 2016) about the Roboski Massacre and smuggling activities, Selim Gökalp’s *Altın Vuruş* (Golden Shot, 2015) about the machines living in a small village looking for the sun. Both these films are removed from Ankara Film Festival because they did not have registration document. In these occasions, festival management announced that these films are not screened because the issue of the document is a “technical and legal necessity” to be followed by the all applicants (Başyigit, 2016).

Until 2014, the registration document was not a must for the film festival. After these incidents, almost all film festivals in Turkey began to list it in the application requirements. Officially, the registration document is given by General Directorate Cinema to ensure it as an entity. This application is a procedure of classifying the films by the Ministry of Culture and Tourism. Since 2014, it has been asked by the festivals as a way of elimination of the certain types of films. After the new cinema legislation was signed in January 2019, it is issued that the registration document was not asked from the films to be shown in the festivals on condition that the films without registration document will be open to audiences older than 18 years. Unless a film has the registration document, it is not possible to release in movie theatres. This last point is a new way of censorship applied to the filmmakers with the recent cinema legislation.

At this point, film festivals are divided in two categories alternative/independent and mainstream. Moreover, mainstream film festivals in Turkey are substantially funded by Ministry of Culture and Tourism. This fund is quite important for the maintenance of the festivals. However, this restrictive requirement became a part of the censorship mechanisms that are imposed on filmmakers whose films touch on socially and politically sensitive issues (Başyiğit, 2016). After the license turned out to be a censorship mechanism in the industry, film festivals are also faced with narrowing space of freedom and diminished variety in their programs (Evrensel.net, 2017).

While many mainstream film festivals like İstanbul, Boğaziçi, Antalya, Adana and Malatya Film Festivals applies censorship to the filmmakers by entitling this requirement as a “technical and legal necessity”, alternative film festivals like Bozcada International Festival of Ecological Documentary, Documentarist, Kurdish Film Days do not require registration document/license from the filmmakers to open more space to diverse voices coming from different cultures and point of views. Under these circumstances, film festivals which were alternatives of the mainstream distribution platforms once are put in a problematic position for filmmakers who do not have many options to show their films. About this point, Duranay states that legislation that is newly approved has also paving the way for censorship by making categorization and licencing by the Ministry of Tourism and Culture compulsory to get theatrically released in Turkey (S. Duranay, personal communication, March 15, 2019).

Besides, film festivals as alternatives platforms for independent filmmakers are also influenced by the risk of monopolizing forces in the industry. For instance, İstanbul Independent Film Festival (IF) was taken over by the CGV group in October 15, 2018 and the festival was cancelled. Festival foundational directors Serra Ciliv and Pelin Turgut had directed the festival for 17 years. In October 2018, Ciliv and Turgut released a letter stating that their posts as festival directors are terminated by CGV management. Although both Ciliv and Turgut organized the festival since its inception, they had an agreement with AFM on the

festival's brand right. After AFM was bought MARS Group, the festival was also sold to MARS and later to the CGV (Ögetürk, 2018). After six months, CGV appointed a new creative team to the festival to organize IF in September 19-22, 2019. The debates on the festival still continue because IF festival was hosting films and documentaries that have controversial themes, challenging narrative techniques and watching experiences. In this sense, IF was a kind of niche and very important film festival for film lovers in Turkey. Hence, next edition of the festival is believed to lose its compelling and critical position for filmmakers who are looking for reaching out to audiences in different platforms than mainstream film festivals.

Consequently, it could be claimed that not every film festival constitutes an alternative position for filmmakers in Turkey. Together with the censorship and oppressive cultural policies, festivals have also been changing parallel to the changes in the film industry. For instance, IKSU film festival also hosts the Meeting on Bridge co-production market. Antalya Film Festival has Antalya Forum that is also a platform that includes pitching competitions, co-production market and in-progress awards. As producer Serkan Çakarer says that film festivals are not just for watching films anymore (2019). He argues that festivals are transforming to places where the industry professionals meet to discuss the next generations' film practices, hence they may not be a distribution places for independent films. The distribution crisis of the independent films is not solved by film festivals only. The crisis should be solved by collaboration of the governments and the festivals by establishing a new system.

Film festivals must be risk-takers which take on responsibility and act as effective game changers to re-order this unfortunate and desperate situation for independent films. Suzan Güverte states that festivals should also contribute to this process as much as distribution companies by adding that cinema in Turkey have a more acute problem than distribution crisis, which is the audience crisis (S. Güverte, personal communication, April 5, 2019).

#### **2.2.4. DVDs**

As I initiated at the very start of the thesis, digital platforms are also turning into conventional distribution models across the world. Turkey is a bit latent to be in concert with global standards because internet and fibre structure have recently been as proper as to enlarge service capacity of these platforms. While technology brings about new platforms, it also gets rid of old-fashion distribution models like DVDs. Duranay states that DVDs are rarely pay off their cost. Instead, we are printing DVDs as a marketing phase and for nostalgic concerns (S. Duranay, personal communication, March 15, 2019). Suzan Güverte (2019) also emphasizes that she could not release its last documentary *Blue* (2017) in DVD because it is rarely printed anymore in Turkey.

As Duranay states that:

I would distribute films in such conventional distribution steps: theatrical release which is to be announced three weeks before release date, home-market in a 4 four months, DVD release in 4 months and Free TV and Pay TV selling in a year following theatrical release. However, this timeline is reversed totally because cinema owners can easily change your films with new titles in recent times. If you did not hit the target audiences in first three days of the show, it was not so easy to give up on films because 35mm films are very time-consuming to change it and bring a new one. So, films did have many more chances and time to create an impact on people and accumulate their own audiences. (S. Duranay, personal communication, March 15, 2019)

Digital technology is a concept of change and the pace of this change has so accelerated that as a DVD distributor initiative, Netflix has now just ended up being the most famous and powerful VOD platform all around the world hence, DVD is almost cast out distribution market in recent years except for educational distribution to institutes, universities and audio-visual libraries.

### **2.2.5. Free Television**

The current potential of digital technologies has dramatically changed the habits of audiences and the way they consume images. Supposedly, this fundamental change comes with unlimited possibilities and shaking off the concrete places of conventional distribution models like television. As Kandar (2018) brings out that a film does not have to be shot in a standard size and not be shown in any

particular screen. By relying on this argument, she says that screen might be a wall in the house, a smart phone screen, or smart-watch.

Television as an exhibition platform has derived its incredibly surpassed power from an enlarge impact-zone in advertisement market so far. However, this power has recently been in turmoil because television ratings have recently started to decrease in Turkey (S. Duranay, personal communication, March 15, 2019). Furthermore, television is now turned to be far from control and impossible for data harvesting. It is not possible to report exactly how many audiences watch TV series or advertisement. As Duranay states digital platforms are now very attractive regarding advertisement feedback due to the data which they can collect from their visitors and social media platforms are also attaining a great role here as a game changer because it replaced television as advertisement platform with outdoor advertising mock-ups (S. Duranay, personal communication, March 15, 2019).

Apart from technological developments which have affected how television is perceived by audiences, there is no place for feature films and documentaries to sell them to television because of the TV series which dominate the whole TV slots in a day. Although Turkish TV series have waxed and waned over time, they have such a continuous international growth trend from South America, Central Asia, Middle Eastern, the Balkans to Russia that almost 25% of imported fiction content on a global scale delivered from Turkey (Constantinou & Tziarras, 2018, p. 27).

Hence TV purchasing is not a very advantageous option for film distributors anymore. IP TVs are also in recession period as Duranay states; Star TV does not make any acquisition because of its due provisions, Tivibu stops buying new titles for a long time (S. Duranay, personal communication, March 15, 2019). Apart from current TV channels, TRT launched a new channel in February 22, 2019. The channel is TRT 2 that is basically scheduled with programmes based on art, culture, and music. Duranay states that she has also worked with TRT 2 but she has concerns about the channel because TRT is very a statist TV channels and their content policy

is not welcoming to different contents that are not peace with government's policies (S. Duranay, personal communication, March 15, 2019).

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As a result, as the discussions above show, there is a risk of monopoly in the distribution sector in Turkey with high concentration rates in the current market. The following part concentrates on the analysis the current situation in digital film distribution market which could appear as alternative distribution methods to conventional ones in the near or distant future.

### **2.3. ALTERNATIVE DISTRIBUTION METHODS: ONLINE STREAMING SERVICES IN TURKEY**

Digital platform market has been vital since 2016 with the launching of different SVoD platforms to Turkish market such as Netflix Turkey, Blu TV, Puhu TV, and MUBI (Vitrinel, 2018). This list might be a bit longer now with the additional new comers to the market since 2016 but I haven't included some of these platforms in this research. The first one is Amazon Prime Video. It is not included in this study because it has some shortcomings in terms of licensing contents and lack of enough number of subtitling and dubbing options. Hence, I keep Amazon Prime Video out of this study while analysing the potential of these platforms to constitute alternative platforms for filmmakers.

The second one is MUBI which is actually a local digital SVoD platform founded in 2007 in Silicon Valley by a Turkish entrepreneur. MUBI is figuratively a beam in the eye for cinephile community in Turkey. The platform has monthly curated content which is changing in a month. Every day, a new content is added to the platform which can be watched in 30 days before being removed. Its revenue model is also based upon subscription like Netflix and Blu TV. The reason why I did not focus on MUBI as a potential digital alternative film distribution model is

that its content catalogue is designed for a very sophisticated and conscious target audience, and its financial returns to filmmakers are not in such amounts to take it as a potential to be an alternative mechanisms.

### **2.3.1. IPTVs and Pay TV**

While I focus on the development of digital platforms in Turkey, I need to begin with IPTVs and how they failed to fulfil expectation of growth in Turkish content market in terms of film distribution. IP TV is a system where conventional and digital televisions' contents are delivered to subscribers through internet protocol technology different than Cable TVs which are also categorized as Pay TVs. When it was first launched IPTVs were promising to boost their subscription rates because content is interactively delivered to audience in IPTVs while contents are directly broadcasted in satellite, cable and terrestrial based TVs without audience participation. However, the expansion rates do not match with this provision because digital technologies have also introduced many different shareholders to the market (Çalışır, 2016).

Telecommunication companies played a great role in IPTV failure because these companies have supplied internet infrastructure to IPTVs. In Turkish context, Turk Telekom is a great example of change in IPTV market because it is an internet provider while it has also IPTV Tivibu. Furthermore, IPTV operators provide the same contents on the webTV and mobilTV without any control mechanisms between platforms. SVoD services are widely used without the need any sort of receiver (Çalışır, 2016, p. 45). As a result of integration of internet operators to the market, many local IPTV brands such as Digitürk, Tivibu, and D-Smart have also launched their digital platforms for the different devices.

The reason is that these new platforms demand exclusive rights of the films, which means that one films is to be screened in one platform. In the last two years, it seems that there is a dramatic decrease in sales to IPTVs because due to economic recession lots of plans remain incomplete (S. Duranay, personal communication,

March 15, 2019). IPTVs were playing important roles in interactive content delivering but they have to content with telecommunication operators and television channels due to the absence of well-developed audiovisual markets. At this point, Çalışır states how politics has impact on the developments of audiovisual markets:

The business plan of the new digital services to become popular does not fit into easily anticipated expansion scenarios when the number and interests of the actors are conflicting with each other in a given period of time. In line with the neo-liberal policies, the main objective of the restructuring of capitalism in the telecommunication field is to break down the network and ensure that a large number of players enter the field. It is hereby intensify the re-evaluation of capital. (2016, pp. 46-47)

What is underlined here is that IPTV might be positioned as alternative platforms to conventional ones but they are controlled by RTÜK and their criteria are related to box-office admission rate. IPTVs are also looking for popular films. In my interview with Senem Taşdemir and Savaş Doğan, they impart that D-Smart is also following box-office admissions in selection process. Thus, the content of IPTVs has also been in concert with mainstream films (S. Taşdemir & S. Doğan, personal communication, March 20, 2019). At one point, Senem Taşdemir has also noted that there is not enough local films to book all slots on TV because all art-house films are not approved by RTÜK (Radio and Television Supreme Council) (S. Taşdemir, personal communication, March 20, 2019). As a result, IPTVs are developing hand in hand with ramified digital categories of their brands, but they might not be categorized as alternatives for independent filmmakers because their selection criteria are shaped through box-office earnings.

### **2.3.2. SVOD Platforms**

Expansion of online streaming services around the world sets the ground for a new film distribution understanding in Turkey. According to a recent report on SVoD platforms and their penetration rate by Statista (2018), the foreseen number of subscription will be 7.4 million by 2022. The

penetration rates of subscription-based video streaming, which is the largest section of VoD market, is 7.2 % in 2018 while it was 5.9% in 2016. Likewise, the scope of film industry has been enlarging in Turkey with increasing admission rates, rising number of local productions, and box-office revenues (Kandar, 2018, p. 45).

Together with theatrical exploitation, filmmakers begin to think of digital platforms as their prime places to release their films though there is still way to go to see these platforms as profitable screening venues in film industry of Turkey (S. Duranay, personal communication, March 15, 2019). Although I categorize digital platforms, especially SVoD streaming services, into alternative distribution mechanisms in this research, most part of the global cinema industry has already been halfway through the transition of digital platforms to being conventional distribution ways. However, this situation is not clear enough in terms of Turkey because there is no detailed and periodically published sectorial research on data, subscription rates, and transparent data sharing mechanisms together with the lack of regulations to control business activities intra-platforms.

As of specific SVOD platforms in Turkey, Netflix Turkey seems to have one of the most aggressive marketing strategies with its originals (S. Duranay, personal communication, March 15, 2019). Since 2016, Netflix has added local titles; both TV series and feature films to its content board (Vitrinel, 2018) Although there is a list of domestic films in the catalogue of Netflix Turkey, most of films within this list are block-buster comedy films made for profit and are not current productions. Besides, most of films are produced by BKM or co-produced by CGV and BKM and distributed by CGV (Kandar, 2018, p. 49). Most of these local films are among the top ten grossing movies in movie theatres. So, it can be claimed that Netflix works collaboratively with dominant production houses and distribution companies such as CGV, TME, and CJ Entertainment Turkey because most of local films on Netflix Turkey are distributed and sold by these distribution companies.

In that sense, As Kandar states that Netflix is a small representation of movie theatres of Turkey (Kandar, 2018, p. 50).

As I previously discuss what co-operation between BKM and CGV signifies, it is to be said that suffocation of independent films in theatrical distribution is also prevailing in Netflix. Thus, Netflix is not categorized as an alternative digital distribution platform for filmmakers because of its content catalogue.

After Netflix, as it is listed in the first chapter, the next two platforms are local ones: Blu TV and Puhu TV. While owned by Doğan Medya Group, Blu TV was using infrastructures of D-Smart and Kanal D contents. After the buy-off, Blu TV introduced a more innovative and active marketing strategy adding its own originals and local features as well as documentary titles. The number of Blu TV members reached 750.000 in the last quarter of 2017, which makes it as the closest rival of Netflix. The advantage of Turkish content and live streaming on 22 Turkish TV channels favour Blu TV over Netflix (Kandar, 2018, p. 51).

In the sense of local feature films, Blu TV is very favourable than Netflix because it has more local and current titles and most of them are art-house independent films. Apart from the list of ‘Classic and World Cinema’ categories, there is also category which gathers selections from ‘Film Festivals’. In these categories out of 90 films, 22 films are domestic productions according to the data of May 2019. There are films from famous directors such as Yılmaz Güney, Şerif Gören, and Zeki Demirkubuz in these categories. Although these directors’ films are included, it seems that curation of Blu TV catalogue is supposedly designed to address mainstream audiences not for cinephiles.

After looking at details of Blu TV catalogues, it seems that comedies and block-busters are not outnumbered in domestic films like it is in Netflix. That’s why; Blu TV has a balanced schedule of art-house and comedy, dram, block-buster films compared to Netflix. Blu TV has also initiated different boutique sections which are bringing their engaged audiences to the platforms

like selected films of short film festivals. Recently, ‘KısaKes’ and ‘Sabancı Foundation Short Film Festival’ sections are launched in Blu TV. At this point, Blu TV seems that it tries to break its conventional circle to broaden its catalogue. The other collaboration which is critical for its marketing strategy is launching its local originals in Amazon Prime. This kind of international collaboration enables domestic titles to reach international catalogues. As Duranay points out that Blu TV has a serious potential for film industry of Turkey but there is a limit in their extent regarding subscription numbers and the number of contents (S. Duranay, personal communication, March 15, 2019).

Another local digital platform is Puhu TV which is founded by Doğuş Media Corporation in 2016. Different than Blu TV, Puhu TV’s revenue model is not based on subscription revenue model, instead Puhu TV is using ad-based revenue model. Puhu TV is also producing original series. *Fi (2017)* and *Şahsiyet (2018)* series are some famous examples of them. However, Puhu TV is lagging behind Blu TV in terms of recent original productions because there is not any recent original content different than TV series.

Furthermore, Puhu TV works more like a digital platform of Star TV which is a national free TV channel. Hence, its popularity is diminishing in last quarter of 2018 (S. Duranay, personal communication, March 15, 2019). When I search for its potentiality to be alternative for filmmakers to release their films, I see that there are not many recent films in the platform’s domestic title. There are total 97 feature domestic films. Most of them are pre-2000 productions. Comparing to Blu TV, Puhu TV’s film catalogue is listing less and older domestic films. Of domestic films, many of them are Yeşilçam comedies. Although there is not a concrete market analysis to comment on, it may not be wrong to say that Puhu TV does not bear the possibility of being an alternative film distribution mechanism for filmmakers regarding its recent in-active screening strategy.

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While ending the part in which I tried to analyse position of online streaming platforms in audiovisual market of Turkey, Kandar articulates that digital development and rising accessibility to the Internet has changed business-flow of these digital platforms (2018, p. 8). As development of online streaming services is inevitably pacing up with technological improvements, politics on these digital platforms are not going parallel with the need of digital content market.

Apart from pirate watching websites, there is another issue to be discussed is the censorship in digital platforms in Turkey. Indeed, censorship is a significant problem regarding both conventional and digital film distribution platforms as I lay down before in the research. The case gets harder since March 2018 when RTÜK acted a new law schema to apply censorship to online contents together with TV contents. This law includes supervision of both international and national online streaming platforms. Additionally, these platforms have been controlled by Information and Communication Technologies Authority of Turkey<sup>7</sup> since March 2018. In the light of this set of information on digital streaming platforms and their potential, I see that the same problem is viable for digital platforms: censorship and lack of contemporary regulations which will help filmmakers and distributors to benefit from both theatrical exploitation and release on digital platforms are significant problems of conventional and digital distribution platforms in film industry of Turkey. Hence, I want to emphasize that there is still a long way to go to for digital platforms in Turkey to be seen and employed as an alternative distribution opportunities in Turkey. Because of that financial returns of digital platforms to filmmakers are not in comparable amounts with theatrical returns while the same censorship tools are employed in digital platforms.

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<sup>7</sup> Bilgi ve İletişim Daire Başkanlığı

### **CHAPTER 3**

**DEALING WITH DISTRIBUTION POLICIES IN TURKEY: THE CASE  
OF *ZER* (KAZIM ÖZ, 2017) AND *MY FATHER'S WINGS* (KIVANÇ  
SEZER, 2016)**

In the last chapter of the research, I will focus on two case studies to further comment on the function of the state's art and culture policy for the distribution, the difficulties and crisis in the current distribution sector in Turkey and emerging digital distribution technology and its contribution to the market to make it more diverse and democratic in terms of content and worldwide availability. One of these two case studies is the feature film *My Father's Wings* (2016) directed by Kıvanç Sezer. The other one is *Zer* (2017) directed by Kazım Öz. I strengthen my argument on the necessity of alternative distribution in contemporary cinema in Turkey with the help of both directors' comments on their self-distribution experiences during the exhibition and distribution of their films.

I examine distribution journeys of two different films produced and distributed at different times to make a correlation between different dynamics in the film distribution sector and highly sensitive political environment of the country. The first reason why I chose different time frames is to investigate what has changed in the time in terms of the film distribution sector in the industry. Although one year gap between two films seems to be too short to make critical analysis to observe significant change in the industry, one year is quite long period for the economic and political agenda of Turkey. As mentioned before in the thesis, there is one attempted military coup, economic recession and raising authoritarian government executed by the decree-law in Turkey during this one year period. Hence, distribution strategies of both films have been operated by different concerns and crises. The second reason is to research the effect of monopoly in the film market that started to give off signals since 2016 and to lay down current conditions in the industry in the light of the experiences of two directors.

Before going in detail, I want to explain the reason why I choose these two films of these two directors. Kazım Öz does signify not only The New Wave in the cinema of Turkey but also the emergence of the Kurdish Cinema in Turkey beginning from the late 1990s before Mesopotamia Culture Center was founded in 1991. His filmography has been a significant contribution to the Kurdish culture and cinema. Especially in his documentaries on Kurdish nomadic culture such as

*The Last Season: Shawaks* (2010), Kurdish Alevi culture and Kurdish political movement in Turkey are main themes on which Kazım Öz works and shapes his art. When I look at his eight films, all films are censored by the government except for his last documentary. In that sense, Kazım Öz's experience as an independent director who is doing political films help me to reflect what politically opponent filmmakers have undergone while distributing their films.

Kıvanç Sezer has also distributed his last film *My Father's Wings* in a collective way by working with different organizations so as to overcome monopoly in the distribution sector. Although his film focuses on the Kurdish issue and the exploitation of the Kurdish workers, he approaches to the issue not with ethnic concerns; rather he portrays the labour exploitation which is the result of the capitalist system. His distribution journey is my focal point in this research, because Sezer has tried a distinctive self-distribution strategy different than other independent filmmakers and gets in touch with his audiences himself to flare demands. Hence, what both Kıvanç Sezer and Kazım Öz told me about their experience in cinema industry contributed a lot to understand the scope of the distribution crisis and concentrate on the probable solutions.

I address more or less the same questions to the directors to see a different part of the same discussions through their experiences. During the interviews with the directors, I keep the discussion in the frame of the research topics but I welcome discussion on related themes such as changing audience behaviours, consumption culture, and the rise of right-wing political parties in the political arena of Turkey.

Additionally, I also share my observations as a production assistant in the post-production of *Zer*. Together with Öz, my participation as a respondent keeps the discussion dynamic and prevents it to be too self-reflexive. Both case studies encompass recommendations and suggestions to improve existing conditions in the film industry of Turkey. These suggestions match with the ones that came as results from the in-depth interviews, interpretation of documents, and literature review. Thus, monopolistic inclinations in the film distribution market, cultural politics of

the government, censorship, digital improvements in screening technologies and ways of struggle to meet with audiences are compelling discussion topics that I have covered in this chapter.

### **3.1. DISTRIBUTION POLITICS AND CENSORSHIP**

Professionals, industry analysts, and film critics I have talked for my research pointed out that the film industry of Turkey is suffering from inadequate cultural politics, especially for the film industry, which does not welcome and encourage diversity. The film industry in Turkey is not tolerant to different opinions and this issue raises concerns for public welfare and intellectual rights. After I have talked with Kazım Öz and Kıvanç Sezer, both of them emphasized that any kind of oppositional political stance is not acceptable by the state at the moment. Both directors believe that the current politics of film distribution are under the supervision of political and ideological concerns (K. Sezer, personal communication, February 15, 2019) (K. Öz, personal communication, March 20, 2019).

The first question I have pointed to them is “in which step of filmmaking are you faced with distribution problem and why”. Although both directors are coming from different backgrounds, their answers are pretty much the same: ‘with their first films’. Kazım Öz has been in the film industry for twenty years as an editor, producer, scriptwriter, and director and he says that he suffered from distribution problem when he decided to distribute his first feature film *Fotograf* (The Photograph, 2001) and *Bahoz* (The Storm, 2008) although Öz’s all films are censored except for one of his feature documentary: *The White Sycamore* (2015) which is not officially released. On his relation with distribution companies, Öz stated that he actively involved in distribution processes of each of his films as a distributor, because he said that he is sure that these companies are also in tune with the market economy which should not be considered free from the state politics (K. Öz, personal communication, March 20, 2019). As he articulated that his first feature film *Fotograf* tells the story of two young men. One of them is going to be

a soldier in the Turkish military to serve his compulsory military service while the other one is going to fight against Turkish soldiers in mountains as guerrilla participating in Kurdistan Workers' Party (PKK). The film makes the audience to think over how these two young men might have been friends if they were raised in a different society which is not feeding racial and ethnic discrimination between Kurds and Turks. Öz says that he worked himself with Özen Film to distribute his film because themes covered in the film concerns the distributor and movie theatres about being labelled as terrorists when they distribute this film.

Like *Fotograf*, Öz's second feature film *Bahoz* is also a significant film for Kurdish people in Turkey because Kazım Öz tells the story of a young Kurdish Alevi student; Cemal. He is leaving his village in Dersim to have a university education in Istanbul in the 1990s. As the story goes along, it is revealed that Cemal is an Alevi Kurdish man but he denies his Kurdish identity. When he resists accepting that he is assimilated by nationalist politics of the state, his friends who are Kurdish and engaged in Kurdish political movements try to wake him up about his mother tongue and ethnic identity. *Bahoz* portrays the Kurdish students' movements in the 1990s in universities where "the anti-democratic and violent attitude of the state forces were addressed to the opponent Kurdish Turkish leftist students" (Çiftçi, 2015, p. 153). *Bahoz* takes the transformation of Cemal into the centre of the narrative. At the end of the film, Cemal is imprisoned for being a terrorist because he became a member of Kurdish students' organization in the university. In the last scene of the film, Cemal has sailed to Dersim where he came from to march to the mountains of Kurdistan to participate in P.K.K.

Across an impressive filmography, Öz has demonstrated a sustained preoccupation with the issues such as ethnicity, Kurdish culture, Alevi culture, massacre and memory that are still the thematic currency of his works. Hence, as presented here, the distribution of his films is always a difficulty and a kind of struggle to reach audiences. Nevertheless, Kazım Öz insists that he does not know another way to work with a distributor because of his worldview and understanding of cinema. Öz defines cinema as an ultimate tool of resistance and a way of

expression of identity rather than producing a commercial material (K. Öz, personal communication, March 20, 2019). In this sense, Kazım Öz keeps being defined as an independent filmmaker who is making films not for the sake of financial gain or consumer culture but for the sake of opening up different discussions in life.

Kıvanç Sezer is the second director on whom I want to talk a bit more to relate his filmography with my research topic. Although *My Father's Wings* is his foray to feature film, before this films he has two short films: *How Much* (2011) and *Game of Hera* (2012). In his first film *How Much*, a trans-woman accidentally enters the toilet for men and does not go back. While using toilet, a man in the cabin comes out and disturbs her by asking about how much she wants to have sex with him. While the trans-woman has quarrel with him, boy's father comes and rebukes him. After the boy leaves the room, the father does the same and asks for her phone number. Sezer shows how gender codes are re-created by men in a different way with different excuses and cultural nuances. Furthermore, the film releases that social acceptances are playing significant roles to call what is proper or what is not.

In *Game of Hera*, Sezer makes a free adaptation of Julio Cortazar's short story *End of Game*. In the film, three young girls make up a game in their leisure time: standing like a statute while a train is passing along them. Things have changed when a boy named Ali sends a message from the train to meet these girls. Sezer deals with family issues and how traumas in the same family have affected significantly each members of the family.

In his first feature *My Father's Wings*, Kıvanç Sezer puts his camera into the heart of the city; the hub of the construction companies and exploitation and noises. The film was selected for well-known international festivals including 51<sup>st</sup> Karlovy Vary International Film Festival. The film calls the audiences to be aware of the sensitive and very subtle details in ordinary humans' lives. Sezer portrays hierarchies in the lives of the construction workers who work under unhealthy conditions by focusing on an old Kurdish construction worker, Ibrahim who learns that he has lung cancer but he could not quit the job because he has a family to take

care of. After he learns that the construction company pays handsome compensation to a worker's family who has lost his life during the work, he starts to search for audacious way of taking this compensation. In the film, audiences are left to question how less a human life worth to be bargained for a certain amount.

In this very courage first film, Sezer outlines the danger of the exploitation system that forces workers to give up their lives to the interest of economic development. As indicated in the synopsis, film “demonstrates the dignity of a man who has run out of hope for the future, highlighting his inner strength as he contemplates sacrificing himself for his family” (K. Sezer, personal communication, February 15, 2019). After the film made its premiere at Karlovy Vary Film Festival, it is released in Turkey, and problems regarding its distribution started at this point because the decree-law was announced and the country was under the state of emergency.

Kıvanç Sezer has indicated that in his films, he focuses on stories that touch on humankind, society, and the problems he has overcome through his life. Hence, both Kazım Öz and Kıvanç Sezer have been dealing with the politics of Turkey and social problems like class struggles, race, and discrimination in their films. So, it is critical here to wrap up that Kazım Öz has at one point self-distributed all his films because he believes that distribution companies are under the surveillance of the Turkish state, which is pretty much against the arguments that Öz makes in his films.

Although he distributed *Bahoz* with Özen Film in 2009, once it was a famous distribution company, he conceded his participation in the process saying that there were some politically sensitive points that these companies could not overcome to distribute his films with full commitment. Furthermore, Öz adds that social and political trends have a direct impact on how their films are seen out of Turkey because domestic politics are also shaping external political actors and cultural organizations like funding bodies, festivals, and workshops (K. Öz, personal communication, March 20, 2019). He said that filmmakers are cast out of

Eurimages when they are going against the Turkish state and sanctions expected to follow, or that Berlinale has sent representatives to select films in pre-application processes in Turkey. Öz believes that all these relationships are shaped through political issues to define certain criteria for being selected to the A class film festivals (K. Öz, personal communication, March 20, 2019). On this topic, Kıvanç Sezer has argued that Turkey is now in a transition period in all senses and this period has to be administered in tune with local cinema initiatives, filmmakers, and representatives of film industry foundations so that the cultural politics are able to both benefit filmmakers and artists (K. Sezer, personal communication, February 15, 2019).

The second problem related to film policy of the state is the censorship in the film industry of Turkey. To begin with Kazım Öz's last feature films *Zer*, it was both supported and censored by the Ministry of Culture and Tourism. *Zer* was supported by the Ministry in 2014 while it was censored in 2017 because of the scenes in which Jan, the protagonist, encounters with PKK guerrillas in their camp, visits a photography exhibition of Dersim Massacre, and sees two graffiti. *Zer* tells the story of a cultural heritage that is buried by loss of memory and identity. Jan was born in France but raised in America. He is a musician who has lost his grandmother who is brought to New York because of her cancer treatment. He listens to a song from his grandmother and he wants to know more about this song. Before he learns details about the song, his grandmother is passed away. He finds himself taking a trip to the city of Afyon in Turkey where he finds that this song is a Kurdish song. From Afyon, he traces his roots back to Dersim that is a symbolic city for Kurdish people because of the secluded Kurdish culture in the city. Along the journey, Jan finds out that his grandmother is an orphaned Kurdish girl. She was orphaned by Turkish soldiers years ago in the 1938 Dersim Massacre<sup>8</sup>. Her family members were killed by soldiers in military operations. The song she sang is the

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<sup>8</sup> Dersim Massacre was executed by the Turkish Republic on Kurdish people who are living in Dersim where Kurdish nomadic people live in 1937-38. The massacre was recognized as a military operation by the Turkish state.

only thing that she passed down to her grandson. Jan follows the roots of the song while he finds out his own identity in Dersim.

As I indicate above, Kazım Öz's filmography is shaped around certain themes such as identity politics, cultural assimilations, Kurdish culture, and Dersim culture. He is also from Dersim, so he knows what he imparts to the audience in his films. Regarding the themes in *Zer*, it is a typical Kazım Öz film in terms of style including the coloring, camera technique, setting and local people as characters in the film. However, it also differs from his other films in terms of its budget and exhibition journey in Turkey. Öz says that *Zer* is the most expensive film he has shot so far. As of its distribution in Turkey, the film was censored by the Ministry and its previously issued registration document was revoked after *Zer* was premiered with blackouts scenes in Istanbul International Film Festival in 11<sup>st</sup> of April 2017. Öz was conditioned to cut out the scenes that set in PKK camps and the ones that show two graffiti's saying that *every state is a killer* and *Soma is a massacre*<sup>9</sup>. Both scenes are cut off by the director and it got a renewed registration document to put the film on national release in Turkey. The important part of this discussion is not the result but how Öz displays the censorship of the Ministry during the premiere of the film at the 36<sup>th</sup> İstanbul International Film Festival.

At this part, I need to analyse how Öz and I dealt with censorship in this period. Before the theatrical release of the film in 20<sup>th</sup> April 2017, the Ministry asked for cutting off the censored parts to allow for commercial release of *Zer* in Turkey and to give a license, but Öz decided to announce the censorship in the world premiere screening in the 36<sup>th</sup> International İstanbul Film Festival on 11 April, 2017 by not cutting off but blacking out censored parts of the film with the atmosphere sounds, not dialogues. Subsequently, all movie houses, almost 100 of them, cancelled their schedules with the film in fear of being stagnated as the opponent to the state (K. Öz, personal communication, March 20, 2019).

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<sup>9</sup> Soma is a province of Manisa. 301 miners lost their lives in the fire 13th of May, 2014. It is stated that fire resulted from a lack of enough control and regulations in the mine

The distribution company of the film was T.M.E. Head of the company; Sultan Duranay also agrees that *Zer* might have had almost 100 thousand audiences adding that she had so much trouble in the distribution of *Zer* because of the censorship (S. Duranay, personal communication, March 15, 2019). After *Zer* was released in Turkey, Öz and I organized different special screenings with actors and actresses to attract more audiences. Afterward, we began to make call outs for audiences who want to see *Zer* in their cities to put them in action. As he mentioned, we had organized more than 200 screenings in Turkey together with labour organizations, NGOs, cultural centres, and student cinema clubs within two years. The official box-office admission was 25.000 together with special screenings. At this point, when I ask if he sees this organizational self-distribution will be sustained for his next project, he said that:

It totally works better and easier because this time we saw how it works. Further, there is both a result in our hands to compare it with our efforts to foresee what we should expect from this type of work and impact on audiences. The network is now familiar with us and if a new film is not delayed, everything will be easy in this sense. ... *Zer* was actually a good example of the distribution system in Turkey to see the relationship between art and the economics of the film industry. These issues are all engaged in politics. It was also good in terms of showing the relationship between politics and art. Of course, we had difficulty at that time but it was not surprising to me, I did expect it. I know the country that I work in. We fought well against it and we did what we had to do. (K. Öz, personal communication, March 20, 2019)

Öz argues that this type of organizational self-distribution might be a starting point to institutionalize an independent network distribution to pave the way to the independent art-house films by making easier to reach these films. He adds that this way of organizational distribution alone is not enough.

Kıvanç Sezer has suggested that independent film directors suffer from difficult conditions of filmmaking but they do not have such power to change conditions in the market, so they are in need of having collaboration with external parties like NGOs or an independent art foundation. The need for a more diverse and culturally multi-dimensional art politics is articulated by both directors, especially for independent filmmakers so as to make a democratic and free

filmmaking environment available to them. Sezer has underlined that participation of local groups and regional cultural organizations which could become an independent network to law making processes is crucial (K. Sezer, personal communication, February 15, 2019).

Kıvanç Sezer strengthens Öz's arguments on the need for an independent distribution network by saying that his last film *My Father's Wings* is distributed by the support of local cinema initiatives, opponent labour foundations and NGOs (K. Sezer, personal communication, February 15, 2019). As Sezer highlights himself, the film makes the audience to be bothered with clashes between workers and capital owners who are self-indulgent and ignorant of workers' life as if they are a kind of material that might be bought with money. Distribution journey of *My Father's Wings* was operated hand in hand with local organizations, opponent political clubs, and union of workers and teachers in accordance with the story that is the focal point of these organizations.

On the distribution process, Sezer said that he would not reach so many audiences if he left the film in the distribution strategy of *Başka Sinema*. He pointed out that *Başka Sinema* is important by its existence but the company has also started to distribute so many films without adding new movie houses to their allied list of cinemas (K. Sezer, personal communication, February 15, 2019). Thus, films could not stay on release more than two weeks on *Başka Sinema* allied movie houses, which is far less to attract the interest of audiences in such an age invaded by popular films and many other options to entertain and diverge preferences of people.

As many film industry professionals argue that the last issued legislation on the classification of films is paving the way for censorship even though distributors and big production houses reached an agreement on the share of ticket prices via new amendments in the recent law (Öztürk, 2019). New cinema legislation enables producers to control ticket prices with distribution companies so that distribution companies do not put an extra amount of price in promotion campaigns. The income

of these campaigns is not equally divided between producers and movie houses. As I mentioned above, one of the biggest players in this game is the CGV Group that owns Cinemaximum movie house chains.

Although new legislation is signed by the President, debates on the content of the legislation are still on the agenda of the cinema industry (Aydemir, 2019). Recent cinema law is expected to cause more problems in the industry because the number of representatives of the film industry is now three while it was six in previous law (K. Sezer, personal communication, February 15, 2019). The majority of the committee will now be bureaucrats. When I ask Kazım Öz a question about this board, he says that the board that is authorized to classify films must involve filmmakers, intellectuals, artist and industry professionals, not officers because the amount subsidized is actually the total tax of ticket prices, which means that cinema industry is earning this amount. However, people on this control board in the Ministry are not objective to allocate public funds equally (K. Öz, personal communication, March 20, 2019).

I need to emphasize that the position of the General Directorate of Cinema has a critical impact on both censorship and allocation of public funds because the same committee decide on the release of films and films to be subsidized with public funds but they are bureaucrats, namely political actors in the political structure of the Ministry of Culture and Tourism. Hence, both directors criticized the recently issued amendments saying that there must be more sectorial representatives in the committee. Otherwise, the committee might be the bearer of political decisions in the selection of funded film projects. Furthermore, Öz suggests that the committee that is in charge of the classification of films to be released and of the selection of the funded projects definitely have to have an independent structure from political actors (K. Öz, personal communication, March 20, 2019).

### **3.2. DIGITAL PLATFORMS**

The second issue brought up during discussions with directors is about the influence of digital technologies on their distribution strategies. Both directors argue that digital platforms have a profound impact on their alternative ways of distribution together with social media platforms although these platforms do not realize their potential for their films for now. Öz states that digital distribution may be the stem point of alternative film distribution because it is now more democratic and free from censorship. However, he underlined that there must be an allocated budget to research and develop the usage of digital platforms in independent cinema (K. Öz, personal communication, March 20, 2019). The economy of independent filmmaking and distribution is the main concern for both Öz and Sezer. Thus, technology has the potential to liberate filmmakers from public funds and censorship to enable independent filmmakers to shoot their own films without public funds.

On a more independent business model, Öz shared his recent plan on his VoD platform project which is to be launched on his website (K. Öz, personal communication, March 20, 2019). He said that technology demands time and investment to give its benefit, so he has recently decided on launching his online platform on which audiences can watch all his films online and get copy of his films in several digital formats. When I ask him about how he could deal with the advertisement of this platform, Öz states that he contends with marketing problem with effective usage of social media tools. He also shared his concerns about big corporate media platforms manipulating consumers' motivations and preferences with algorithms. He emphasized that he will struggle to produce independently as far as he can.

On the same issue, Sezer articulates that digital platforms will radically shape the future of film exhibition in Turkey because audience behaviours are inclined to digital platforms such as Youtube, Netflix, and Blu TV. About changing watching experiences, Sezer accepts that he also lost his endurance to watch videos more than ten minutes on social platforms. Thus, he suggests that the distribution and marketing of the films should be integrated into upcoming digital trends. As of

local online streaming platforms, Sezer also argues that Blu TV and Puhu TV are so important but their impact area is not big enough to compromise an alternative distribution model for filmmakers, yet. Netflix Turkey is also important but not much interested in independent films. However, both Öz and Sezer believe that digital platforms will shape film distribution in the near future.

### **3.2. MONOPOLY IN THE FILM DISTRIBUTION MARKET**

Kıvanç Sezer's film *My Father's Wings* was released in 26 places while *Zer* was released in 10 places in Turkey. T.M.E. distributed *Zer* while *My Father's Wings* was distributed by *Başka Sinema*. Both films are nationally and internationally awarded independent films but they could not find places in the biggest chain of distribution sector: CGV's Cinemaximum movie houses. On this subject, both directors agree that monopolistic tendencies in the market are damaging local films because unlike most of the European national film markets, domestic films outnumber international titles in box-office in Turkey. However, the film market is not supporting these local productions as it should be. The distribution sector is now dominated by vertical integration of big corporate distribution companies like CGV, CJ Entertainment, and UIP.

When I ask for their suggestions on distribution models both directors express that the state is responsible for current market conditions. They suggest that the state should propose a new cultural amendment including more independent and publicly funded cinema houses to distribute independent films which are supported and ran by the public funds. When I ask directors about relation between the audience and cinema, Öz states that he first understood in distribution of *Bahoz* that filmmaking does not mean anything if the film does not meet with the audience (K. Öz, personal communication, March 20, 2019). Öz points out that monopoly in the film market has to be regulated with distribution subsidies and alternative public movie houses in which only local independent films are screened so that more audiences can easily reach to these films.

The biggest movie houses chain; Cinemaximum has curated a different schedule of independent film screenings for the last two years, but they have only 13 movie theatres to screen art house films across the country. As KİVANÇ Sezer says that movie theatres are also managements and they by their nature have to make profit to continue their business. However, the case is here that Cinemaximum has owned exhibition stage, distribution and advertisement part together with film production. This kind of vertical business integration does not give permission to small local movie theatres to survive. The result is that independent local movie theatres are shot down while others are submerged into the big halls of shopping malls (K. Sezer, personal communication, February 15, 2019). Like independent films, independent movie theatres are in danger of being closed down because of fiscal problems.

In conclusion, both ÖZ and Sezer argue that inadequate cultural politics do not help filmmakers to distribute their films with their potential and meet with large number of audiences from different part of the country rather than a limited number of audiences who are living in the capital cities. As Sezer indicates that state policies has to issue amendments that are prepared according the needs of the cinema industry to regulate monopoly in the market to give chance to small independent cinemas and independent filmmakers. Although technological developments in exhibition sector help filmmakers to distribute their films with relatively small budgets, the operational process makes the distribution difficult to conduct the whole process from one hand and create a work flow for the next projects.

## CONCLUSION

In the monopolistic film distribution industry in Turkey, the framing of public funding has left independent filmmakers into the harsh conditions of the capitalist market economy. Public funding, incentives, and subsidies are given for production, scriptwriting and festival organizations by the Ministry of Culture and Tourism. Although the number of produced films has increased in recent years, notably since 2005, the number of theatrically distributed films is not relatively increasing. Akkaya (2016) brings out:

Even though DG Cinema claims its *raison d'être* is to avoid market imperfections by providing funds to films that have artistic and communitarian values, DG Cinema and the legal regulatory measures are clearly unable to provide sufficient institutional and monetary mechanisms that would guarantee that publicly funded low-budget films reach audiences. (p. 69)

Due to inadequate public funding, independent filmmakers design their distribution strategy in tune with the film festivals and distribution companies. Independent filmmakers are left to fight for a room in the distribution market to make their films

screened in movie theatres. Nonetheless, most of the box office exploitation is from mainstream films and comedies, that's why distributors seek these types of films which would address 'the mainstream taste', not independent films.

The standards are determined by the rules of the five big production houses and major big distribution companies as I list them in former parts of the thesis. Out of five big distribution companies, CGV Group has been dominating the distribution market since 2016. In the vertical business model, CGV Group manages a great number of movie theatres as a leading company in the exhibition industry in Turkey together with its allied media agency. The absence of a well-designed competition legislative structure almost brought the film industry to an end in Turkey. In such a deadlock in the film industry, independent filmmakers seek alternative distribution models to reach the audience.

I set out to explore alternative film distribution mechanisms that independent filmmakers whose films could not find enough room to meet with the audience in the film industry in Turkey. As I present the detailed outputs of this journey in the previous chapters with all its aspects, some independent filmmakers venture to use self-distribution, online streaming services, independent distribution companies, and festivals to distribute their films. By analyzing these methods that filmmakers use to break off monopoly in the film distribution market, I saw that all these models have serious potential to be an alternative to conventional theatrical release, nonetheless, regulations on digital platforms and their income models prevent filmmakers to solely rely on day to day release on streaming platforms. Additionally, the box office exploitation is still constituting most of the income of a distributed film. The issue of financial returns is crucial to enable filmmakers to think about the next projects, thus the online platforms are not a kind of alternative distribution models to be considered by independent filmmakers, yet.

Furthermore, the legislative structure does not propose any amendments to pave the way for filmmakers to distribute their films in the domestic market with different methods. As popular blockbuster films exclusively dominate the market,

the low-budget independent films are situated in a vulnerable position to compete for finding a distributor (Vitrinel & Par, 2011). In short, to solve the distribution crisis, GD Cinema must co-work with artists, filmmakers, representatives of the industry to prepare a cinema legislation with the help of insights from the sector. Otherwise, the monopolistic film distribution has a profound impact on the cinema of Turkey because only a few big production houses and distribution companies will survive in the film industry. I have to round off conventional distribution in Turkey by saying that the political and ideological power of the government has a profound effect on the shape of the film distribution industry. The perspective that shapes the film industry has to be changed so as to present solutions to the distribution crisis. On the relation between policy and creative industries, Garnham (2005) points out that:

The policy issues at stake are long established ones in the fields of arts and media. In which cultural fields, why and how should the state intervene? Historically there was a clear division between policy towards the arts, based broadly on principles of patronage and enlightenment and on assumptions of an inherent opposition between art and commerce, and policy towards the mass media, and therefore the provision of mass or popular culture, where the main concerns were press freedom and pluralism, defense of a national film industry, and the regulation and public service provision of broadcasting on grounds of spectrum scarcity. In these cases, the policy was based largely on an economic analysis of what, it was always accepted, were large-scale economic activities, or industries, operating largely under market conditions, and on the various forms of market failure that justified regulation. (p.16)

What I found in my research and interviews with professionals from the industry is that there is an acute need for a different perspective to look at creative industries in Turkey to design them according to the concerns of filmmakers and artists, not to those of the market economy.

Apart from the theatrical release, film festivals and TV channels and digital platforms are also included in conventional distribution methods. By analyzing the function of the film festivals as conventional distribution methods, I get a chance to reveal that politics have also shaped the main film festivals in Turkey like İstanbul Film Festival, Antalya Golden Orange Film Festival or Boğaziçi Film

Festival. Thus, independent filmmakers whose films are about politically sensitive issues could not find a place in the lineup of these festivals. This research reveals that film festivals are not alternative distribution platforms for independent films. There are a few alternative/independent film festivals that are embracing different titles from different parts of society but their presence is also so vulnerable because they are not granted by public funding or financial subsidies.

The DVD market has changed its position in the market with online streaming services. As Suzan Güverte points out filmmakers may not print DVDs anymore (S. Güverte, personal communication, April 5, 2019). TV purchasing as a conventional film distribution method is still important but the economic recession in recent years has adversely affected TV sales of the films. The decrease in the advertisement rates in the television market and data harvesting leads distributors and filmmakers to the online platforms rather than TV channels (S. Duranay, personal communication, March 15, 2019). Besides, TV channels are looking for blockbuster films to broadcast on their channels. Evidently, independent films do not have the same admission rate as popular films. Thus, the DVD and TV channels are also not in a position to serve as alternative distribution methods for independent filmmakers in Turkey.

Over the last decade, technological developments have a profound effect on the film industry. From production to distribution, and exhibition sector, every phase of the industry has undergone a transition period. Online streaming platforms, piracy, and cutting edge exhibition facilities like IMAX and screens with the 4DX technology have changed the way how films are consumed. The viewing habits and the target audience also changed because there is a productive audience in front of the big screen. Kıvanç Sezer suggests filmmakers think of these audiences and their consumption habits while they draw the frame of the distribution. The nature of film watching has transformed with the penetration to the VOD platforms with limitless access to the Internet (Kandar, 2018, p. 64). Recently, VOD platforms have evolved to be a fundamental aspect of film industry in Turkey. Netflix, Blu TV, and Puhu TV are big players in the VOD and SVOD market in Turkey. I search

film distribution to explore if digital platforms, technological developments can democratize the monopolistic film distribution market in Turkey. However, the research results in that the catalog of these online streaming platforms is more or less reflection of the mainstream films. Kandar (2018) points out that:

The domination of mainstream which is existing in theaters as a result of industrial conditions is also present in the platforms. While Netflix and BluTV have libraries constituting from the drama and comedies which appeal to the general taste and be seen in theaters throughout the year, they are interspersed with a few art-house films. At that point, the weakness of Netflix can be clearly seen. (p. 65)

To summon up the discussion on the online streaming platforms in Turkey, the politics of film distribution in Turkey has a definite effect on every part of the film distribution.

As I elaborate on the last chapter in the thesis, independent filmmakers try their own ways to distribute their films without being lost in the hoops of the film distribution industry. Both Kazım Öz and Kıvanç Sezer work with the audience and labor organizations, NGOs and local cinema clubs to flare demands and organize screenings with a collective effort. Both directors articulated that the current government does not tolerate any oppositional voice in any part of life. Thus, the case is the same in the film industry. The first thing is that filmmakers should act together to build an independent network organization to distribute independent filmmakers. It seems that self-distribution is not a sustainable way of distribution because the individual initiatives and seasonal organizations have contributed to the process, thus it may not be easy to find the same organizations and persons at the same place for the next projects.

Although I did not include in the related chapter, I want to bring about the censorship issue on online platforms at this point so that prospective scholarly work might open new discussions on the issue. Radio and Television Supreme Council (RTÜK) issued a new regulation for online platforms on August 2, 2019. Any online platforms in Turkey including

Netflix, Blu TV, and Puhu TV are now subjected to the supervision of the RTÜK. That's why I have to accept that online streaming services might also encounter with censorship in Turkey in the near future like TV channels. Hence, how online streaming services evolve in the film distribution market in Turkey is an exciting process to witness in the near future.

I dovetail the result of this research with current developments on the film distribution environment in Turkey and see that the relation between cultural policy and the industrial and economic policy regulates the film industry in Turkey within a longer trajectory. It is not possible to project a bright future for the cinema industry of Turkey without plurality, diversity, and innovation that will catch the glimpses of the technology together with knowledge. When I set out to write this thesis as an assistant producer, I had lots of possible solutions to the distribution crisis that I witnessed two years ago. Nonetheless, at the end of one-year writing processes, I see that the distribution crisis in Turkey is beyond excellence or failure of individual filmmakers; rather it is a matter of system and way of looking to the world. Thus, I want to finish this research with the words that are the source of my inspiration to write this thesis: "filmmaking does not mean anything if the film does not meet with the audience" (K. Öz, personal communication, March 20, 2019). I will be working in the film industry and in the academy in solidarity with filmmakers who are fighting for their ideas.

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