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**THE EFFECTS OF TURKISH TV SERIES ON OTHER CULTURAL AND
CREATIVE INDUSTRIES: MUSIC INDUSTRY**

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THE EFFECTS OF TURKISH TV SERIES ON OTHER CULTURAL AND CREATIVE INDUSTRIES:
MUSIC INDUSTRY

TÜRK DİZİLERİNİN DİĞER KÜLTÜREL VE YARATICI ENDÜSTRİLERE ETKİLERİ: MÜZİK
ENDÜSTRİSİ

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ABSTRACT

Today, TV series industry is considered as one of the most valuable branches of creative economy that interacts with other cultural and creative industries in order to generate content, thus creates a significant multiplier effects on these industries. Music industry can be shown as one of these industries. When the examples are examined there are some country originated TV serial genres that have a well-developed beneficial relationship structure with music industry in the global market. However, when the Turkey's case is examined it is seen that as one of the countries that have succeeded globally as a TV series genre, this relationship with music industry could not be developed sufficiently for Turkish TV series. Therefore, this study is made, based on the observation that there is a necessity to improve the interaction between Turkish TV series and music industry.

In the first chapter of the dissertation, the creative economy definition, film industry and TV series industry structures, which play an important role for the subject, are tried to represent. Global music industry's state and different methods of music usage in TV series have also given place. The chapter is closed with an examination of two country originated TV series genres that are prominent with their relationship with music industry in the global market. In the second chapter, the notion of value chain, which has an important place for creative economy, took place and value chain models of TV serial and music industry is examined. Finally, the position of music in a TV serial value chain is attempted to detect over a TV serial music value chain model proposal. The final chapter focused on the investigation of Turkey's case and the position of music in Turkish TV series. The study, which ends with the suggestions part, argues the idea that, due to the secondary position that music has in Turkish TV series industry, the possible opportunities for emerging new areas about serial music are being missed out.

Key words: TV serials, Turkish TV series, music industry, TV serial music

ÖZET

Günümüzde dizi endüstrisi, içerik üretebilmek adına diğer kültürel ve yaratıcı endüstrilerle etkileşime geçerek, bu endüstriler için önemli derecede çarpan etkisi yaratma özelliğiyle yaratıcı ekonominin önemli kollarından birini oluşturmaktadır. Müzik endüstrisi, dizilerin çarpan etkilerinden faydalanan endüstrilerden biri olarak gösterilebilir. Çeşitli örnekler incelendiğinde, küresel pazarda bir 'tür' olarak anılan ve müzik endüstrisiyle fayda sağlama temelinde bir ilişkiye oturtulmuş, ülkelerin özgün yapımı olan dizi türleri görülmektedir. Ancak, bir 'tür' olarak küresel anlamda başarı kazanmış olan Türkiye'nin durumu incelendiğinde, Türk dizileri için bu ilişkinin yeterli düzeyde geliştirilemediği görülmektedir. Bu nedenle bu çalışma, Türk dizilerinin müzik endüstrisiyle etkileşiminin iyileştirilmesine dair ihtiyacın gözlemlenmesi üzerine hazırlanmıştır.

Çalışmanın ilk bölümünde, konu için önemli bir yer tutan yaratıcı ekonomi tanımı, film ve dizi endüstrilerinin yapıları tanıtılmaya çalışılmıştır. Küresel müzik endüstrisinin konumu ve dizilerle müzik kullanımına dair çeşitli yöntemlerle ilgili bilgilere bu bölümde yer verilmiştir. Bölüm, müzik endüstrisiyle olan ilişkisiyle ön plana çıkmış iki adet ülkenin özgün dizi türünün incelenmesiyle son bulmaktadır. İkinci bölümde, yaratıcı ekonomi için önemli bir yeri olan değer zinciri kavramı yer almaktadır. Buna ek olarak dizi ve müzik endüstrilerinin değer zinciri modelleri incelenmiştir. Son olarak, dizi değer zincirinde müziğin yeri, yeni bir dizi müziği değer zinciri modeli önerisi üzerinden saptanmaya çalışılmıştır. Son bölüm, Türkiye örneği ve Türk dizilerinde müziğin konumuna odaklanmaktadır. Öneriler kısımlarıyla son bulan çalışma, Türk dizilerinde müzik unsurunun ikinci planda bırakılması nedeniyle, oluşabilecek yeni alanlara dair fırsatların değerlendirilemediğini savunmaktadır.

Anahtar kelimeler: TV dizileri, Türk dizisi, müzik endüstrisi, dizi müziği

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ABBREVIATION LIST

- CCI: Cultural and Creative Industries
- DCMS: Department of Culture Media and Sports
- DSP: Digital Service Provider
- EBU: European Broadcasting Union
- EIB: European Investment Bank
- ESS-NET CULTURE: European Statistical System Network on Culture
- HALLYU: Korean Popular Culture and Media
- IFPI: The Intellectual Foundation of the Phonographic Industry
- IKSV: Istanbul Foundation for Culture and Arts
- K-DRAMA: Korean Drama
- K-POP: Korean Popular Music
- KEA: European Affairs
- MESAM: Association of Musical Composition Owners
- MPAA: Motion Picture Association of America
- MSG: Association of Musical Composition Owners' Group
- MÜ-YAP: Association for Neighboring Rights of Phonogram Producers
- MÜYORBİR: Association of Music Interpreters
- OST: Original Soundtrack
- OTT: Over-the-top
- RIAA: Recording Industry Association of America
- TAVAK: Turkish European Foundation for Education and Scientific Studies

TESİYAP: Association of Television and Cinema Producers

TUIK: Turkish Statistical Institute

TV: Television

UK: United Kingdom

UNCTAD: United Nations Conference on Trade and Development

UNESCO: United Nations Educational, Scientific and Cultural Organization

USA / US: United States of America

VOD: Video on Demand

WIPO: World Intellectual Property Organization

YEKON: Creative Industries Council

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INTRODUCTION

Today, TV serial industry is in the spotlight for getting bigger and stronger every day. It is considered as one of most consumed cultural and creative industry branches. With the feature of being a complex hub for several cultural and creative industries, it also serves significant multiplier effects on other industries. In this sense it feeds other industries as it benefits from them. Music industry is only one of the cultural and creative industries that TV serial industry feeds. However, music industry also carries the future of being an intersection point for both TV serial industry and music industry. Hence, this union doubles the multiplier effects for both industries.

When some country originated TV serials genre examples are examined, a couple of genres that generated a well-structured trade model with music industry can be spotted. As America is the leader in all entertainment sectors, it can be said that it also generates a good example with its TV serial and music industry body relation. However, as another global country originated TV serial genre, Korean Drama industry also gets attention lately. As a developing country, the well-structured characteristics of Korean Drama industry and beneficial trade relation that generated with music industry can be shown as an example model in the global industry.

On the other hand, when the characteristics of TV serial music is examined over the value chain phenomenon, TV serial music benefits from both actors of TV serial and music industry. In this sense, it can be said that TV serial music functions in its own value chain actors which can be very beneficial in the meaning of generating some sub-supporting fields for music and TV serial industry.

Furthermore, when the Turkish TV serial industry is examined as a global country originated TV serial genre, Turkish TV serial provides some multiplier effects for

other countries. This brings out the idea that, Turkish TV serial industry has a potential for activating music industry and the potential for generating some new sub-markets like TV serial music. In this sense, the study carried out in three chapters, basically aims to detect the possibilities that may arise from the Turkish TV serial and music industry relation. While conducting this research, in the first chapter, global position of TV serial industry and music industry have examined. Additionally, the footprint of TV serial music tried to detect. In the second chapter, the value chain phenomenon has tried to analyze over the TV serial music perspective. And finally, Turkey's position has tried to determine. In order to collect data during the field research, ten in-depth interviews have conducted.

CHAPTER ONE

1 TV SERIES AS AN OUTPUT OF CREATIVE ECONOMY

Creative economy, especially in recent years, by increasing its importance in terms of countries' development plans, is considered among top factors which are beneficial to economy of the countries. As an important subsection of creative economy, TV series industry constitutes one of the foreground industries which are beneficial to creative economy. Due to its growing popularity in recent years, TV series industry continues to increase its importance in creative economy day by day. In addition to that, by interacting plenty of different cultural and creative industries, it also carries a role of reviving these industries. Further into this chapter, the position of TV series industry in creative economy, and the multiplier effects of TV series on other cultural and creative industries will be examined.

1.1 THE DEFINITION OF CREATIVE ECONOMY

"All around the world, the 'creative economy' is talked about as an important and growing part of the global economy" (Newbiggin, 2010, p.15). Especially for the last thirty years, both developed and developing countries have recognized the annually growing potential of creative economy and started to take it under consideration as an important subject for their development strategies as it comprises an important part of the global economy. This position has made the sectors of creative economy become important agents for the economic development of many countries (Yaratıcı Endüstriler Konseyi (YEKON), p.5). Creative economy also shines out for bringing developments to creative sectors as a generator of jobs, wealth and cultural engagement, thus governments and creative sectors across the world are recognizing the importance of the creative economy more and more every day (Newbiggin, 2010, p.80).

According to the information that is given by United Nations Conference on Trade and Development (UNCTAD, 2010, s.9), the term 'creative economy' first appeared in John Howkins' book about the relationship between creativity and economics. Howkins (2001) explained the phenomenon as followed, "creativity is not new and neither is economics, but what is new is the nature and the extent of the relationship between them and how they combine to create extraordinary value and wealth" (p.8). As it can be understood from the statement and also it is mentioned in many sources that although the term creative economy considered as an almost new phenomenon now, it can be said that the creativity as an action of extraordinary minds and the culture as a reflection of societies living had been existed for a long time.

"The desire to create things whose value is not purely practical – things that are beautiful; that communicate cultural value through music, drama, entertainment and the visual arts; that communicate social position through style and fashion – these desires are as old as human society. There always have been, and always will be, people with the imagination and talented to make and do these things. And there will always be people who are prepared to pay them to do it" (Newbigin, 2010, p.15).

Therefore, it can be said that, the real new thing is the combination of creativity and culture with the economics and the unpredicted results that have pushed the governments to recognize and define the phenomenon as one of the most important generators of the century.

However, defining the phenomenon may not be as easy as recognizing it, since it varies. Several studies show that the phenomenon has been defined more than once and probably all these definitions continue to evolve as the term widens its umbrella. Therefore, as the first step, recognizing the creative and cultural industries may be crucial in order to understand the creative economy, how it functions in the economies of countries, what it comprises and the limits of it, if there are any. Because, they basically lay at the center of creative economy what can be labeled as the broader term (UNCTAD, 2010, p.9). To do so, some say that

first the word 'creativity' and 'culture' should be investigated as separately. However,

“When culture is the subject it can be selected in almost every written source that the most common emphasis is that there are lots of definition and approaches to it. It can be considered as natural. Mostly, starting from different perspectives of different areas to explain culture causes this result. And this situation brings the feature of amphiboly to the term” (Limon, 2012, p.108).

The same uncertainty issue can be pointed out also for the term 'creativity' because it may be hard to reflect all the dimensions in one definition. However, UNCTAD (2010) investigates creativity in three categories according to the characteristics of it in different areas of human effort: artistic creativity, scientific creativity, economic creativity and at the ground of all there is technological creativity (p.3). “All above involve technological creativity to greater or lesser extend and are interrelated. Regardless of the way in which creativity is interpreted there is no doubt that, by definition, it is a key element in defining the scope of the creative industries and the creative economy” (UNCTAD, 2010, p.3).

Additionally, as a different point of view, some say that creativity should also be studied as a social process in order to detect its inputs to economic growth. However, since the relation between the creativity and socio-economic improvements are not very clear, it might be difficult to detect which kind of creativity benefits economic growth the most.

Furthermore, some say that innovation also should be considered under this definition because there are some examples of innovation that also have artistic features in some creative industries. Yet, some agrees on the opposite point of view which considers innovation to be more likely technological than artistic and production based. Therefore, even though it is said that there are some examples of innovation with artistic features, it is still an ongoing debate.

Moreover, it is said that the creative goods and services are also considered as very important to be able to explain the cultural and creative industries. It is stated by UNCTAD (2010) that “sometimes a distinction is made between the creative and the cultural industries; sometimes the two words are used interchangeably. A sensible way to proceed is to begin by defining the goods and services that these industries produce” (p.4).

In this case, it can be said that the joy and appreciation of the product that is felt by both the creator and the consumer is beneficial to have an idea about the value of it. So, it can be said that these goods and services have some sorts of features that make them valuable for creative, cultural or social reasons and even though it cannot be identified by numbers the degree of consumption of it makes them estimable for the economy. Although, the appreciation of the goods is significant in order to identify which industries are creative, it is still considered not enough because the appreciation and the consumption of the product varies according to country and its cultural components.

Moving on, it can be detected from the researches about the topic that the perception of culture as an industry varies for different reasons. UNCTAD (2010) argues that the term ‘cultural economy’ was used in the post war period as a radical critique of mass entertainment by the members of Frankfurt school (p.5). However, as it is also indicated by Newbigin (2010) that despite the digital technology and the possibilities that come with it in the creative areas are new, desire to create things that are beautiful and expressing self or emotions with cultural mediums are as old as human society. Therefore, there have been and always will be people who have the talent and desire to create new things and who have the motivation to invest in them (p.15).

Still, even though creating a worldwide-accepted definition for cultural industries is underlined as a handicap, there are a few definitions that are most common and available. One of them is United Nations Educational Scientific and Cultural Organization’s (UNESCO). UNESCO (2009) defines cultural industries as “sectors of organized activities whose principle propose is production or

reproduction, promotion, distribution, and/or commercialization of goods, services of a cultural, artistic or heritage related nature.” UNCTAD (2010) adds that these goods and services also protected by copyright (p.5).

Again, it can be seen in the studies that the term ‘creative industries’ also have several definitions, which differs from country to country. As Newbiggin (2010) states, it is difficult to measure the size or to estimate the worth of these industries (p.17), so the discussions about how to define them probably will continue. Therefore, it would be right to say that there is not a single classification but there are a couple of models, which encloses different aspects of the term. As an example, United Kingdom (UK) Department of Culture Media and Sports (DCMS, 2001) defines creative industries as “those that requiring creativity, skill and talent, with potential for wealth and job creation through the exploitation of their intellectual property”. On the other hand, the World Intellectual Property Organization (WIPO, 2017) focuses on the issues like creation, manufacture, production, broadcast and distribution of copyrighted works. There are also a couple of other classification examples that can be seen in the studies for European Commission (2017) or other organization. Therefore, it can be said that, “there is no right or wrong model of the creative industries, simply different ways of interpreting the structural characteristics of creative production. The attractiveness of the various models may therefore be different, depending on the analytical purpose” (UNCTAD, 2010, p.7). In addition to all this, because some classification examples also enclose the cultural industries’ departments, some say that cultural industries fall within the creative industries. However, it is also a possible to see some different views about the issue.

Lastly, as it is mentioned in Creative Industries Council’s (YEKON) report, today, the creative economy is simply emerged from the recognition of the carried economic value of industries like mass media, fashion or advertisement after being very popular. And now they are taken very seriously in the development plans especially by developing countries.

Yet, the definition discussions on the cultural and creative industries are still considered as one of the challenges. However, it can be seen from the studies that a standard definition and a common classification is needed in order to create a framework of these industries. Therefore, the most common and available definitions that are made by organizations of this sector can be considered as the definitions that are needed. Finally, it is highlighted that no matter how these industries are classified or defined, there is no opposition to the idea that they lay at the base of the term 'creative economy'.

1.2 FILM INDUSTRY AS AN IMPORTANT ELEMENT OF CREATIVE ECONOMY

The film industry is a subject that hundreds of studies about creative and cultural industry fields which is consider as one of the most important chain rings of creative economy for a very long time. It shines out for its characteristics of collecting many cultural and creative disciplines under its umbrella and generate employment and therefore provides added value. "Film industry is also taking place as one of the most growing cultural economies in West Europe and North America. As a combination of cinema, television, advertising industries, the film industry is also in a close relation with music, video and internet industries" (Töre, 2010a). In addition, many studies about the topic signifies that the film industry is very important both for its effects of production and for making city image better by evoking tourism industry that is very important for urban economy.

Although, it is said that the roots of film industry lean back to the days when the picture projector is invented, it can be said that the film industry of today is in a very different place with a very different propose. It is said that at the beginning, Europe had the dominance in the world's market but by the time when the World War I ended, America took hold the market. It can be said America is still

maintaining its position in the market even today. Many studies show that the American film industry 'Hollywood' holds a major part of the shares in the market of the world. Töre (2010a) suggests that, distribution actors play a valuable role on this success. They distribute the products of the industry to the wider markets and sends back the income and information to Hollywood. Therefore, the success of the system is based upon integrating distribution with itself.

When the structure of the film industry is examined, it shows that the industry plays a role as hub for other creative and technical employment. It is in a strong relationship between television and advertising industries. These three industries provide product and services very vigorously for each other. Other cultural economies like Internet, music, photography, performing arts, publication and software take place at the mutual fields of these relations. Therefore, the film industry feed and is fed by all those industries (Töre, 2010a).

Harry Potter and Marvel series may be given as an example to these relations. In another way it can be said that films also can be an inspiration for other sectors. The books that are written after the movies or accessorizes that are inspired from the movie characters can be the examples of this case. In addition, studies show that film industry also can be disintegrated, as it can be integrated. For example, while the scenes are shooting different countries and the post-production can be done at another country and the theme song of the movie can be composed by a foreign composer. So, it can be stated that this structure also benefits the industry to spread to the world.

On the other hand, the opportunities that film industry provides for the cities are another topic that can be highlighted. The film tourism is showed as one example that shined through. It is pointed out that the places that are showed in the movies or TV series get the attention of the audience and trigger the desire to visit. According to some sources, the number of tourists who take a visit to several destinations on the guidance of television or other communication networks is increasing every day.

To continue, it is said that the globalization is a critical topic that should be investigated in the case of film industry. Sources signify that the technological developments help the productions to spread to the world much faster than it had before. It is said that, one of the benefits of it is that cities that have less power in the market can present their productions. In addition, this new way of distribution also makes consumption to be globalized.

To conclude, according to the studies that has been done about the topic, the film industry is a complex of many creative sectors, which also offers several employment opportunities. With this feature, film industry earns its place as one of the most important industries for creative economy. Therefore, it can be said that it also has an influential role on the birth of sectors like television dramas and other similar smaller creative industries.

1.3 TV SERIES AS A FILM INDUSTRY BRANCH

In today's world, television serial industry is considered as one of the branches that born out of film industry that has an important part in the creative economy. It shines out for its feature of being a widespread industry that holds a big potential of making huge income to countries' economy. It can be said that television serial industry is a creative narrative structure that can be a tool of great power for creative economy. It shares features and outcome effects of the film industry as being a combined industry of several other cultural and creative industries. Since it interacts with multiple cultural and creative industries while creating content, multiplier effects also appear as a result as much as direct effects.

Many studies and reports of UNCTAD, UNESCO, WIPO or KEA European Affairs have given place about the innovations of digitalization in cultural and creative industry (CCI) fields. It is said that, one of the outcomes of digitalization in the sector is the globalization of the goods and services. Similar outcomes can

be also detected in TV industry. Many sources claim that, thanks to the digital era, TV contents can be easily reached by almost everyone around the world. Additionally, nowadays TV serials are considered as one of the most consumed creative products of all. Some sources show that, in some country's TV serials is even a preferable option than cinema as it is cheaper and continue for longer periods of time (Lena, 2016, p. 18). Therefore, it can be said that it has the same soft power and economic income potential as film industry, only more effective because it is a continuous type of narrative concept.

Moreover, sources about country's cultural policy models like UK, United States of America (USA) or even South Korea show that they give more attention to TV serial industry everyday as they notice its power of reaching beyond borders and activating other sectors, contributing the cultural economy. Globalization can be shown as the key reason for this. Because of the globalization, borders do not limit people from consuming global products anymore. Therefore, any cultural and creative product is more accessible than ever, and every sector has the potential of becoming popular among people.

Same rule applies for TV series industry. Serials can be exported to global markets and be consumed globally. This also affects the consuming balance as some genres pop up among others and make a name for themselves and the country that they are originated. This can be considered as a big opportunity for both developed and developing countries that they get the chance to introduce their cultural products, goods and services and get bigger in the global market. On this matter, some country-originated television serial genres can be shown as an example. As an interesting feature it can be said that, though each of it consists of different structural and cultural features, huge groups of global audience base can be spotted for them. Thus, these country originated TV serials are now considered as serial genres in the global market.

1.3.1 Economic and Cultural Contributions of TV Serials

As a result of globalization and many equilibriums shifting due to its impact, the creative economy has now become one of the most important tools in the development strategies of the countries. Moreover, TV industry may be said to be one of the areas affected by this state. Being constantly in demand and constantly changing and developing, naturally, TV series sector is one of the realms with the swiftest interactions and returns in this sense. And within this context, TV industry is also important for the creative economy.

TV series are taken to be as important as a tool of soft power as the cinema, albeit a different one, as they continue for longer periods of time and they enable the viewers to find similarities with their own lives and to associate with the characters. Especially during the recent years, diverse and high-quality productions increasing in number receive remarkable attention in the global market in the series industry and the audience is growing larger every day.

The series industry is important for the country's income and for planning the creative economy for countries such as Mexico, Brazil and Korea, which have succeeded in standing out with their original series among the developing countries and alongside with the series sector of the USA, one of the most developed countries in the sector, which is quite large and nearly unrivalled. Looking into the research on this matter, it appears that the TV series industry has serious economic and cultural contributions to both urban-based development economies and country-based economies of the countries through both direct and indirect means, being one of the top genres among the types of TV programmes. Some major examples of such cultural and economic contributions are the job opportunities it offers on the basis of the cities as well as throughout the country, positive effect of the increase in the number of tourists from other countries as an element of soft power, positive effects in being a reason for preference especially in higher education, an increased interest in and demand for the country's language, advertising certain other industries in both the local and the global

market due to collaboration with music, design, fashion and many other creative industries at the stages of production and broadcasting, and high income from export to other countries and many others.

Being the worldwide leader in both export and demand from international audiences, the US series industry can be said to be one of the most valuable creative industries for the country's economy after the movie industry. According to the data of Motion Picture Association of America (MPAA, 2018) the series and movie industries offer job opportunities directly or indirectly to 2,5 million people with salaries above the average as compared to the rest of the country in general. In this sense, these industries are considered to be among the largest private sectors creating job opportunities. Also, it is explained that the exported productions alone contribute USD 17 million per year to the country's economy. Income from the series industry also matters for the cities. For example, it is stated that, in only two seasons of the series called *Riverdale*, a US production shot in Vancouver city, British Columbia, Canada, an income of 60 million dollars was generated for the state (Ip, 2017).

South Korea, as one of the countries standing out for her series industry among the creative industries, also displays examples of such direct and indirect economic and cultural contributions. Being one of the top countries among the developing countries, South Korea can be said to consider Korean popular culture and media called *Hallyu* as very important for the country's economic development strategies, making them stand out in the global market. It is noteworthy that the country started to put more emphasis on the creative economy and culture policies after the 'Korean Wave' that spread in Asia especially during the early 2000's. Kim and Jinn (2016) describe this tendency as follows:

"In opposition to cultural policies of the 1990's emphasizing commercial imperatives, cultural policies since the mid 2000's have been intertwined with considerations of soft power and how Korea increasingly posits itself as a developed, post-industrial middle power with an important role to

play on the global stage, both as an economic and a cultural power.” (p. 5517)

At present, South Korea is considered as one of the countries that have made themselves a name, first in the Asia continent and then up to Europe and USA, with its series industry in addition to other industries, such as music and games. An inquiry into the sources on this matter reveals that the series contribute considerably to the country’s economy especially through export and tourism, and that they also play an important role in the increased interest for academic studies, language studies and the food culture in Korea. Minter (2016) marked this as follows:

“Last year, exports of South Korean culture surged by 13.2 per cent, accounting for tens of thousands of jobs, even as the country’s total exports declined by 8 per cent. The benefits don’t flow just to the studios, either: in 2014, one popular Korean soap generated nearly 500 million dollars in economic activity, including through tourism and cosmetic sales.”

In addition, many sources point out the effects of the Korean Dramas (K-Drama) over the foreign audiences and the increased interest in the Korean culture in other countries as well as the increased interest in the Korean language courses and Korean cuisine in countries such as Japan and Taiwan. Similarly, some sources report a serious increase in the number of students coming from other countries to study at the universities in South Korea and the number of applications for scholarships offered by the government on a yearly basis, relying on the government statements.

Therefore, it can be stated that, all these examples from different countries can be considered as the examples of TV series’ multiplier effects to other industries as it is a complex of several of them. It benefits to the country economy by triggering the audience’s attraction to the cultural products. In a way, it functions as an

advertisement tool without giving any direct messages. Therefore, it can play a huge role on the matter of contributions to the country's economic value.

1.3.2 Country Originated TV Serial Genres

With the contribution of technology and many other creative industries, today, TV series are considered as one of the most important means of the creative economy to generate income due to their power to access very large audiences regardless of age, race or gender. Given the diversity of the series, it appears that productions of many genres, and even productions combining many genres without relying on a single category can address mixed audience groups and can earn themselves an important place in people's daily lives as compared to the times when series started to gain popularity.

Looking at the present state of the TV series, we can see a multitude of contents that can address people of any age and gender in many forms in all societies. This serves to facilitate categorizing the types of series and allows the series to be mentioned with reference to their genres, so that the characteristics of contents can be understood. Although the concept of 'Genre' is used for nearly anything in order to allow grouping, it can be said to be specifically important for TV series due to the characteristics they point out to. When "genres of series" are mentioned, we first think of concepts such as drama, comedy or crime, just like the case with the cinema. However, this causes certain conflicts for the TV series researchers when defining the genre for TV series. One of the main reasons for this is that the series may come into existence in hybrid forms, without being bound by a single genre. According to Mittell (2015),

"Genres are not logged in the text or programmes categorized by particular genres; instead genres are forged by the cultural processes of categorization itself. Genres are conceptual categories used to link together a number of television programmes, but they also articulate a range of

cultural assumptions that become linked to the category beyond the programming itself' (p.12).

It can be inferred from such sentences that we can see series in many different forms in terms of genres.

When grouped by their audience masses, the genres may further be grouped as cartoons, romantic, drama and crime etc., based on ages, genders, and areas of interests; or they may be grouped differently as drama, telenovela, soap opera, serial and series etc., according to their characteristics and cultural affinity. In addition, the series of the same category may also become a trademark under the names of their respective countries and may be taken as separate genres as they are highly shaped by the cultural and formal characteristics of the countries they originate from and may reach out to large audiences across borders in such form. 'American serials', 'UK drama', 'Latin American telenovelas', 'Korean dramas' are among the examples of such genres. Each is named after their country as they reflect the respective culture intensely and they are also named after the forms, such as telenovela, soap opera and drama, due to their formal characteristics. In addition, we can see that such series may also be in various categories such as drama, comedy, crime etc., with genres being drama, soap opera and serial etc. However, regardless of the category, these "subtexts" seem to appear within the framework of formal traits and characteristics specific to the genre and culture.

In this sense, as it is mentioned before, some of the TV serial genres that are accepted as country originated TV serial genres in the global market, play a valuable role for the countries in the global creative economy. To introduce the most popular country originated TV serial genres, American serials can be selected as first global TV serial genre.

According to many studies, today American TV serials are considered as the most consumed serial genre around the world and the top of the list of global TV series industry market. It is underlined in some sources that, as the country dominating the economy worldwide, nearly half of USA's income is generated by the entertainment sector, where cinema and TV are among the media with the largest share. According to Butler (2012), with the evolution of daytime serials

promoting to prime-time schedules it opened the door for American serials to become the champion of serial genres. Also, with the technological developments and economic freedom over the years, helped the US series to become the leader in production as well as cross-border distribution.

Following American serials, UK dramas also can be shown as an influential genre in the global market. UK dramas have gained achievements quite comparable to the American TV series in terms of popularity in the global TV industry. Considering that USA and UK frequently cooperate, especially with respect to creative industries, it would not be wrong to call the UK TV industry the sister sector of the USA. One of the most important reasons for this might be that they have a common language, in addition to all that they share politically and culturally. In addition to that, Weissmann (2012) says that neither country has a particularly well-developed dubbing or subtitling system which means that they both rely on each other more on imports in the same language than others with a different national language (p.18). Additionally, importing from one another, the numerous joint productions also stand out. However, when looked closer in terms of form, UK productions appear to have certain different cultural traits as compared to the US productions.

As another unique example, Latin American telenovelas can be shown which still maintain their presence as a genre despite losing their previous popularity. Looking into the rise of the telenovela genre, it is noteworthy that this genre has attained much more power and much higher success than expected as a content of a third world developing country. By that, this genre also disproved the argument that the Third World countries are innocent victims of Hollywood invasion (Biltreyst and Meers, 2000, p.398).

Last but not least the global popularity of Korean TV Drama (K-Drama) genre may also be illustrated by the *Hallyu* phenomenon which is a name called for the products of Korean popular culture that have become extremely popular in the global market (Kim and Long, 2012, p. 4). Within this context, although Korean series constitute a genre in themselves, it will not be right to see them as a

medium representing South Korea's popular culture in the global market alone. Because, when the general characteristics of the Korean Wave are inquired further into, it appears that all the areas are in an exchange with each other and support and benefit each other. Still, when the K-Dramas are addressed as a genre in themselves, they seem to have a remarkable place in the global marketplace for the Korean Wave. In addition, some name K-Dramas as the second genre that succeeds in becoming a counter-flow of culture against the dominant US broadcasting system, like the Latin American shows. However, although the demand for K-Dramas is still stated to be quite high; the cross-border success of the Korean culture is not limited to the series only, and this success is possible with many other elements, such as K-Pop, K-Fashion, K-Drama, video games etc. Therefore, it would be more accurate to assess the success of the Korean series not alone but as a counter-flow of culture along with all the Hallyu popular culture products, which is different from the case with the Latin American series.

1.4 MUSIC INDUSTRY AND MUSIC IN TV SERIES

For music, it can be said that it is one of the oldest social and cultural activities of human history. As for music industry notion, it would not be wrong to say that it is one of the leaders among other cultural and creative industries since the times when cultural and creative industries were defined. As being one of the most produced and consumed cultural and creative products, music today, generates a valuable part of people's lives and creative economy. In this sense, while music reflects the characteristics of the culture it comes from, by its feature to be one of the industries most affected by the changes and developments of the age, and it has managed to hold a position as a precursor among other creative industries.

It is fair to say that the music industry has been one of the most revenue and employment generating areas of the creative economy for many years. With different actors involved in the process at every step until the stage when an idea

becomes a composition and then it is consumed by the listener, the music industry is referred as one of the cultural and creative industries that has considerably the power to employ. It also has the ability to support and revitalize other creative industries together with many different industries. In this sense, the music industry constitutes one of the cultural values that must be preserved in order to ensure continuity and to sustain developments.

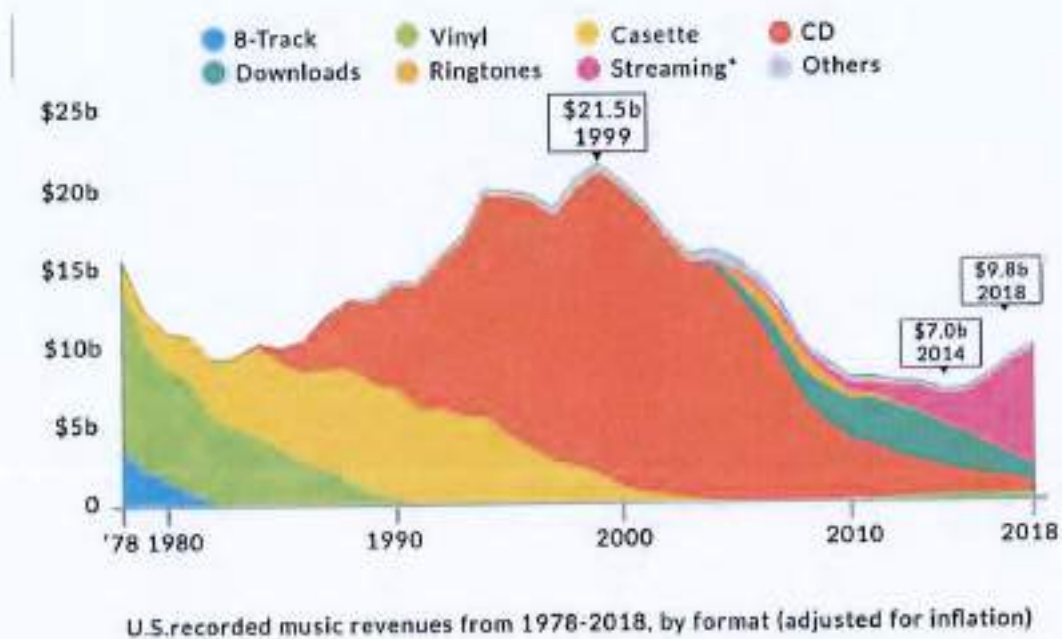
However, perhaps this industry, which has the power to reach more people than any art or cultural industry can reach, which is directly proportionate to the place it occupies in human life, in many ways, it is the first content industry that has to go through a process of digital disruption (WIPO, 2017, p.14).

When the the history of the music industry is examined, it is seen that over the past three decades, music consumption preferences have changed quite frequently. Looking at the historical charts of The Recording Industry Association of America (RIAA, 2018), vinyl records, cassettes, CDs and download methods are the most common forms of music consumption periodically, respectively. (Richter, 2019)

However, no formal change has been as shocking for the music industry as the results of digital recording technology. It is safe to say that this process was an important crisis period for the music industry, which has been caught off guard by the digital recording and consumption process that comes into play at an unexpected point. Looking at the historical statistics of the RIAA (2018) (Figure1.1), it was seen that until 2000, due to sales of albums and singles in CD form, which was the widespread music consumption preference of that period, a significant revenue from the music industry was generated. It was recorded that in 1999, the inflation-adjusted music revenue was 21.5 billion dollars, and cd-form album and single sales amounted to \$198 billion only in America. This number is more than double what was achieved in 2018 (Richter, 2019). Since 2000, the music industry has experienced an average of 15 years of decline which has been experiencing major difficulties in preventing illegal downloads as a result of the proliferation of illegal mp3 download platforms since 2000, and since 2015,

thanks to the increase in streaming subscriptions, it has once again entered a period of ascension (International Federation of the Phonographic Industry (IFPI), 2016, p.5; Richter, 2019).

Figure 1.1 U.S. Recorded Music Revenues Between the Years of 1978 - 2018



Source: RIAA. (2018)

It is stated that today, global income from music consumption forms continues to rise steadily since the last four years. According to 2018 data, revenue from global registered music increased by 9.7% year-on-year to \$19.1 billion. It is also stated that this is the highest growth rate recorded since 1997 (IFPI, 2019, p.12).

On the other hand, it is stated that, as another result of digitalization, music industry has reached the most global level that it has ever been, and other alternative music genres are more accessible than before. Latin, French and South Korean pop music, which has reached a size that is almost a competitor to world widespread American pop music, are cited as one of the main examples to

globalization of music. Additionally, the growth and developments in the Chinese market in the recent years are underlined (IFPI, 2019, p.7).

Moreover, it can be said that copyright management bodies have gained significant importance through this shift process. It is known that, in music industry management organizations for the rights or collecting organizations also play a significant role on the matter of representing the artist and the musical content as much as publishers and labels. "These organizations are mandated to license copyrighted works and collect royalties as part of compulsory licensing or individual licenses negotiated on behalf of their members. Collecting societies collect royalty payments from users of copyrighted works and distribute royalties to copyright owners" (European Commission, 2017, p.137). Therefore, these organizations generate one of the most important chain rings of music industry. However, the decline in income from mechanical rights and piracy issues caused by illegal online platforms left no choice but do some restructuring amongst rights management organizations over the past few years (European Commission, 2017, p.133).

Finally, it is noted by artists, stakeholders and associations that, in order to sustain growth in line with the rise in recent years and to reach the full potential of the market, it is necessary to continue taking measures against wide-range rights violations. It is stated that, on the matter it is necessary to carry out serious studies on issues such as the global introduction of the necessary legal certainties, the determination of the freedom areas of the rights holders, the conditions of fair licensing and the prevention of illegal access. (IFPI, 2019 p.36, 37).

Furthermore, synchronization, in other words music in film and media industry is shown as another lifesaver section of music industry that helped in times of digital crisis. Simultaneous use of music with a visual media content, or synchronization with the terminology in the industry, is one of the special areas where music and the film and media industry coincides. "Synchronization in the music industry is simply the process of having a musical composition in connection with a moving

picture. This could be a TV show, a movie, advert, video game or anything with a visual platform” (Kirabo, 2016).

Although synchronization in the music industry or sync in short has not been much preferred in the past, it is said that the method has become a permanent choice over time as a result of positive feedbacks have been sought recently following the use of works by famous artists in film and media industry. Plummer (2017) provides Sting's synchronization agreement with a car company as one example of this situation; The famous singer had difficulty in increasing the sales of his new album 'Brand New Day' in the first place due to radios' refrain from playing the song 'Desert Rose' on the album, but with a car brand, the commercial deal and after the usage of the song in the advertising film, the album made the Top20 chart in ten countries. As similar examples became more frequent, synchronization has become a preferred method for artists to spread their works to a wider audience.

Today, it is observed that synchronization has a growing field within the music industry. Attempts to compensate for the gap created by dramatically decreasing physical album sales, especially as a result of digitization in the music industry, have forced actors in the industry to move more towards other areas, so the trend towards areas such as synchronization has increased. This increase has also led to the formation and growing importance of professions such as music supervisors or music advisors in the field (Plummer, 2017).

Today, the share of synchronization in the global music industry stated as 2.3% increasing by 5.2% compared to last year, in 2018 (IFPI, 2019, p.15). It is said that the synchronization revenues obtained from TV series also have an important part of this ratio. In this sense, the growing popularity of TV series is increasingly globalized all around the world and they are seen as an important tool, especially for artists who want to spread their works to a wider audience. In addition, sync contributes significantly not only to musicians and artists, but also to music producers, broadcasters, and record labels, in this sense, it contributes to both the music industry and the television industry. For example, the usage of musical

composition from an archive company in a TV serial that is broadcasted in many countries provides the company copyright revenue as much as it helps to leave the impression of being a reliable source for providing content in the industry. (Kirabo, 2016).

Again, it can be said that, for the synchronization rights management plays a crucial role, because either an original musical composition that is produced for a TV serial or an archive music of an artist or a composer that is used in a serial, it still holds copyright for the owner of the musical content. Therefore, the rights management organizations or collecting societies become involved in the process of tracing the rights of the owners.

1.5 EXAMINATION OF TWO COUNTRY ORIGINATED SERIAL GENRE EXAMPLES THAT ARE PROMINENT WITH THEIR RELATIONSHIP WITH MUSIC

Nowadays, the TV series industry can be seen as one of the most rapidly and technically developing industries. As film making, the TV series productions go through many stages of creation and preparation until the day they meet the audience. For the TV series which contain many elements and therefore can be called a collaborative work product, which in fact get a huge amount of contribution from more than one creative industry, it is observed that as the popularity and competition rate in the sector increase, the concern of creating high quality works increases equally. Producing a high-quality television series involves a powerful scenario and acting as well as good cinematography, fiction and many other technical details are prerequisites. At this point, there is no doubt that music will be as important as a scenario or actors and actress choices for a television series.

The musical element takes one of the key roles at all stages in the production of TV series from the creation phase till meeting with the audience. Creation of

themes for the characters in the scenario, creation of the emotional character of TV series itself, leading the emotion of the audience, ensuring the continuity of scenes can be shown as the main tasks of music in a TV series.

“Music and speech go hand-in-hand on television. In many programs, dialogue will always be accompanied by music. In any event, television is seldom devoid of both music and speech. It’s not a quiet medium, which is why the awkward silences in *The Office* are so effective in emphasizing the characters’ embarrassing situations” (Butler, 2012, p.330).

In addition to these, the soundtracks of the TV series have a significant role in the soundtrack market, which was born as a common denominator of film, TV series and music industry. In this sense, it is seen that the productions that have been used wisely by prioritizing the element of music, can be mentioned not only with a well-designed scenario of the series but also the successful performances of the players as well as with their music. At this point, it has been observed that some of the countries that have become a brand with their series have established a warm relationship between the music industry and series industry. In particular, the American and Korean series of industries can be ranked first in the list of countries that implement this relationship in the best and systematic way. Even though they both are the countries that come into prominence not only with their TV series but also with their TV series’ music, it is possible to say that they have some major differences in terms of form.

1.5.1 American Serials

For the American TV series industry, it can be said that it is a dominant power in this field for quite a long time and is one of the oldest series manufacturers. Therefore, when the sources are analyzed, it can be said that the place of the music element in the series passes through certain stages and the use of music in the series has undergone certain changes. Butler (2012) mentions on the matter

that, in American serials the usage of original tunes has avoided for very long years and it is preferred to work with studio musicians to create music. However, after the premiere of *WKPR in Cincinnati* in 1978 the rules have changed totally, and it opened the gate of usage of original tunes in serials (p.330).

When we look at the recent history of the American series for the last twenty years, the original songs of many artists are frequently seen both in the music used in the episodes and in the soundtrack albums of the series. As mentioned in some sources, in a drama with an ordinary American series can format, an average of 200 or more different original songs may be cleared and used in one season consisting of average 23 episodes. This, of course, leads to very positive feedback in terms of being an advertisement for many artists and activating music industry. "For instance, after a Tegan and Sara song was incorporated in *Grey's Anatomy*, its digital downloads skyrocketed from 59 to 1200 per week" (Butler, 2012, p.331).

At this point, one might think that all the artists who want to promote their songs can be considered to want their songs to be used in the series. However, Butler (2012) explains the situation in a different way. He says that although it is an effective way of promoting for artists, it still can be challenging process to clear the rights of artists (p.330). Yet, when we look at the American series industry, it is seen that original song usage is more recognized and common.

Moreover, another example for the music relations in American TV series can be suggested as the musical series or musical episodes in series. For the musical series, the musical series called *Glee* can be given as the best example to interpret the popularity of the genre. As stated in many sources, the series gained a quite large popularity in the period between 2009-2015, during the six seasons singing more than 800 covers of other artist's original songs have been played. The repertoire of songs covered by the actors, as well as a few original songs specially composed for *Glee*. On the other hand, as an example to the musical episode interpretation *Grey's Anatomy* can be shown, which as a top-rated show it had a musical episode. In this example, sources show that in one episode, 10 songs, each of which are the songs of well-known artists, are re-performed by the cast.

All these examples show that American serials use music not only for basic purposes but also to raise the artistic value and power up the narrative variety. As to do so, it also chooses a close relationship with the music industry so that it supports the soundtrack industry, which can be suggested as a good method to emerge new fields of creative income.

1.5.2 Korean Dramas

Korean drama, or K-Drama in short, is a global country originated genre that is especially on the rise recently more than ever. Although, the Hallyu or in other words the Korean Wave is a familiar phenomenon, which refers to the significant increase in the popularity of South Korean entertainment and culture starting in the 1990's in Asia and recently beyond (Jin, 2012, p.3) after the unexpected spread of K-pop all over the Europe and North America K-Drama is now expected to be the new Hallyu sensation as it increases its recognition in the global markets every day (Maybin, 2018).

Looking at the Korean dramas, it is noteworthy that the usage of original songs, as in the American series, is a common choice. However, unlike the American serials in the Korean drama industry, it can be suggested that there is different system of soundtrack production. When the examples and some sources on the matter is examined Korean drama, industry choose a close relation with music industry by supporting a sub-industry created only for film and drama soundtracks. Although there are limited studies on the matter, it can be spotted from related surveys that for Korean dramas producing original songs for each drama is the common preference.

Korean drama industry is a very productive industry that produces more than 100 dramas in a year that consist only one season with an average of 16 episodes (Maybin, 2018). However, what can be considered as a good system is that an original soundtrack (OST) album is also produced and distributed on digital

platforms for every drama. As to do so, it can be spotted that it also uses the music industry elements.

In addition, as every drama has OST albums, these songs often performed by well-known actors who appear in the drama or by well-known idols of K-pop who also most likely to appear in the drama. On the other hand, as it is stated in some sources that, it is also possible to mention about professionals who only write, compose or sing music for OST industry.

So, it can be said that although Korean drama industry has an intense exchange relationship with the music industry rather than utilizing it. Thus, the Korean drama not only benefits from music industry but also supports an emerged sub-music industry as well.

CHAPTER TWO

2 THE EXAMINATION OF TV SERIALS' EFFECTS ON MUSIC INDUSTRY OVER THE CONCEPT OF VALUE CHAIN

As it is prevalent for numerous other creative industries, value chain phenomenon is also crucial for TV series industry in order to understand the working system and the actors of it. When the other industries that TV series industry interacts are examined, it can be observed that music industry carries an important role. In this chapter, effect of TV series industry on music industry will be examined over the concept of value chain phenomenon.

2.1 THE DEFINITION OF VALUE CHAIN

The concept of 'Value Chain' is a phenomenon that is researched and developed since its first appearance in Porter's 'Competitive Advantage' book in 1985 and maintains its value today to almost any industry. "It's been studied in a wide range of academic domains, from industrial economics to development economics" (European Commission, 2017, p.35). Certainly, many new approaches and innovations and concepts in applications of different fields are developed. The concept of value chain can be defined roughly as "systematic method to investigate competitive advantage" (T.C. Ministry of Economics, p.19) but of course this definition won't be enough to understand the phenomenon of value chain comprehensively.

As Porter (1985) introduces the phenomenon of 'value chain', he used the sentence: "a systematic way of examining all the activities a firm performs and how they interact is necessary for analyzing the sources of competitive advantage" (p.33) and he added; "The value chain disaggregates a firm into its strategically relevant activities in order to understand the behavior of costs and the

existing and potential sources of differentiation” (p.33). In this sense, it can be said that value chain determines the operations that would be useful to gain competitive advantage.

In order to understand the concept of competitive advantage, one should start with value chain in general setting, then suitable operations that is specific to that organization should be determined” (T.C. Ministry of Economics, p.19). In this sense, the phenomenon of value chain has a considerable importance for almost every sector and organization, especially in an environment where globalization rapidly changes all balances and carries environments of competition from local markets to global market. For this reason, Porter’s (1985) example has gained new definitions simultaneously with changes in sectors.

Botkin and Matthews (1992) have defined the phenomenon as “a sequence of activities during which value is added to a new product or service as it makes its way from invention to final distribution” (p.26). Again, with a similar approach, Kaplinsky and Morris (2000) have developed the explanation a little more, and defined it as;

“The value chain describes the full range of activities which are required to bring a product or service from conception, through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers, and final disposal after use” (p.4)

In addition, Kaplinsky and Morris (2000) included the positive effects of the phenomenon of value chain in sectors in the global world by saying that “by its concentration on inter linkages it allows for an easy under covering of the dynamic flow of the economic, organizational and coercive activities between producers within different sectors” (p.2).

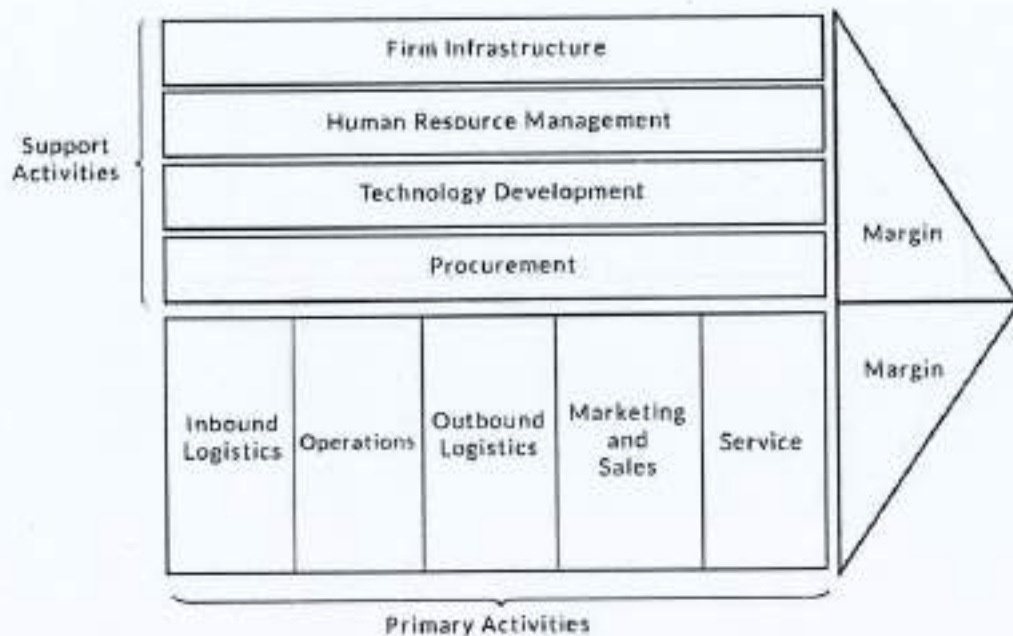
However, in order to understand the improved definitions of the value chain phenomenon and to learn the ways of implementation in different sectors today, it would be a good step to examine the model of Porter (1985) as the first and the

basic model (Figure 2.1). Porter (1985) separates the model into two main parts as *primary* and *support activities*. Primary activities consist of five subtitles as *inbound logistics, operations, outbound logistics, marketing and sales, service*:

- Inbound Logistics: Activities associated with receiving, storing and disseminating inputs to the product.
- Operations: Activities associated with transforming inputs into the final product form.
- Outbound Logistics: Activities associated with collecting, storing and physically distributing the product to buyers.
- Marketing and sales: Activities associated with providing a means by which buyers can purchase the product and inducing them to do so.
- Service: Activities associated with providing service to enhance or maintain the value of the product.

As it was with the primary activities, Porter (1985) considers support activities under four subcategories: procurement, technology development, human resource management and firm infrastructure. Procurement stands for the buying function. But technology can be important for every industry; in fact, it holds the key point for some. For the human resources it can be said that it consists of recruiting, hiring, training, development, and compensation of all types of personnel. And finally, firm infrastructure consists of activities like general management, planning, finance, accounting, legal, government affairs, and quality management. Infrastructure, unlike other support activities (Porter, 1985).

Figure 2.1 Michael Porter's Value Chain



Source: Porter, M.E. (1985), P. 37

Porter (1985) also described value activities to support this value chain model and establish the importance of linkages that provides the relationship between these activities. Accordingly, a company must create its own value chain within a specific industry that it competes in order to gain competitive advantage. At this point, apart from technology and economics, determining the relevant value activities plays an important role. These activities should be categorized in a way that they contribute to the competitive advantage of the company in the best way. Linkages are gaining importance at this point. Because, linkages provide the relationship between the way any value activity is implemented, and the implementation of another activity. Therefore, in order to use the linkages, the information flow is often needed to provide optimization and coordination (Porter, 1985).

Botkin and Matthews (1992) have addressed the phenomenon of value chain as they simplify and consider it under three main headings; I. Phase, II. Phase and III. Phase. Although the value chain elements of many phases, such as research, development, production, marketing, are in a close relationship with each other in the progress sequence, they are listed below in these three main sections:

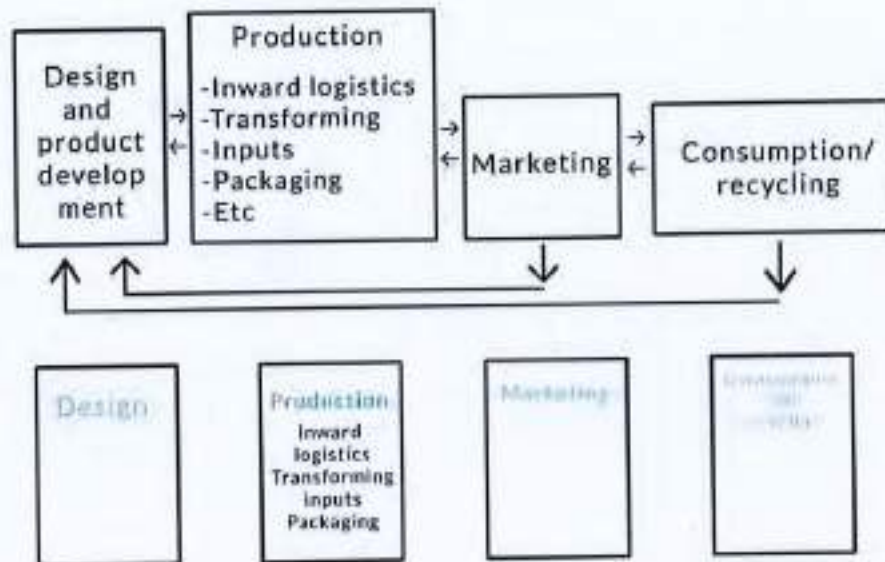
I. Phase: research, development, and design

II. Phase: production (manufacturing, fabrication)

III. Phase: marketing, sales, and distribution

Finally, Kaplinsky and Morris (2000) carried the phenomenon one step further, which first examined in a simple form under four main headings and then addressed more complex versions. According to Kaplinsky and Morris (2000), The Simple Value Chain (Figure 2.2) is consisted of four main categories; design and product development, production, marketing, consumption/recycling. The only category that is again divided into sub-categories is the production stage. Kaplinsky and Morris (2000) considered inward logistics, transforming, inputs, packaging and other similar phases under production section.

Figure 2.2 The Simple Value Chain



Source: Kaplinsky, R., Morris, M. (2000). P. 4

“Moreover, there are ranges of activities within each link of the chain. Although often depicted as a vertical chain, intra-chain linkages are most often of a two way nature – for example specialized design agencies not only influence the nature of the product process and marketing, but are in turn influenced by the constraints in these downstream links in the chain” (Kaplinsky and Morris, 2000, p.4).

In the continuation of the Simple Value Chain, Kaplinsky and Morris (2000), refer to an example of a more complex value chain that one comes across in real world, and mentioned many side elements that affect these four parts from production of the product until it reaches to customer (p.4). For example, if we address the complex value chain of an orchestra, one needs to begin with the planting of the trees that is used in the construction of the instruments to be played before the formation of the orchestra, and he/she should include all the sectors that have been interacted until production of instrument in the chain. The same

system also applies to production and marketing parts. This can also lead to the formation of many different value chains that is fed by the result of intermediary producers within a given value chain.

According to this, with the consideration of models that are examined, these can be said;

“Value chains are an interesting concept for both analysis and policy development. Indeed, value chains allow for an analysis that goes further than the traditional sectorial analysis and better reveal the economic links and interrelations that exist between different actors. It leads to a deeper insight into the actual workings and dynamics of economic actors. It also provides a better understanding of the role that different activities play in creating economic value and employment” (European Commission, 2017, p.35).

2.2 VALUE CHAIN OF CULTURAL AND CREATIVE INDUSTRIES

Considering the value chain models that are developed through time, it can be also possible to talk about the existence of a value chain for Creative and Cultural Industries. “Creative value chains consist of an initial creative idea, which is usually combined with other inputs to produce a cultural work, which then moves through a series of interlinked stages before it reaches the final consumer” (European Commission, 2017, p.35).

UNESCO (2009) has described the 'The Culture Cycle' model (Figure2.3), which includes different phases of culture's creation, production and distribution departments. The model is consisted of five headings that are creation, production, dissemination, exhibition / reception / transmission and consumption / participation.

- Creation: Originating and authoring of ideas and content.

- Production: Creation of the unique cultural work, reproducible mass media forms or the construction of materials necessary for the emergence of a cultural product.
- Dissemination: Distribution of cultural works that is produced to the Consumer/exhibitionist.
- Exhibition/Reception/Transmission: sale or donation of live or agentless experience meets the audience, place that consumption occurs.
- Consumption/Participation: Activities that the audience or consumers are involved in cultural activities or when they are consuming a cultural product. (P. 11-12)

Figure 2.3 The Culture Cycle



Source: Unesco. (2009). P. 12

It is one of the points that draw attention that UNESCO (2009) prefers to use a circular scheme, since each category has different connections, rather than a horizontal grouping system when explaining this concept. Because, some creative and cultural areas may not exist at every stage of this cycle or may be active in multiple of these phases. For example, an activity can take place in both the

creation stage and the exhibition stage. One of the good examples to this could be the musicians who sing their own compositions. On the other hand, people can take part in both producing and consuming parts at the same time. Here again, the trends arising from technological products constitute good examples. "For example, people can create and consume at the same time through technology such as YouTube or blogs" (UNESCO, 2009, p.13).

In addition, UNESCO (2009) has mentioned the three intersection points of these five main substances, which are not directly included in the 'Culture cycle' but have important roles in the phases of this cycle. These points are called education and training, archiving and preservation, equipment and supporting materials. The reason why these parts are not included in culture cycle is because they are applicable in all cultural and culture related areas.

Finally, European Statistical System Network on Culture (ESSnet-Culture, 2012) presented a creative value chain form similar to the model of UNESCO. In this form, groups are examined in six headings including creation, production / publishing, dissemination / trade, preservation, education, management / regulation. These six titles can be examined in two groups of three components; core functions – creation, production / publishing, dissemination / trade – and support functions – preservation, education, management regulation.

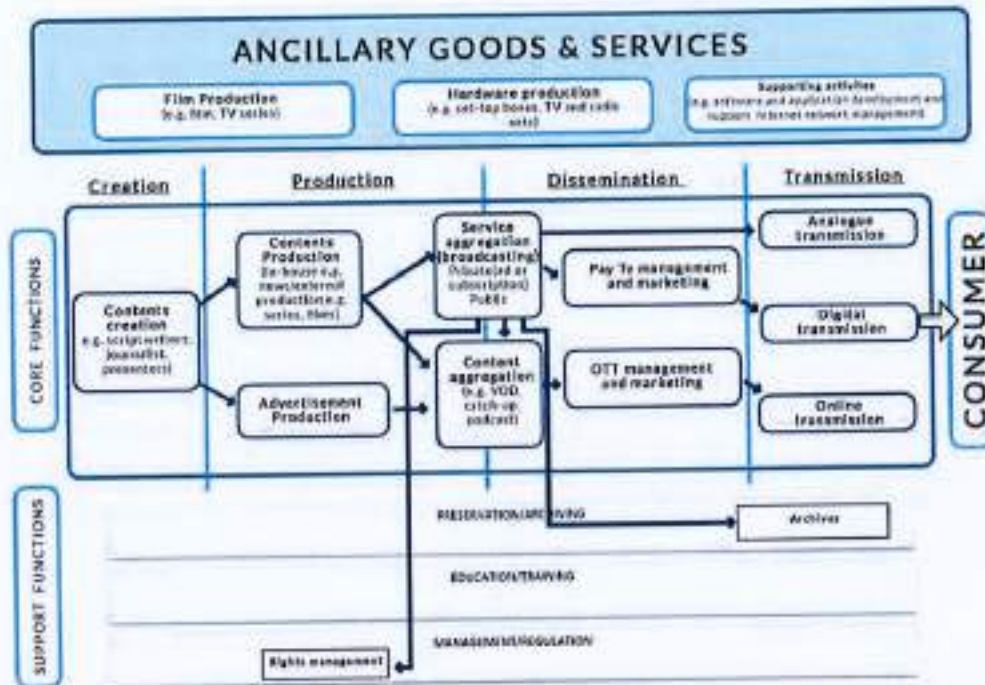
Finally, after examining all these value chain models and how it evaluates according to the industry through time, it can be said that it is a very crucial factor for industries in order to specify its sections and functions. It helps an industry to function in the right way and helps understanding its power and limits. The active usage of the value chain models in different industries also proves that it is a working mechanism and its benefits industries to get competitive advantage. Although, Michael Porter's (1985) value chain model may not be function for every industry like creative and cultural industries, which have a more complex and mixed structure. However, it roots the basis in a strong manner.

2.3 VALUE CHAIN OF TV SERIALS

It can be argued that the television broadcasting industry is one of the most popular creative industries. In many sources, it is underlined that the countries' economies have been significantly contributed by income from television broadcasting. TV Series constitutes an important part of this income. For this reason, the TV series industry value chain is also important for both stakeholders in this field and the creative economy.

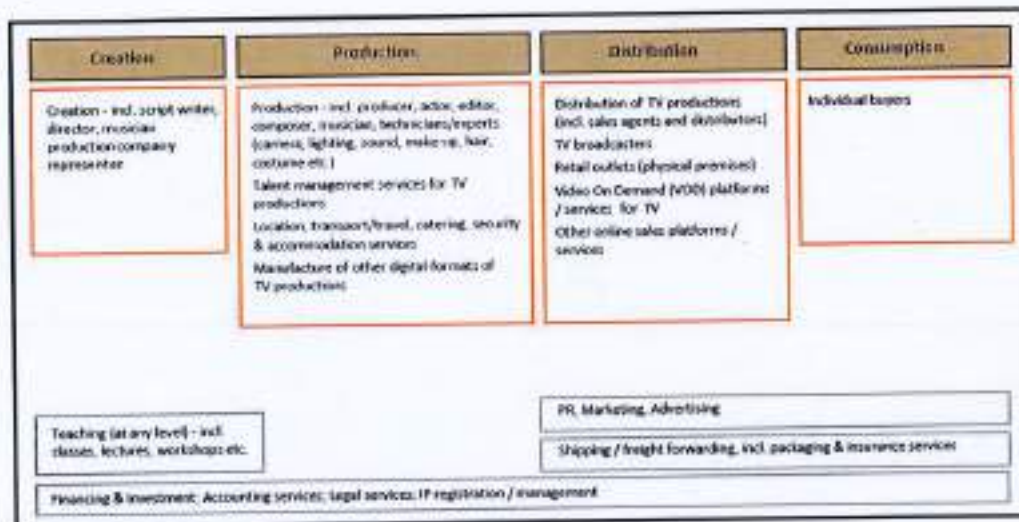
The European Commission (2017) examines the TV broadcasting value chain through a value chain model (Figure 2.4) that is composed based on the models of UNESCO (2009) and ESS-Net Culture (2012). Accordingly, the value chain of the television broadcasting industry is basically composed of four main sections: Creation, Production, Dissemination, and Transmission. Also, the European KEA European Affairs (2015) on the other hand, maps the representors of TV serial industry for each section of the value chain (Figure 2.5).

Figure 2.4 TV Broadcasting Value Chain



Source: European Commission. (2017). P.178

Figure 2.5 Mapping the Representatives of TV Broadcasting Value Chain



Source: KEA. (2015). P. 22

Creation: This section consists of actors in the creation phase of the content. If the priority is to be explained in the ranking, the first group is creative team that is the authors, screenwriters, directors, music composers and producers. The next step is to cast the actors and actresses. The last chain of the ring is the technicians who are responsible for the issues such as sound, light and camera. Preparations such as acquiring/clearing rights, outline formation, research of financial resources, finding of people who will take part in creative team, budgeting and creation of production calendar are also realized at this stage. In addition, many of the writers and authors in the sector who are the actors involved in the visual media and music industries, are working as freelancers. Directors can work as freelance, as well as employees of production companies in the sector. Many technicians are employees of production companies or broadcast channels. In addition, it would not be wrong to say that there is a monopolist market approach for the stakeholders involved in the content creation section (European Commission, 2017, p.179,184; EIB, 2001, p.11).

Production: This section contains the stages in the process of preparing the generated content. The production and post-production phases of the series are incorporated into this section. This stage contains finalization of the production budget, determination of places, hiring of the spaces and shooting with the prepared scenario and team. At this stage, one or more broadcast channels can be invested in the production of the content, or the rights of the prepared content may be sold to another broadcast tool. The merging of content is also one of the important points that make up this title. Moreover, the agreements between the advertising firms and channels can also be carried out at this stage. On the other hand, clearing rights is carried out during the production stage, if not performed in the creation phase. For the Creation and Production departments, it can be said that they form two basic rings of the value chain of the series industry, since the most important preparations occur in these stages (European Commission, 2017, p.179, 180,185; EIB, 2001, p.11).

Dissemination: This third function is consisted of marketing and managing operations of broadcasting tools.

Transmission: The contents of the fourth and final part consist of bringing this prepared content together with the audience through various channels.

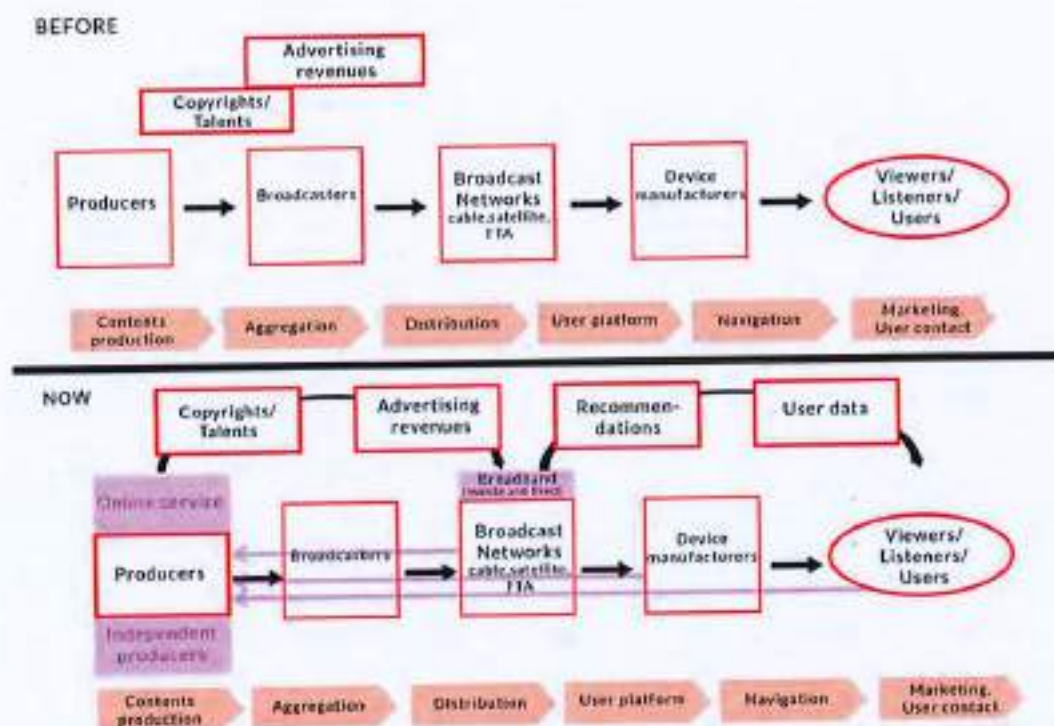
In addition, The European Commission (2017) mentions four core functions as well as three support functions in value chain model that it created. Support function is comprised of preservation / archiving, education / training, managing / regulation titles. These sections include the archiving, protection of products, management activities related to the relevant sectors and educational opportunities that people who want to be in the sector can attend (p.178).

Nevertheless, as a result of the changes in the sector provided by technological developments and digitalization becoming more and more popular among consumers, the actors in this standard value chain of series are also considered to take dominant roles in different sections. Hence, it is mentioned that the lines between the sections become blurry or even disappear in some cases. This situation is considered as an evolvement that causes all the balances to be changed in terms of the sector, especially in Europe and United States. Although the effects of digitalization differ from country to country, it is seen as one of the undeniable facts that it continues to spread rapidly throughout the world. Especially in America and Europe, in the over-the-top (OTT) concept some applications such as Apple TV, Hulu, Rakuten, Netflix offers the opportunity to follow the programs to their subscribers without conditional to a certain day and time period which are seen as the game changer. In addition, the 'video on demand' applications, which are put into practice by the channels, are a form of adaptation to this concept. The fact that digital platforms leave behind TV channels and cause deadlocks in terms of copyright laws has been highlighted. in many sources and reports.

In this sense, the European Commission (2017) mentions that OTT actors only pay for their advertising revenue, since third-generation stakeholders are

frequently experiencing problems with broadcaster rights in particular (p.180). However, it is possible to talk about the producers and channels that sell their own series to be broadcasted on digital platforms in order to be more profitable. On the other hand, as a result of digitalization, it is seen that certain dynamics change in the value chain of TV series (Figure 2.6). An example of the recent Netflix example, one of the most popular digital platforms; Netflix produces its own original productions in addition to the series and films it has purchased. This removes Netflix from being a broadcast medium on the value chain ring and puts it in the owner of content position. At the same time, it is an element that disables the distribution stage because it has the opportunity to bring the contents directly to the audience. It can be said that this location applies to all digital content platforms that produce their own original content. Therefore, it is mentioned that certain borders start to blur in the value chain model.

Figure 2.6 More Complex Value Network Model



Source: European Broadcasting Union (EBU). (2014). P. 57

To summarize, digitization is the new dynamic in the value chain of TV serial industry that changes all the task distributions. The new emerging consumption portals also functions as creator, producer, distributor and disseminator as they started to produce their own content. However, it can be said that the programmed TV is still a preferable choice in countries as the channels try to keep up with the innovations in the industry and also keep creating new good serials. Therefore, it can be stated that the basic model of TV serial value chain still applies in the industry in some level.

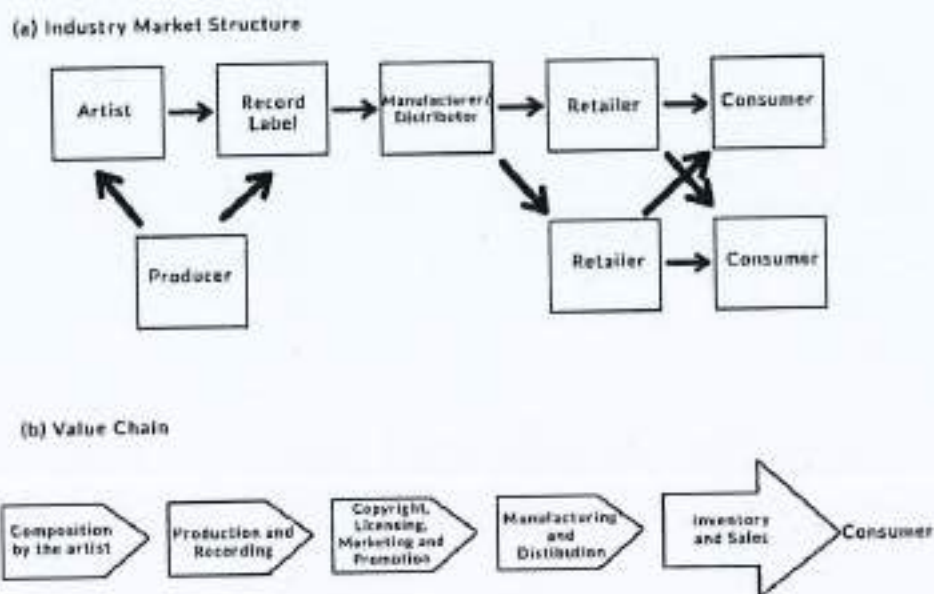
2.4 VALUE CHAIN OF MUSIC INDUSTRY

Music industry is considered as one of the fundamental industries of cultural and creative industries. Especially for many countries like America, Europe and some of the developing countries, music industry is pointed out among the top three creative economy branches that help countries' development in economically, employment wisely and many others. However, as several sources point out, music industry has been going through some stages of fluctuation over the past several years, which also can be called as a struggle that is caused by the outcomes of digitalization. It is said that music industry was one of the first industries that had to deal with the unfortunate effects of digitalization and these effects were resulted in a way that some of the main actors of the of the industry's value chain had to shift their roles with other emerging digital actors.

When the traditional players of music industry value chain are examined there are numerous individuals and companies that are engaged in the music business. Those can be shown as the people who create music and the companies that take part at phases of production, licensing, promotion, dissemination and transmission (Pulverer, 2010, p.6). According to this, Bockstedt et al. (2006) examined the traditional music industry in five stages (Figure 2.7): composition by the artist,

production and recording, copyright / licensing / marketing and promotion, manufacturing and distribution, inventory and sales (p16).

Figure 2.7 Traditional Music Industry Value Chain



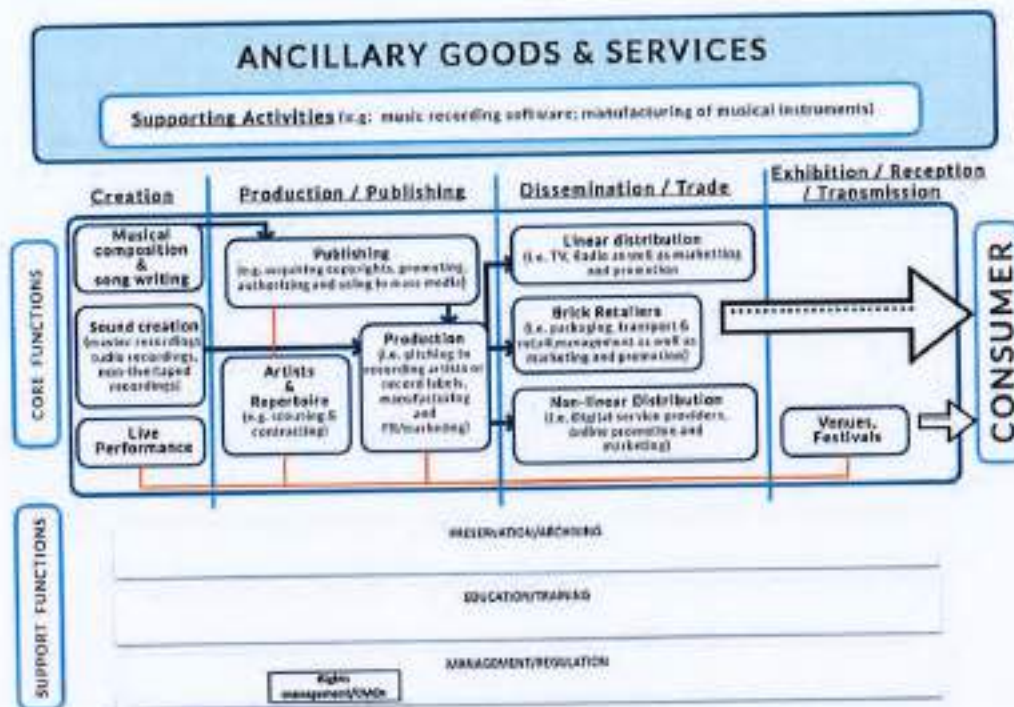
Source: Bockstedt, J.C., Kauffman, R.J., & Riggins, R.J. (2006). P. 16

According to Bockstedt et al. (2006) in the traditional process of music making the 'hit record' system was preferred, so producing and distributing recorded music was very expensive. Therefore, artists always needed to sign with a label in order to cover the cost and benefit from the essential services like artistic development, music production, CD manufacturing and distribution, marketing, promotion, publicity sales and even legal presentation or else they had to maintain their independence. Therefore, in the traditional chain recording labels played the most valuable role, thus they also made the most profit of it (p.15). However, it is said that digitalization changed the roles of the actors and if it can be put in this way, the production and dissemination actors took the biggest wound from it.

Bockstedt et al. (2006) state that digital music products have several features that affect market structure. It is easily reproduced, easily transferred, easily searched and easily stored (p.16). As for one positive outcome it can be said that digitalization effects, in a certain way, freed independent artists from the need of signing with a label in order to produce and disseminate their music as they can use the accessible technological tools and upload their productions on digital platforms. On the other side however, these features of being easily producible and reachable caused labels and dissemination companies to suffer from copyright piracy for a long time (European Commission, 2017, p.133). In this sense, new actors had to be included in the value chain in order to keep up with the changes and increase the revenues again in music business.

European Commission's (2017) new digital era music industry value chain that includes game changer new actors can be shown as a useful guide in order to understand the new structure of the industry. It examines the chain in four main stages as creation, production and publishing, dissemination and trade, exhibition / transmission and reception (Figure 2.8). On the other hand, KEA (2015) maps the recorded and live music representors separately under the value chain segments (p.21) (Figure 2.9).

Figure 2.8 Music Industry Value Chain in The Digital Era



Source: European Commission. (2017). P.136

Figure 2.9 Mapping of the Representatives of Music Industry Value Chain

	Creation	Production	Distribution	Consumption
Mark-recorded	Songwriter/composer &/or lyricist Arranger Producer Musician Other performer etc.	Music recording – lead producer, studio manager, studio engineer & other recording staff, retail manager, graphic artist/designer etc. Manager/provider of rehearsal facilities Music publisher Manufacturer of music-related merchandise Manufacturer of music instruments (e.g. guitars) Manufacturer of CDs, DVDs, & other digital formats	Music radio stations Music TV stations Music-related (radio) fair Retail outlets – physical premises Online sales platforms / services – incl. music streaming, digital downloads etc.	Individual buyers
Mark-live	Songwriter/composer &/or lyricist Arranger Producer Choreographer Performing artist – musician, dancer	Music production – producer, director, technicians/experts (lighting, sound, make-up, hair, costume etc.) Location, transport/travel, catering, security, accommodation, insurance services Manager/provider of rehearsal facilities Manufacturer of music-related merchandise	Booking agent Promoter Event organizer Event producer Manager/provider of venues for live performances, concerts, festivals, carnivals Ticket vendors – physical premises Online sales platform/services	Individual buyers
	Agent: A&P services			
	Teaching (at any level) – incl. dance, techno, world jazz etc.		PR, Marketing, Advertising (incl. publicist, concert/album events)	
	Insurance & investment: Accounting services, Legal services, IP registration / management, Collective Rights Management services		Shipping / freight forwarding, incl. packaging & insurance services	

Source: KEA. (2015). P. 21

Creation: This phase consists of music composers and songwriters. At this stage, besides the musical composition actors the sound creation actors also take part. Although there are some artists who perform their own work, the artist may not be necessarily responsible for this part since there are many artists who do not perform their own work also. For the creation part it can be said that, despite of the decline of the overall turnover of the main investors in recorded music in the new digital era, with the contribution of independent artists and entrepreneurs, it maintained its state as strong and vibrant (European Commission, 2017, p.137,144).

Production / Publishing: The production stage starts with the recording of the music. This usually done by record labels or small independent studios. However, it can be stated that the number of creators who record their music by using more affordable technological tools is significantly increasing. The production of the music recording, manufacturing of the copies -if there will be physical copies-, distribution to retailers and marketing of the product are conducted by the record companies at this stage. In addition to that, music publishers also take part who are responsible for the representation of the written song by creating opportunities and revenue streams, getting radio play or synchronization to media etc. Therefore, different actors may control the right holds. For example, for the musical work the music publisher and associated collective rights management bodies take part but for the representation on the behalf of the artist may be conducted by the labels and associated collective rights management bodies (European Commission, 2017, p. 137,144)

For the production phase, it would not be wrong to say that the relation between artists and labels maintain its system as the big label still hold a big share of the industry. However, it can also be said that the production process has affected by the self-producers.

Dissemination / Trade: When the digital shifts are examined, it can be stated that this part of the chain is the most affected part compared to the traditional chain as the physical sales are decreasing dramatically over the past years. However, this

phase is also the part that new actors mainly take part like digital streaming platforms like Spotify, Apple Music, Google Play etc. European Commission (2017) states that record companies are vertically integrated, controlling both production and distribution and independent labels generally contract distribution to major labels. But since there are emerged digital service providers (DSPs) that set the dissemination now, the labels also must have direct deals with the largest DSPs in order to regain power in the distribution segment.

In addition to DSPs, it can be said that the online platforms and video portals like YouTube also plays a very important role in the distribution of music.

On the other hand, exposure of recordings in radio, music blogs, magazines, media etc. that is conducted by the marketing departments also can be shown as the dissemination phase. However, artists by themselves again, can be active in dissemination as they recognize the power of social media in the meaning of creating a fan base.

Lastly, "with regard to the global live music market, there is also a concentration in this sector with Ticketmaster / Live Nation Entertainment controlling a large share of the festival and event ticket sales market worldwide" (European Commission, 2017, p. 145).

Exhibition / Reception / Transmission: As another distribution channel, the live performances, festivals and concerts play an important role on this part. In this sense, in addition to the artists, record labels again and concert promoting companies can be shown as the actors of this phase.

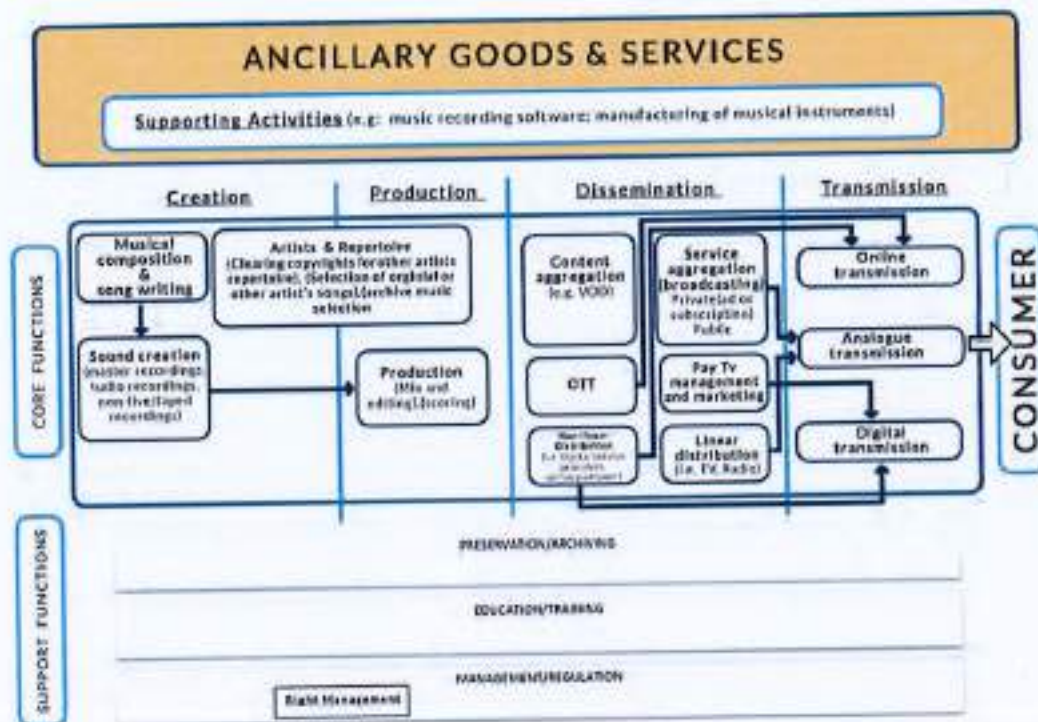
2.5 THE EXAMINATION OF MUSIC'S FUNCTION IN TV SERIAL VALUE CHAIN

Music is showed as one of the crucial elements in a TV series production. It is possible to see many sources highlighting the importance of music in a TV serial. It functions in many positions for multiple purposes. Thus, it takes its place starting from the creation phase in the value chain. When the value chain of TV serials is examined music involves in the process from the beginning where the main actors –director, scriptwriter and producer- of a production are gathered. The role of music starts from the character development according to the script and continues until the end of the series. Since serials are continuing narrative productions, music's function never stops until the series end (Klean, 2016).

When the sources are examined, two methods of music usage can be marked in serials. One of them is the usage of the authentic compositions that are made only for the TV serial and the second method is the usage of already existed original songs by different artists. These two methods require different types of professions as well. For the compositions, people from the music industry who compose film and serial music take place. On the other hand, for the song selection and right clearance job music supervisors take part. A music supervisor's job can be simply described as sourcing the songs that make up the soundtrack of a TV show or movie (Rindner, 2017).

When the European Commission's (2017) TV serial and music industry value chain model is examined in the light of these two methods of music usage, the music's process in the serial value chain can be followed (Figure 2.10).

Figure 2.10 The Proposed Model of TV Serial Music Value Chain



Source: European Commission. (2017). P. 136, 178

Creation: In the creation phase of the chain, music takes place in the process of creation of theme songs produced by the composer. The recording of created song also happens at this stage. Klean (2016) states that in most of the cases the music supervisors also included in the creation process to understand the concept of the work and to start selecting suitable songs. The existence of music in the pre-productions phase takes place as defining the needed budget to produce the authentic themes and clearing rights of original songs.

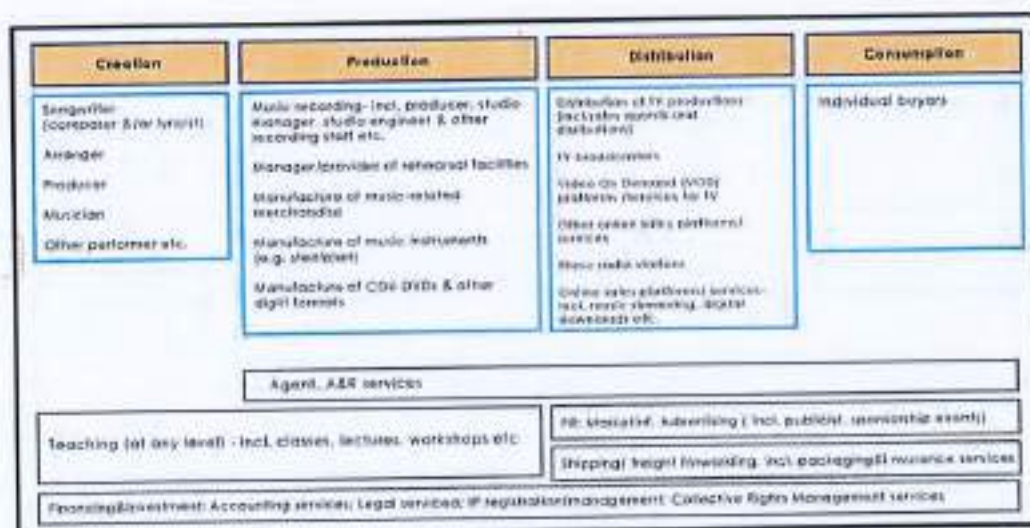
Production: In the production phase where the producing of the TV content is being managed the editing of the music over the scenes takes place (European Commission, 2017, p.137). The usage of other original songs also be involved at this stage. Therefore, the rights clearance from the owners is managed at this stage if necessary.

Dissemination: TV serial music's first appearance after the creation and production phases happens through the serial after the start of the broadcasting. Therefore, TV serial itself and the other consumption mediums plays the role for dissemination of TV serial music. However, after the appearance in the series, the serial music can be consumed through other bodies like radio, digital and online platforms for music and TV like Spotify, YouTube or VOD platforms. Or the music can also take the form of a soundtrack and promoted as a part of the serial depending on the deals with the owners of both music and the serial.

Transmission: Finally, the transmission of the TV serial music can be managed through analogue, digital and online transmission channels of the TV serial value chain actors.

In the light of this examination, it can be said that the representors of TV serial music sector consist of both music and TV broadcasting value chain actors (Figure 2.11). At the creation and production parts music industry chain representors takes part next to the broadcasting actors. However, at the dissemination and transmission parts, music industry actors play the supporting role and broadcasting actors leads the process.

Figure 2.11 Mapping of the Representors of the Proposed TV Serial Music Value Chain



Source: KEA. (2015). P. 21, 22

To sum up, these stages show that music as a special field functions for both chains at the same time. It functions in the TV serial chain by using music industry sources and it functions in the music industry chain by using TV serial industry sources. It can be said that it is also consumed by both industries. This situation brings TV serial music to the position of intersection point that function both together and separately within industries. It also provides new emerging market opportunities in creative fields like soundtracks. Therefore, it can be said that music plays a non-negligible role for TV serial industry as it functions in a crucial position as well as it plays an important role for benefiting music industry by benefiting right owners and artists. In fact, one may say that it can be considered as a relatively separate industry since it supports TV industry as it activates music industry at the same time.

CHAPTER THREE

3 THE POSITION OF TURKISH TV SERIES

TV series industry constitutes one of the most important factors that is beneficial to Turkey's economy. It can be seen that with the success of Turkish TV series in national and international markets in recent years, the value of Turkish TV series has also started to increase in both local and global markets. In this sense, it is possible to observe the effects of Turkish TV series on other cultural and creative industries of the country. In this chapter, the relation between Turkish TV series and music industry is examined and the effects of Turkish TV series on music industry are tried to detect.

3.1 CULTURAL AND CREATIVE INDUSTRIES IN TURKEY

The creative economy has become one of the most important factors that play a role in the development of the countries nowadays. In this sense, countries generate new policies to support the creative economy and update these policies by following the developments. Especially developed countries that have noticed the economic and cultural contributions that the creative economy can provide to the country, are promoting the cultural and creative industries. Because the cultural and creative industries, which are actors of the creative economy, have an impact on the increase of education, civilization and intellectual level, the development of creativity and the growth of production, and they create new business areas with a multiplier effect directly and indirectly by interacting with other industries and help to the development of both individuals and the country, domestically; as well as help to brand the country by increasing its export power in foreign markets.

As Akşit (2014) pointed out, the creative industries are seen as a strategic tool in terms of economic growth, employment, social integrity in the countries nowadays and they contribute to intellectual capital creation, increase employment and export income, reduce social exclusion, increase cultural diversity, contribute to humanitarian development by maintaining interactions between creativity, culture, economics and technology (p.787). For this reason, recently that innovations take place continually, technological developments and digitalization have been constantly changing the balance by entering lives of more and more people, the cultural and creative industries which are mostly positively influenced and are much less damaged relatively to many other sectors from all these changes, has gained awareness of people.

When the relevant resources are examined, it is seen that developed countries such as the US and European countries take the creative economy actors into consideration and have updated their country policies based on these factors. When the reports about the creative economy are examined, although there might be little nuance differences, it is seen that the definition of the creative industries and the boundary framework are determined, in addition to strict copyright laws and audits arranged accordingly. Moreover, an approach that raises the level of consciousness of people in this sense attracts attention. The state's financial support that is provided for the creative industry tools however, most important approach of all. This situation is an evidence of that the states of the developed countries are aware of the power and significance of the cultural and creative industries. Which also sets an influential example for developing countries in the sense of getting motivated to develop better.

For Turkey, which is one of the developing countries, it can be said that, taken certain number of steps by noticing the power and importance of creative economy have been taken. However, the debate on the adequacy of these steps is still ongoing. One of the main reasons for these discussions consists of the limited number of researches and reports that conducted about Turkey on the matter. The studies conducted about the cultural and creative industries of Turkey commonly

remained only in the framework of Istanbul, Ankara and Izmir, which are three major cities. This makes it difficult to collect and reach data about the state of the whole country. Again, among studies that are performed, it shows that only small number of them give place to the grouping of cultural and creative industries in Turkey. The Turkish European Foundation for Education and Scientific Research (TAVAK, 2016), grouped cultural and creative industries in Turkey under 13 main titles (p.46, 47). These titles can be listed based on the sectorial distribution of them in the economic field as: broadcasting, film, audiovisual broadcasting, music, performing arts, museums, galleries, culture, architecture, design, modern creativity, sports and gastronomy (Table 3.1).

Table 3.1 Cultural and Creative Industries in Turkey

THE MAIN CREATIVE SECTORS	SUB SECTORS
1. Publishing Industry	1. Book publishers 2. Newspaper publishers 3. Music publishers 4. News agencies 5. Writers 6. Agencies and managers 7. Newsagents, bookstores
2. Film Industry	8. Filmmakers 9. Cinema businesses 10. Film and video distribution 11. DVD sales 12. Performers and auxiliary branches such as costume, makeup, light, screenwriters
3. Audio-Visual Publishing	13. Private radio 14. Television 15. Series 16. Competition 17. Musicians and music groups 18. Composers 19. Recording industry
4. Music Industry	20. Production companies 21. Concert organization 22. Musical productions 23. Music festivals 24. Independent artists 25. Private Theaters
5. Performing Arts, Visual and Plastic Arts	26. Cabaret 27. Opera 28. Concert agencies 29. Production companies 30. Dance groups 31. Painters and sculptors
6. Museums	32. The number of visitors 33. Exhibitions
7. Galleries	34. Gallery sales 35. Auctions
8. Retail Trade of Cultural Materials	36. Music markets 37. Bookstores
9. Architectural	38. Interior architecture 39. Landscaping 40. Design
9. Architectural	41. Civil engineering / architecture 42. Urban planning, regional planning
10. Design Industry	43. Industrial Design 44. Fashion
11. Modern Creativity Industry	45. Advertising agencies 46. Software development 47. Game software
12. Sports Economics	48. Football economy 49. Basketball economy
13. Gastronomy Economics (cultural dimension)	50. Restaurants 51. Night clubs 52. Touristic Hotels 53. Drink manufacturers

Source: TAVAK. (2016). P. 46, 47

Kanburoğlu (2017) indicates that, in the last decade the creative industry fields in Turkey had grown significantly and putted in an important added value to country's economic development process (p.16). On the other hand, Lena (2016), studies contribution of cultural sectors to the economy in Turkey between the years of 2009 – 2013 under turnover, added value, workforce efficiency, employment in Turkey and concluded the following results;

- The total turnover produced in the culture economy in 2013 in Turkey is 8.1 billion TL, which constitutes 0,26% of total turnover produced in all industry and service areas in the country.
- In 2013, the culture economy is 2 billion 302 million, and this number is 0,49% of the added value produced in all industry and service areas of the country.
- In 2013, because the contribution of the cultural economy to the added value of the country's economy is more than to the turnover, share of the added value of cultural economy in the turnover is ahead of other industry and service sectors.
- The average annual workforce efficiency in the culture economy is 47,239 TL, when average of years between 2009 and 2013 is considered.
- In 2013, the number of people working in the cultural economy sectors is 35,474, which constitutes 0,27% of the number of people working in all industry and service fields (p.2, 3).

If considered these results arise from Lena's (2016) work, it can be said that the cultural and creative areas have much smaller budgets compared to other industrial and service areas, yet country's cultural and creative areas have potential to contribute substantially to its economy.

In addition, the import and export data of Turkey regarding the years can be seen as a positive table. UNCTAD (2018) indicates that Turkey has exported product 9.9 billion dollars in 2014 across all the cultural and creative industries. Designed goods and art crafts have the largest ratio among these exported products, and the jewelry design, interior architecture and fashion areas follow it (p.415). In

addition, the export rates in the field of audiovisual are noteworthy. According to the data of the year 2015, Turkey is ranked among the top 10 developing countries in the field of exporting creative goods. In addition, it ranks second after China in the ranking of countries exporting worldwide in the field of art craft (UNCTAD, 2018, p.22, 26). All this draws positive view for the cultural and creative industries in Turkey. However, it is observed that, both the budgets provided by the state and the distribution of consumption of the cultural and creative industries, and the guidance in this sense, have been very much backward compared to many European countries. As underlined in many sources, the insufficient budgets provided by the government, significantly restrict the areas of economic freedom of the sectors, in this sense. The report of YEKON indicates that, in 2011 the number of individuals working in the creative sectors constitutes 1.09 of total employment and produced added value in the sector corresponds to 0,85% of the total added value of the country's economy. Istanbul Foundation for Culture and Arts (IKSV, 2012) refers to the issue of the state's insufficient budget as follows:

"Ineum Consulting Company, in their report that is prepared in 2009 for the Forum D'avignon which is one of Europe's leading organizations in the fields of culture economics, measured public expenditures per population for cultural activities in various European cities, including Istanbul and determined that the public resource transmitted per capita has an average of 58 euros in cities where the city's population exceeds 1 million people. This amount is 20 euros for Istanbul" (p. 29).

As with the work of IKSV (2012), many studies have shown that a large majority of research on the cultural and creative industries in Turkey focuses on the city of Istanbul. This is due to the fact that many of the industries in this field are concentrated in Istanbul, and at the same time, in terms of both production and consumption rates, Istanbul constitutes the large majority of the country. In this sense, it would not be wrong to say that Istanbul is keeping its finger on the pulse of the cultural and creative industries throughout the country. "Istanbul takes the

leading position in Turkey's landscape. More than 50% of employment and almost 75% of turnover in the creative industries originates from Istanbul" (Aksoy and Enlil, 2010).

In addition, being a city with many more young populations compared to many other European countries is also one of the major factors. It is stated in the report of YEKON that in Turkey in 2011, rate of the number of employees working in the creative sectors in total employment is 1.09% while the rate of the number of individuals working in creative sectors in Istanbul to the total employment number in Istanbul is 3,28. Hence, in the light of all these, studying of the production and consumption approach for the cultural and creative industries in Istanbul will exhibit a decisive picture of the countrywide stance in Turkey. According to the data of the World Cities Culture Forum (2017), the number of public libraries in the city is 62, the number of national and other museums is 71, the number of the theaters is 189, the number of plays in theaters is 12.926, The number of art galleries is 199, the number of cinemas is 99, the number of movie theaters is 100,000, the number of film festivals is 14, the number of bookstores is 134, the number of bookstores for 100.000 people is 0.9 , the number of festivals is 150, the number of foreign students studying in the country is 14.072, the number of international tourists arriving in a year 11.842.983.

Compared to the developed European cities such as Berlin, Paris and London, there are many differences. Not only in developed countries but also in developing countries such as Seoul, the capital of Korea, it is seen that although it is much larger in terms of population and acreage, Istanbul has a table that is far behind in terms of vehicles and spaces that will enable cultural activities. If this special status will be assessed from Istanbul in Turkey, Turkey's cultural and creative industries can be said to be not yet approached the level that needed.

Yet, although there are several reports and studies about creative industries in Turkey, it is important to mention that even though most of these studies are focused on the big three cities of Turkey, all of them are exclusive studies, they have run in different years and have different scopes. Additionally none of the

studies have run over one general report that is done about creative industries in Turkey. Therefore all of the studies and reports reflects the result of its own scope and does not view the general and current scene of creative industries in Turkey.

3.2 FILM INDUSTRY IN TURKEY

When the film industry as a whole is considered, it can be said that differently from the past, today it takes shape as a merging of a couple of industries like cinema, TV, advertisement and video. And when the size of these markets is considered it can be said that film industry is one of the creative industries that has a large share in cultural and creative industries. Since, it benefits from several other creative industries, film industry also considered as one of the most economic income provider and employment offering industries.

When the film industry in Turkey is examined, it also consists of three major industries that are cinema, TV and advertisement. It can be said for TV and cinema industry is the most consumed industries in Turkey. However, it is also mentioned in several researches that advertisement industry is the biggest economic support source for both industries. In addition, the value chain of the film industry is examined these three industries also have similar value chain models. Still, it would not be wrong to consider cinema and TV industries as brother industries in Turkey's case (Töre, 2010b).

When the demand rates for all cultural and creative industries are examined throughout the country, as indicated by Lena (2016), especially cinema and television come into prominence among the audiovisual media sectors. One of the important wheels in Turkey for the development of the economy will not be wrong to say that is the film industry. Therefore, when many research and investigation reports, as well as an area in which direct relationship to the number of sectors, recently in audio-visual industry in Turkey said to be one of the industries located in the most active manner. Considering the history of cinema

industry in Turkey, in particular because there may be mentioned quite a stagnant period in terms of the frequency of production or production number. Between 1960 and 1980, between 100 and 300 films were produced. The year 1972 can be interpreted as the golden year of the movie industry which produced 302 films. The number of the films decreased by 3/4 in the following three years in 1980 and climbed again with a small increase in 1984 - 1986 periods. Aside from the small leaps experienced in the first half of the 1990s, it would not be wrong to say that our cinema film production has reached the end of 2000s by declining (Töre, 2010b, p.17).

However, when the extremely fast rise graph seen in the last 10 years is examined, a significant increase is observed in the number of films produced every year. Many sources point out that the number of Turkish films in cinemas in recent years is more than foreign films. In this case, the cinema sector in Turkey has become one of the sectors in the foreground again. When looking at the overall picture in the country's cinema industry in Turkey, as Lena (2016) interpreted, employment in the country within the creative industries is seen as one of the most profitable industry after the added value and TV series industry in terms of consumer preference (p.18). In addition, UNCTAD (2015) spouses in proportion to the period of upswing in the cinema sector in Turkey has increased the number in the section related to cinema in universities and industry to more qualified in this case it is mentioned that lead to the establishment. In the same report, she emphasizes that the increasing quality of films has attracted attention in the international community, and in six years 30 Turkish films have been awarded by 76 film festivals including Cannes, Venice and Berlin film festivals (p. 49).

Nevertheless, the criticism that the movie industry in Turkey in local platforms are also available. Given the most common criticism of Lena (2016) on the subject and the film industry in Turkey, the number of remaining in the shadow of the success of the films in the Top 10 in terms of an average of 100 films from box office receipts entering the vision each year, almost all the television stars has taken the leading roles and it has also been referred that the genre of the films has

similarities with TV series (p.18). Of course, there are some who consider this situation as the TV series sector helps to revive the cinema sector.

On the other hand, as noted by TAVAK (2016), the number of movie theatres and the number of seats in the country has increased significantly as the number of film production increases (p.125). For this reason, in terms of the number of small scale and few large companies, the number of firms related to the industry, especially the production companies, has increased in proportion to the increase in the number of domestic films produced. In addition, the preferences of the film audience are now mostly based on local productions. In this sense, according to the studies, the increase in domestic film production has a positive effect on people's increasing interest in cinema. In this content, there is an increase in the number of audiences who watch the movies and the tickets that are sold. However, when analyzed in terms of population and participation rate, although there is hope that there will be better developments; the frequency of people going to cinema in a year is still low compared to European countries (İKSV, 2016).

This situation can be considered as one of the reasons that the pricing system which can be considered as high compared to the average in ticket prices. But of course, this is not the only reason. Another issue stated that the productions that do not compete in commercial lanes are not able to reach the level of enough spectators.

"In November 2013, Turkey met with a new distribution model which was arranged for the sake of independent films that has struggle to find a theatre to be released Başka Sinema (Alternative Cinema) became the new distribution model for well-liked national and international films. Since its foundation, Başka Sinema screened more than 100 independent films in select theatres" (İKSV, 2016, p.9).

One of the positive developments in the cinema sector has been the support provided by the Ministry of Culture and Tourism since 2004, as stated in the UNCTAD (2015) report. This support is considered as one of the tools to help

increase the number of films (p.49). In addition, the New Film Fund, which was established with the partnership of Anadolu Kültür and IF Istanbul International Independent Film Festival, started to support the films in 2015. Again, as one of the positive developments, creating incentives for the withdrawal of foreign films made in Turkey value- added tax law changes are shown. In this way, some parts of the production of some of Hollywood films were shot in Turkey. Also, incentive projects are being prepared for the General Directorate of Cinema. In addition to all these, it is observed that co-productions have been realized with Europe in recent years and 6 joint production movies were released in 2016. However, this number is observed to be very low compared to the total number of movies.

On the other hand, one of the problems in the industry is the lack of copyright laws. Turkey is known in the film industry and in the professional associations, there are organized union presence. However, the deficiencies in the subject matter of the law are an obstacle for these institutions to be as strong as European or American examples. In this sense, new formations established by the directors and producers to increase cooperation, communication and solidarity among filmmakers and to help developing different production and distribution models (IKSV, 2016, p.3).

Finally, the conclusion that can be drawn from the survey on the location of the film industry in Turkey just as in other cultural and creative industries, community cultural education levels increase and the country in terms of contributing to development is an important power and potential, but it seems still not reached the expected level of activity. One of the most important reasons that cause this, especially high artistic value films in every sense of the box office films less than the demand and support can be said. In this sense, it is important that both the filmmakers and the audience are directed towards the subject and the policies to be followed by the state are important. Unfortunately, in this sense, it is seen that orientation approaches have not been made at the required level yet.

3.3 TURKISH TV SERIAL INDUSTRY

The series industry, which constitutes one of the important branches of the film industry, has become one of the important wheels that has turned the economy for Turkey as well as for many countries in recent years. Especially in the last ten years, Turkish series that have achieved significant success in the country as well as abroad are now referred to as a genre in the global market.

The story of exporting Turkish TV series abroad, which were already very valuable in the country for a long time, first started in 2001 when the series called 'Deli Yürek' was sold to Kazakhstan, and the series quickly gained popularity and in 6 years it was shown for 12 times. However, in 2007, the series 'Gümüş', which opened the industry to the Middle East and the Balkans, played an important role to pave the way to dozens of series that would follow it (Öztürk and Atik, 2016, p.74). And today, Turkish TV series reaching a very serious level of popularity abroad in a short period of time, the series ranks second in the global ranking of exports after the United States and they are exported to a total of 142 countries (Hürriyet, 2017). As a result of the increase in the popularity of the series abroad, an increase in the amount of wages demanded per episode has also increased, allowing the revenue from series exports to grow significantly over the years.

Furthermore, it is not wrong to say that the success of Turkish series at home has drawn similar tableaux. According to many sources, Turkey ranks high among the countries that watch TV the most. Although digitalization is increasing its effects over TV industry in global markets, most studies show that TV consumption is still in a relatively high rate in Turkey and TV serials constitute a large portion of this rate. According to the RTÜK survey conducted in 2018, the people of Turkey spend at least 3.5-5 hours of TV per day watching TV and TV series rank first after the news in the list of TV viewing preferences. Moreover, according to TUIK (2015) data, watching TV series in Turkey ranks highest in the ranking of the most widely performed social activities, such as 96%. While this

data clearly shows the size of series consumption within the country, it also sheds a light on the desperate rivalry between channels and production companies that are constantly trying to produce ratings record-breaking productions.

According to Gülçur and Eken (2017), as of 2016 in Turkey there are 558 licensed channels that consist of 162 cable and 396 satellite channels (p.158). Although, it looks like a high variety of numbers, only major seven of these channels are able to invest in producing TV serials. In this sense, almost 80 percent of the advertising revenue generated in television channels goes to these channels (Özkan, 2016), however, it is stated that this situation is still not enough for the channels to make a profit. Although there are no official data released by the channels, it is known today that a series production is paid between 550,000 and 1.2 million TL per episode (Özkan, 2016). At this point, the revenues from the ads have a great importance to the channels that are the investors of the series, but the likelihood of the channels receiving advertising is in line with the ratings received by the series. In this sense, series productions with the potential to get high ratings in order to replace the investment and gain superiority in the competitive environment constitute the priority preferences of the channels. In this case, the produced contents are limited within the framework of the genres approved by the audience, repeating itself with similar productions and causing innovative approaches in the sector to not find space for itself.

Nevertheless, when the results are observed, it is seen that the system that is already functioning brings positive outcomes despite its shortcomings and still receives demand. Positive results are observed especially on the TV series' revival of other industries. Some sources point out that the success of the series in the local market has helped revival of the film industry, which has been decreasing for many years. In this sense, the intensity of domestic productions on similar topics and starring the most popular series actors paints a picture of these interpretations. In addition, the series industry, which works with many creative industries by its very nature, contributes positively to other areas such as fashion, design and literature, and has a leading role in promoting our cultural products in

both the local and global markets. In addition, numerous sources draw attention to the revival in the country's tourism and the increasing number of Arab tourists visiting the country every day as a result of the success of the series in the global market. This positive picture allows the series industry to remain one of the country's most important areas of economic income and employment, despite the competitive environment.

3.3.1 Value Chain of Turkish TV Serials

When the characteristics of the TV serial industry in Turkey are examined, similar model features can be detected with Morris and Kaplinsky's (2000) simple value chain model (Figure 2.2). The reason for that may be stated as the lesser-digitalized level of the industry compared to the global examples. Although some sources point out the changes that digitalization caused in the industry it can be said that Turkey is still not at the same critical point as America and Europe is in means of digitalization. Though, there are variety of digital, Video on Demand (VOD), Pay TV or Subscribed Video on Demand (SVOD) portal options, it can be seen from multiple statistics that the ratio of consuming scheduled TV serials is still among the popular cultural activity trends in Turkey. Therefore, the simple value chain model is still considered as maintaining its applicability. According to that the value chain of TV serials in Turkey consists of four main stages as creation, production, dissemination and transmission.

Creation: As the first and maybe the most crucial ring of the chain, creation consists of the producer, creative crew as in screenwriters, directors, composers that compose serial and film music and technical team. The creation of an idea or the development of an idea that is demanded by the producers or in most cases the broadcasters also take part at this stage. In most cases in Turkey, the idea that will be created for a serial mostly demand by the broadcaster channels who finance the

work. So, the decisions about selecting the scriptwriter director, composer are made here by producers who have an agreement with broadcasters.

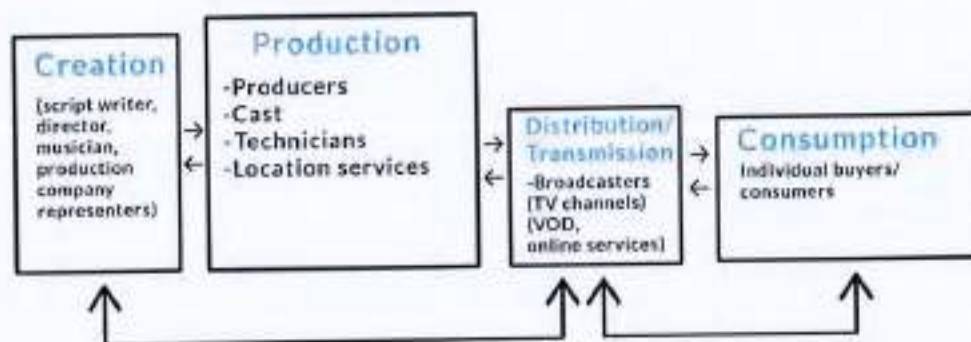
After the completion of the creative crew the creation of works, script and music comes. But, unlike some other examples in the world, only 3 to 5 episodes' scripts are created at this stage as the dynamics of character of the serial can be interfered or changed at further points (Gülçur and Eken, 2017). For this situation it is defined as problematic and limiting for the creators that the ultimate decision makers are always the broadcaster as they finance the work and therefore, they can change or interfere in every stage of the scenario according to the consumers demand. Under these circumstances the talent and imagination of directors, scriptwriters and even musicians are limited to go further from the general familiar concepts. It can be considered as a protection mechanism of broadcaster to prevent any financial crisis caused by low ratings. It is stated as the fear of going out of the ordinary (Gün, In-depth Interview, 2019). In addition to all that, the estimations about the finance and budgeting of the work are discussed and planned at this stage before the production begins.

Production: This section consists of pre-production, production and post-production phases. Casting selections, technicians, locations are decided at pre-production phase. Also, any other estimated budget changes are discussed here. Production follows the pre-production. Filming the content starts at this phase. In Turkey, TV serials generally are made by producers that are financed by broadcasters. or directly by the broadcaster as also the producers. In some cases, series can be produced by the sub-production companies of broadcaster companies like D Production by Doğan Group's Kanal D as an example. In addition, as it can be seen in some production examples, only very occasionally, an independent production company and broadcaster company make agreements and produce the work in partnership. However, in most cases copyrights are owned by broadcaster companies as financiers (Gülçur and Eken, 2017, p.166). Finally, at the post-production phase assembling, sound, special effects if necessary and other finishing touches are performed.

Dissemination: This part especially plays an important role for movies as it undertakes the marketing operations and agreements with the movie houses. However, it might also take place on TV serials for stages like poster design or marketing (Töre, 2010b).

Transmission: The last step before consumption consists of any channel – TV channels, pay TV, VOD, SVOD, IP TV etc. – that meets the consumer with the content.

Figure 3.1 The Adaptation of Kaplinsky and Morris' Simple Value Chain for Turkish TV Serials



Source: Kaplinsky, R., Morris, M. (2000). P. 4

As a surprising feature, the characteristic structure of this value chain shows that despite the traditional value chain model is still more accurate in Turkey, the actor's roles in the value chain come out of order, as in broadcasters actually demand the type of content from the producer companies to be created. This reverse flow of duties mostly related to the economic hierarchy that the actors hold. Gülçür and Eker (2017) also relate this matter to the strong relation between the broadcasters and consumers take part when the consuming is the issue. Thus, the consumers lead the types and context of the matter and, they lead the way that the scenario follows as they show interest or not.

To sum up, when the value chain of Turkish TV serials is examined, the broadcasters significant managing the process according to the most consumable content as the investor catches the eye. However, this situation as it is mentioned in several sources, leads Turkish TV serial industry to squeeze in narrow limits and enables more creative or artistic contents to come out. Yet, the observed increasing demand on the digital consumption preferences whispers the future digital era dominance in Turkey. In that case, the shifts on the ruling roles of the actors will also be inevitable.

3.3.2 Music in Turkish TV Serials

It is known that music is an indispensable element for TV serials. It keeps its importance from the beginning till the end. If the main purposes of music in a serial is considered, such features like leading the audience's feelings, covering alien voices, making the transition between scenes, signaling the story flow when it is uncertain can be listed before many. When the methods of using music in a serial, however, may differ according to interpretation of the content. Many researchers refer to the value of music by pointing out how pointless would a TV content be if the music behind would vanish. This example helps to understand that music can have as much importance as the scenario.

If the different genre examples are examined, various methods of music usage can be spotted in TV serials. As some starter methods, the theme songs or generic songs gain great importance as they represent the series. Gürgen (2019) states on this matter that the generic music is the key element to attract audience to watch the series. It should be attractive and hypnotic and catchy that it finally may be even more popular than the series itself. As another technic, there may be usage of other artist's original songs. In this case, music serves for another purpose. Butler (2012) states on the matter that the music and the lyrics match the atmosphere of the scene and the mood of the character. In fact, it represents the mood of the

character/characters, so the lyrics also match the dialogs or refers to the words or feelings out of the dialogs (p.336). Such examples about the purpose of music in a narrative can differ according to the characteristics of the serial industry. However, one thing remains the same that all the various technics, group under the terminological definition of synchronization, which provides added value to the overall music industry.

When the music usage in Turkish TV serials is examined, it may be said that music covers a significant part of the narrative genre. In this case, a big share for serial music in the overall music industry may be expected. According to Gülçur and Eken (2017), in 2008 the music industry's estimated size in numbers was 30 million TL and the share of TV serial music was 5%. Today the total number from revenues of music industry in Turkey has given as 42.400 thousand dollars and 900 thousand dollars of this number was recorded as the revenues from synchronizations (Organization of Neighboring Rights of Phonogram Producers (MÜ-YAP), 2019). Considering these numbers and the TV production ratios in Turkey, it can be estimated that a great portion of this number consists of TV serial music revenues. In this sense, the protection of the rights holders' shares becomes an important matter.

In Turkey, six authorized rights collector societies take part on this field for music industry thus for the TV serial music right holders. These societies can be listed as the Organization for Neighboring Rights of Phonogram Producers (MÜ-YAP), Union for Musical Composition Right Owner's (MESAM), Union of Musical Composition Owners' Group (MSG), Union of Music Performers (MÜYOR-BİR), Union of the Neighboring Rights of Phonogram Producers (MÜYABİR) and Union of the Neighboring Rights of Phonogram Producers (MÜZİKBİR) (Turkey Ministry of Culture and Tourism Directorate General for Copyright). These societies hold great amount of importance in the means of added value for the music industry actors as they are the representers for protecting the rights of owners.

In addition to that, most of these societies are known for their agreements with some very important international rights collector societies. So, it can be said that, they are also the representers of Turkey's music industry in international markets.

3.3.3 Media Coverage

Although, compared to American TV serial soundtrack market the Turkish TV serial soundtrack market is very tiny there are still some examples of TV series music that got very popular and even opened the doors of fame for some musicians. When the media coverage about the Turkish TV serial music considered several articles, news or interviews can be spotted especially in online newspapers and magazines.

As the first example, one of the most popular TV serial music since the 2000's can be selected which is *Zerda's* music by Kır a . What is important about this music is that according to the sources it was one of the first real serial soundtracks in Turkey that had a success this big. The soundtrack was considered as so popular back in the day that in a piece of news in HaberTurk (2007) mentioned about the topic as followed: "TV serial music which have approximately 30 years of history became so popular these days that the market value reached 150 million dollars. This made the serial music a new gate for income for artists." The same article also pointed out that G khan Kır dar's music in *Yabancı Damat* and *Kurtlar Vadisi* has brought in approximately 500 thousand TL only from copyrights.

In another interview in H rriyet (2017), G khan Kır dar who is another famous musician and serial music composer in Turkey told that even though he was a singer and producer before he started creating serial music his popularity expanded after his serial music career.

On the other hand, when the media coverage is investigated about the subject, two articles can be considered as valuable for emphasizing the power of TV serials in the meaning of music promotion. In the first article, Gence (2010) points out the

new method of making famous singers or actors covering songs for serials and the enormous outcomes of the method. He says that the song 'Götür Beni Gittiğin Yere' that covered by Ferhat Göçer for a serial or the song named 'Üflediler Söndüm' covered by Olgun Şimşek who is a famous actor then appeared in the serial called *Kapalıçarşı*, went beyond many other popular songs. "Now pop singers are releasing their new songs by tv's top serials. Music of serials gains as much attention as the script or actors," he adds (Gence, 2010). In the second article, the popularity of *Binbir Gece*'s Music in Serbia takes place and states the music of *Binbir Gece* has gain popularity in Serbia's cellphone ringtones preferences (HaberTurk, 2010).

Moreover, Koloğlu (2015) referred to digital music platform Spotify's statistics of most listened Turkish serial music top ten list. According to the article Toygar Işıklı stands out with nine songs out of ten. But the number one of the lists is the *Muhteşem Yüzyıl*'s vol.1 soundtrack. In addition, Koloğlu (2015) also mentioned some of other popular serial music examples in Turkey and selected out Pinhani's song 'Hele Bir Gel' for *Kavak Yelleri* and Pilli Bebek's songs for *Behzat Ç.* as successful examples.

At this point, referring to the excellent success of *Muhteşem Yüzyıl*'s music may be appropriate. According to the NTV, as the latest news of the success of Turkish TV serial music, *Muhteşem Yüzyıl: Kösem*'s composer Aytekin Ataş won an award for being in the 50 most played songs in Latin American radio and TV market list with his generic song of *Muhteşem Yüzyıl: Kösem* at the El Premio ASCAP 2019 ceremony that is organized by ASCAP (American Artists and Editors Association). According to the article, Ataş mentioned that it is especially an important award for not only because he won a competition with several many famous Latin American composers but also his music was the only one without lyrics. When Ataş's statement is considered this award can be recognized as a global success of a potentially growing market, therefore another milestone.

To sum up, when the media coverage about serial music in Turkey is examined, it can be seen that some examples appeared through time which mostly pointed out

the success of a couple of composers who earned a name for their good work and applause by the audience. These articles have a place in spotlighting the music and its given artistic value to a serial. The media coverage also matters for guiding people to make awareness about other profession fields in serial industry. Therefore, it can be said that it is an important tool to support serial music industry. However, it can be seen from the articles that the scope of the subjects does not differ as expected. Therefore, Aytekin Ataş's success example matters due to its premise quality.

3.4 EMPIRICAL STUDY

3.4.1 The Aim and Importance of the Study

As an element of creative economy, TV serial industry is considered as one of the most consumed products in global market lately. This places TV serial industry on one of the front lines of most economic value providing industries. For TV serials it can be said that, they have the power of activating other creative industries as much as it merges and benefits from other creative industries to produce a product. On the top of these other industries, the music industry can be shown as one of the crucial elements for TV serial industry as well.

If the propose of music in a TV serial is examine, it shows that the music industry carries an irrefutable importance for TV series. The importance of music for a serial also spots out when it is investigated over the value chain phenomenon. Nonetheless, the TV series industry also provides a great amount of benefits for music industry in the meaning of creating an alternative field for serial music.

When the different TV genre examples are examined it is possible to talk about the existing serial music market models that plays an upfront role in activating both TV and music industry. This situation brings out the idea that similar models can be applied in Turkey as well.

This study that consists of three chapters have created based on the hypothesis that Turkish TV serials carry a potential for an alternative serial music market which both contributes to music and TV industry as the Turkish TV serials have achieved a great success both locally and globally. In this sense, the aim of this study is 1) to examine the structural and functioning frame of Turkish TV series industry as a global phenomenon, 2) to detect the value that music has in Turkish TV serial industry, 3) to remark the necessity and potential that TV series industry have on supporting markets for both music and TV industry in Turkey, 4) to map out a route to use this potential in a beneficial way. In the light of these, the

questions that are expected to find answers specific to Turkish TV series are as follows;

1. What is the position and function of music in Turkish TV series?
2. Does Turkish TV series affect music industry in a beneficial way?
3. Is it possible to develop a well-structured market for TV serial music and soundtracks in Turkey?

According to this understanding, the study carries two notable features that point out to its importance.

First, among the studies that conducted on Turkish TV series and Turkish music industry, this study holds the feature of being one of the first studies which conducted on a subject about TV serial music and TV series' effects on music industry. Throughout the study, a couple of examples around the world have been pointed out and compared with Turkish TV serial industry; also, the possible economic and cultural benefits have investigated.

Second, the study also tries to understand the inner function of TV serials and music industry by examining the value chain structure of these industries. It examines all the stages starting from creation till dissemination that a production goes through and tries to identify the actors that represent these stages. It also examines the music's function in TV series once again over the view of value chain by proposing a sample sub-chain model. In this sense, it is anticipated that the findings of this study would form a basis for future extensive studies on the subject.

3.4.2 Methodology

Both TV serial and music industries are two relatively biggest industries of creative economy that brings both economic and artistic value to the countries. They interact with each other and benefit from each other. Music in TV serials

plays a crucial role in the meaning of fulfilling many needs. Likewise, TV serials play an important role in music industry as a powerful advertisement medium that brings economic and cultural value to music industry. TV Serial music functions as an intersection medium for both music industry and TV serial industry. So, it can be considered as a special multi-function field that supports and benefits both industries. It raises its value among creative industries every day and makes it worthwhile to bring this subject into forefront. It also makes serial music a field that worth searching for and raise knowledge about.

Sanul (2012) underlines that, the theoretical findings of a well-developed field study can provide consistent suggestion towards practical problems and this would contribute to the social sciences. Therefore, the reason that created this study is based upon the observation that the value of serial music field cannot be made use of in Turkey, which is a practical issue. Therefore, the study mainly aims for to look for the possibilities for a potential market on TV serial music and soundtracks in Turkey.

To start the study, which consists of three chapters, first, I have conducted a literature review to build the theoretical base of the study. In these sections that encloses the first two chapters, I have investigated the position of TV serials in film industry and in creative economy. After that also I have tried to detect the music's function and value in TV serials by examining other international TV serial genre examples. Further in these sections of the study, I have investigated the value chain phenomenon. To do so, I have analyzed both TV serial and music industry's value chains and the actors that represent the part of the value chains. In addition to that, I have investigated the function and the actors of TV serial music in the value chain by proposing a TV serial music value chain model. While investigating these chapters, I have benefited from the official reports and statistics that are conducted by official organizations, institutions and association bodies as secondary sources. Especially, European Commission (2017) and KEA's (2015) value chain mapping models have generated the bases for the TV serial music value chain proposal.

In the following chapter, which is the third chapter of the study, I have tried to investigate Turkey's position. Since it is a qualitative study, I have used the 'In-depth Interview' method as the principle methodology. As stated by Geoff Payne and Judy Payne (2004), 'In-depth interview' is a method for data collection in face-to-face setting, using an oral question-and-answer format, which allows respondents to talk about issues in less directed but discursive manner. While generating the sample group of the scope of my study, I have tried to designate the interviewees / respondents among the above proposed TV serial music value chain representors (Figure 2.11). So, list of the respondents in final consisted of ten people: four from the field who work in serial music industry and six from the associations that play an important role in the value chain.

So, I have constructed the first part of the interviews, to collect data on the creation and production sections of the value chain, with four interviewees from the field who work in creating, selecting and producing music for TV serials. As the first interviewee for the creation part, I have met in his studio with Ender Akay who is a well-known awarded composer for his works in film industry. Additionally, he is a professional who is in the field for over twenty years and apart from cinema productions, he also composes for TV serials. As another TV serial music composer, I have carried out an interview through e-mail with Cem Tuncer who a professional musician with an impressive background is also being a well-known TV serial music composer. He is in the business for almost ten years and mostly known for his famous works for top series like 'Öyle Bir Geçer Zaman ki', 'Hayat Şarkısı', 'Anne', 'Kadın', 'İstanbul Gelin'.

To collect data on the production section, I have met in his office with Hasan Saltık, a very famous music producer and the founder of 'Kalan Müzik'. He is a very well-known for his many works besides successful and important studies for collecting and archiving Anatolian music genres as well as other genres. He is one of the board members of Neighboring Right of Phonogram Producers Organization (MÜ-YAP) and in addition to all that, currently participates in TV serials as a music advisor.

To finalize my process of collecting data from the field actors, I have interviewed through e-mail with Ebru Suda who also works as a music advisor for TV serials.

While conducting the first part of the interviews, I have asked three groups of 'semi-structured' questions to have a more depth opinion about the matter. The first group of questions formed to understand the processes that music goes through in a serial production. Second group of questions were formed to examine music's purpose and position in Turkish TV serials. And the final group of questions asked to find the answers to any potential that Turkey has for a well-established series music and soundtrack market in the country.

For the second part of my interviews, I have carried out six interviews with people from the rights collecting societies in order to have more detailed information about music industry in Turkey and the dissemination and transmission sections of the value chain. For this part of the research, I have met with Bülent Forta, the general coordinator board member of MÜ-YAP, which is a rights collecting society as well as the representative of Turkish music industry. Bülent Forta on the other hand is also known for his participation in the studies about cultural and creative industries in Turkey.

As my research developed, I have met with Barış Şensoy, the secretary-general of MSG, which is another collecting society for musical composition right owners, Aylin Bendilli and Ali Haydar Yıldız who are heads of copyright distribution department of MESAM. These three interviews provided very valuable information for my study on the matter of understanding the distribution and transmission structures of music industry in addition to copyright values. As the last rights collecting society for music industry, I have met with Merve Nimetoğlu, the secretary-general in MÜYORBİR. Besides from being the general secretary of MÜYORBİR, Merve Nimetoğlu is also a committee member of UNESCO Diversity of Cultural Expressions Committee and known for her participation on the studies about cultural industries. For the second part of the interviews, I have conducted my last interview with Burhan Gün, the general

secretary of TESİYAP. This last interview, different from others, was important as it provided information from the TV serial industry.

The interviews that I have conducted with the rights collecting societies had crucial impact on understanding the key concepts of the industry as they represent very important actors in the value chain. So, all of the interviews have made in the representers' offices in face-to-face setting. For this part of the interviews I have again composed three 'semi-structures' question groups. The first group of questions was formed to understand the footprint of synchronization in music industry in Turkey. The second group of questions was formed to have a deeper understanding on the dissemination process and the final group of questions, as it was before, has tried to find the answer to any potential that Turkey has for a well-established series music and soundtrack market in the country.

3.4.3 Limitations

The study that basically emerged from an observation on the potential of serial music carries for other sub-markets in Turkey have tried to be conducted in two main sections. The first section, which consists of the theoretical base of the study, has investigated on desk research. And the second section has conducted in 'In-depth Interview' method. However, for both sections of the study, several difficulties have experienced.

As the first and most challenging difficulty, the lack of relevant sources on both literature review and in-depth interview processes can be shown. Since it is a qualitative research, the written information had a very important value for the study in order to frame the research field. Although there are many researches that have been conducted about TV serials, it is seen while conducting the research for theoretical structure that only very little of them touch upon the issues about serial music market.

The same struggle can be pictured out in a worse scenario for Turkey. One of the important struggles have encountered while investigating about the scope of creative industries in Turkey. Having different exclusive studies with different years and scopes have made it difficult to frame the general state of the country on the matter. Again, among the literature researches about TV serials, although there are many studies about TV serials, it is seen that there is almost none that touches upon the relation between TV series and music industry. It was a big deal that even on media coverage mostly could not pass the criteria of a reliable source. In addition, the lack of inventories, statistics, and reports were the main reason of the struggle for determining the size of serial music in music industry in Turkey. Therefore, the necessary inner information tried to be collected from the interviews.

Another obstacle has encountered at this point. While the interviews with rights collecting societies were being conducted, as much as the respondents were willing the answer the questions not many of them were willing to share house reports and statistics. So, the data for the Turkey's case in the study tried to detect after synthesizing all the interview answers.

In addition to that, some of the obstacle has been encountered at the phase of interview appointments. Due to the busy schedules of professionals some of the appointments had to be postponed once or twice which caused a delay on finishing the research. Furthermore, due to the location obstacles some of the interviews had to be conducted through e-mail. Therefore, for those interviews only brief answers to the question have been received and any other possible detail missed out.

As an important additional detail it should be mentioned that while conducting the interview phase of the study, for the data collection on dissemination and transmission sections of the value chain, it has also been tried to make an appointment from Metin Uzelli, the Turkey representer of the global dissemination company The Orchard, and from Ateş İnce, the founder of PuhuTV with three years of experience on digitally transforming Turkish drama and the

managing director of MADD Entertainment which is a joint venture international distribution company between AY YAPIM and Med Yapım. However, all of the several requests were declined each time. So, for this part of data collection of the study had to remain as deficient. This resulted as the needed information being collected from other interviewee's opinions and some other secondary sources.

Finally, as an important problem, some of the counter answers of interviewees have made it difficult to form a consistent understanding on the matter while synthesizing the obtained results.

3.4.4 Outcomes and Discussion

Music in TV serials plays a crucial role in means of fulfilling many needs. It also functions as an intersection medium for both music industry and serial industry. So, serial music can be considered as special multi-function sector that support and benefits both industries and create added value. And this feature makes TV serial music's value grow each year.

In this study, the value of TV serial music has taken under consideration from the Turkey's point of view and Turkish TV serials' effects on music industry have tried to be detected. To do so, after a desk research for theoretical basis, the field research have carried out with the method of 'In-depth Interview' with people from the field and rights collecting societies. While conducting the interviews, three main question groups have prepared that aims to find the answers for the research questions of the study.

As the first group of questions was directed, it was expected to find out about the TV serial music's footprint in the overall music industry and the actors that take part in it. According to that, with no differentiation, various music usage methods like composing a musical piece that is dedicated only to the serial itself or a musical composition that belongs to other artists but played in some episodes of the serial, is considered under the synchronization title of music industry. Which

also brings out the issue on synchronization rights and the rights that are protected by the rights collecting societies.

As Gün (in-depth interview) stated, broadcasters play the leading role on TV serial industry in Turkey. Because, most of the contents are ordered and financed by the broadcaster companies which also make them the biggest right holder of the content. On the other hand, music constitutes one of the most important branches of a TV serial. Therefore, the composer of the original music of a serial is also considered as one of the right holders of the content. So, the composer also can take a fair share from the copyright revenues. However, in some cases the rights of the musical compositions that are composed for the serial are bought by broadcasting companies after the serial is completed so that when the TV serial is imported the broadcaster company collects all the copyright revenue. Therefore, if a soundtrack album of a serial is released, composer's share from the revenues also decreases. This situation breaks the incentive of the composers on the matter of releasing soundtrack albums for serials.

On the other hand, the usage of other artists' musical compositions or original songs in serials started to be more popular than before. The reason why for this technic to be considered as efficient is because it is much cheaper and benefits the artists for marketing. Additionally, the technic has a positive effect on reviving the music industry. So, as the positive outcomes of TV serials' impacts on marketing other original songs is observed, the artists' and record companies' motivation to give the usage rights of the songs for TV serials grows bigger. Saltık (in-depth interview) mentioned that music advisor and provider companies like his own, can easily detect the increasing streaming numbers and revenues from the statistics that dissemination firms like 'The Orchard' provides for them.

However, this technic does not affect the motivation of broadcasting and production companies on releasing soundtrack albums or support the TV serial music market. Because the other artists' musical compositions and song are not included to the soundtrack albums of the serials but take part in artists' own albums. The reason for that is explained as the unfair copyright revenue

distribution agreements between the artists and other leader right holders. As it is mentioned in the interviews, if an agreement about a musical composition taking place in the soundtrack album of a serial is signed between the right holders, the production or the broadcasting company receives most of the revenue from copyright. This leads the artists to the direction of not signing the agreements for soundtrack albums. Instead, artists prefer to release the songs on their own albums and receive the whole revenue. However, although this case builds a barrier on the developments of soundtrack market in Turkey, the preference ratio of this music usage technic by production companies increases because it is cheaper, efficient and reduces the budget for music in the production. So, as much as it does not help with the developments for soundtrack market in the country, it benefits the music industry revenues in the country.

Today, Turkey's overall revenue of music industry is given as 42.400 thousand dollars. In this number synchronization comprises only approximately %2 of the total revenue (MÜ-YAP, 2019). As this number looks small, it continues to grow every year as the usage of archive songs is increased. So, it can be said that the recognition on synchronization in music industry is also growing and it becomes a more rapid and preferred method by both the TV serial industry and music industry.

When the second group of the questions asked, several malfunctioning aspects of the industry have encountered. This question group was designed to reveal the position and function of music in Turkish TV serial industry. At this point of the interviews especially music composers reflected their struggles on dysfunctions of the field. The main problematic point is viewed as the long hours of contents. It is stated that because of the long time periods of episodes, music's propose as an emotion builder evolved into a medium to fill the long-time gaps. Akay (in-depth interview) stated on the matter that this approach weakens the effect of music in the serial therefore the quality of the series also weakens. In addition to that, Tuncer (in-depth interview) explained that although there might be some rare satisfying examples of serials that have good partnership with music, musical

chattering to kill time is a more common practice in Turkish TV series. Hence, even though Turkish melodies are more diverse and fuller of emotion compared to many other examples from the world, they cannot be displayed due to the wrong approach and lack of knowledge.

The problem about the long hours of the episodes is explained with the desire of broadcasting companies to obtain advertising revenue. As Gün (in-depth interview) explained, broadcasting companies finance the TV serials and they regain most of their investment from the advertising revenues. So, if it can be put in this way, the broadcasting companies compete to have more advertising revenues. Which results with prolonging the hours of the episodes. However, this situation leaves the broadcasters and directors with the need of much more filler compositions between scenes, thus the musicians also have left in the position of composing filler music more than musical and dramatic content.

The composers state that, the value of the music in a serial can be measured with the clever rests with no music behind the scenes. Giving clever break points between musical transitions not only doesn't tire the audience but also makes the audience realize and appreciate the music of the content more. Hence, both music and TV serials artistic value grows. However, in Turkey's case, non-stop music in the background in most of the production's calls attention. Tuncer (in-depth interview) and Akay (in-depth interview) explain this approach with the lack of knowledge of the content producers and directors about the creative music usage.

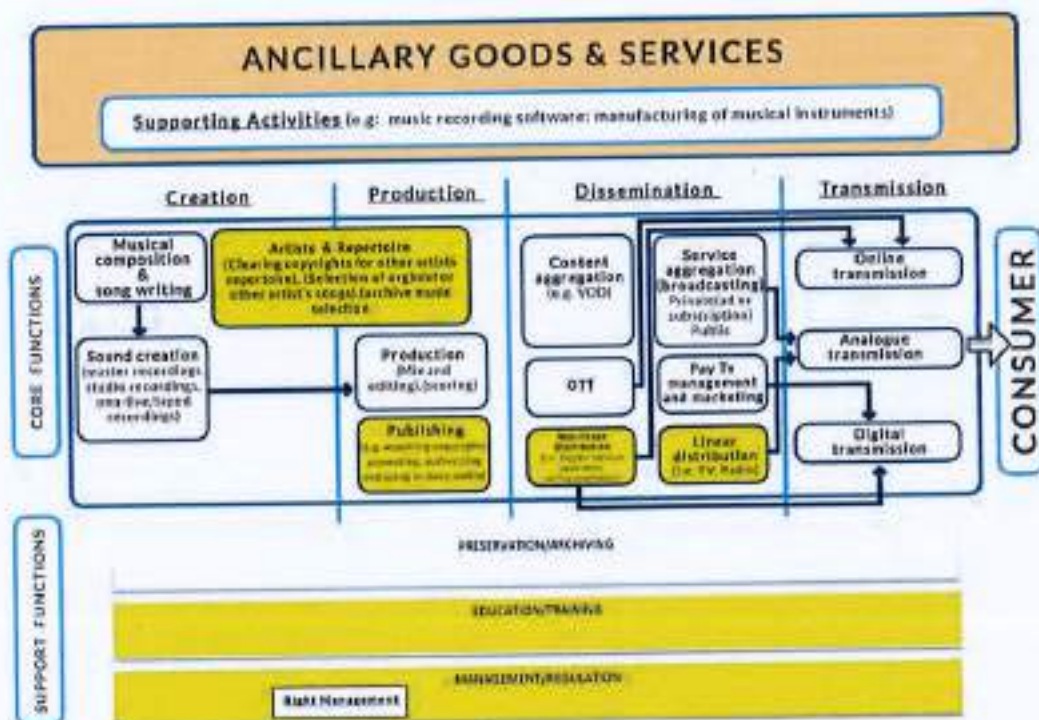
Finally, the third group of questions was designed to investigate the possibilities for a TV serial music market in Turkey. As answers are collected an unexpected fact have been encountered. It is stated by most of the respondents that, although it is not very recognized, a TV serial music / soundtrack market exists in Turkey. Most of the top-rated serials' soundtrack albums or songs are published and disseminated through online / digital platforms. In addition to that, Tuncer (in-depth interview) stated that, Turkish TV serial music is the most popular musical genre of Turkey in foreign countries. These statements can be considered as surprising result for the research because of the secondary position of music in the

serials as it is mentioned above. But, it also an efficient sign on emphasizing the potential power of the market if it was more recognized, well-developed and advertised.

However, on the contrary, Gün (in-depth interview) argued that, although the soundtracks of serials are released on digital platforms it cannot be considered as an existing market. He said that to call some initiatives as a market, it requires more than some streaming numbers on digital platforms like economic incentive and investments from the actors or events and award ceremonies. None of these categories can be spotted in Turkey on the serial music field. Therefore, it is not possible to speak of an existing soundtrack market in Turkey.

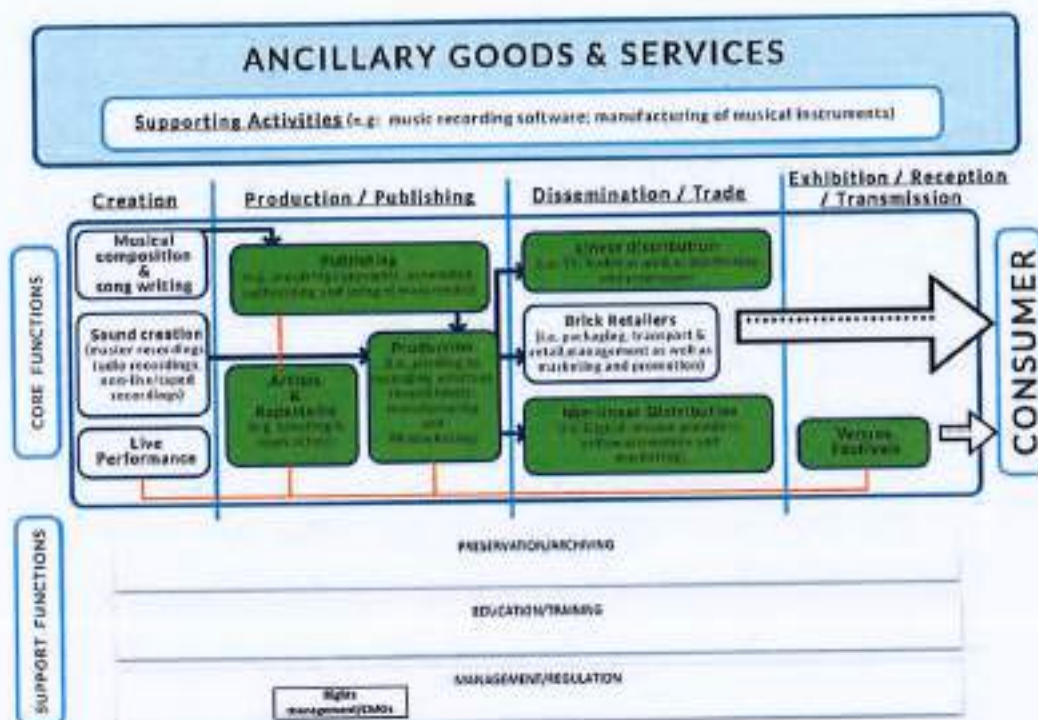
It can be seen from the outcomes that there are some problematic points setting some serious barriers that prevents the industry from getting developed and recognized. When these problematic points are examined over the TV serial music value chain model it stands out that some of the processes of core functions section that take place in the creation, production and dissemination, and two of the main three sections of the supporting functions section are affected negatively (Figure 3.2). On the other hand, when the outcomes of the effects of TV serials on music industry are examined over the music industry value chain, it can be seen that many of the processes from the production, dissemination and transmission phases are positively affected (Figure 3.3). Therefore, it can also be detected from this mapping method that although TV series benefits the music industry of the country, the TV serial music industry still requires more effort and recognition.

Figure 3.2 The Reflection of the Problematic Points on the Proposed TV Serial Music Value Chain



Source: European Commission. (2017). P. 136, 178

Figure 3.3 The Reflection of the Positive Outcomes That TV Serials Provide for Music Industry on the Music Value Chain



Source: European Commission. (2017). P.136

To interpret, when TV serial music is examined from the functioning point of view, it can be said that there are several obstacles caused by the dysfunctional approach. Therefore, the music in a TV serial cannot display its potential as an artistic value-adding actor. In this sense music's supporting purpose for TV series weakens as well as the TV series' multiplier effects (Figure 3.2). However, when usage of other artists' song in TV serials is considered, there are positive outcomes for both sides of the content (Figure 3.3). At this point some observations come out that TV serials can activate music industry however it cannot make use of the potential that TV serial music carries. The first reason for that can be shown as the long hour periods that TV series are produced. As it affects the industry in the meaning of quality, it also weakens the support relation between music and TV serial industry. As the second reason, uneven copyright

regulations between the actors can be suggested. However, the actors can benefit from each other, in this type of structure they cannot support and move in accordance with each other. This affects the soundtrack market in Turkey in a negative way. Additionally, the actors' unconcerned approach to the issue negatively affects the possibilities for another market formation (Figure 3.2). As a result, although there is a huge potential for developing the already existent TV serial soundtrack market in Turkey, due to the lack of correct approaches caused by limited vision and economic concerns, it cannot be profited as it can be.

CONCLUSION AND SUGGESTIONS

When the function of music in a TV serial is examined, music plays a crucial role for the serials. However, when a TV serial genre example that has a well-established relation with music is examined, extraordinary outcomes can be observed for both industries. Since the crisis in music industry that is caused by the effects of digitalization, the music industry actors have become much more interested in the capacity that synchronization field has. That is why the reports show that synchronization increasing its revenue each day. Of course, the growing and digitalizing TV serial industry is one of the biggest supporters for this relation with music.

When the Turkey's case is investigated however, an unfortunate figure gets attention. Even though, it can be detected from the solid examples that Turkish TV serial music may provide economic income as well as employment opportunities, the correct usage of it cannot be generated. Therefore, the power of TV serial music becomes unnoticeable.

To prevent these unfortunate outcomes, several suggestions can be interpreted. As the first suggestion, shifting the weakened position of music in Turkish TV serials holds a high priority on the matter. In addition to that it is observed from the outcomes of the interviews that, there is a need for a revision on the rights dissemination agreements between TV serial and music industry actors. The third suggestion can be addressed as the need to support studies and attempts to raise the knowledge about rights managements. Furthermore, it is believed that, loosening the movement frames for TV serial musicians would result very satisfying outcomes in the meaning of creativity. Therefore, supporting the stakeholders to be bolder in taking risks may cause more positive outcomes and affect the creative productivity in the field. Additionally, generating a new association that consists all the actor of the TV serial industry may help generating solutions for many obstacles and may provide added value to the

sector. Finally, creating a value chain model map to determine the actors and their functions for the industrialization of the market will be very useful in determining the steps to be taken.

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