Turkey’s TV Drama (Dizi) Industry Deserves More Attention

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TV drama (Dizi) has emerged as Turkey’s most popular cultural export in the past decade. The export revenues for broadcast rights of Dizis increased from one million dollars in 2007 to $130 million in 2012. All participants in Turkey’s Dizi industry deserve a big congratulation for this success. International interest in Turkish Dizis started in the Middle East nearly a decade ago. Millions of Arab TV viewers were captivated by Gümüş (Noor in Arabic). This was followed by the Magnificent Century (Hürrem Sultan). In the meanwhile the geographic reach of the Turkish Dizi has expanded from Pakistan to Eastern Europe and the expansion continues. In 2012 Sweden became the first Western European country to broadcast a Turkish Dizi (Son).

Turkish Dizis are likely to remain popular in many countries in the coming years but they will face strong competitive challenges, as some countries will try to imitate Turkey’s success by promoting their own TV drama industry. The most important regional challenge to Turkish dominance in this sector is likely to come from Dubai, which is investing heavily in its film and TV industry. Anyone who is familiar with the efficiency and effectiveness of Dubai government must acknowledge that once Dubai targets an industry it can become a strong competitor. In face of these challenges Turkish Dizi industry needs a strong public-private partnership and an active government support policy in order to remain competitive and expand its export revenues in the years ahead.

The $130 million export revenues of Dizi broadcast rights in 2012 might seem very small when compared to Turkey’s total export revenues, which exceed $100 billion per year. The contribution of Dizi to Turkey’s economy, however, goes far beyond its direct sale revenues. Dizi shows have emerged as valuable instruments for promotion of tourism and popularity of many Turkish products. A research study by Cebeci et al. (2013) has clearly demonstrated this contribution. The Dizis have also served as the main instruments for spread of Turkish cultural influence in the neighboring regions and as such have enhanced the soft power of the Turkish government.

In light of this valuable contribution of TV drama to the economy and international image of Turkey, it is important to evaluate the policies of Turkish government for support and promotion of this industry. The TV drama series that are shown by TV stations outside of Turkey fall under the category of cultural exports. In recent decades governments in many countries have increased their direct and indirect support for cultural exports, which include music, film, books, computer games and TV programs.

South Korea and Japan are two Asian countries with significant cultural exports
where the governments actively support their cultural export industries. The policies of these governments can offer some valuable lessons for Turkey. The government of Japan initiated an active cultural export policy in 1980s while the Korean government launched its support program in 1990s. The experience of South Korea is particularly relevant for Turkey because, similar to Turkey, its primary cultural export is TV drama series. In 1998 President Kim Dae-Jung introduced a Cultural Industry Policy with a special focus on TV Drama. This policy included financial support for drama producers and an active government support for promotion and distribution of Korean TV dramas in international markets.

Several European countries also have active support policies for promotion of cultural exports. A detailed account of these policies has been reported in a 2014 article that lists the best practices of each government and offers many valuable lessons. Sweden, for example, regards fashion as its dominant cultural export (with more than 15 billion euros in annual export revenues). The Swedish government offers financial support as well as marketing and training support for the fashion industry. Similarly, the British government has an active support program for promotion of TV programs and music products in international markets. It uses the government resources to discover sale opportunities and promote UK television products in various countries. The British government also supports research on tastes of TV audiences in different parts of the world and passed the findings to domestic TV program producers.

As of now Turkey lacks a comprehensive cultural export policy or even an overall government policy in support of the “culture industry” which includes books, music, theater, cinema and television programs. Ever since 1970s the government has allocated a small amount of financial support for movie production, which has ranged between $20 million to $30 million per year. Until very recently, however, policy makers paid little attention to TV series.

The AKP is the first Turkish government to have noticed the export value of TV dramas. In 2010 TV producers were offered a seat in the Council of Exporters, which includes the representatives of 23 other export-oriented industries. The Dizi producers have also been invited to join the high-ranking diplomatic visits in which a large number of trade and industry representatives accompany the prime minister in foreign trips to promote Turkish exports. The AKP has also paid attention to TV drama industry in the 2011-2013 Social Development Plan but it has done so in a selective manner. The government is offering financial assistance to TV series that promote family values.

While membership in the Council of Exporters is a positive step, it is not sufficient and it falls short of the more active support that the governments of several other countries such as Japan, South Korea, Canada and Sweden have offered to their primary cultural exports. Turkish policy makers must recognize the significance of Dizi program exports not only for their direct export revenue but also their indirect contribution to Turkish economy and cultural image, as was described above. This
recognition will justify a larger amount of government support for this industry.

Here are five specific policy recommendations for promotion of the Dizi industry:

1) Establish a council of experts in TV Drama industry (this can be named the Dizi Council) with members from well-respected directors, screenplay writers, producers, and actors. The Dizi council will review applications from Dizi producers for government financial support. High quality TV series such as the Magnificent Century are expensive and independent producers face a considerable financial risk when they invest in such projects. Unfortunately, Turkish TV stations don’t accept a share of this burden and only pay for a Dizi after a few sessions are ready for broadcast. This initial high risk can deter independent producers from high quality expensive projects that have the best export potential. It is at this initial stage that financial support from the Dizi council can play an important role. Furthermore, this financial support does not have to be a burden on taxpayers. Government can offer finance to a Dizi project in the context of a public-private partnership (such as a profit sharing arrangement in which government will be entitled to a portion of export revenues in return for its financial support.)

For the Dizi council to be successful it must operate as an independent and impartial council that focuses only on the quality of the projects and operate without any ideological or political bias. The members of the Dizi Council must be selected based on merit and it must be structured in such a way that it can function free from the interference of political parties and government officials.

2) Use the diplomatic resources of the Turkish government for active promotion and distribution of Dizi programs in important export markets. Specific activities include facilitating contact and communications with local distributors, and arrangement of tours for actors and directors of Turkish TV dramas that gain popularity in a specific country. Another valuable diplomatic activity is to help overcome regulations that some governments might impose against broadcast of Turkish TV programs.

3) Support for research and development activities to improve the quality of screenplays and production activities. For example, Turkish embassies can help conduct surveys in some target countries to study the attitudes of viewers toward a specific Dizi. Government can also offer support for production of multiple versions for some segments of a Dizi so that if a section of the plot is hard to comprehend by foreign audiences or might cause sensitivities in some countries, a substitute version of that segment can be recorded for export markets. Production of multiple versions is costly but it will enhance the attractiveness of a Dizi in various markets. The government can also provide support for Film and audiovisual departments in various universities to support research on TV drama industry. Analysis of plot development, study of TV drama production in other countries and identification of potential competition in each international market are some of the research topics that the Turkish government can support in order to help the Dizi industry.
4) Development of laws and regulations that help support the industry by assuring a fair and productive relationship between independent Dizi producers and TV broadcasters. The government, for example, can pass regulations to make sure the distribution of broadcast rights (between producers and broadcasters) in domestic and international markets will be fair and create incentives for all parties so that the industry remains viable and profitable. The South Korean government, for example, imposes a minimum broadcast quota for domestic independent producers. According to this regulation TV stations must meet a minimum airtime for broadcast of programs that are produced by independent producers. Fair and sustainable regulations are also needed to protect the rights and benefits of the actors, directors and screenplay writers.

While strong competition has played an important role in improving the quality of Turkish Dizi shows, too much competition can be counterproductive as it can erode the profit margins and force Dizi producers to focus too much on cost cutting. Extreme cost cutting measures can sometimes lead to compromise in quality of the products. The government (through its Dizi Council) must also manage the competitive nature of the Dizi industry by carefully monitoring the mergers and consolidations to make sure the entire Industry remains competitive at the international level.

5) Financial support for subtitle creation and dubbing of Dizi shows into English and other foreign languages.

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Overall, neither the Dizi industry nor the Turkish government must take the export success of Dizi shows for granted. As the most important cultural export of Turkey at present, the Dizi industry deserves the full attention and support of the Turkish government. An efficient and dynamic public-private partnership is required to expand the reach of Turkish Dizis in the global market. The global value of cultural exports worldwide was approximately $600 billion in 2012 and it is likely to grow even larger in the future. Turkish Dizi shows deserve a larger share of this huge market than just $130 million.

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