

Turkish Film Industry 2010 Report¹

Following the international acclaim of several Turkish films and the growing share of Turkish Films at Turkey's box office numbers, Turkish film industry has become an interesting field to observe in the last few years. These developments have continued in 2010. In 2009 the number of new Turkish releases were 69. In 2010, this number slightly dropped to 65, however the number of admissions for Turkish films increased to 21,706,524, from 18,790,700. This was a crucial increase, after the sharp drop in 2009. In 2008 the number of admissions for Turkish Films was 23,074,291.

In 2009, the total number of admissions for Turkish and foreign releases was 36,899,954. In 2010 with an 11% increase, the total number of admissions reached 41,064,394. Turkish films share in the total admissions has reached **53%**. In comparison to other countries, where there is no quota for foreign releases this is an unusually high share. However when one considers that in 2009 the total admissions in France, Germany, Poland and South Korea were 200,000,000, 146,000,000, 39,000,000 and 156,000,000 respectively, the relatively small size of Turkish market becomes more apparent. Still this also highlights the potential for growth.

The average admissions per Turkish films is 334,000. However when you study the box office numbers of each and every new Turkish film released, you observe that only the top 12 films were able to sell over 334,000 tickets, and top five Turkish hits shared the 62% of the admissions. These numbers tell us that, the increase in production and the increase in admissions are not really related processes in Turkish Cinema. The industry has been able to produce a few popular movies every year drawing millions to the theaters, however the general admissions level for less commercially oriented movies are able to reach to only a limited number of audience. The most striking example of this is Semih Kaplanoğlu's Bal (Honey), which won the Golden Bear in 2010. The film was released with 32 copies and barely reached 32,000 admissions. What is more disappointing is the fact that in the box office list for Turkish films in 2010, there are 29 more films under Bal. So out of the 65 Turkish films released, 45% were under 30,000 admissions.

This unequal distribution of admissions, raise important questions regarding the sustainability of growth of production and the development of the industry. One of the main reasons for such picture is that the distributors in Turkey, take minimum risk and leave almost all the distribution, PR and marketing expenses to the producer. Hence, they could easily distribute Turkish Films to support Turkish Cinema, even though if they don't expect any commercial gain. Sometimes for the distributor it is really difficult to find enough number of theaters, or to keep the film showing more than one or two weeks, but still many films are granted the chance to have a theatrical release and enter the annual statistics. Thanks to the highly risk averse practices of distributors in Turkey.

¹ The data presented in this report is compiled from Focus 2010 World Film Market Trends, Anrakt Sinema Gazetesi, Box Office Türkiye and Yamaç Okur's ongoing research on film production support system in Turkey.

2005-2010 Theatrical Release Data - Turkey

Year	Total Admissions	Total Number of Films Released	Turkish Films	Admissions for Turkish Films	Share of Admissions for Turkish Films	Foreign Films	Admissions for Foreign Films	Share of Admissions for Foreign Films
2010	41,064,394	252	65	21,706,524	53%	187	19,357,870	47%
2009	36,899,954	255	69	18,790,700	51%	186	18,109,254	49%
2008	38,465,046	265	50	23,074,291	60%	215	15,390,755	40%
2007	31,161,700	247	40	11,875,820	38%	207	19,285,880	62%
2006	34,860,844	238	34	17,800,496	51%	204	17,060,348	49%
2005	27,250,989	221	27	11,441,856	42%	194	15,809,133	58%

Turkish Ministry of Culture and Tourism’s Production Support:

The support of the funding program introduced by the Ministry of Culture and Tourism in 2005, remains to be the only national support mechanism for local productions. Some of the data on this support over the five years is as follows:

Number of Films Received Support from Turkish Ministry of Culture and Tourism General Directorate of Intellectual Property and Cinema				
Year	Feature	First Feature	Post-Production	Total
2005	14	0	0	14
2006	10	8	1	19
2007	24	11	6	41
2008	16	14	2	32
2009	16	11	5	32
2010	15	17	7	39

The Average Amount of Support Given by Turkish Ministry of Culture and Tourism General Directorate of Intellectual Property and Cinema			
Year	Feature	First Feature	Post-Production
2005	95,194 €	0 €	0 €
2006	101,889 €	138,889 €	16,667 €
2007	154,067 €	119,377 €	27,375 €
2008	121,982 €	107,382 €	15,825 €
2009	130,056 €	93,001 €	26,505 €
2010	176,942 €	107,957 €	30,161 €

In 2010, of the 65 new Turkish films released 10 of them had received support from Turkish Ministry of Culture and Tourism's production and post-production supports. This table gathers the data on these supported films.

The support of Ministry of Culture and Tourism to films released in 2010						
	Film's Title	Support Year	Support Type	Support Amount (TL)	Support Amount (Euro)²	2010 Admissions
1	Köprüdekiler (Men on the Bridge)	2007	Documentary Production	30,000	16,871 €	2,702
2	Kara Köpekler Havlarken (Black Dogs Barking)	2008	First Feature	200,000	105,498 €	Not disclosed by the producer
3	Eşrefpaşalılar	2008	Feature	200,000	105,498 €	486,833
4	Yüreğine Sor (Ask Your Heart)	2009	Feature	225,000	104,626 €	144,749
5	Ses (The Voice)	2009	Feature	200,000	93,001 €	56,630
6	Memlekette Demokrasi Var	2010	Feature	400,000	201,071 €	71,566
7	Bal (Honey)	2010	Post-Production	60,000	30,161 €	31,910
8	Son Mevsim: Şavaklar (The Last Season: Shawaks)	2010	Post-Production	60,000	30,161 €	6,859
9	Kavşak (The Crossing)	2010	Post-Production	60,000	30,161 €	18,735
10	Çoğunluk (Majority)	2010	Post-Production	60,000	30,161 €	22,834
11	Anadolu'nun Kayıp Şarkıları (Lost Songs of Anatolia)	2009	Post-Production	65,000	30,225 €	12,277

Besides supporting national productions, in order to increase international productions in Turkey and subsidize co-productions, Turkish government introduced a tax incentive scheme to attract foreign productions in 2009. This scheme allows companies with bases abroad to rebate the VAT's of their costs occurred in Turkey. On average VAT Tax in Turkey is 18%. At the moment there is no case which benefitted from this new incentive.

Turkey does not have a law on cinema and there are many legislative holes regarding the intellectual property rights in audiovisual productions. Turkish film industry has been organizing as Turkish Cinema Council (Türkiye Sinema Konseyi) to form a civil body to make demands for further institutional and legislative support mechanisms. At the moment the council's top priority is to make their draft law to found a Turkish Cinema Institution part of the parliament's legislative agenda.

Internationally acclaimed emerging young directors and producers from Turkey have formed New Cinema Movement in 2010. This movement aims to intensify co-operation, solidarity and

² The TL amounts were converted to Euro amounts through the annual average Euro/TL exchange rate of the year the support is given.

communication between young filmmakers for alternative production and distribution models in Turkey. The guilds and the trade union for audiovisual sector in Turkey are not as powerful as their counterparts in Europe and U.S. These institutions have been organizing and mobilizing in the last few years to become stronger organizations.

Distribution:

In distribution free market conditions apply for distribution and no subsidies or incentives are involved. As of 2010 there are 19 Distribution Companies in Turkey. 17 of them are domestic companies. UIP and WB have their Istanbul offices since 1992. Fox Films are distributed by the local company, Tiglon. More than 70 % of the market are shared among 4 distributors: Özen Film, UIP, WB, Tiglon. Besides TV and DVD sales as a new source of revenue for distributors and producers, IP TV & VOD exist since 2009.

European Co-Productions:

Turkey has been a member of Eurimages since March 1990. With Eurimages the annual average has been 4 majority co-productions and 2 minority co-productions.

Out of 69 Turkish films released in 2009 only *Süt (Milk, Semih Kaplanoğlu)*, *Pandora's Box (Pandora'nın Kutusu, Yeşim Ustaoglu)* and *11'e 10 Kala (10 to 11, Pelin Esmer)* had European co-producers. Majority Co-productions are usually with Greece, Bulgaria, Hungary, Germany, and France. No regular public support exists for minority co-productions. Minority co-productions are usually financial co-productions with Balkan countries.

TV:

Since the deregulation of the monopoly of the public broadcasting in 1990 TV productions and ad films industry have been important sites for building the technological and human capital for Turkish Cinema. Although TV networks do not commission TV films, there is a big market for TV series. Recently Turkish TV series have started to access Middle Eastern, North African and Balkan markets.

2010 Turkish Film Industry Fact Sheet

Average price per ticket	9.26 TL / 5 €
Loaf of Bread in Istanbul	0.50 €
Average Beer Price at a Bar	3.5 €
Number of screens (2009)	1.679
Total Number of Films Released (2010)	252
Local Films Released (2010)	65
Population (2010)	73 million
Total Admissions (2009)	36,899.954
Total Admissions (2010)	41,064,394
Box Office Gross (2010)	200,000,000 € (€ / TL =1,9)
Box Office Gross (2009)	140,000,000 € (€ / TL =2,2)
Admissions for Local Films (2010)	21,706,524
Admissions for Local Films (2009)	18,790,700
Admissions for Local Films (2008)	23.074.291
Share of Local Films (2009)	51%
Share of Local Films (2010)	53%
Digital 3D Cinema Screens (2009)	62
Average Budget for Local Productions:	500,000 €
Ministry of Culture and Tourism's Production Support (2010)	(15 features, 11 first features)
INTERNATIONAL SUCCESS (2002-2011)	
2011: Bizim Büyük Çaresizliğimiz (Our Grand Despair) by Seyfi Teoman competes at Berlinale	
2010: Çoğunluk (Majority) by Seren Yüce wins Lion of the Future at Venice Film Festival	
2010: Bal (Honey) by Semih Kaplanoğlu wins Golden Bear in Berlin Film Festival	
2009: Pandora'nın Kutusu (Pandora's Box), Yeşim Ustaoglu wins Golden Shell–Best Film and Best Actress Awards at San Sebastian Film Festival	
2009: Uzak İhtimal (Wrong Rosary) by Mahmut Fazıl Coşkun wins Tiger Award at Rotterdam Film Festival	
2008: Üç Maymun (Three Monkeys) by Nuri Bilge Ceylan wins Best Director at Cannes Film Festival	
2008: Gitmek (My Marlon and Brando) by Hüseyin Karabey wins Best New Narrative Filmmaker Award at Tribeca Film Festival	
2006: İklimler (Climates) by Nuri Bilge Ceylan wins FIPRESCI Prize at Cannes Film Festival	
2002: Uzak (Distant) by Nuri Bilge Ceylan wins Grand Prix and Best Actor Prize at Cannes Film Festival	

