

Turkish Film Industry 2015 Report

Although came alive in the middle of the 1990s, Turkish film industry's heydays were the 2000s in terms of productivity and success on a national and international level. Whilst a total of 321 films were released in 2013, 86 of which were Turkish, a total of 357 films were released in 2014, and 108 of them were local productions. In 2015, there was a leap forward: 402 films were released and 136 of them were Turkish. Thus, since 1983, for the second year in a row, more than 100 local films have been theatrically released in Turkey.

In 2014, the number of admissions for 108 Turkish films was 35.781.569. In 2015, 34.273.257 tickets were sold for 136 Turkish films. Compared to 2014, there was a 25% increase in the total number of theatrically released films, yet a 4% decrease in the number of admissions. Market share for local films decreased one percent, to 57% from 2014 to 2015. While the year 2015 witnessed one of the highest number of admissions in the last twenty five years, Turkey was observed to fall behind European countries in terms of admissions, with proportion to the population. The country still has a small film market compared to its population of 75 million. As such, Turkey has a high potential for growth and it is very important to mention that Turkish films still retain the strength to dominate local box office.

Distribution

Free market conditions apply to the Turkish film distribution industry, with no subsidies or incentives. 19 distribution companies have been active in Turkey, among which UIP, WB and Pinema dominate the market.

Since October 2013, virtual print fee (VPF) application has been operated. Due to the structure of Turkish film industry, producers pay VPF. However, there is no consensus in the industry regarding the method of payment.

Among the 402 new releases in 2015, *Düğün Dernek 2: Sünnet* became the most watched film with 6.068.147 admissions. In 2015, 8 of the top 10 films at the box office were Turkish productions. In spite of this fact, the total number of admissions for these eight films represent 51% of total admissions for the 136 new Turkish releases. Looking at this picture, it goes without saying that increases in the number of productions and admissions do not support each other in the Turkish cinema sector. Although Turkish cinema manages to create popular films that draw millions of people to movie theatres in recent years, films that are not competitive in a commercial sense can only reach limited admission figures.

In November 2013, Turkey was introduced to a new distribution model to serve for independent films that previously had to struggle to find a theatre for screening. Başka

Sinema (Alternative Cinema) offered a new distribution model for national and international films that were soon embraced by the audience. Since its foundation, Başka Sinema screened more than 100 independent films in select theaters.

2005-2015 Theatrical Release Data								
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 Admissions for Foreign Films
2015	60.228.409	402	136	34.273.257	57%	266	25.955.152	43%
2014	61.248.838	357	108	35.781.569	58%	249	25.467.269	42%
2013	50.405.020	321	86	28.990.793	58%	235	21.414.227	42%
2012	43.935.763	281	61	20.487.442	47%	220	23.448.321	53%
2011	42.298.500	288	70	21.222.541	50%	218	21.075.959	50%
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%

Support

A considerable increase has been recorded in the production of Turkish films thanks to the support provided by the Ministry of Culture and Tourism since 2005 and the increasing admission numbers for Turkish films. While only 9 Turkish films were released in 2002, this figure has increased to 108 in 2014 and 136 in 2015. The support from the Ministry of Culture and Tourism was the only national support mechanism for local productions until 2015. Yeni Film Fonu (New Film Fund) which was launched last year by non-profit cultural institution Anadolu Kültür and İstanbul Independent Film Festival, started to support films.

Besides the support for national productions, an amendment was made to the VAT law in 2009 in order to increase international productions in Turkey and subsidize co-productions. This change in the legal infrastructure allowed for companies that are based abroad to rebate the VAT for their expenses incurred in Turkey. Best Picture Oscar winner *Argo* and latest James Bond movie *Skyfall* had scenes shot in Turkey. Also, many scenes of Russell Crowe’s directorial debut, *The Water Diviner* (2014) were shot in Istanbul and Çanakkale. Apart from this, the General Directorate of Intellectual Property and Cinema is drafting a new law to allow for foreign films to be shot in Turkey. For detailed information you can visit the website: <http://www.sinema.gov.tr>

In 25 June 2012, a new declaration by the Ministry of Economy came into force that would support the service export which earns foreign exchange. With the regulations in the declaration, it was expected that film industry would receive support for distribution and marketing. However, the demands of the industry and the content of the declaration did not overlap, and as a result, the industry could not benefit from these new regulations.

While guilds and trade unions for the audiovisual industry in Turkey are not yet as powerful as their counterparts in Europe or the USA, there are 10 active institutions. With the new regulations in the intellectual property law, these institutions’ activities and efficiency are expected to increase. Besides these institutions, a movement named Young Turkish Cinema was initiated in 2010 by young Turkish directors and producers, which aims at increasing cooperation, communication and solidarity between young filmmakers and supporting the development of various production and distribution models.

In 2015, 24 out of 136 newly released Turkish films have received support from the Turkish Ministry of Culture and Tourism’s production and post-production funding. The following table gathers data on the films supported by the ministry:

Support from Turkish Ministry of Culture and Tourism General Directorate of Cinema for the Films Released in 2015						
	Film’s Title	Support Year	Support Type	Support Amount (TL)	Support Amount (Euro)¹	Admissions
1	Nefesim Kesilene Kadar (Until I Lose My Breath)	2012	First Feature	200.000	62.500	4.106
2	Kuzu (The Lamb)	2012	Feature	350.000	109.375	3.480

¹ The TL currencies were converted to Euro through the average Euro/TL parity.

3	Neden Tarkovski Olamıyorum? (Why Can't I be Tarkovsky?)	2012	Feature	300.000	93.750	2.410
4	İçimdeki Balık (The Fish in Me)	2012	Feature	250.000	78.125	234
5	Beni Sen Anlat (You Tell Them About Me)	2012	Feature	300.000	93.750	238
6	Dolanma (Entanglement)	2012	First Feature	200.000	62.500	642
7	Çekmeköy Underground	2012	First Feature	200.000	62.500	1.115
8	İyi Biri	2013	Feature	375.000	117.187	6.968
9	Çalsın Sazlar (Let the Band Play)	2013	Feature	400.000	125.000	28.408
10	Sarmaşık (Ivy)	2013	Feature	250.000	78.125	21.644
12	İçimde Akan Nehir	2013	First Feature	250.000	78.125	5.429
13	Yola Çıkmak	2013	First Feature	250.000	78.125	597
14	İçimdeki İnsan (To Kill a Rat)	2014	Feature	400.000	125.000	1.601
15	Abluka (Frenzy)	2014	Feature	510.000	159.375	18.527
16	Mustang	2014	First Feature	300.000	93.750	23.344
17	Son Mektup (The Battle of Canakkale)	2014	Feature	1.750.000	546.875	810.138
18	Çılgın Kamp	2014	Feature	500.000	156.250	5.254
19	Firak	2014	Feature	350.000	109.375	837
20	Guruldayan Kalpler	2014	Feature	300.000	93.750	4.023
21	Uzaklarda Arama	2015	Feature	500.000	156.250	87.007
22	Bana Adımı Sor	2015	Feature	600.000	187.500	103.962

23	Mavi Gece	2015	Feature	450.000	140.625	15.273
24	Pırdino Sürpriz Yumurta	2015	Feature	450.000	140.625	127.467

Number of Films Received Support from Turkish Ministry of Culture and Tourism General Directorate of 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
2011	23	23	12	58
2012	25	11	5	41
2013	15	7	0	22
2014	39	15	0	54
2015	35	14	0	49

Average support received from Turkish Ministry of Culture and Tourism General Directorate of Cinema			
Year	First Feature	Feature	Post Production
2005	52.976 €	0	0
2006	61.133 €	83.333 €	10.000 €
2007	91.319 €	70.757 €	16.225 €
2008	77.083 €	67.857 €	10.000 €

2009	93.229 €	66.666 €	19.000 €
2010	117.333 €	71.588 €	20.000 €
2011	84.057 €	73.913 €	24.166 €
2012	109.333 €	69.700 €	22.666 €
2013	129.636 €	90.476 €	0
2014	168.589 €	102.380 €	0
2015	161.607 €	92.634 €	0

European Co-Productions

Among the films released in 2015, 6 of them were co-productions: *Frenzy (Abluka)* by Emin Alper, *Mustang* by Deniz Gamze Ergüven, *Nefesim Kesilene Kadar (Until I Lose My Breath)* by Emine Emel Balcı, *Kuzu (The Lamb)* by Kutluğ Ataman, *Ertuğrul 1890* by Mitsutoshi Tanaka and *Dolanma (Entanglement)* by Tunç Davut.

There is a significant increase in the number of Turkish productions, but the same increase can't be observed in the number of co-productions. Since there is no direct support system for co-productions, the existing support systems are not operated with the participation of producers, and a portfolio of producers who are willing to make international productions cannot be created. Due to regulations, the support system of Ministry of Culture and Tourism is only open to co-productions if the film's main producer is a Turkish citizen. Besides, as a country that is still a candidate, Turkey cannot benefit from Creative Europe programme, which only supports audiovisual industries in the EU-member countries.

Television

Since the de-regulation of the monopoly of public broadcasting and the establishment of private TV channels in 1990, TV productions and advertisement films have been important venues for developing technological and human capital for the Turkish Cinema. Although TV networks do not commission TV films, there is a huge market for TV series. Recently, Turkish TV series have started to access the Middle Eastern, North African and Balkan markets, where they are followed with a considerable interest.

Turkey – Film Industry Fact Sheet (2015)

Average Price per Ticket	11,27 TL / 3,52 €
Number of Screenings	2290

Total Number of Films Released	402
Total Number of Local Films Released	136
Total Admissions	60.228.409
Box Office Gross of Local Films	362.560.588 TL / 113.300.184 €
Box Office Gross	678.557.424 TL / 212.049.195 €
Admissions for Local Films	34.273.257
Share of Local Films	57%
INTERNATIONAL ACCLAIMS (2002-2015)	
<p>2015: Mustang by Deniz Gamze Ergüven was Foreign Language Film Oscar nominee; Abluka (Frenzy) by Emin Alper won Jury Prize at Venice Film Festival; Nefesim Kesilene Kadar (Until I Lose My Breath) by Emine Emel Balcı was screened at the Forum section of the Berlin Film Festival; Kar Korsanları (Snow Pirates) by Faruk Hacıhafizoğlu was in Generation Competition of the Berlin Film Festival; Salı (Tuesday) by Ziya Demirel was in Cannes Film Festival's official short film competition.</p>	
<p>2014: Kış Uykusu (Winter Sleep) by Nuri Bilge Ceylan won Golden Palm at Cannes Film Festival, Mavi Dalga (Blue Wave) by Zeynep Dadak and Merve Kayan was in Generation Kplus Competition of the Berlin Film Festival, Sesime Gel (Come to my Voice) by Hüseyin Karabey was in Generation 14plus Competition of the Berlin Film Festival, Seaburners (Kumun Tadı) by Melisa Önel was screened at the Forum section of the Berlin Film Festival, Kuzu (The Lamb) by Kutluğ Ataman was screened at the Panorama section of the Berlin Film Festival, short film Ağrı ve Dağ (Ağrı and the Mountain) by Hasan Serin was in Generation Kplus Competition of the Berlin Film Festival, Sivas by Kaan Müjdeci won Jury Prize at Venice Film Festival, and Song of My Mother by Erol Mintaş won Best Film and Best Actor prizes at Sarajevo Film Festival.</p>	
<p>2013: Zerre (Particle) by Erdem Tepegöz won Best Film and Best Actress at Moscow Film Festival.</p>	
<p>2012: Tepenin Ardı (Beyond the Hill) by Emin Alper won Caligari Film Prize at Berlin Film Festival, and Best Film at Asia Pacific Film Awards; Küf (Mold) by Ali Aydın won Lion of the Future at Venice Film Festival.</p>	
<p>2011: Bir Zamanlar Anadolu'da (Once Upon a Time in Anatolia) by Nuri Bilge Ceylan won Grand Jury Prize at Cannes Film Festival.</p>	
<p>2011: Bizim Büyük Çaresizliğimiz (Our Grand Despair) by Seyfi Teoman was in competition at Berlin Film Festival.</p>	
<p>2010: Çoğunluk (Majority) by Seren Yüce won Lion of the Future at Venice Film Festival.</p>	
<p>2010: Bal (Honey) by Semih Kaplanoğlu won Golden Bear in Berlin Film Festival.</p>	
<p>2009: Pandora'nın Kutusu (Pandora's Box) by Yeşim Ustaoglu won Golden Shell - Best Film and Best</p>	

Actress Awards at San Sebastian Film Festival.
2009: Uzak İhtimal (Wrong Rosary) by Mahmut Fazıl Coşkun won Tiger Award at Rotterdam Film Festival.
2008: Üç Maymun (Three Monkeys) by Nuri Bilge Ceylan won Best Director at Cannes Film Festival.
2008: Gitmek (My Marlon and Brando) by Hüseyin Karabey won Best New Narrative Filmmaker Award at Tribeca Film Festival.
2006: İklimler (Climates) by Nuri Bilge Ceylan won FIPRESCI Prize at Cannes Film Festival.
2002: Uzak (Distant) by Nuri Bilge Ceylan won Grand Prix and Best Actor Prize at Cannes Film Festival.

Sources: Box Office Türkiye, Sinema General Directory, Antrakt