

PUBLIC FUNDING IN THE TURKISH NATIONAL FILM INDUSTRY

A Master's Thesis

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PUBLIC FUNDING IN THE TURKISH
NATIONAL FILM INDUSTRY

The Graduate School of Economics and Social Sciences
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by

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By Adnan Şahin

I certify that I have read this thesis and have found that it is fully adequate, in scope and in quality, as a thesis for the degree of Master of Arts in Media and Visual Studies.

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ABSTRACT

PUBLIC FUNDING IN THE TURKISH NATIONAL FILM INDUSTRY

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M.A. in Media and Visual Studies

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This thesis examines the economic and industrial effects of Turkey's one and only national public film funding scheme, Law 5224, enacted in 2004 and put into practice in 2005 onwards. Adopting an economic film history approach, it analyses a 15-year period (2005–2019) to assess how the funding body's objectives, expectations, and operational framework have influenced film production and the career trajectories of funded directors. Drawing on a compiled dataset created from publicly available sources, the study provides both macro-level statistical analysis and micro-level career-based evaluation of the funding scheme and its impact on directors' career trajectories. The findings indicate that while Law 5224 has contributed to increased production levels in parallel with the industrial growth the Turkish film industry undergoes, the main objective of improving the film industry, and financial expectations from applicants show a misalignment between the public funding body and the private, oligopolist distribution industry. Thus, the structural limitations in Law 5224 hinder its capacity to foster a sustainable, balanced film industry. The research contributes to the underdeveloped literature on the Turkish film industry economics, offering a quantitative study of public funding's industrial role and its interaction with private market dynamics.

Keywords: Public Film Funding, Turkish National Film Industry, Law 5224, Film Distribution, Economic Film History, The Ministry of Culture and Tourism

ÖZET

TÜRK SİNEMASINDA DEVLET DESTEKLERİ

Şahin, Adnan

Yüksek Lisans, Medya ve Görsel Çalışmalar

Tez Danışmanı: Doçent Dr. Colleen Bevin Kennedy-Karpat

Ağustos 2025

Bu tez, 2004 yılında yürürlüğe giren ve 2005'ten itibaren uygulanmaya başlayan, Türkiye'nin tek ulusal kamu film destek programı olan 5224 sayılı Kanun'un ekonomik ve endüstriyel etkilerini incelemektedir. Ekonomik film tarihi yaklaşımı benimsenerek, 15 yıllık bir dönem (2005–2019) analiz edilmekte ve destek kurumunun amaçlarının, beklentilerinin ve operasyonel çerçevesinin film yapımına ve destek alan yönetmenlerin kariyer rotalarına nasıl etki ettiği değerlendirilmektedir. Kamuya açık kaynaklardan derlenerek oluşturulmuş bir veri setine dayanan çalışma, hem makro düzeyde istatistiksel bir analiz hem de mikro düzeyde yönetmenlerin kariyerleri üzerinden fonlama sisteminin etkilerini irdeleyen bir değerlendirme sunmaktadır. Bulgular, 5224 sayılı Kanun'un Türk sinema endüstrisinin yaşadığı endüstriyel büyümeyle paralel olarak üretim seviyelerinin artmasına katkıda bulunduğunu, ancak sektörün geliştirilmesi amacının ve başvuru sahiplerinden finansal beklentilerin kamu destek kurumu ile özel, oligopolist dağıtım sektörü arasında bir uyumsuzluk gösterdiğini ortaya koymaktadır. Bu nedenle, 5224 sayılı Kanun'un yapısal sınırlılıkları, sürdürülebilir ve dengeli bir film endüstrisini teşvik etme kapasitesini engellemektedir. Araştırma, Türk sinema endüstrisi ekonomisine dair sınırlı gelişmemişteki literatüre katkı sağlamakta; kamu desteğinin endüstriyel rolünü ve özel pazar dinamikleriyle etkileşimini nicel bir çalışma olarak sunmaktadır.

Anahtar Kelimeler: Sinemada Devlet Destekleri, Türk Sineması, 5224 Sayılı Kanun, Film Dağıtımı, Ekonomik Film Tarihi, Kültür ve Turizm Bakanlığı

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CHAPTER I

INTRODUCTION

Since its emergence, cinema has been situated in a dual paradigm where its cultural / artistic status is one end of the spectrum, and its commercial status is the other. Because of its technology-oriented nature, its expectation for collective consumption, and its artistic capabilities, critical approaches to cinema are divided into two loose categories, artistic or commercial based on the people, country, or time-period in focus. However, the boundaries separating the artistic nature and commercial status of film are not sufficient to regard it as two entirely different approaches. The artistic and commercial positions are intertwined and mutually influential on one another. Even though products of cinema “are cultural, public as well as private goods, with a symbolic (historical, national, linguistic, social) significance that cannot be reduced to a mere commodity” (Jackel, 2003, p. 1), in order to understand how these cultural products fall within the wider sociological sphere of audience, its economic and commercial status should not be overlooked.

The economy surrounding cinema creates a foundation for the entire ecosystem, regardless of the products’ commercial or artistic objectives. The economics of film determine its infrastructure, its foundations, and therefore its potential (Monaco, 2009, p. 289). Therefore, understanding cinema in its entirety requires industrial and economic approaches as well in order not to neglect its commerciality, since cinema’s industrialization took much less time than its consideration as the seventh form of art. Therefore, the queries regarding whether cinema is an art or a commerce have one definite answer: “They exist together” (Tanrıöver, 2011, p. 13).

In spite of this dual nature, the notion around Turkish cinema tends to be distinctly separated. There are only a handful of scholarly works focusing on the industry rather

than its thematic values. Especially for the era after the 2000s, the majority of works focusing on modern Turkish cinema, also known as New Turkish Cinema or The Renaissance, tend to look at the aesthetic features following visual film analysis methods. One potential reason for this inclination is the way Turkish cinema is growing. After the period of stagnation, in the early 90s, emerging directors managed to lead Turkish cinema towards a more art-oriented place by reflecting their personal concerns through filmic languages. Such an approach not only turned film into a viable form in Turkey but also attracted the European festival spheres, therefore increasing the popularity of Turkish cinema within the global arthouse cinema scene. These films were realized with much less budget compared to their European counterparts and paved the way for the New Turkish Cinema. Hence, this overall artistic spark of the era also urged scholars to analyze the period within the framework of its artistic features. The economy is rarely mentioned, except for some notable works stated in the literature review section. Many of the works about New Turkish Cinema mention the economy by stating the increasing production and audience numbers, without delving into the system itself (Dönmez-Colin, 2008; Suner, 2002).

No film, people, or period regarding cinema can be entirely separated from the economics surrounding it (Allen & Gomery, 1985). Therefore, even the artistic launch of New Turkish Cinema has economic and industrial aspects behind it, similar to the European Art Cinema, within which Turkey has managed to find a place. One of the most important industrial aspects in the European film industry is public support initiatives, which have turned into a “long tradition” (Jackel, 2003; p.1). The Turkish film industry, and the growth in production, is also related to public funding bodies becoming available during the 90s. Namely Eurimages, the Council of Europe’s European Cinema Support Fund, is one of the economic reasons behind the industrial growth during the New Turkish Cinema. Turkey’s membership started in 1990, and Eurimages has funded Turkish productions since then, enabling Turkish directors to produce films more easily than in earlier periods. However, the growing trend of production and audience numbers since the early 2000s should not be solely related to Eurimages. As a pan-European support scheme, Eurimages’ impact is crucial for the initial spark, yet its impact on the overall national industry and continuous growth is debatable. Since “a national cinema is

a particular industrial structure; a particular pattern of ownership and control of [...] human resources and capital” (Hjort & MacKenzie, 2000, p. 60), national initiatives that have direct influence on domestic production and consumption bear more importance for understanding this growth.

Turkey currently has one operational funding scheme: Law No. 5224. It is offered by a subdivision of the Ministry of Culture and Tourism, the General Directorate of Cinema. It was enacted in 2004, and the first batch of funded films was released in 2005. The time it came into force overlaps with the early New Turkish Cinema period, positioning this scheme as one of the main reasons for the growing production. Law 5224’s sole focus is Turkish cinema, which makes it much more locally influential than pan-European funding schemes for domestic production. Therefore, this thesis is centered around Law 5224 and its operation in Turkey.

The approach here is not thematic, artistic, or cultural. This thesis is an attempt to fill the gap in Turkish film industry literature by analyzing the economy of Law 5224 and its impact on the wider Turkish film industry. The great majority of scholarly works focusing on public film support in Turkey are also in Turkish, and this thesis attempts to fill this gap by questioning Law 5224’s place in the Turkish film industry and its impact on directors’ career formations. Therefore, this thesis only focuses on Law 5224 and films funded through this funding scheme, without shifting to genre, theme, or aesthetics. The aspects in focus are only financial. Similarly, political aspects are also excluded, even though there might be some political connotations that could have been included. Yet, I believe a total industrial analysis is a prerequisite for further political and cultural questions.

The aim of Law 5224 is stated clearly in the law itself, “developing and strengthening the cinema industry in the fields of education, investment, enterprise, production, distribution and exhibition” (Law No. 5224, Article 1). Accordingly, in this thesis, the Ministry’s attempt to develop the cinema industry, especially in the fields of production and distribution, is examined. Research takes the past 15-year period, from its start to 2019, into account, and the economic variables that show the changes it caused, along with the changes in the law itself, are at the center of this study. The main concern is what Law

5224 made possible for the people in the industry. Similar to what Colin Crisp argues, “not all things are possible at all times. The conditions of production circumscribe more or less tightly and determine more or less precisely what can or cannot be done. [...] Unrealized projects and limited output serve as a constant reminder that a set constraint existed quite independent of the will of any individuals involved in the process” (Crisp, 1993, Introduction, XIII-XIV). Therefore, the main attempt is to investigate the industrial and economic circumstances and the ways in which the Turkish public funding body has an impact on film production and distribution in Turkey, in light of what is possible and what is not.

The basic economic aspects included in this research chronologically follow the basic value chain argued by Allen and Gomery in *Film History: Theory and Practice* (1985), namely production, distribution, and exhibition. Funding is taken into account as the first step for production, and how their release schedules are followed, in order to examine how they are distributed. Therefore, exhibition is not regarded as a separate sector but is thought to be intertwined with distribution based on their interrelated nature in the Turkish film industry. The main economic variables are annual funding amounts, the number of funded projects, box office performance, and further production capabilities of funded directors. The 15-year period is examined using an economic film history approach in order to see whether sustainable production environments are possible within the Law 5224 framework and the tangential private distribution sector.

As the literature review section also points out, there are very limited works focusing on Law 5224. Public film funding in Turkey is a highly understudied topic, and the main reason is the paucity of data. The most comprehensible dataset available is Yamaç Okur’s collection of funded films between 2005 and 2023. The dataset for this research combines Okur’s dataset with box office data and other information about directors from The Movie Database using basic Python and Excel tools, which are more thoroughly explained in the methodology section.

This thesis follows a simple top-down structure. Chapter II is the literature review, and Chapter III is the methodology. Key academic literature about the general film industry studies and the potential path for studying the industry is outlined. Then, with a narrowed

scope, the topic shifts to public film funding literature to understand how funding bodies in other countries are studied. This section highlights certain methodologies for looking at funding bodies in an academic context. Each funding body is different in terms of how it operates in the respective country; thus, many of these works are only able to demonstrate methodological concerns, yet also highlight the tendency to have a national focus in public funding studies, or even general film industry studies. Co-production is a section separate from national public funding, as it functions differently. Although co-production appears in a very small portion of this study, public co-production literature is included to show its function in the industry and to correlate with its limited impact on Turkish cinema. The last section is devoted to distribution studies in order to show both the theories of how distribution is decisive in other industrial sectors, in this case for funding and production, and also to exemplify its private economy nature, contrary to the public function of Law 5224. Works focusing on Turkish cinema take place in each sub-heading, yet their scarcity is visible and accordingly argued through reviewing key works regarding the research period.

Chapter IV is derived from the question of how Law 5224 operates as the only public film funding body in the Turkish film industry. It offers a bird's-eye view of Law 5224 by examining the industry and funding scheme as a macro-level statistical analysis. Drawing from the dataset, how Law 5224 operated in the 15-year period is laid out, along with its economic implications. This chapter examines the economic variables such as the number of funded films, annual funding budgets, and box office performances in a historical structure, highlighting differences between and potential visible patterns between years. It also compares support categories and shows the different operations for different categories. It starts off by comparing feature length production categories with works of other formats, then shifts to feature length production only for the rest of the chapter. After close inspection of economic variables, it moves to the distribution sector to see how it accompanies and affects the aforementioned circumstances. Chapter IV presents and summarizes the data to demonstrate how Law 5224 economically operates. Apart from certain inferences, Chapter IV also accompanies Chapter V to narrow the focus for a better portrayal of industrial situations in the Turkish national context.

Chapter V examines Law 5224 more closely to answer how public funding affects directors' career trajectories by examining director-level micro impacts rather than the wider policy-level industry analysis. Adding on to the dataset used in Chapter IV, Chapter V additionally includes privately financed films of funded directors in order to portray the career trajectories of funded directors. Hence, Chapter V focuses more on how public film funding in Turkey shapes the career formations of filmmakers. Directors are grouped in terms of their positions in the industry and their involvement with the funding body. For instance, the number of films a director made before funding is calculated and grouped in three categories: debut directors, early career directors, and established directors. Then, certain aspects such as box office performance, consecutive funding, and consecutive production are analyzed. Two support categories, feature length film production, and first film production are compared in order to examine whether Law 5224 allows directors to form a career as directors in the industry after first funding. Rates of consecutive funding and further production capabilities' correlation to financial success; accordingly, the relation of financial success with distribution is at the center of this chapter. The main objective is to investigate career formations before and after funding and reveal the visible impact of Law 5224 and understand if the funding scheme is compatible with the private distribution sector. Ultimately, the concern is to figure out what is possible in terms of career establishment for directors after first funding and surrounding funding-adjacent industrial circumstances that create these possibilities.

This thesis is an economic film history study of Law 5224, the only public funding body in Turkey, through a quantitative study. It covers the 15-year period between 2005 and 2019, and its main purpose is to understand how Law 5224 works. Main research goals that branch into deeper connections are to comprehend the law's designated requirements, expectations, and aims; evaluate if these expectations are met by applicants; and determine how this alignment between expectations and industry players impacts the career formation of directors, along with the Ministry's capability to attain a sustainable and improved film industry. This research acts as a basic portrayal of public funding and the current industrial landscape in Turkish cinema.

CHAPTER II

LITERATURE REVIEW

2.1. Introduction

Cinema has been in the scope of countless academics and researchers shortly after its first acceptance as a visual medium. Hence, the academic research surrounding cinema has a myriad of different approaches, types, and concerns. No sooner, or even simultaneously, was cinema accepted as a form of art, than its process of industrialization had begun, turning the visual medium into a commodity whose products can be bought and sold. The entertainment value of cinematic products is accepted along with its artistic value, generating an everlasting dualist “tension between commerce and creativity” (Hesmondhalgh, 2013, p. 82). While a great majority of academic contributions acutely emphasize cinema’s aesthetic and cultural quality and how it utilizes its medium-specific tools to carry out its artistic purposes, film industry studies understand and theorize the commercial status of film by focusing more on financial variables and circumstances that shape it. “Before the film can be considered as a cultural object, it must first be conceived as an industry” (Moran, 1996, p. 1) despite the predominance of “text-centric criticism” analyzing the filmic form and aesthetics, interrogating meaning or representation (Allen & Gomery, 1985; McDonald, 2013, p. 147). However, the academia surrounding industry studies does not, mostly, reject film’s artistic state. Rather, this discourse fosters discussion related to its economic/industrial value by narrowing it down into a commodity that is produced, distributed, and exhibited.

Anne Jackel, who analyzed *European Film Industries* (2003), believes in the inability to reduce film into a mere commodity since “the fact that a film is commercial does not prevent it from being cultural. But being a cultural activity also does not exclude its commercial character” (Murschetz, Teichmann & Karmasin, 2018, p. 7). The culturally symbolic value of film remains apparent within industrial studies, yet these analyses make the products of cinema more material, so that the economic variables that are understood through industrial works can be utilized by others who pursue social or ideological studies (Allen & Gomery, 1985). As Nitin Govil conceptualizes, rather than considering industries as “pre-given and stable formations, Film and Media Studies might take up a more foundational conceptual challenge” (Govil, 2013, p. 173). Industry studies, as a subfield of cultural, film, and media Studies, asks “how are industries made up?” by specifically focusing on industrial structures, processes, and practices through economic value of creativity in media economics, with an eye towards industry policy and practice (McDonald, 2013; Govil, 2013). There are different methods to achieve this, such as Production Studies¹, Critical Media Industry Studies², Culture Industry Studies³, or Economic Film History, of which the latter is applied in this thesis.

Media industry studies propose a spectrum in which culture and commerce are situated at the two ends, similar to the inherent tension in culture industries. While some methods and theories focus on the cultural impacts of industrial circumstances, others focus on basic economic variables and their change in a historical context. This study mainly follows the value chain of the film business, such as funding, production, distribution, and exhibition, within their economic variables through numerical/analytical data. Main triangle, production, distribution, and exhibition, or “basic descriptive model” (Allan & Gomery, 1985, p. 132; Spicer, 2018, p. 429), is the main structure of how cinematic products are realized and accordingly a framework to describe the economic/industrial

¹ Check Mayer, V., Banks, M.J., & Caldwell, J.T. (Eds.). (2009). *Production Studies: Cultural Studies of Media Industries* (1st ed.). Routledge or Mayer, V. (2011). *Below the Line: Producers and Production Studies in the New Television Economy*. *Duke University Press*.
<https://doi.org/10.1215/9780822394136>

² Havens, T., Lotz, A.D. and Tinic, S. (2009), Critical Media Industry Studies: A Research Approach. *Communication, Culture & Critique*, 2: pp. 234-253

³ Hesmondhalgh, D. (2019). *The Cultural Industries*. Sage.

situation. In my case, public funding is the main aspect in focus since it is a crucial part of the value chain and film production in the national context.

Film industries tend to function differently regarding the nation in scope. Even though the path of production, distribution, and exhibition remains similar in a range of national/transnational contexts, each of these sections is applied, controlled, and regulated differently. Each must account for national policies or the operation of other industry actors such as private production and distribution companies, movie theaters, sales agents, etc. The main reason for a national focus is the same dual tension between culture and commerce, tailored to a coherently presenting context. Nations take policy actions “to reconcile the split between culture and industry, thus tackling cinema as a composite practice and acknowledging its ambivalent status as industry craft, entertainment, and art (Vinuela, 2024, p. 55). Thus, countries with a “mixture of economic and cultural interest” intervene in the industrial workings with “loans, tax incentives, etc. to have a national cinema,” which creates a “mesh of culture and economy” that is specific to the nation in scope (Vitali & Willemen, 2006, p. 46; Elsaesser, 1989). “National contexts continue to define cultural policy and industry practice” because they are socially and culturally important and too valuable to be left to the private market forces (Jackel, 2003, p. 1; Rasmussen, 2018, p. 106). This is why national cinema, or domestic film industries, can be defined in economic terms, through broad questions of “Where are these films made, and by whom? Who owns and controls the industrial infrastructures, the production companies, the distributors, and the exhibition circuits?” (Hjort & MacKenzie, 2000, pp. 52-53). Therefore, film industry studies tend to have a domestic focus, if not a wider regional focus, in order to analyze the economic or industrial circumstance that reflects on the relevant business.

The United States, being the quickest in commodifying and industrializing cinema, also has a plethora of academic research about the Hollywood film industry. Nevertheless, Hollywood’s studio system and its well-established global reach make the insights of Hollywood-centered economic history hard to apply to other national contexts. The essential private businesses scattered around the entire value chain, namely production,

distribution, and exhibition, of cinema in Hollywood, also differ from the perspective of state intervention in the national context.⁴

2.2. Economic Film History

Some literature in Hollywood industry studies provides a framework for the economic film industry approach as valuable examples and the methods and approaches it borrows from different fields, such as economics, business, or film studies. One of the earliest conceptualizations of the historical study of film economics is set forth by Robert Allen and Douglas Gomery in the seminal work *Film History: Theory and Practice* (1985). Cinema, as an industry, has three main sub-industries that are “interdependent yet separate”: production, distribution, and exhibition (Moran, 1996, p. 1). Thus, the process of film production is comprised of this value chain, coined as the basic descriptive model by Allen and Gomery (1985), which is also the main frame of analysis for industrial studies. Then, the economic film historian should accordingly ask “How, when, where, and why were motion pictures produced, distributed, and exhibited?” (Allen & Gomery, 1985, p. 132; McDonald, 2013, p. 148; Spicer, 2022). These questions “could equally apply to all media industries in historical or contemporary contexts” (McDonald, 2013, p. 148). Thereby, economic film history research enlightens the economic circumstances in which films are produced, distributed, and exhibited in terms of the ownership, control, or financial performance in a historical framework. Because “no national cinema, however large or small, has escaped the need for the enormous costs associated with production, distribution, and exhibition” (Allen & Gomery, 1985, p. 132). The need for large amounts of money to function in the film industry has always been prominent, which causes changes in the industry, such as new financing methods or distribution windows, to meet the industry’s inherent demand for capital, and also chain reactions of power balance and ownership. Economic film history, therefore, uncovers these economic changes and circumstances in film industries in a historical framework, also

⁴ Bordwell, D., Staiger, J. & Thompson, K. (1985). *The Classical Hollywood Cinema: Film Style & Mode of Production to 1960*. Columbia University Press)
Balio, T. (Ed.). (1985). *The American Film Industry*. University of Wisconsin Press.

demonstrating the importance of economic considerations for other historical approaches. (Allen & Gomery, 1985; Herbert, Lotz & Punathambekar, 2020).

What Allen and Gomery also suggest two reasons why studying economic film history is hard. The first is the aesthetic tendency in film writing that downplays the economic circumstances. Even though “no film has ever been created outside of an economic context”, studies on filmic form and aesthetics tend to deemphasize the economic aspects (Allen & Gomery, 1985, p. 132). These aspects are quite observable in the academic literature on Turkish cinema. The academic works concerning a similar timespan to this study, those that exclude Yeşilçam and focus instead on New Turkish Cinema, analyze the aesthetic, thematic, and representational inquiries with little touch on the economic/industrial circumstances of those films’ production. Gönül Dönmez-Colin in *Turkish Cinema: Identity, Distance, Belonging* (2008) delves into the themes of identity, gender, and representation in modern Turkish Cinema through an aesthetic study. Asuman Suner, similarly to *New Turkish Cinema: Belonging, Identity Memory* (2002), focuses on New Turkish Cinema in an aesthetic interrogation, focusing on issues of identity, representation, and modernization. Savaş Arslan in *Cinema in Turkey: New Critical History* (2011) has more of a historical framework, covering from Pre-Yeşilçam to New Turkish Cinema with some industrial commentary. He mentions key industrial changes in “Postmortem for Yeşilçam: Post-Yeşilçam, or the New Cinema of Turkey” chapter, but not as detailed as to categorize it as an Economic Film History, and rather as a Critical Film History. Murat Akser and Deniz Bayrakdar’s edited collection, *New Cinema, New Media: Reinventing Turkish Cinema* (2014), has articles ranging from philosophy, aesthetics, and politics. Some chapters have more of an industrial focus, such as Hilal Erkan’s “A New Look at Film Reception: Summer Theatres” as a reception studies, and Tülay Çelik’s “International Film Festivals: A Cinema Struggling to Exist between New Resources and New ‘Dependencies’” as festival studies. The valuable historians of Turkish cinema, including but not limited to Agâh Özgüç, Giovanni Scognamillo, Nijat Özön, Nurullah Tilgen, Rekin Teksoy, and Burçak Evren, have produced works of social or political historiography that briefly mention industrial circumstances, if necessary, without limiting the discussion to the economy and industry. There are countless academics or authors whose works have inarguably contributed to the existing literature,

but few have questioned the industrial circumstances of Turkish cinema, which can be correlated to Allen and Gomery's (1985) second hardship of an economic film history study.

The second reason, which can also be the cause of the first hardship addressing aesthetic tendency in academia, is the "paucity of data". If no records have survived or been protected, then there could be no grounded study of economic history (Allen & Gomery, 1985, p. 134). This situation is also observable in Turkish cinema literature. Turkish cinema lacks an official historical database of industry information (Erkılıç, 2003; Tanrıöver, 2010; Yavuz, 2012; Vitrinel, 2015). The pre-90s period, in particular, lacks any official data concerning box office, admissions, or any other economic variables. The absence of data explains why there are very few industrial analyses of Turkish cinema.

Data collection and access are still issues during this research. The data sources that made this research possible are not from official government databases, but individual collections shared with the public. Box Office Türkiye and Antrakt are important sources for box office and distribution information, while Yamaç Okur's self-published database regarding state funded films in Turkey allows funding-centered research. However, this information is scattered online, which requires manual collection, which limits the focus and length of an industry study due to the time it consumes for data collection. Even though much more is accessible as a result of individuals who collect and share data, the lack of an official government database still limits what is possible in Turkish film industry research.

Allen and Gomery propose two approaches to an economic film history study: Marxist analysis and industry analysis. For the Marxist approach, they argue that the large companies and financial institutions act as a ruling class by dominating the nation's wealth and power. Applying this framework to film economics breeds discussion of power balance and exploitation of economics through imperialism, questioning how large companies or even countries with strong cinematic production exploit the weaker players of the industry, or even countries with weak cinematic power. As this study will follow the industry analysis approach, it is advised to consult Chapter 6 in *Film History: Theory and Practice* (1985) for further understanding of the Marxist approach and Thomas H.

Guback's *The International Film History: Western Europe and America Since 1945* (1969) for a seminal example.

The industry studies approach is different from the Marxist approach in terms of research perspective and the researchers' aim in the study. Industry analysis, in contrast to the Marxist approach, “analyzes only a set of institutions, business enterprises (usually corporations) that desire to maximize profits. [Since] an industry is simply a collection of similar businesses” (Allen & Gomery, 1985, p. 138). This approach utilizes the available economic data as evidence from industry reports, metadata, data visualizations, and other sources. The industry analysis approach allows for the study of the industrial infrastructure of film by identifying the basic conditions of supply and demand and evaluating its market structure, conduct, and performance within the chosen period (Herbert et al., 2020; Spicer, 2022). Therefore, it presents the causes and effects that shape the circumstances of production, distribution, and exhibition in the respective film industry by building upon “extensive archival research and analysis of primary documents” (Herbert et al., 2020, p. 41). However, since the “industrial analyst only seeks to understand economic variables, leaving questions of sociology and ideology to others,” the approach has some advantages and drawbacks. Whereas it provides a strong tool to analyze how corporations behave in the industry, it is limited to economic variables, with nothing social or ideological. “It deals only with the economics ‘half’ of film, enabling future socioeconomic extensions with broader approaches” (Allen & Gomery, 1985, p. 150). Under the light of these concepts, there are multiple examples of economic film history studies that each have a distinct focus in terms of the industry they study and the historical narrative they put forward.

There are four examples that I will discuss and all of them follow Gomery and Allen's economic film history perspective. Colin Crisp's *The Classic French Cinema* (1993) studies the French film industry between 1930-1960 and argues that conditions of production are determined by economic and political constraints independent of the individuals' desire. Therefore, Crisp conducts an economic/political history of mid-20th-century French cinema by analyzing the basic available data, such as box office, cinema attendances, or production numbers, and also conducts interviews with directors to understand the political economic circumstances in the industry. Hence, Crisp's study is a

significant example of a national film industry research with a political economy approach and an economic film history perspective.

Anne Jackel's *European Film Industries* (2003) is another example of an economic film history with a pan-European focus. It covers the early 20th century with a historical overview and then analyzes in depth the economic circumstances of European cinema from the 80s to the late 90s. Jackel touches upon many aspects of the European film industry while discussing Europe's collective struggle to compete with Hollywood in terms of their policy responses. The European national and pan-European funding schemes, distribution/exhibition windows, and the impacts of these policy responses on the industry are studied through public data and policy details. Also, a detailed historical analysis of MEDIA and Eurimages programs clarifies how and why these co-production schemes evolved over the years. In addition, Jackel discusses European initiatives of distribution and exhibition, as well as other points of contact with other industries, such as television funding initiatives. Briefly, *European Film Industries* (2003) proposes an economic film history of Europe, focusing mostly on pan-European initiatives with policy research and basic data analysis. The case studies provide a detailed understanding of the industrial and economic circumstances that are portrayed through industry analysis.

Gerben Bakker's *Entertainment Industrialised: The Emergence of the International Film Industry, 1890–1940* (2008) is another economic entertainment history that covers the emergence and industrialization of filmed and live entertainment. Cinema's market integration and its transition to an industry are studied with a comparative approach covering the United States, Britain, and France, with occasional references to smaller film industries such as Denmark and Sweden. It uses "business history to examine organisations, industrial economics to analyse the industry as a whole and economic history to investigate the origins of cinema and to conceptualise and quantify its effects on the entire economy" (Bakker, 2008, p.5). A wide array of sources such as "company archives, trade magazines and contemporary industry studies, but also government reports, censuses and recent works of other scholars" are used during analysis (Bakker, 2008, p. 7). Allen and Gomery's concepts are prominent in Bakker's study as they point out that there are many instances in the research where description dominates analysis because a great section of the study is devoted to collecting, locating, and combining data

(Bakker, 2008). Yet these descriptions analyze the period's economic circumstances and changes. Also parallel to Allen and Gomery, Bakker warns the reader about the absolute economic film history perspective of the research, arguing that this is where other works can be consulted to gain insight into the political, social, or cultural history of entertainment (Bakker, 2008).

Lastly, Jon Burrows's *The British Cinema Boom, 1909–1914: A Commercial History* delves into the question of “how the projection of moving pictures became a mass entertainment medium in Britain” (Burrows, 2017, p. 1). It focuses on the exhibition industry in Britain between 1909 – 1914, when many movie theaters were launched, and Burrow attempts to figure out the economic reasons behind this rapid expansion through industry analysis. He mainly makes use of surviving company registration data to learn about the demographics of exhibition entrepreneurs and their companies, along with the capital raised during boom years. Additionally, Burrows studies the Cinematograph Act of 1909 to reveal the policy response during these years. Since Burrows's work focuses on periods and industrial circumstances, public data concerning investments, profits, or financial company performance is also used.

2.3. Industry Studies on the Turkish Film Industry

These examples of economic film history are unique in their approach, narrative, and concern, yet they are quite similar in terms of the method they utilize. There are countless more examples of economic film history studies with different takes on the method and perspective (e.g., Abel, 1994; Balio, 1985; Guback, 1969; Bordwell, Staiger & Thompson, 1985). Contrarily, Turkish academia has produced relatively few key studies based on industry analysis.

Deniz Yavuz's *22 Years of Turkish Cinema* (2012) (Türkiye Sinemasının 22 Yılı)⁵ is an economic film history focusing on the industry of Turkish cinema between 1990 – 2011. It covers all films released in the timespan with their box office, festival appearances, and the companies they worked with. It covers the market shares of all production, distribution, and exhibition companies, a list of all theaters, and the list of films circulated

⁵ All the Turkish sources are translated by the author of this work unless noted otherwise.

in this market. All the films funded by the Ministry of Culture and Tourism and Eurimages with yearly budgets are also available in the study. Therefore, even more than a decade after its publication, Yavuz's (2012) study is still one of the broadest and most inclusive industry data collections to date.

Hülya Uğur Tanrıöver's study, *Position and Goals of the Turkish Film Industry* (2010), covers a wide range of fields from audience to directors, market performance to overall industry portrayal. It is the "first scientific study on films and TV series, regarding the inclusion of all the aspects of the value chain in the Turkish film industry. Funding, production, distribution, exhibition, box office, and festival performance with basic data" (Tanrıöver, 2010, preface). It covers a 6-year period from 2005 to 2010 and analyzes the available basic data of box office, admissions, market share of companies, theater and seat numbers, funding amounts, and festival appearances. Moreover, Tanrıöver also conducts interviews with industry professionals and offers qualitative film analysis of theme, filmic language, and representation. Therefore, Tanrıöver's study shines out with its ample scope concerning various aspects of the Turkish film industry, but the limited time frame makes it more of a snapshot than a panoramic view of Turkish film industry history.

Ertan Tunç, in his book *Economic Structure of Turkish Cinema: 1896-2005* (2012), proposes a historical profile of the Turkish film industry within its economic, political, sociological, and technological context. It supports the economic growth in Turkish cinema and studies this growth with statistical data regarding production, distribution, and exhibition. Tunç's work also utilizes content analysis approaches to correlate box office performance with film quality and comparisons between film critics' commentaries and audience ratings. The wide time period he focuses on and the correlations between industrial structure and political, historical, and sociological implications deem his book a seminal study regarding the economy of Turkish Cinema.

Like Ertan Tunç's book, Hakan Erkılıç's earlier master's thesis, *Economic Structure of Turkish Cinema and the Effects of This Structure on Our Cinema* (2003), provides an economic history analysis of the Turkish film industry. Erkılıç emphasizes the dual status of cinema as a form of art but also as a commercial industry and departs from this

distinction on a historical basis. He mainly portrays the industrialization of Turkish cinema between late 1896 and the 1990s and argues that Turkish cinema is built upon two factors: the filmmaker and the spectator, without any support from banks, industrial groups, or the government. He also portrays the formation of the industrial structure within its political context and its impacts, along with governmental practices such as censorship and laws regarding film. Therefore, both Erkılıç's thesis and Tunç's work are important sources to understand the period before state film funding was launched in the early 2000s.

There are also many Turkish and English articles focusing on, or to some extent touching upon, the Turkish film industry. Nezih Erdogan and Deniz Goktürk's "Turkish Cinema" (2001) has a historical framework, briefly discussing the earliest years and Yeşilçam. The early coverage focuses on directors who produced the earliest works and popular genres in Yeşilçam. The only industrial aspect is the theater and admission numbers to show the regional distribution system in Yeşilçam. The New Turkish Cinema part has the most industrial interrogation as they talk about the available ways of finance (Eurimages and the previous state funding scheme⁶), admission numbers, and cinema numbers. However, the data they use covers until 1998, which barely includes the New Turkish Cinema period. Melis Behlil in "Close Encounters?: Contemporary Turkish Television And Cinema" (2010) studies the effect of television's emergence in Turkey and its impact on the film industry. She briefly discusses the history of the film industry, mentioning key changes before 90's such as the crisis of Yeşilçam, the flourishing video market, and the notable decline in the number of films produced and distributed, along with the American distribution companies' entrance to Turkey, influencing the domestic production and distribution sectors. Then, Behlil evaluates television's effect on Turkish cinema as a response to Zeynep Çetin-Erus's "Television's Influence on Popular Turkish Cinema of the Last Decade" (2007)

Çetin-Erus' article, named "Distribution and Film Industry: Distribution Sector in Post-1990 Turkish Cinema" (2007), resonates more with the scope of this work. Çetin-Erus discusses the Turkish film industry after 90s with a focus on distribution. Hollywood's

⁶ Law No. 3257 of January 23, 1986 on Cinema, Video and Music Works of Art

dominance in Turkish film distribution after 90's, and the resulting oligopoly are studied with the data of company market shares, number of films these companies distributed, and admissions they got each year. Also, the number of domestic productions that American companies circulated is criticized. She argues that American distributors prioritize Hollywood production regardless of the box office potential of the Turkish films. Özen Film, figuring out the potential in national films earlier than Americans, managed to compete in terms of market share with Warner Bros. and UIP's Turkish subsidiaries. Çetin-Erus also discusses cinema chains and their market share, revealing how vertical integration and oligopoly distort the natural supply/demand balance.

Levent Yılmazok, both in his PhD thesis and published article "Turkish Films Co-Produced Within Europe: The Story After Twenty Years' Experience in Eurimages" (2010) delves into Turkey's history with Eurimages. Rather than solely basing his research on the economy of co-production, he renders the "Eurimages experience" by interviewing funded directors, Eurimages officials, and Turkey's Council of Europe representatives, along with economic comparisons of paid fees, funding amounts, and box office receipts. He discusses Eurimages' criteria, emphasizing the mix of cultural and economic goals, and arguing to what extent Turkey achieves the "European" objective of Eurimages. Ece Vitrinel's "An Analysis of Turkish Film Industry in Comparison with The French Model" (2011), as the title suggests, compares the French film industry with Turkey, pointing out the industrial growth Turkey had been experiencing in terms of domestic films' box office performance and admission share. However, Vitrinel argues that this growth is imbalanced and irrational owing to the value chain practices and distribution of media power, mainly the oligopoly in distribution, resulting in an unsustainable circulation network. France, on the other hand, endeavors to balance the entire value chain with multiple funding schemes and the CNC's (Centre national du cinéma et de l'image animée) extensive public aid incentives, despite having lower admission shares for domestic French productions than Turkey. Vitrinel criticizes the Turkish film industry for having only one state funding scheme and its scope being too narrow to improve other value chain practices, such as distribution and exhibition.

Ece Vitrinel's other published industrial study, "On the Turkish Film Industry Report of the European Union Audiovisual Observatory" (2015), discusses the European

Audiovisual Observatory's industry analysis titled *The Turkish Film Industry: Key developments 2004 to 2013* (2014). Similar to her comparative study, Vitrinel talks about the key findings of the report in terms of the weak and strong aspects of the Turkish industry. The market share of domestic films is still prominent in the review, but like her previous study, the weaknesses still prevail. "With a monopolized distribution and exhibition network that is late in digital transformation, a cinema culture that is increasingly confined to shopping malls and dominated by major box office monsters," Turkish cinema has a weakness that counteracts the industrial growth (Vitrinel, 2015, p. 194).

Serdar Çağlar's "A Focus Group Study Based on Sector Employees at Turkish Film Industry After 2005" (2020) departs from the increase in production rate after 2005, which he correlates with Law 5224. Çağlar interviews industry professionals such as directors, producers, screenwriters, and collects information on various industrial subjects such as the spread of film theaters, the criteria of the funding scheme, audience behaviors, and so on. Correlating the increase in production with the establishment of the Law 5224 is not only specific to Çağlar but almost all industry studies I mentioned that are published after 2004 also mention the impact of this state funding scheme on the annual production (Tanrıöver, 2010; Behlil, 2010; Yılmazok, 2010; Vitrinel, 2011, 2015; Yavuz, 2012; Tekeoğlu, 2016; Çağlar, 2020). Not only the industrial studies, but nearly any work concerning the New Turkish Cinema mentions the increase in production, and potential box office success of the domestic films as key changes of the time (Arslan, 2011; Bayrakdar & Akser, 2014; Akser, 2018; Suner, 2002, 2010; Yücel & Onaran, 2011; Dönmez-Colin, 2008, 2014, 2021). I argue that the funding scheme is key to this increase in production and can be correlated economically with the rebirth of Turkish cinema. There are six works that center their study on Law 5224 (Binatlı, 2005; Erkıılıç, 2008; Akbulut, 2016; Birincioğlu, 2019; Diker, 2020; Yetkiner, 2020). However, the global conceptualization of state funding needs coverage first.

2.4. Public Funding

Film is a business that requires capital to operate effectively and control the inherent risk in the industry (Murschetz et al., 2018). For national film industries, this risk comes from

not only the needed capital and the anticipated return, but also the competition with Hollywood, whose wider cinematic practice enables them to exist as a global transnational component of most of the national cinemas (Vitali & Willemen, 2006). The impact of a foreign industry on a national industry is both economic and cultural, affecting the type of films circulating in the network. The state intervenes when these impacts are felt and harm domestic industries (Hjort & MacKenzie, 2000). Therefore, the global reach of Hollywood with wide circulation networks drives national film industries to compete with it, resulting in governments creating policy precautions to protect their industries, both economically and culturally (Jackel, 2003). Therefore, state subsidies, public/state/national funding/aid/support - terms that Jackel and other scholars here used interchangeably and are thus used in this thesis similarly - can take the forms of funding bodies, tax incentives, or quotas for national productions. The goal of these schemes and structures is to reduce the cost of filmmaking and enable films to access exhibition venues while increasing the chance of reception beyond what the competition in the market would normally allow (Murschetz et al., 2018; Jackel, 2003).

Since Hollywood's dominance has a global effect, states intervene to stabilize the competition, making production possible for a wider variety of industry players (Murschetz et al., 2018; Jackel, 2003). These state aid initiatives to protect national industries started around the 1950's in Europe and have continued to influence their respective markets (for more historical context, see Jackel, 2003). State aid aims to stabilize competition in their film industries, and Europe shares a transnational, regionally defined framework in terms of how the funding activities work in the pan-European sphere, beyond the EU in some instances. One of the main attempts of state aid is economic, to decrease cost while increasing its potential revenue, so that film producers can continue to contribute in a more economically efficient way and stabilize their filmmaking process through sharing the risk with the state (Murschetz et al., 2018; Jackel, 2003). These funding schemes dynamize film industries as they offer capital to enable functional operation. In 2010, the European film industry in the EU region accounted for "over 75,000 companies and made 60 billion euros in revenue" (Murschetz et al., 2018, p. 99). Among these national industries, Germany, France, Italy, the UK, and

Spain accounted for approximately 80% of releases, industry turnover, and more than 370,000 persons employed (Katsarova, 2014, p. 1). Such an industrial growth enables these states to devote large amount for public funds, notably “in 2012, Germany, France, Italy, and the UK provided funding in the amounts of 201.3 million euros, 720.1 million euros, 75.8 million euros, and 134.2 million euros, respectively” to their own industries (Lange, 2012; Murschetz et al., 2018, p. 99). These amounts show the financial importance of public subsidies as they are intended to allow production. Therefore, the government support for competing against the external Hollywood force has made European film industries heavily rely on the state aid mechanism and turned it into a long tradition, defining industry practice and cultural policy in a national context (Jackel, 2003; Murschetz, 2018). How state support shapes national film industries is not only economic but has inherently cultural connotations as well, since state intervention causes “cultural mode of production,” which is “a strategy of cultural and economic resistance” to external forces, specifically Hollywood. (Hjort & MacKenzie, 2000, p. 54; Vitali & Willemen, 2006, p. 46; Hesmondhalgh, 2013)

Because of the long tradition of state aid mechanisms available in Europe, the academic body of work defining state aid has a variety of scopes depending on the region it examines. As public funding recalls national intervention in film industries, most of the available literature has a national focus, rather than a global theorization of public support. Anne Jackel’s economic film history research has a chapter (“Chapter 3: Production Financing and Co-production”) dedicated to state funding, both national and European public co-production, defining how state aid modifies industries by raising new ways of production through risk control and capital supply. The study covers the EU region with some detailed case studies of Iceland, Ireland, and Luxembourg, France, Germany, Italy, and Spain. In a similarly broad and detailed work, *Handbook of State Aid for Film Finance, Industries and Regulation*, the edited collection of Paul Clemens Murschetz, Roland Teichmann, and Matthias Karmasin, published in 2018, state funding is studied in three parts: “scholarly themes”, “current practices”, and “future directions”. The first part has notable theoretical and methodological ways to study state aid, such as cultural economics, media economics, governance studies, public policy and finance, and

management studies, showing the variety of approaches available for state aid research. In the second part, “current practices”, studies state aid within national contexts, having different nations in scope in each article, namely Austria, Germany, France, Italy, Korea, Latin America, Spain, New Zealand, Switzerland, the UK, and Ireland. Again, these studies also range differently in terms of how they approach state aid, both theoretically and methodologically, from political economy, policy research, and finance.⁷ Moreover, definitions and possible frameworks offered in these works are valuable for this thesis because their theoretical framework is suitable for a Turkish study of state aid in Turkey.

Studies of public aid aiming at specific national film industries are also important as they offer possible ways to analyze state aid and its industrial impact. Udo Bomnüter and Annett Schulze’s “Governance of the German Film Industry: A Multilevel Analysis of State Aid Policy” studies state aid in Germany with a policy focus, discussing its decentralized subsidies and its influence on protecting the industrial strength of German cinema through policy design (Bomnüter & Schulze, 2019). Margaret Dickinson and Sylvia Harvey’s “Public Policy and Public Funding for Film: Some Recent Developments in the UK” study state aid in the UK through the commercial cinema’s economic closeness with Hollywood and the UK’s policy response, with some historical overview (Dickinson & Harvey, 2005). Jordi McKenzie and W. David Walls’s seminal study of the Australian film industry, “Australian Films at The Australian Box Office: Performance, Distribution, and Subsidies,” studies the box office performance of Australian films in an 11-year sample period, from 1997 to 2007. Their approach, unlike other examples, borrows from finance as they use empirical data analysis to evaluate the box office performance of Australian films. Despite the great range of approaches available in the collection’s literature, two of them stand out: project management and policy research.

⁷ See Chapter 2 (State Aid for Film: A Synoptic Overview) for full book outline. (Murschetz, Teichmann, Karmasin, 2018)

2.4.1. Policy Research Angle

State aid aims to strengthen artistic and creative talent while protecting cultural integrity and diversity, which ensures the economic growth of the industry through stable production and circulation (Murschetz et al., 2018). Along with the economic factors that facilitate public funding schemes, such as market stability and enhanced production for a bigger national film industry, state funding schemes also entail a cultural perspective. The desire to protect national film industries from external forces is not only economic but also cultural, keeping the cultural diversity available through locally produced films' competition with Hollywood in the national film sphere (Murschetz, 2018). Therefore, the government's policy response fosters the policy research angle since public funding schemes are basically policies for film and other audiovisual works. These policies shape how industry functions in the social and cultural sphere by deciding on the media we get accordingly with political interests, cultural values, or other economic objectives (Freedman, 2008; McDonald, 2022). State aid, as a policy intervention in the value chain, has economic and political aims, for instance correcting market failures, tackling ownership concentration, and democratizing the industry for local producers (Flew, 2018; McDonald, 2022). Moreover, an economic aim, such as encouraging local production through state aid mechanisms, might have cultural results, such as increasing the variety of voices in the industry by democratizing media ownership (McDonald, 2022). Therefore, state aid technically encourages production for local players in the industry and promotes both economic growth at the micro-individual level and macro-industrial level; it also contributes to cultural diversity by enabling local and individual voices.

This cultural/economic impact can be seen through state aid research because production within national borders is characterized heavily by state aid (Moran, 1996; Jackel, 2003). Thus, governments act as investors for producers whose aims are not solely economic but also cultural. The funding schemes are also a bilateral contract between the state and the producers, imposing certain requirements and expectations on the producers. Public funding schemes are often criticized for putting funded films under more pressure than privately funded productions, as they are expected to meet the criteria before and after the production, being economically successful and representing the culture that the state

desires to promote (Murschetz et al., 2018). The contract and its expectations are theorized through project management theory, which can highlight the interaction between producer and state investor.

2.4.2. Project Management Angle

Terje Gaustad's "How Financing Shapes a Film Project: Applying Organizational Economics to a Case Study in Norway" article applies organizational economics to the state aid mechanism to see how bilateral agreements shape a film project through mutual objectives (Murschetz et al., 2018, Chapter 8). Project management and performance study branches of organizational economics are applied within agency theory and transaction cost theory. The argument here is that film financing agreements, both public and private, affect production and distribution strategies, thus affecting the film's performance (Murschetz et al., 2018). The public funding schemes that producers seek out are bilateral contracts made between the producer and the government acting as the investor, and this contract generates mutual objectives that need to be met through project strategy. The objective of the producers (internal objectives) can be a box office performance or festival success (market-oriented) or the target genre or audience (content-oriented). The objectives of the investor, however, depend on the investor's reasons for financing the project, which, for private investors, can be fully market-oriented. Nonetheless, the objectives of public funding schemes are also shaped by cultural and governmental objectives, as well as economic ones. For an effective project strategy, these objectives should be aligned either prior to the agreement through negotiations or afterward during subsequent value chain activities. As the objectives of public investors are strictly defined in funding requirements, negotiations are not flexible, and the objectives of the state investor can only be met during value chain activities to be able to have further funding in the future.

Gaustad's work wonderfully theorizes the demand and expectation that states have for funded projects and how a possible misalignment might affect the performance, both artistic and financial, of the funded films (Murschetz et al., 2018). Such requirements exist for the democratization of the scheme and effective allocation of available resources

for a sustainable industrial sphere; nevertheless, they are also criticized because of their complicated political structure and empirically inexistent benefit to national industries (Murschetz et al., 2018).

2.4.3. Criticizing Public Film Funding

Public funding schemes are criticized by many researchers, and these criticism bears significance in the literature (McKenzie & Walls, 2013; Murschetz et al., 2018; Jackel, 2003). Some of these critiques, similar to the rest of the public funding literature, have national borders; yet there are some perspectives that can be applied to this work especially, in Jackel's *European Film Industry* (2003) and *The Handbook of State Aid for Film* (2018). As discussed above, the aim of state support is to foster artistic strength and economic stability of the national players, from producers to below-the-line workers, for an economically improved industry and the vision for a more culturally diverse, democratic, and creative audiovisual sector. Yet, these schemes are criticized for being "inefficiently allocated, unfairly distributed, and bureaucratically organized" and being inefficient in adapting to changing industrial circumstances (Murschetz et al., 2018). Murschetz, Teichmann, and Karmasin identify eight ways that state funding risks being ineffective or even harmful to the industry:

State funding schemes may:

- Unduly endanger artistic freedom and expression.
- Do not correct the fundamental problem of market failure in the industry.
- Are considered as economically ineffective as "free markets" work better.
- Are a waste of taxpayers' money as costs exceed benefits to consumers and producers.
- Are considered to be politically charged as far as they require consent across opposing political forces backed up by a solid and impartial method of selecting projects and channeling the money to them.
- Cannot create long-term sustainability but instead create dependence on the handouts of the state.
- Do not improve the working conditions of producers, filmmakers, and other creative staff.

- Do neither incentivize consumption of audiences nor improve their satisfaction with the films funded (Murschetz et al., 2018).

In short, state funding has been criticized for its ineffectiveness in the accomplishment of its aims. The public capital allocated for production, or other practices in the value chain, shows little economic return, only “keeping alive those who are already economically weak” without balancing the economic structure of the industry due to poor production quality or lack of distribution for funded films (Murschetz et al., 2018). For subsidies in the form of loans, Jackel argues that only a very small percentage of funded films make enough money to pay the loan back (Jackel, 2003), which demonstrates their ineffectiveness in generating a sustainable industry. Hence, alongside providing a chance for production, aid schemes pressure the producer owing to the expectations and objectives attached by the government, influencing the future practice of the funded players (Murschetz et al., 2018). However, even with these complaints, producers still depend on state aid mechanisms to secure funding, as it is a major component of production, and few people could manage to exist in the industry without it (Dale, 1997; Jackel, 2003). This “subsidy-trap” mentality, coined by Martin Dale (1997), is similarly criticized in the limited literature on state aid for film in Turkey without neglecting its positive aspects.

Ömer Cüneyt Binatlı’s article “State Aid for Cinema According to Law No. 5224” (2005) is the earliest work focusing solely on the state aid mechanism in Turkey. As it was published in the same year that the first batch of films was funded, it only managed to summarize the law and explain how it works. Hakan Erkılıç’s “State Support for Films Within the Framework of Cinema Policies” (2008) puts emphasis on the importance of state funds for national film industries to protect their cultural identities against Hollywood hegemony (Erkılıç, 2009, p. 57). Without ignoring the positive impact on our industry, such as generating resources for domestic films, he argues that an independent film institution is needed for further development. He overviews the history of Turkish film policies with key events, and studies the policy design of the 5224 Act, suggesting possible ways to improve it.

Kültigin Kağan Akbulut's work "Ministry of Culture and Tourism Cinema Supports" (2016) is one of the most comprehensive works on state aid in Turkey. In a journalistic fashion, he reviews the history of public aid in Turkey, mainly the previous unsystematic scheme, Law 3257, which was in effect between 1986 and 2004, and argues that Law 5224 is the first systemic funding body and the biggest economic source for the New Turkish Cinema. He uses Yamaç Okur's data collection on funding and investigates films' performance at the box office and festivals. Also, he discusses the annual funding amount for each category and the percentage of tax that is dedicated to funding. Then, he conducts interviews with industry professionals and scholars. He interviews producer Serkan Çakarer on the economic issues in the current funding scheme. Yamaç Okur, also a producer who participated in the General Directorate of Cinema's funding committee, enlightens the producer's perspective and how the funding law impacts producers' working system, and whether the policy design is suitable for a sustainable industry, along with how the committee chooses which film to fund. Ahmet Gürata, as a scholar, also discusses the selection process and potential ways of improvement during interviews, similar to fellow scholar Melis Behlil's perspective on the scheme and foreign examples that the Ministry might take as an example.

Yıldız Derya Birincioğlu's "Behind the Scenes of Populist Discourse: Evaluations on Law 5224 on the Evaluation, Classification and Support of Cinema Films" (2019) studies the 2019 update of the law and whether it is sufficient to solve the existing issues. Birincioğlu argues that even with the update, the law falls short in solving the issues in distribution and exhibition, or in other words, balancing the market power in value chain activities other than production. She puts emphasis on the recent growth of Turkish cinema in terms of screen and admission numbers, yet the funding scheme is not enough to provide a balanced, economically sustainable industry. The fact that many films that were successful in international festivals yet got narrow distribution and exhibition in Turkey is the outcome of oligopoly in the distribution/exhibition industry. In addition, Birincioğlu suggests that Turkey needs more support mechanisms, possibly from independent institutions, to break the dependency on a single mechanism, more akin to conditions of production in France, Germany, or Austria.

Can Diker's "A Critical Political Economy Evaluation of Film Supports Given Between 2005-2020" (2020) criticizes the capitalist Hollywood economy and hegemony on national film industries, and studies a 15-year period of Turkish national film funding from a political-economy perspective to evaluate the funding body's sufficiency to break the Hollywood supremacy. He studies the market share of the biggest three distribution companies and the rate of domestic productions they circulate, along with funding amounts, audience numbers, and box office performances. Like Birincioğlu, he argues that the oligopoly in distribution results in ghost funded films that can hardly find a proper distribution channel, and this oligopolistic structure results in a distorted supply/demand balance. Beyler Yetkiner's "A Review of the Projects Deemed Appropriate for Evaluation by the Cinema Support Board" (2020) also criticizes the funding scheme by arguing that there are too many funded films that were not released, which renders the scheme ineffective. The existence of funded films that vanished without leaving a trace, neither as box office nor circulation data, raises questions of whether they were even produced at all. Even within the limited literature on national funding in Turkey, there are some recurrent issues that endanger the production and circulation of independent domestic films even after the period of nominal industrial growth.

Another critique specific to Law 5224 is the political motivation of both the Ministry and the funding committee, affecting the evaluation and the selection process. Nur Tuğçe Biga's doctoral research titled "After 2000 conservative discourse in Turkish cinema" (Biga, 2022) argues that the political Islam and conservatism in Turkey led the Ministry to support films aligning with their political motivation. Biga studies the films that receive the most support each year to reveal their political motives. This concern of politics behind Law 5224 also raises the question of potential cultural conflicts among committee members during the selection process. Biga's study can be consulted for further understanding.

Another form of subsidy available for film industries and the pertaining players is bilateral or multilateral co-production agreements. Even though these co-production schemes also formed as a public mechanism to support film industries, their implication

goes beyond the national borders to put emphasis on collaboration between two or more nations. The need for co-production funding has roots similar to national funds, namely the protection of national film industries from global Hollywood, but the way transnational co-production schemes are designed and criticized is different than nationally focused public funding.

2.4.5. Co-Production

Co-production treaties “de-provincialise” national film industries by creating a connection between local producers and the rest of the world (Hammett-Jamart, Redvall, & Mitric, 2018, pp. 63-64). Therefore, their impact is beyond the national borders and aims at platforming collaborations between more than one local filmmaker with a motivation similar to national subsidies: competing with Hollywood’s high-budget global practice in both national and overseas screens by increasing the available capital for European productions (2018, p. 2). Even though national aid is helpful to an extent, its main focus is bound to the respective national industry and economy through legal instruments, not pooling them together into an international collaboration (2018, p. 2). This inward-looking establishment of national funds often compels producers to seek financing outside of their national territory because of simultaneously growing budgets and declining revenues (2018, p. 5, 55). Co-production agreements, with more “outward looking” policies focusing on international collaboration, co-operation, and expansion were initially established in Europe as early as the 1920s, aiming at “solving the issues with nationality” (2018, pp. 3, 55). A full consideration of transnational co-production is tangential to this study’s relevant schemes and is only taken into account when it is necessary to compare it to Law 5224, to evaluate its impact on the films funded by the Ministry, not the entire film industry. Still, it is necessary to mention how co-production bodies are conceptualized in the literature in terms of their economic/cultural objectives and impact on European film industries.

The main features of a co-production are addressed in *The European Film Production Guide* (1996) as follows:

1. Co-production generally covers all the stages of audiovisual production from initial development to production and post-production of the final product.
2. Co-production is international.
3. Contributions from the co-producers may be economic, technical, artistic.
4. The final outcome is a joint product. (Andersen, 1996, p. 448)

The fact that a co-produced film is an “internationally joint product” generates some other incentives for the producers as the film gets “national treatment” in each participating country (Hammett-Jamart et al., 2018, p. 3, 50), enabling it to qualify for public resources from different nations, based on national content quotas or direct subsidies. Moreover, the co-produced films have stronger circulation potential, especially among foreign screens, since they are distributed separately by the agreed countries with each producer acting as an “ambassador” to secure sales agreements and distribution guarantees (2018, pp. 3, 50). While the co-produced projects must also apply for national subsidies and ought to meet the requirements for both the co-production and national criteria, this dual qualification is still possible in Europe (2018, pp. 50, 55). Owing to these benefits, co-production became an important funding possibility between European nations, and accordingly, has been studied in various co-production literature.

The chance of having two national supports along with co-production incentives made collaboration substantially popular among European film industries. While the (inter)national support becoming available through co-production, be it direct subsidies, tax incentives, or circulation potential, accordingly brings a greater chance of economic success, and it also divides the risk among respective producers (Hammett-Jamart et al., 2018). This distribution of revenues, responsibilities, and risks is in proportion to the amount contributed to the project, which generates two types of producers: minority and majority co-producer (2018, p. 13). The majority producer is mostly called the delegate producer who developed the project and has creative input from the screenwriter and director of the same culture and language. In contrast, a line producer with zero risk and no financial or creative input may be added to the project in order to benefit their audiovisual system and potential national subsidies (2018, p. 13).

Since co-production offers a collaborative way of film financing, it has become significant for European film production, both nationally and continentally. Available co-production possibilities account for a great portion of production in Europe and make it possible for small nations to have a film industry and function in the pan-European industry (Jackel, 2003, p. 60; Hammett-Jamart et al., 2018, p. 49).

2.4.5.1 Eurimages

Currently, the only official European co-production program that Turkey is a member of is Eurimages. Despite the European focus, Eurimages accepts applications from associate members. Each country pays a fee to keep the membership active and sends a representative to the committee. In the past, Turkey occasionally became a member of the MEDIA (Mesures pour Encourager le développement de l'industrie audiovisuelle - European Union) branch programs covering non-EU countries, or there were some co-produced films that benefited from MEDIA owing to the partner producer's nationality. For instance, IKSIV's (Istanbul Foundation for Culture and Arts) Meetings Under the Bridge or CNC's Aide Aux Cinémas Du Monde programs are funded by MEDIA. Therefore, these films have the MEDIA logo in their intros in addition to the sub-organization's logo that funded the film, without being searchable in the MEDIA film funding database. Therefore, it is impossible to track the history of Turkey's official membership to the MEDIA, or even the reason why the MEDIA logo appears in a Turkish project, which urges this study to limit co-production with Eurimages. See Jackel (2003) for more information on the history and effect of MEDIA on European film until the MEDIA Plus program.⁸ Eurimages, on the other hand, officially includes Turkey, and its major effect on Europe as a whole is partially reflected in the Turkish film industry specifically.

Eurimages is one of the most well-established co-production mechanisms available to Europe beyond the EU zone (Hammett-Jamart et al., 2018, p. 3). According to Jackel (2003), the early success of Eurimages is visible in the number of applications made in 1994, as over a quarter of the films made in Europe that year were funded by Eurimages.

⁸ Anne's Jackel, European Film Industries (2003)

(Eurimages News, 1994, Jackel, 78). Moreover, like national funding bodies, Eurimages also aims for cultural diversity by enabling European filmmakers to compete with Hollywood by allowing local production, without neglecting the economic parameters (2003, p. 76). One goal is to partner countries with low production levels with higher ones in order to increase the production rate of industrially small countries. However, this motivation does not mean to ignore the artistic and creative quality, or the professional standing of the key players attached to the funded films (2003, p. 77). Hence, Catherine Bizern and Anne-Marie Autissier state that for countries with relatively low production capacity - such as Iceland, Luxembourg, Turkey, and Hungary - “Eurimages had become an indispensable additional element in completing the financing of feature films” (Bizern & Autissier, 1998; Jackel, 2003). Because of how co-operation treaties positively affect the economic and cultural state of both countries, France has 57 intergovernmental agreements in place, Italy 39, and Canada over 50. (Hammett-Jamart et al., 2018, p. 3)

After countless treaties signed between different European and non-European countries, “co-production has thus become inscribed in the European cinematographic landscape” and turned Europe into a “global hub for international co-production” (Hammett-Jamart et al., 2018, p. 5). The meso- or macro-level effects of these co-production agreements are analyzed through their economic variables. For instance, Julio Talavera’s *Statistical Overview: Production: Co-production and Circulation* uses two data sets: the Lumiere database (European Audiovisual Observatory) and admission/budget information from National film centers to analyze production in 36 European countries, including key non-European ones,⁹ and attendance and circulation figures for 47 markets (Hammett-Jamart et al., 2018, p. 42). Talavera’s findings show that co-production generates a higher number of admissions and allows twice as much overseas circulation as purely national films (2018, p. 38). Philip Drake, responding to Talavera, correlates this success with having two producers causing two domestic circulations, and the higher budget that co-productions have than national films due to the funding they get (2018, p. 85). Therefore,

⁹ “The 28 EU countries plus Bosnia and Herzegovina, Iceland, “The former Yugoslav Republic of Macedonia”, Montenegro, Norway, Russia, Turkey and Switzerland” (Hammett-Jamart et al., 2018, Chapter 2, p. 42).

the importance of national and supra-national funding bodies available for many European films cannot be overstated (Jones, 2016, p. 87).

There are also some criticisms around European co-production practices, including the so-called *Euro-pudding*. The cultural requisite of co-productions is akin to national state subsidies, as they both demand cultural representation of the collaborating countries from the funded films (Hammett-Jamart et al., 2018, p. 11). Euro-pudding, accordingly, defines the co-production practices that focus on the funding requirements rather than the reluctance to partner with different markets (Eleftheriotis, 2001). The desire for cultural diversity and representation requires the different nations to collaborate artistically and technically. Despite its positive motivation, a chosen DOP might be excluded because of his/her nationality, or too many nations might be involved in having as many public resources as available from the related countries, resulting in disarrayed attempts at cultural representation. (Hammett-Jamart et al., 2018, p. 248,) The involvement of many countries under non-coherent objectives also results in a similar disarray, which can also cause the project to be unappealing to the audience. (2018; p. 120).

Nonetheless, Mariana Liz offers a more positive perspective on this issue, arguing that the type of Euro-pudding, which was prevalent in the earlier days of European co-production initiatives, has since been replaced with a more satisfying version of co-production that is described as “creative”, “artistically motivated,” and “necessary” (Liz, 2015, p. 21). Also, there are many others who are opposed to the term Euro-pudding in itself as an unfair characterization, without necessarily overlooking potential ways to improve (Hammett-Jamart et al., 2018; Liz, 2015; De Vinck, 2009, p. 89). De Vinck argues that European co-production, mainly Eurimages, offers an opportunity for national film industries to collaborate. However, it still falls short of distributing the co-produced content in countries outside of the partnership agreement (2009).

Furthermore, there are also some arguments about the transnational/supranational objectives of European co-production. Even though these treatises have international dimensions in terms of the multilateral policy design, the practice fails to meet supranational objectives but rather operates as simultaneous, self-contained acts of

national governments (Rivi, 2007, p. 64). The reason behind this criticism is the fact that the audience is unable to see these films as “European” but as national products because of the major or delegate producer’s dominant cultural inheritance to the project (Hammett-Jamart et al., 2018, p. 64). As each producer or country might have different objectives, “Official co-production embodies all of the tension associated with the overlapping jurisdictions, local vs international, protection vs expansion, culture vs commerce” (2018, p. 55). Therefore, the extra challenges it creates are also ingrained in the very nature of public co-production, even within the indisputable opportunities it offers. On Turkey’s experience with Eurimages, Levent Yılmazok argues that “a striking majority of” Turkish co-production’s objective is “financial in that the necessary fund for the film is raised in different countries, but the film is national in terms of its content - a national film of the majority co-producing country” not a collaboration in artistic or technical quality of the work (Yılmazok, 2010). According to his interview with Robert Olla, Executive Director of the Eurimages Fund, there may be two reasons for Turkish co-production tendency to remain national: the relative lack of co-production experience and Turkish language’s “underprivileged” status in Europe, which limits distribution potential in other European countries, such that these films “inevitably narrate stories that aim at the audience in Turkey in the first place” (2010, p. 96).

2.5. Distribution

Cinematic production is a value chain in which each link in the product’s lifecycle is as crucial as the others. Therefore, an examination of public funding in Turkey needs to study distribution practices to see how publicly funded films in the respective nation reach out to the audience. Thus, research on national cinemas ought to incorporate distribution alongside production within the nation (Vitali & Willemen, 2006). The production practices could only make sense, especially for the public funding context, when the study includes distribution. Even though production has the most dominant support scheme in Turkey, distribution or other value chain studies give the necessary meaning to state funding (De Vinck, 2014; Henning & Alpar, 2005; Raats et al., 2018). This is why there are various conceptualizations and definitions of distribution despite its seemingly obvious function of connecting a media product with its audience.

Distribution as an ontological concept is defined by many researchers within its spatial and temporal effects on media products. For example, in the edited book *Digital Media Distribution: Portals, Platforms, Pipelines* (2021), Paul McDonald, Courtney Brannon Donoghue, and Timothy Havens define distribution as “limiting when and where media are available. In other words, “it defines the temporal and spatial conditions in which media exist.” They also emphasize that distribution maps this availability by creating spaces, rather than occupying them at different levels such as local, national, regional, and global (McDonald, Donoghue & Havens, 2021, p. 4). Through this creation, distribution manages the movement of media through time and space and makes its most significant impact through its ability to accelerate or delay delivery (Cubitt, 2005; Lobato, 2007; McDonald et al, 2021). Joshua A. Braun in “Points of Origin: Asking Questions in Distribution Research” similarly stresses this temporal and spatial quality and defines it as the “movement of content from the time it is produced to the time it reaches the consumer” (McDonald et al., 2021, p. 29). Hence, distribution is not only the mere act of spreading information but also the agent for managing the time and place at which media items become available. This is why “distribution is key to the film industry” as “production exists to meet the demand created by the mechanism of distribution rather than distribution existing to serve production” (Moran, 1996, p. 2).

The academic distribution literature has little “thematic consistency” with two points that are generally agreed on: distribution being examined far less than production or consumption, and the dramatic change that the digital age has sparked in distribution practices, which requires greater inquiry (Perren, 2013, p. 165) Distribution consists of many different acts of occupying the space between exhibition places and producers. The distributor, once they acquire the distribution rights from producers, becomes responsible for selling and marketing the project. They negotiate the release of films with exhibitors in terms of the release pattern and plan an advertising and publicity campaign. At later points in the long tail, they organize the reproduction of prints and licensing to other release windows such as television companies, video distributors, cable operators, and VOD platforms. If the films have overseas circulation potential, then distributors also schedule overseas release patterns. Then they collect revenues from these release

windows and pay the stakeholder parties (Jackel, 2003; Perren, 2013). Within these marketing and release strategies to establish and sustain audience awareness, distributors decide the exhibition windows in terms of when, where, and how long a film is publicly available (Perren, 2013; Smits, 2022). Thus, the core principle of distribution is managing accessibility through a curation of what the audience will see.

How long a film stays available is directly related to how many people get to see it. Therefore, distribution is the film's access to the market by deciding on the window during which it stays available. The central focus on accessibility leads distribution studies to conceptualize it as "managing market accessibility" (Smits & Meir, 2024, p. 139). While distribution manages access to a film in the market, it also manages the film's access to financial success because release and marketing strategies are a decisive part of the financial success or failure of a film (Jackel, 2003). Therefore, a distributor not only circulates content or products but also information and money (McDonald et al., 2021). This is why distribution tends to be more privately structured, whereas production has more state intervention (McDonald et al., 2021; Moran, 1996). Distribution practices' direct correlation with the financial success of the projects makes it privately owned rather than state controlled despite nascent state distribution funding schemes. The cost of producing a film is much higher than reproducing more copies for distribution, especially digitally (McDonald, 2022). Thus, producers financially rely on the extent to which the distributor will make these copies available and thereby repay the production budget. Such a dependency makes distribution practices represent a corporate power that gravitates towards oligopoly and monopoly (McDonald et al., 2021; McDonald, 2022).

How Hollywood films manage to circulate in overseas markets using their subsidiary companies is an example of corporate power and oligopoly, since a great majority of American productions are distributed by the same company. However, to find their place in this corporate American structure, national distribution companies work in a very similar fashion, as major companies with enough market power in an oligopolistic action in the market (Jackel, 2003; McDonald, 2021). Zeynep Çetin-Erus's "Film Industry and Distribution: Distribution in post-1990 Turkish Cinema" (2007) studies this structure in the Turkish film industry. Apart from Hollywood subsidiary companies that distribute

largely Hollywood films in their big market share, a domestic production circulates through big companies' media power and their exhibition network ownership. These companies decide the circulation patterns of films, thus impacting the survival of the film and the producer. Vertical integration, production, and distribution or even exhibition by the same company, reduces the risk but disables independent producers' possibility of financial success by forcing them to rely on big companies' decisions (Çetin-Erus, 2007). Even though the company shares and the companies taking part in the distribution oligopoly have changed tremendously since Çetin-Erus analyzed it, or as stated in the documentary *Kapalı Gişe: Türkiye'de Tekelleşen Film Dağıtımı* (2010), the oligopolist structure in industrial practices remained the same. The distribution industry in Turkey is one of the key reasons why funded Turkish films face box office failures, as argued by scholars of Law 5224 mentioned above.

CHAPTER III

METHODOLOGY

Under the guidance of the academic literature, this thesis will follow a similar structure to the economic film history examples mentioned above. The public data between 2005-2019 will be studied and visualized in order to reveal the trends and economic circumstances of Law 5224. The main data set for this study is Yamaç Okur's Ministry of Culture Cinema Support List 2005-2023 data collection, consisting of information on all funded feature-length films, funding amounts, and box office receipts. The General Directorate of Cinema's annual announcements will be used to double-check Okur's collection and to create a dataset for rejected project applications. While www.boxofficeturkiye.com is the main source for both box office performance and distribution companies' market shares, the Lumiere database is also useful for seeing overseas circulation and double-checking the box office performances. TUIK's annual *Cinema and Performing Arts Statistics* will be considered to evaluate the size of the market in terms of seats, theaters, and admission numbers.

Apart from these raw data, published industry reports are valuable for comparing and extending the dataset. İstanbul Chamber of Commerce (İstanbul Ticaret Odası) published three industry reports, each covering a different timespan. *Situational Analysis of Turkish Cinema: 2005-2010* (2014) (Türk Sinemasının Durum Analizi: 2005-2010), *Film Industry in Turkey: 2011-2015* (2017) (Türkiye'de Film Endüstrisi: 2011-2015), and *Film Industry in Turkey: 2016-2020* (2022) (Türkiye'de Film Endüstrisi: 2016 - 2020). In

addition, there are similar reports available published by different organizations: Ministry of Development's *Development of The Visual Services Sector: Study Group Report* (2018) (Görsel Hizmetler Sektörünün Geliştirilmesi: Çalışma Grubu Raporu), Fil-San Foundation's *Situational Analysis of The Film Industry In Istanbul and the Future of The Sector Project: Analysis Report* (2017) (İstanbul'da Film Sektörünün Durum Analizi ve Sektörün Geleceği Projesi: Analiz Raporu), Competition Authority's Cinema Services Sector Report (2016) (Sinema Hizmetleri Sektör Raporu) and European Audiovisual Observatory's *The Turkish Film Industry: Key developments 2004 to 2013* (2014). Previous industry studies (Yavuz, 2012; Tanrıöver, 2010) and their data will also be considered to cover the entire timespan. These reports and data will be used to portray the financial variables in the Turkish film industry, focusing on Law 5224 between 2005-2019.

Certain Python and Excel tools are used to collect raw data into an analyzable database. Chapter IV offers a macro industry look at Law 5224, examining funding amounts, application numbers, box office performances, and distribution companies. After double-checking box-office information in Yamaç Okur's dataset and manually matching each funded film with a distribution company, basic Excel functions are utilized for calculations and filters for funded category-specific analyses in Chapter IV. This information is also double-checked using the data from the aforementioned reports.

Chapter V requires a different data collection and database creation phase. To achieve this, 5 Python scripts are used. During this process, an LLM model, Anthropic's Claude Sonnet 4, is used as a code helper tool, allowing me to create working Python scripts and debug when necessary. The first Python script, *Fetch_Filmographies.py*¹⁰, fetches full filmographies from TMDb (The Movie Database) according to the list of director names or their TMDb IDs. It uses *tmdbv3api* to connect to the database and fetches all films where the names in the input list are credited as Director into a CSV file. It also uses process filmmakers in batches to avoid hitting access rate limits, along with retry and

¹⁰ See Appendices for full Python scripts.

connection check features to avoid potential issues. The API is removed from the script in Appendix A, and the list of directors is shortened.

Dataset_Merger.py merges two Excel files by moving relevant information about each film and director into a bigger CSV file. The main dataset here is the full filmographies, and this script merges the information on funded films from Yamaç Okur's dataset with the full filmographies. It highlights funded films and adds funding amount, period, and support category information. This way, the full filmography dataset is improved by adding information on funded films. Then again, *Dataset_Merger.py* is used to add box office information to matching films, along with their distribution company information. Therefore, the final dataset includes all films of funded directors with separate funding, box office, and distribution information.

Dataset_Merger_Unmatched_Rows.py is a double-check script that runs through two Excel files and detects rows in the reference file that are not present in the full dataset, then creates a new Excel file with merged data. It allows for comparing two datasets, such as full filmographies with Okur's file, and reveals any information that is missed during the initial merge. It also checks if the filmography collection script managed to match the correct director names by checking if funded projects are present in the directors' filmographies.

After having full filmographies of funded directors with highlighted funded projects, box office information in Box Office Türkiye is required in an analyzable format. Thus, the IMPORTHTML function in Google's Sheets is used to transfer the box office information on the website into an Excel sheet. This allowed this research to incorporate reliable box office information. However, since this function puts release dates and film titles into the same cell in Excel, the Python script in *Split_Film_Name_and_Date.py* is used to separate this information into two columns. It detects Turkish month names in dates and separates them from film titles, thus creating a more workable dataset.

This dataset is used throughout Chapter V by using simple Excel functions to calculate box office averages, production volumes, funding patterns, etc. The order of films needs

to be chronological, but each director's film also needs to be listed together. Even though the output of *Fetch_Filmographies.py* follows this pattern, merging all this data, double-checking, and making manual arrangements might alter the intended order. Therefore, *Sort_By_Director_and_Year.py* checks this order, moves film rows, and orders them chronologically within their respective director, creating a clean, analyzable, and neat dataset consisting of all financial and quantitative information and attaches each information with director names, allowing for the micro-industry focus in Chapter V.

These Python scripts are used in Chapter V to create the dataset, and Excel formulas are used to calculate financial success, career status, and funding patterns to portray the career trajectories of funded directors. This chapter departs from the first funding instances of each director and then portrays the career establishment of directors in terms of their ability to make further films after funding by comparing only two support categories: first film production support and feature-length production support. While Chapter IV mainly uses Yamaç Okur's dataset, along with some additional information from Box Office Türkiye, Chapter V creates a bigger dataset to portray the career trajectories of funded directors. Therefore, Chapters IV and V accompany each other to achieve the aim of this research: portraying Law 5224's economic history along with its impact on the filmmaking careers of Turkish directors.

CHAPTER IV

SITUATING PUBLIC FUNDING IN THE TURKISH FILM INDUSTRY

4.1. Introduction

Since the early 2000s, the Turkish film industry has shown an apparent quantitative growth trend in terms of production, admission figures, and box office numbers. This has been accompanied by qualitative growth, for which New Turkish Cinema scholars can be consulted (Dönmez-Colin, 2008; Suner, 2010; Arslan, 2011; Akser & Bayrakdar, 2014), but to stay within the boundaries of this research, the quantitative growth is necessary to apprehend the industrial circumstances between 2005 and 2019. Industrial growth in Turkish cinema has not only attracted local studies of the era in question but also some European scholars. In 2008, when European Audiovisual Observatory's "FOCUS - World Film Market Trends Report" included Turkey as a standalone section to their study, they discuss Turkish film industry with doubling domestic productions over the past two years (Focus: World Film Market Trends, 2008), "growing significantly over the past years" (2009-2011), strengthening "its position as the seventh largest European market" (2012) or "registering the highest box office growth in all of Europe" (2015). The International Union of Cinemas' UNIC reports emphasize the growth similarly, saying that it "enjoyed equally positive results based on successful local films, having developed in recent years into resilient growth markets" (UNIC Annual Report, 2014-2015). Or in a Turkey-focused industry study, *The Turkish Film Industry: Key Developments 2004 to 2013*, Martin Kanzler puts great emphasis on the growth trend that Turkey had demonstrated since the early 2000s, "firmly establishing Turkey as the second largest European growth market and the 7th largest European theatrical market" (Kanzler, 2014, p. 1)

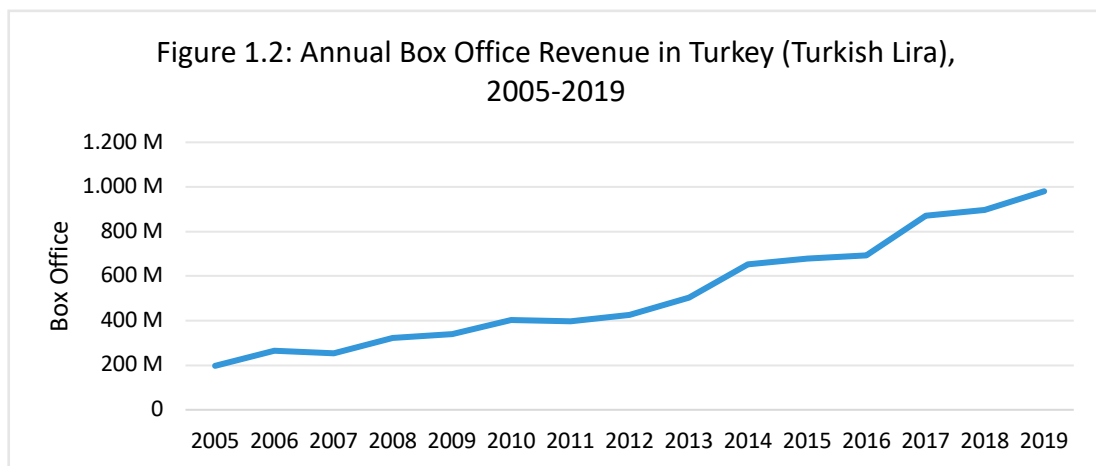
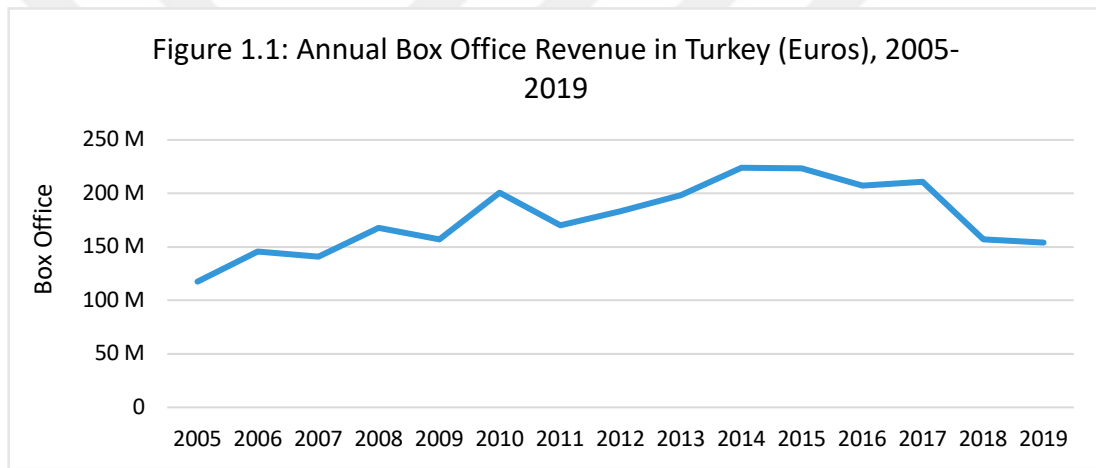
As mentioned in Chapter II, almost all these scholars point out that Turkey's growth correlates with two funding bodies that became available for Turkish filmmakers around the same time. One is Eurimages, which is a pan-European co-production scheme for filmmakers, but more importantly, the other is the Turkish Ministry of Culture and Tourism's national funding scheme that was established in 2004 (Tanrıöver, 2010; Behlil, 2010; Yılmazok, 2010; Vitrinel, 2011, 2015; Yavuz, 2012; Tekeoğlu, 2016; Çağlar, 2020). Funding body's support for domestic productions has increased national production rates and enabled directors/producers to secure a budget, thus entering the domestic film market. However, what makes the Turkish film industry stand out in the global industry discussions is not only the production rate, but admissions, screen numbers, and most importantly, domestic admission percentages, showing the aforementioned industrial growth and allowing to situate public funding in the industrial landscape in Turkey.

4.2. Screens, Cinemas, Admissions, and the Domestic Market

The public data of box office intake or admission figures proves the Turkish film industry's growth between 2005-2019. The reason why 2019 is the cut-off year for this thesis is the COVID-19 outbreak, which requires a new set of analytical tools and datasets due to the sharply increasing popularity of SVOD platforms during this period. Also, Law 5224 went through a major update in 2019, allowing the Ministry to fund co-productions and theater chains along with some changes in the systematics of funding, such as the removal of loans and providing funding rather in the form of grants. However, the 2019 revision might still lack definite industrial impacts for a thorough industrial study because of the instant COVID-19 outbreak just after the update, rendering the impacts of the revision almost entirely unreviewable due to closed theaters and stagnated production. Therefore, all the discussion about Law 5224 in this thesis covers the earlier versions of the scheme with their financial connotations, meaning only the financial and quantitative aspects of the Turkish film industry and Law 5224 are studied in order to focus on the economic impact of the funding body on the wider film industry and its players.

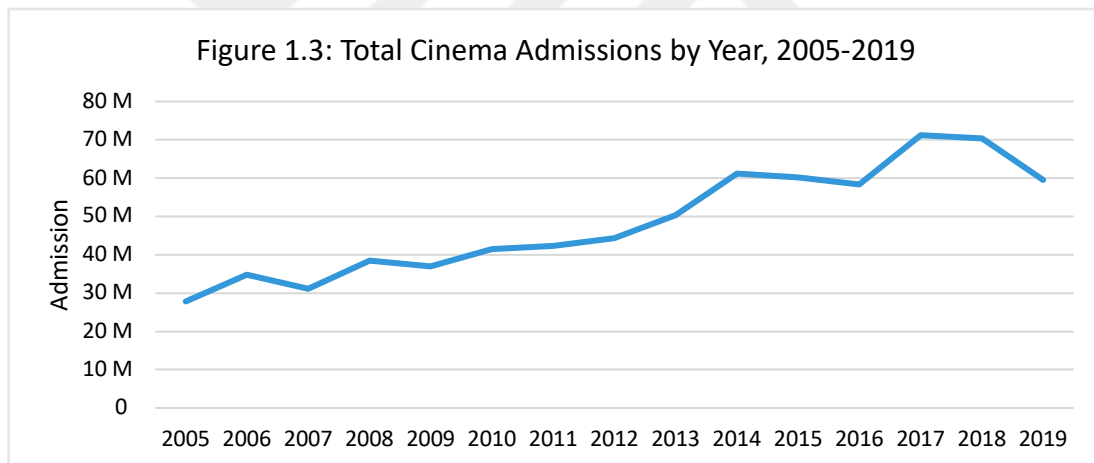
Public data regarding the Turkish film industry and the funding scheme lay out the growth mentioned above on a chronological basis. Annual box office data indicate an

upward trend, showing how each year was more successful than the last, as measured by admission and box office figures. However, annual box office data can be misleading when evaluating industrial growth because of the hyperinflation that Turkey has been facing. Comparing annual box office records in Euros in Figure 1.1 and Turkish Lira in Figure 1.2 helps correct the figures to account for inflation, resulting in a more fluctuating record, which makes it hard to analyze monetary data in a meaningful fashion. In order to keep inflation into account and make the study understandable to a wider readership, all monetary data is converted to Euro equivalents of each year using the annual changes of Turkish Lira as recorded by investing.com.



Even in the case of inflation, there is a fluctuating overall growth trend in the Turkish national box office. The change between 2005 to 2019 is €36.474.056, which indicates a 31% increase. Moreover, 2014, the centennial of Turkish cinema, also marks the peak in terms of box office, displaying a €223.991.969 total gross, which accounts for a 90%

increase over the starting point of 2005, along with “registering the highest annual box office growth in all of Europe” (Focus: World Film Market Trends, 2015). The Turkish Ministry of Culture and Tourism doubled the available funding budget in 2014 in order to celebrate the 100th anniversary. “In the 100th year of Turkish Cinema, in addition to the record-breaking support provided to feature-length films, the substantial support given to short films, documentaries, and animation projects — which will serve as a foundation for successful productions and a source of motivation for young directors — will also pave the way for high-quality productions in the industry” (General Directorate of Cinema Funding Committee Announcement, 2014/3). Also, it is important to note that the lowest box office in Turkey within the study years is also 2005, the starting year. Hence, the annual box office of the Turkish film industry has an upward trend despite hyperinflation-related or other social/political factors.



Admission figures reflect the overall industrial growth’s similarity to box office intake, yet in a steadier trend, owing to being less related to inflation. Even though box office intake is directly shaped by admission figures, admission is not a monetary figure, making it more consistent than box office. The growth is more systematic with minor fluctuations, as it is observable in Figure 1.3. The total change in admissions from 2005 to 2019 is more than 31 million, with the lowest figure recorded in 2005 at 27,801,041 tickets. Even though the highest box office record was in 2014, it does not correspond to the highest admission in 2017 with 71.188.594 tickets, which proves why box office records might be misleading due to inflation. The change between the lowest and highest admission accounts for a 156% growth, securing Turkey as the 7th largest market in

Europe (Focus: World Film Market Trends, 2018). The sudden 15% decrease in 2019 may be the result of the 16% increase in average ticket price, the highest in the selected timespan. Nevertheless, the upward trend is clear.

Even more than the robust growth trends in both box office and admissions, what sets the Turkish film industry apart from its European neighbors is the high market share of domestic productions. Turkey boasts the highest domestic percentage in Europe, being more than %50 percent in all years except 2005, 2007, and 2012. Such a rate is quite

Figure 1.4: Domestic Film Market Share in Turkey (%), 2005-2019

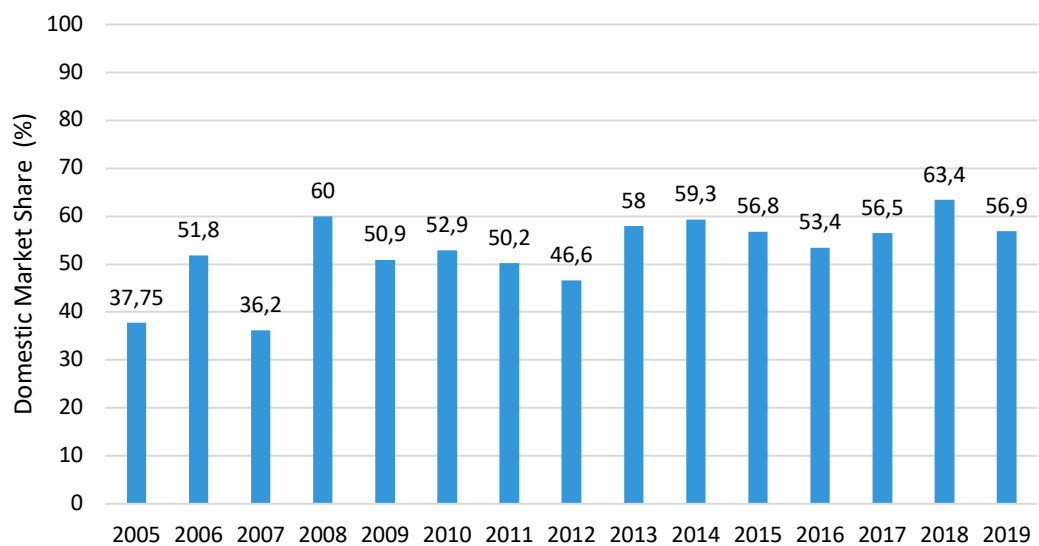
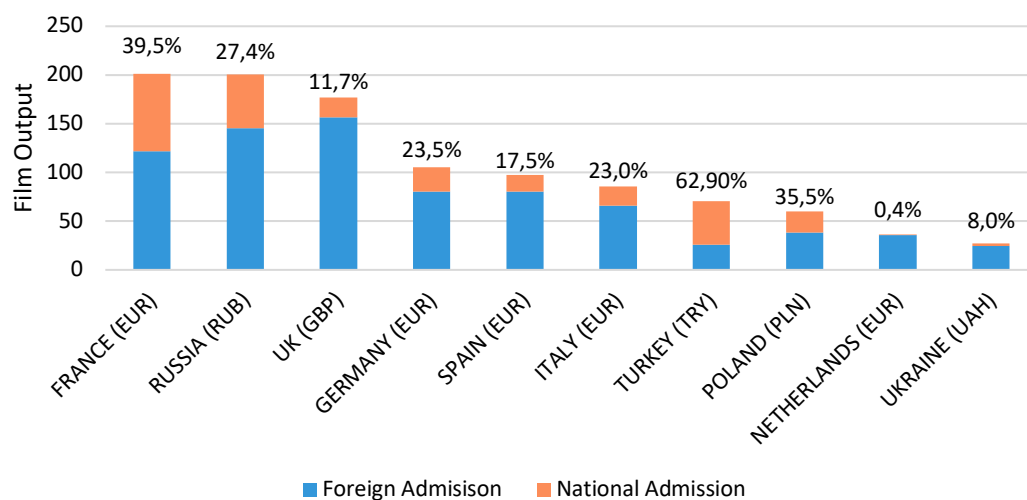
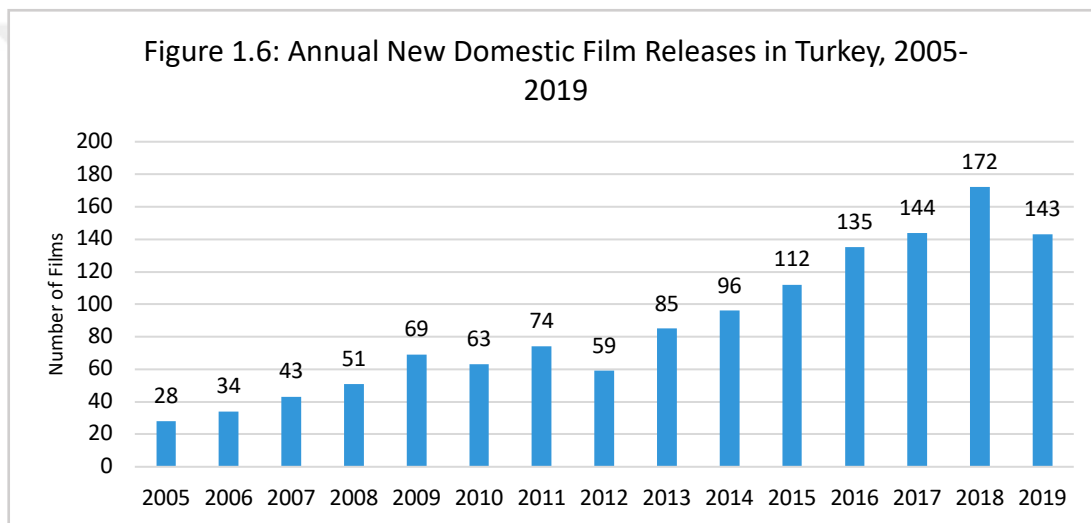


Figure 1.5: Top 10 European Film Industries by Cinema Admissions and National Market Share, 2018



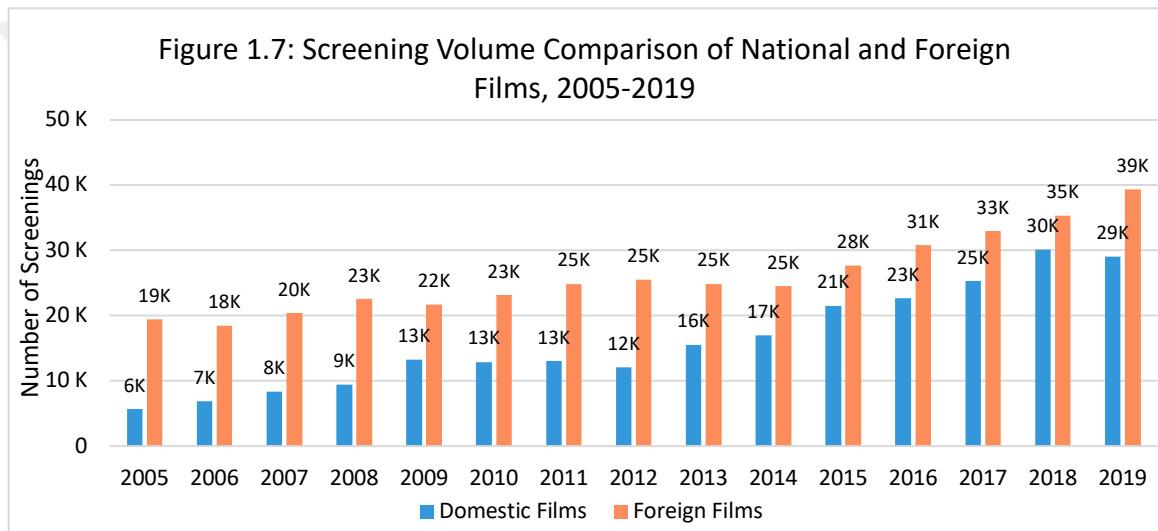
impressive, especially in Europe, as any other major European film market, including the leader France, only managed to achieve up to 39.5% market share for domestic production in 2018, compared to Turkey's 62.9% (Focus: World Film Market Trends, 2019). In 2018, Turkey was the 7th biggest overall European film market in terms of admissions and 1st in national market shares, as one can see from Figure 1.5. Turkish national market share, which is the highest in Europe indicates, that audience preferences enable the Turkish film industry to survive against Hollywood by providing a domestic film market.



Film production rates also have a similar uptrend, which can be directly correlated to the funding scheme itself because of Law 5224's direct impact on production. Film production rates exceeded in parallel with box office and admission figures between 2005-2019, shown in Figure 1.6. The uptrend is also quite stable, meaning there are only slight annual fluctuations, and almost every year is quantitatively better than the preceding years. Even though Turkey does not match the top 6 largest markets of Europe in production, "it has become the 8th largest film producing country in Europe" (Kanzler, 2014, p. 33; Şentürk, 2017, p. 40). Therefore, the production volume in Turkey is in an upward trend, similarly and accordingly to admissions and box office numbers.

While 2019 also displays a decrease in admissions and box office (EUR), a lower production rate is correlated to the overall decline in the industry. One factor in this overall decline is the crisis between exhibition and production companies, also known as the "popcorn wars," when exhibition companies started selling tickets as a promotion to

popcorn buckets or other side items. This led production companies to postpone their release schedules or hold them entirely until the General Directorate of Cinema banned such marketing strategies in late 2019. However, as this crisis is beyond what this thesis aims for, Çağla Karabağ and Ezgi Bugey’s “Concentration in the distribution and exhibition networks within Turkish film industry: The case of CGV Mars Entertainment Group” (2023), as a Turkish article, and Murat Akser’s “Turkish online film distribution: Fighting for Indie filmmaking in a neoliberal and censored context” (2023) as an English source can be consulted for further understanding of the issue.



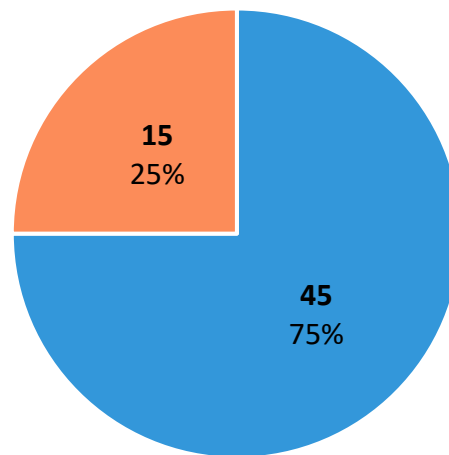
Knowing the record-high national market for domestic productions shown in Figure 1.4, comparing the numbers of domestic and foreign film exhibitions summarizes how production volume, and similarly exhibition intensity for domestic production, improved over the course of 15 years. Also, Figure 1.7 shows that the reason behind the domestic films’ market share is not their heightened circulation, but that the audience prefers to see domestic productions. Foreign films have more screenings than domestic films, yet the market share for domestic films has been above 50% since 2013. While the number of foreign screenings in 2019 doubled compared to 2005, exhibition volume for domestic films grew five times, reflecting the industry’s great tendency towards domestic productions. Nevertheless, foreign films’ having higher exhibition volumes without lowering the domestic market share below 50% shows the strengths of Hollywood and other foreign conglomerates’ distribution networks, which will be briefly pointed out later in the chapter. The main reason behind these improvements in domestic production and

exhibition volume may address questions regarding the public funding scheme established in 2004 by the Ministry of Culture and Tourism and its impact on these industrial improvements.

4.3. Law 5224: Public Film Funding in Turkey

Law 5224 is not the first public funding scheme. In 1986, Turkey put the *Cinema, Video, and Musical Properties Law* (No. 3257) into practice, aiming to support local productions and combat the growing pirating industry. Even though it was an attempt to respond to the 80s production crisis and made a few productions possible, it failed to propose a systematic scheme to improve the industry (Akbulut, 2016). Therefore, Law 5224, being the first systemic scheme and an improvement to Law 3257, along with a lack of data regarding the previous scheme, makes it the central support mechanism to be studied in this research.

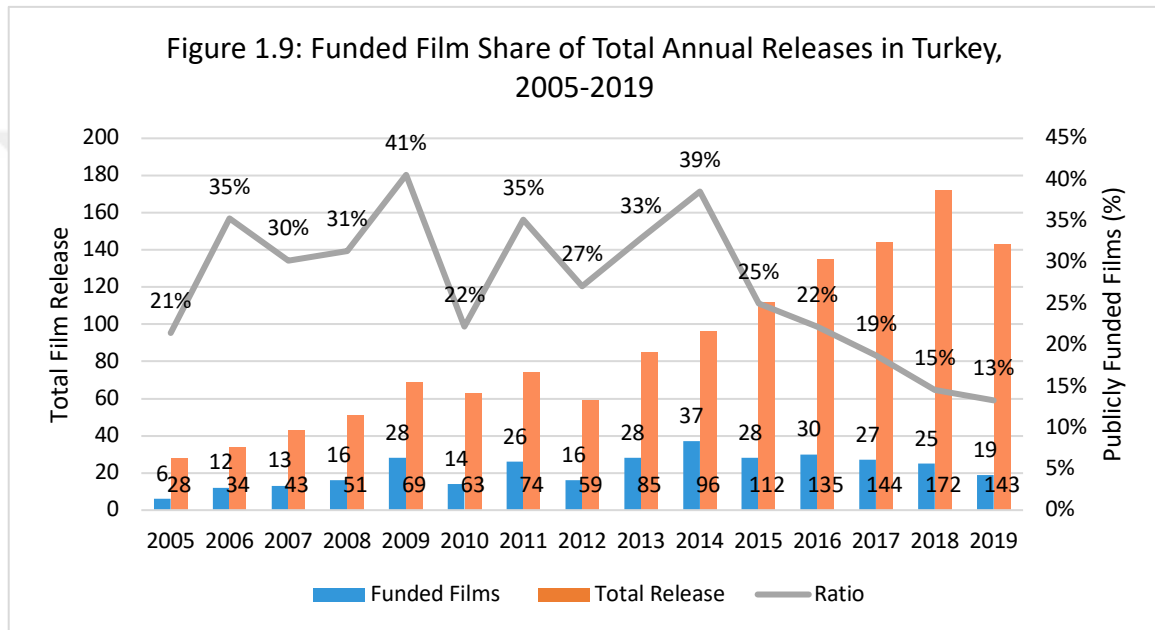
Figure 1.8: Number of Films Funded by Eurimages and Law 5224 Support Programs, 2005 - 2019



■ Both Eurimages and Law 5224 Support ■ Eurimages Support Only

Starting with the Council of Europe's funding program, Eurimages' inclusion of Turkey in 1990, along with the establishment of the Turkish national film funding scheme, Law 5224 in 2004, new ways of funding have been launched for Turkish filmmakers. These funding schemes are crucial for the New Turkish cinema era. Because of Eurimages' European-centered nature and limited impact on the Turkish film industry, Eurimages-funded projects are excluded from this study in order to focus only on the national public

funding body. As shown in Figure 1.8, there are 60 films supported by Eurimages between 2005-2019, including co-productions with Turkish producers as the minority, and 45 of those are also funded by Law 5224. Knowing that there are 565 films funded by the Ministry in the same time span, Eurimages only accounts for 10% of publicly funded films in Turkey. This is why Eurimages is excluded from this research despite its undeniable impact on the creation and global circulation of New Turkish Cinema.



The proportion of publicly funded films among the total number of releases in Figure 1.9 also indicates the importance of the funding body for Turkish cinema. Even though it is in a declining trend, especially after 2016, 27% of the annual total release in the industry consists of the funded films. Its intensity before 2016 ranged around 30%, with some notable years such as 2009 at 40%, yet it declined towards 15% around 2018. Therefore, Law 5224's impact on the increasing production rates in Turkey is visible, as a quarter of the entire post-2005 Turkish cinema is supported by the government. Even though the rate of funded films among the total number of released films declines after 2016, public funding is one of the largest reasons behind the increased production numbers and overall industrial growth in the Turkish film industry. Production is only a section in the value chain and needs the collaboration of other value chain activities. Therefore, without a proper distribution sector, these improvements could only lead to quantitative growth rather than a sustainable film industry. Before the section devoted to how distribution

hinders the potential of financial success for funded films, the Turkish Ministry of Culture and Tourism's sustainability vision is important to understand the cause-and-effect relations between production and distribution.

4.3.1 Public Funding Scheme: Rules, Expectations and Requirements

Rules and requirements not only show how funding mechanisms work, but also shape the visions they promote regarding industrial impact. Law 5224 has two parts dedicated to the explanation of rules and expectations: the law and the regulation. The text of Law No. 5224 states the main aims, rules, and terms that it entails. "Regulation on the Support of Motion Pictures", on the other hand, thoroughly explains how the rules, aims and terms in the law will be applied with certain procedures and principles. During the years 2005-2019, Law No. 5224 had no changes. However, there were two updates to the regulations, respectively in 2010 and 2013, which prompted minor changes to how certain aspects of the support scheme were put into action within the industry.

The aim of Law 5224, as one might expect, is to improve the conditions of the industry through funding domestic projects related to film. As the law defines, funding depends on "evaluating projects related to production, script writing, archive, documentation, technical infrastructure, education, research, development, promotion, distribution, marketing, and exhibition in the cinema sector and supporting those deemed appropriate" (Law No. 5224, Article G). Therefore, funding, as stated by the Ministry in the law, not only comprises production but also all other sorts of sectors tangential to production.

These supports can be given as grants or loans, determined by the type of funding or the potential of the application. Also, these supports can be direct or indirect. Whereas direct support means direct payment to the applicants, indirect supports pay loan interests, leaving the debtor to be only responsible for the principal payment. Applications are evaluated by the funding committee, consisting of different representatives from employee associations, the Ministry, and industry professionals. How this committee is formed is explained in detail in Article 5 of Law 5224 and Articles 9, 10, 11 of the regulation text.

There are three main areas of funding: project support, production support, and post-production support. In Figure 1.10, project support is a direct grant for pre-production

stages such as “research, development, scriptwriting, translation, and design.” Production support aims to cover the entire filmmaking process, from pre-production to eventual release, through direct or indirect loans. Lastly, post-production support provides direct or indirect funding in the form of a loan or grant for “marketing, distribution and exhibition” stages of finished films in order to help them reach the audience (Official Gazette No: 25642, Article 8, section A).

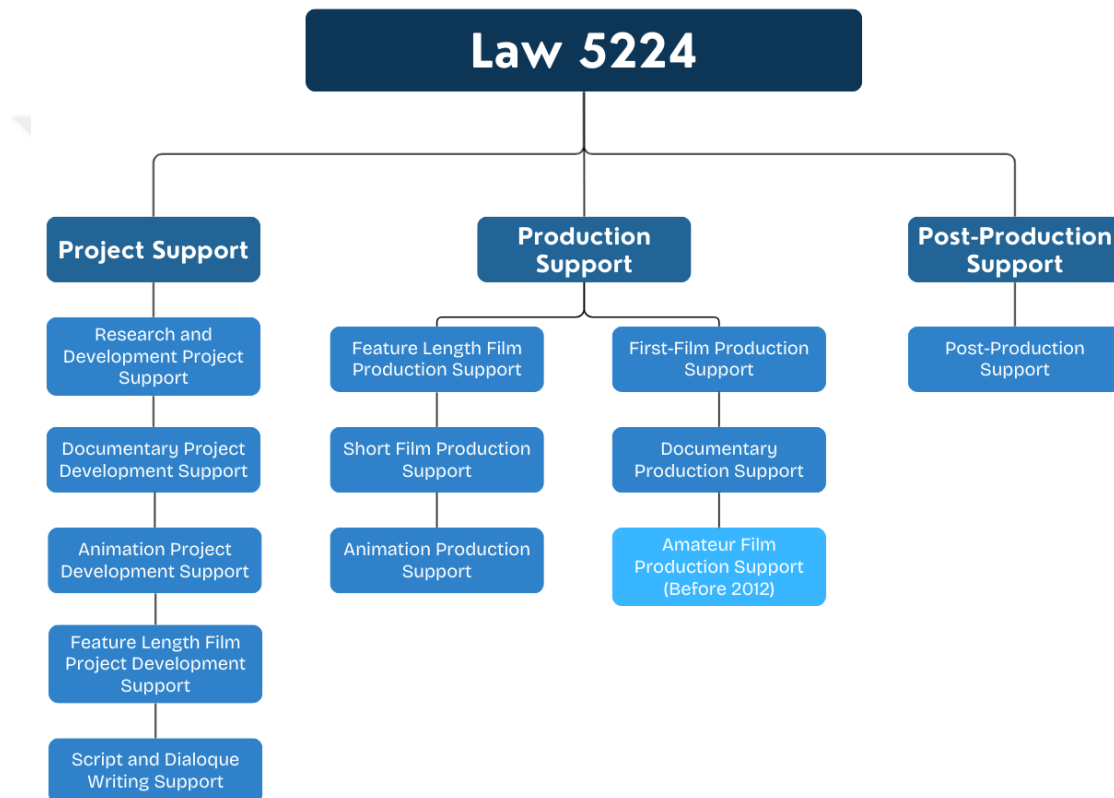


Figure 1.10: Law 5224 All Film Support Categories, 2005-2019.

As shown in Figure 1.10, these three main areas of funding have some subcategories as well. Project funding can be given for script development, documentary film development, or more generally, a research and development project. Production support can be a fiction feature length film production, first film production, short film, documentary, or animation. Before 2012, there was an amateur film production category as well, yet it still has limited data regarding its circulation and was removed from the funding body around 2012; thus, it is not included in this study. Post-production does not

have any subcategories. Figure 1.10 shows each main and subcategory that Law 5224 offered until 2019, excluding new funding categories added after the 2019 revision.

While evaluating applications, the funding committee pays regard to a set of criteria specified in Article 14 of the regulation. Articles in these criteria indicate certain features that applicants need to fulfil, along with what the Ministry expects from the filmmakers. These expectations are related to the applicant's previous work and their anticipation for the invested projects, which is additionally important in understanding the Ministry's mindset while evaluating applications.

- a) Possessing qualitative value and originality in terms of cultural, artistic, and aesthetic aspects,
- b) Contribution to the promotion of national culture and cultural values,
- c) Compliance with public order, general morality, the protection of the mental health of children and young people, respect for human dignity, and other principles set forth in the Constitution,
- d) Realism of the budget and financial plan, and the feasibility of the implementation schedule,
- e) If applicable, previous works and national or international achievements.
- f) In applications for production support, additionally, the experience of the producer, director, and artistic team involved in the production in their respective fields, the project's potential for national and international circulation, and its ability to foster the development of new artists (Official Gazette No: 25642, Article 14).

What is especially crucial for this study are the last two criteria, previous successes in Article E and the experience of the creative team along with the project's circulation potential in Article F. Connecting these two items implies that the applicants' previous works are significant in order to be eligible for funding, in addition to the aforementioned "circulation potential" which suggests that the General Directorate of Cinema wants the funded directors to be able to reach their films out to the public and must keep this ability

intact for potential future funding possibilities. Past successes or failures have an impact on the chance of future funding potential, according to what the criteria indicate. Apart from the evaluation criteria, there are also some general rules or prerequisites that influence the applicants. If a project is rejected according to the aforementioned criteria, the applicant cannot apply with the same project in the same year. Also, projects rejected twice by the committee will not be considered again. Other than the general criteria, there are also category-specific prerequisites and expectations that determine directors' eligibility for funding.

As stated above, funding in each category can be provided as a loan, a grant, or a combination of both. The type of film project determines how funding is awarded, and types that are eligible for grants do not require repayment. Feature films are eligible for loans, rather than grants, as their industry status offers better commercial prospects than shorts, animation, or documentary film projects. Documentaries and short films mostly rely on non-commercial exhibition venues such as festivals or cultural events, which turn them into potential ways to show eligibility in the industry as a director rather than having commercial success. Animation, on the other hand, is an underdeveloped sector, and grants are expected to improve animated films' industrial circumstances. Contrarily, feature length films compete in the commercial scene, and live-action fiction feature length films are expected to circulate in the industry through distribution and exhibition companies that reach out to the wider public through theaters. This is why the feature length film production support requires the applicants to produce and commercially release their funded films in order to meet the criteria and repay the support.

The directors and producers who did not manage to commercially release their films or to return a profit face some consequences. Firstly, repayment is waived so that the loans given to these filmmakers turn into grants. But in this case, the filmmaker cannot apply for another funding for a set amount of time. Initially, this penalty period was set at 3 years for directors and forever for producers. However, one of the major changes of the regulations in 2013 was reducing the exclusion period for producers to 3 years. If the producer manages to pay the loan-turned-grant back during the 3-year suspension period, they are able to apply for funding again. If the film was not commercially released or

filmed, the end of the fiscal year that it was funded is considered as the date of release for the purpose of statutory interest calculations.

Another way to be deemed eligible for funding after a commercial loss is for the funded film to be invited to an international festival specified by the Ministry of Culture and Tourism. The Ministry's official list separates festivals into three categories, ordered according to their reputation and prestige. For instance, Cannes is an A-level festival, a level at which an invitation is sufficient to waive the loan entirely. However, for B-level festivals such as Moscow or Caria, the filmmakers need to win an award too. For national festivals, including Antalya, İstanbul, Ankara, and Adana, the films must specifically win Best Film or Best Director to waive the loan and be eligible for funding again. Other award categories at national film festivals are not sufficient to meet this expectation. The Ministry shares festival lists as part of the funding committee announcement only when there is a change. The latest list was announced in 2013 with 17 festivals in the A-list, 57 in the B-list, the C-list for the Oscars, Golden Globe, and Asia Pacific Awards, and lastly four national festivals in Antalya, İstanbul, Ankara, and Adana. Therefore, the circulation that the Ministry expects takes at least one of two forms: commercial circulation in the theaters, or cultural presence in festivals. Such focus on festivals shows Law 5224's aim for funded films to not only circulate theatrically, especially but not exclusively nationally, but also among international festivals. Even though festivals are crucial to obtain a full picture of how Law 5224 operates culturally, a close examination of the festival expectations of Turkish public support is beyond the scope of this thesis. Still, these dual indications of success, either festival presence or commercial return, are criticized by scholars discussing the public film support mechanism in Turkey (Erkılıç, 2008; Diker, 2020).

Similar to feature length film projects, other categories also have some prerequisites or criteria to be eligible for application. In the script development subcategory, screenplay writers who are funded twice must realize one of their funded screenplays as a film in order to be able to apply for further funding. The research and development category also works the same, at least one funded project must come to life before the third funding. First film category is the same as feature length production support in terms of box office or festival expectations. Post-production support, on the other hand, does not turn into a

grant after an unsuccessful theatrical run, and the applicants are expected to pay it back regardless, sometimes through debt enforcement.

No matter the type of film, the Ministry of Culture and Tourism does not fund the entire planned budget. For all three areas of support, the fund only covers up to 50% of the designated budget. Before 2013, this upper limit was 30% for production and post-production categories; the changes made that year equalized the percentages across all three areas. If there is a miscalculation in the designated budget and it ends up less than what was specified in the application, the excess amount is considered a debt and repaid.

These rules, prerequisites, and expectations not only summarize how the support mechanism technically works, but also show the main aims and expectations of the government with this public funding initiative. As claimed by many other scholars of New Turkish Cinema, public funding in Turkey has allowed more productions to come to life. The fund that the General Directorate of Cinema offers is the primary source of budget for these films. What the Ministry envisions through increased production rate is not only the numerical increase in new films available for screening, but also an idea of sustainability through reutilizing the money spent on cinema by the audience into new production possibilities. The main budget of the support scheme comes from a 10% entertainment tax levied on the ticket prices. While 75% of this taxed amount is transferred to the Ministry of Culture and Tourism, the remaining 25% is allocated for municipalities. In the bigger picture, the aim is to reuse this capital generated by ticket sales to keep the industry alive. However, the funding budget for new film projects is less than the amount the Ministry collects each year through the entertainment tax.

The Ministry transfers 10% of the entertainment tax into Law 5224's annual funding budget. However, the annual budgets do not correlate to the promised transaction of 10%, as criticized by Kültigin Kağan Akbulut. He says, "However, when we look at the total box office revenue and the share that is supposed to be allocated, the amount on paper is never actually transferred. In fact, although box office revenues increased significantly over a ten-year period, the amount of funding did not increase until 2013" (Akbulut, 2016, p. 15). He correlates this with what former Director General of Copyrights, Abdurrahman Çelik, said in an interview regarding the reason for the misalignment.

According to Çelik, exhibition chains do not pay their taxes accordingly because the penalty for not paying taxes is lower than the taxes themselves; thus, the Ministry cannot acquire the taxed amount as it should. Akbulut also states that the amount transferred from the entertainment tax to the General Directorate of Cinema is also used for the directorate's regular expenditures. Since this issue is beyond the scope of the current project, scholars and researchers can be consulted for further understanding (Akbulut, 2016; Birincioğlu, 2019; Diker, 2020)

This idea of sustainability is also visible in the inner workings of the support scheme, which impacts the rules, prerequisites, and criteria of Law 5224. The distribution of loans and grants is meant to sustain the scheme on its own by expecting commercial return from those in the best position to obtain it in order to fund projects far less likely to turn a profit. The reason why feature length production support is given as a loan is to enable circulation of money from commercially mainstream films towards less commercial forms such as documentaries, short films, or animations. Therefore, the capital collected as tax should circulate among different projects and make multiple projects available to the audience. Successful films then lead to more taxed capital, and the cycle continues.

This vision of the Ministry is not only visible through the reuse of entertainment money but also in the criteria applied to determine success, especially from the funded feature length films. The criteria specified in Article 14 also suggest an idea of sustainability in terms of how the Ministry chooses projects to fund. As stated above, sub-articles E and F put emphasis on the applicant and creative team's past successes and achievements, which might be understood as being programmed in prestigious festivals or box office success. The Ministry's expectation for funded films is circulation in either the domestic exhibition market or international film festivals. Therefore, what the Ministry expects from directors and producers is to be successful in the past and have the potential to hold that success for future projects. Filmmakers applying for production support for feature length film have most probably completed and released projects before. Thus, the projects they underwent are important for their further funding applications according to the criteria. If they are deemed eligible for another support, the new project turns into another past work that the committee will include in their

evaluation, which could potentially affect the filmmaker's eligibility for any future funding possibilities.

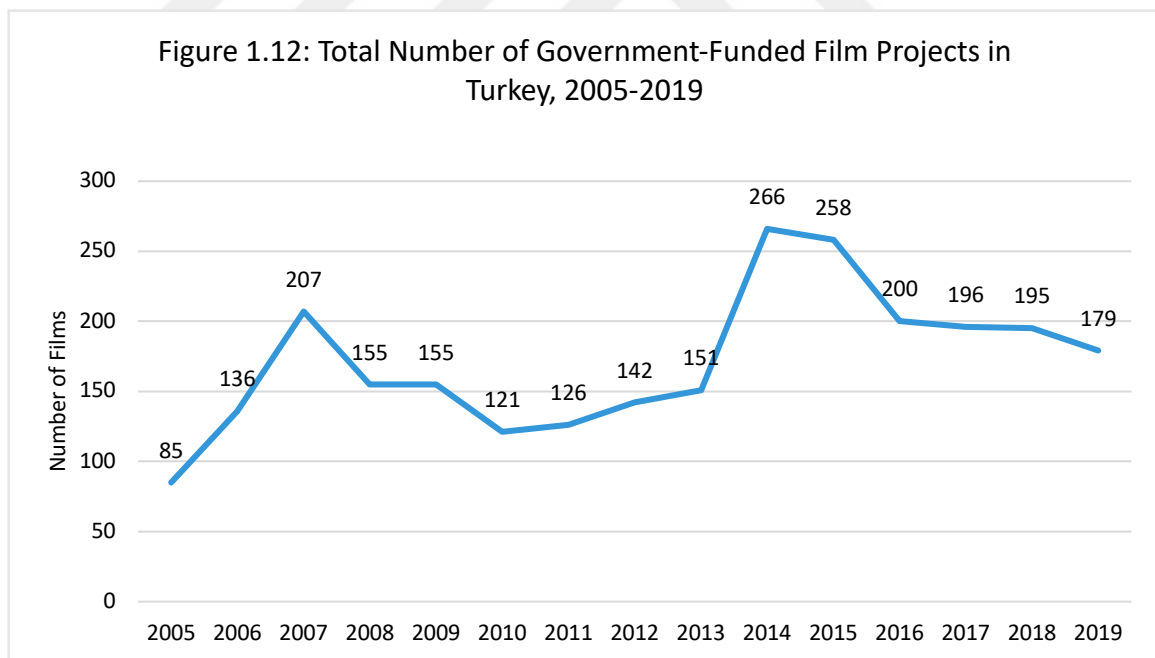
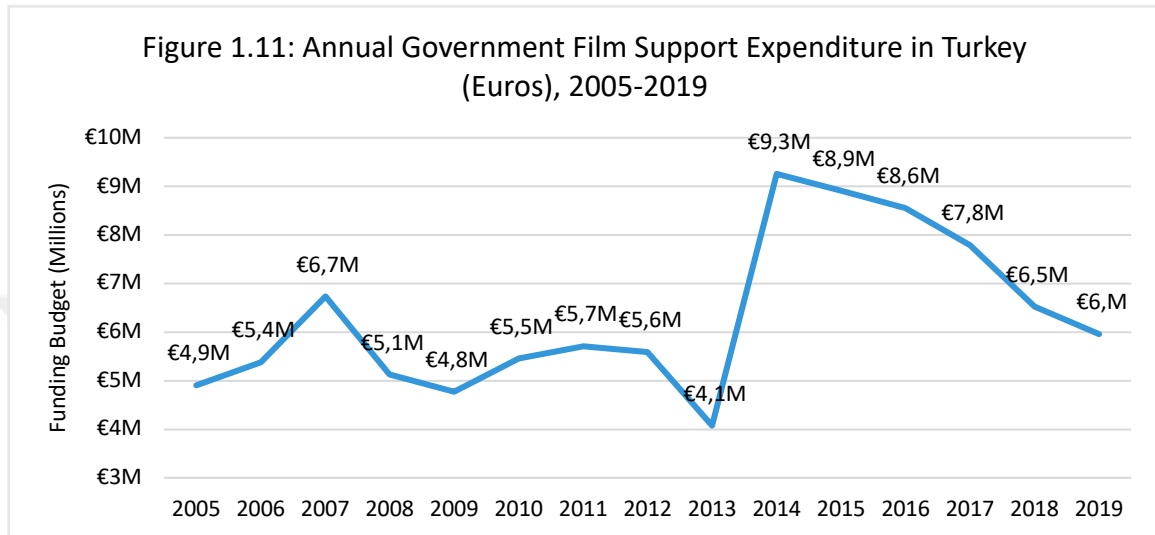
For the first film category applicants, this circular motion starts with the funding scheme itself, rendering an evaluation of a past success impossible, apart from short films or documentaries. Therefore, filmmakers funded with the first-film category begin their career journey with Law 5224, and accordingly create their debut work that the Ministry will evaluate later if the filmmaker applies for further funding. Knowing that everyone can be funded in this category only once, the funded debut work will be the only project to demonstrate any "past achievements" in the context of evaluating the potential for further state funding.

What the General Directorate of Cinema expects is for past success to lead to future success with consecutive funds. They aim at a sustainable funding process where the money spent on previously successful filmmakers will be kept in the circle, while the market determines whose potential is left unrealized. Thereby, the vision of sustainability can be observed both in the overall transfer of capital from tax to filmmakers and within the evaluation criteria of how the Ministry chooses who to fund. This vision, on a surface level, seems to aim at channeling the resources towards the parties that can foster circular success, leading to more production. That said, financial success is directly related to distribution, and the oligopoly in distribution hinders the accessibility of financial success; therefore, the current structure of distribution in the Turkish market hinders the sustainability vision. Oligopoly in the Turkish distribution industry requires a closer look, and to evaluate whether the sustainability vision works or not, the dataset regarding public funding needs to be reviewed to pave the way for the examination of distribution.

4.3.2. Economic Portrayal of Law 5224: Expenditure and Financial Return

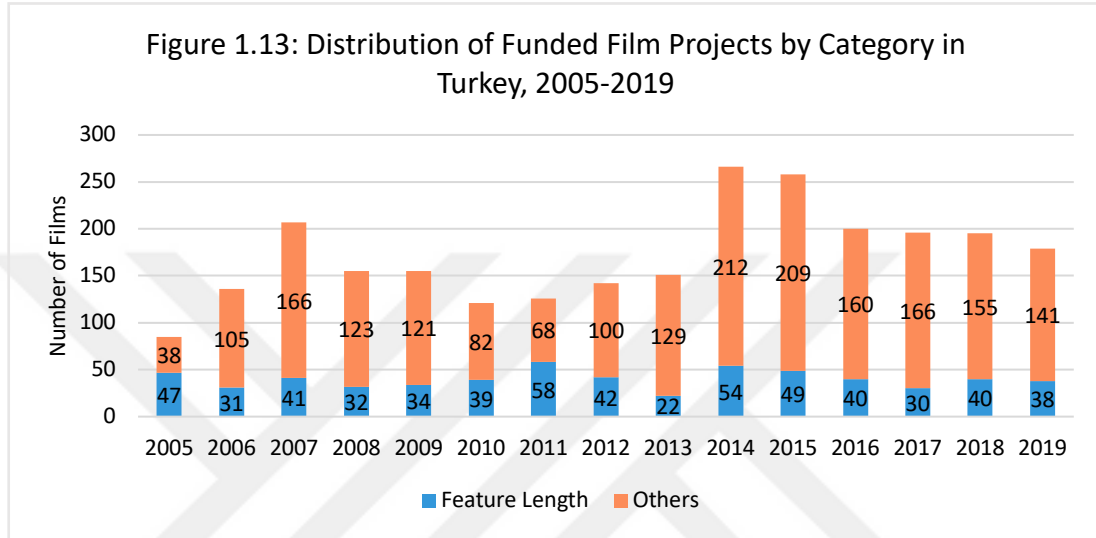
If we look at the amount spent on film funding each year through Law 5224 between 2005 – 2019, the total funding budget seems to lack a definite trend when viewed in Euros, possibly caused by the inflationary instability of the Turkish Lira. However, there are some years of high supply, notably in 2014. As noted above, the potential reason for the sharp increase in 2014, which more than doubled the budget of 2013, the lowest budget of the period of study, is the celebration of the 100th year of Turkish cinema. After

2014, the visible downtrend, likely exacerbated by inflation, returned to a position similar to pre-2014. Therefore, the Ministry increased the budget according to inflation in order to provide stable support in terms of the number of films funded each year.



Compared to the budget, the total number of funded projects graph has a very similar curve, with 2014 being the highest, and a gradual decrease coming after that. The amount spent on funding, obviously, has a direct impact on the number of projects funded between 2005 – 2019. The similarity of these graphs also strengthens the idea of the Ministry's attempt to regulate the budget and number of funded films to stabilize the

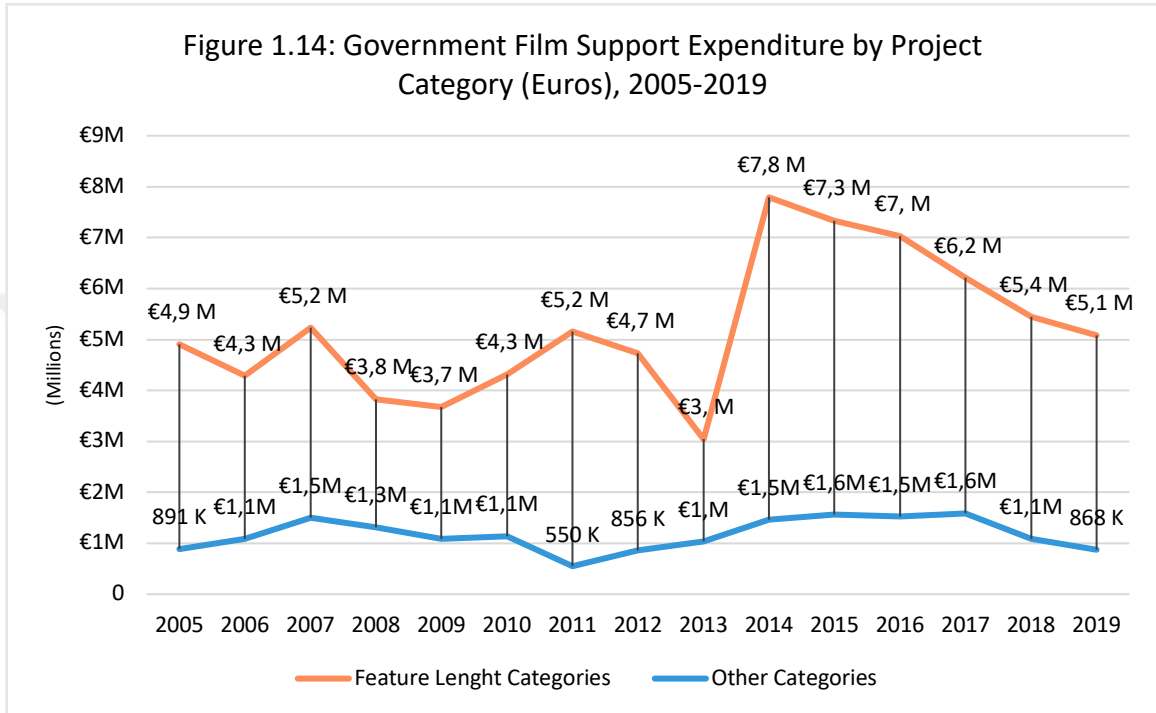
support scheme. These numbers consist of all projects from three main categories: project, production, and post-production. These numbers are gathered from Yamaç Okur's dataset and manually collected from the General Directorate of Cinema's annual announcements.



Dividing the number of funded films into two groups in terms of their format, feature length productions and others (documentary, short film, screenplay, animation, and research project) shows that the number of funded feature length films (production, first film, post-production categories) are outnumbered by the number of funded documentaries, short films, screenplays, animations, and research projects by a significant margin. In fact, the first funding year was the only time when the number of feature length films was closer to that of other categories. After 2005, the number of funded non-feature length projects substantially increased while funded feature length films had slight changes over the course of a 15-year period.

Even though non-feature length projects are funded in greater numbers than feature length films, the amount allocated for feature length films is much larger than for other project types. Expectedly, feature length projects are more expensive, especially if they aim to return profit. Therefore, feature length project is funded with large amounts of loans by the Ministry. Other projects, on the other hand, are funded with grants in smaller amounts to numerous projects, as they do not have the potential to return a financial profit, but might spread culture in different non-commercial venues. The number of funded films and the budget allocated for each support group demonstrate the reason why

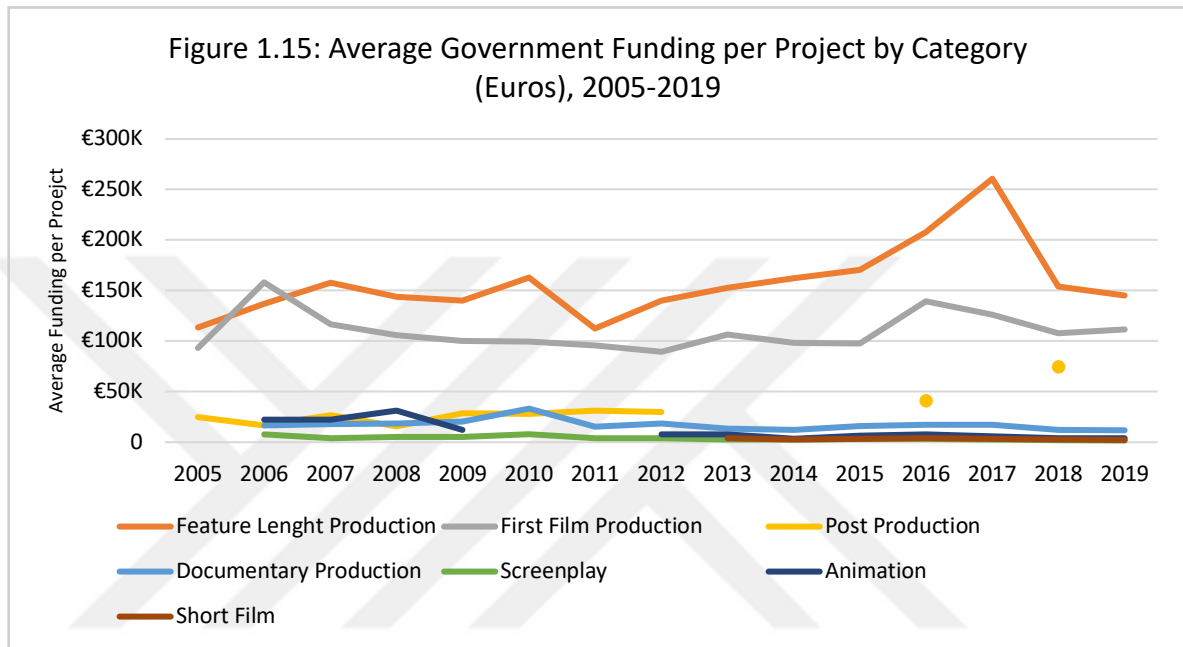
feature length film support is a loan. Funded feature length films are the main financial resource of the support mechanism as the only profitable category that can lead the Ministry to fund non-commercial projects using the capital gained through ticket sales.



The average amount a funded project gets for each category also demonstrates the overall funding system. The gap in the post-production category is for the years when no post-production project was funded. The short-film gap, along with the lack of data for 2005 for categories except feature length production, is due to a loss of data. We have the total amount spent on short films each year, but lack the exact number of projects before 2013, making the calculation of the average amount less reliable.

As can be seen in Figure 1.15, average funding per project is much higher for feature length production support categories, first film, and production. It ranges between €100.000 and €250.000 according to budget and the number of funded projects each year. Yet it is rational to regard 2014 as an exceptionally sharp jump because of the record-high funding budget for the anniversary, which produced the overall average result of €157.334. First film category, with a smaller range of €100.00 to €150.000, does not have a similar curvature to production fund, surpassing the production average in 2006 with a peak. Furthermore, it went to a sharp increase in 2013, rather than 2014, alongside the

production fund. This unstable formation of the graph might show that the first film category is more experimental in terms of the number of funded projects and the budget allocated for these, whereas production support is kept more stable in terms of the same parameters. The overall average is €109.805.



Other categories, which mostly offer grants rather than loans, have the lowest and most stable average funding per project. Especially the amount spent on documentary and screenplay funds seems to be directly proportional to the number of films funded and results in a straighter line, even though the number of funded projects changes drastically between years. The average amount of documentary support changes between €11.000 and €17.000, while the screenplay fund ranges between €2.000 and €7.000. Animation support is the most unstable category in terms of the number of films funded each year, ranging from €3.800 to €22.000 per project, and it is not always directly proportional to the number of funded projects, but more related to the amount that the Ministry is willing to spare for animations each year.

Therefore, looking at the exact number of funded projects for each category yields a better understanding of the allocation of the budget between years. To compare the average amount per project with the number of projects funded each year, Tables 2.1 and 2.2 show the number of funded projects and the average funding amount between 2005 – 2019. These tables also show the percentage of change from the previous or closest years.

By far, the least dynamic category is feature length production in terms of the number of funded features and the average sum they receive. The biggest increase is in 2014, because of the 100th anniversary, as stated before, with a 160% increase in the number of funded films, from 15 to 60.

The overall number of funded feature length films remains relatively stable with a maximum 40% percent decrease in 2013, along with several increases of 50% in 2011 and 40% in 2018. There are other smaller fluctuations as well, yet the overall dynamics seem stable. The average funding amount is tracks with the number of funded films, but with an even more stable nature. Only in 2011 and 2018, a notable decrease in the average funding occurred. This is also when the number of projects increased to a similar degree, indicating an attempt to fund more projects without increasing the total budget. However, the major increase in 2014 does not show a similar mindset. Even though the number of funded projects has increased by 160%, the average amount is kept stable with a 5% increase. Therefore, other than two notable years, 2011 and 2018, the number of funded films is decided based on the available budget. The main attempt is to increase the average funding each production gets rather than increasing the number of projects without securing them a workable budget. This is why the number of films fluctuates more than average funding, as the average funding tends to be more stable, or tends to increase compared to the number of funded films. The first film production category is similar to the feature-length production category, with more changes over the years, with 2014 once again the largest increase. However, 2012, 2013, and 2016 faced a decline of around 40%, which meant an increase in average funding in 2013 and 2016. Contrary to feature length production, the first films category has more fluctuations in the number of funded projects, which may be related to the overall number of applicants or the budget allocated for first film funds, as the average funding amount is relatively stable, similar to the feature length production category.

Other categories are substantially more dynamic in terms of budget and number of funded films than feature length production funds, since the number of projects funded and the allocated budget are mostly related to overall budgetary conditions. For example, in 2007, the number of post-production projects jumped to 6 from 1, a 500% increase.

Table 1.1: Government Film Support: Project Numbers and Annual Changes by Category															
Year	Feature Length Production		First Film Production		Post Production		Documentary Production		Screenplay		Animation		Short Film		Total
	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	
2005	36		8		3		32		32		4				47
2006	22	-38.89%	8	0.00%	1	-66.67%	49	53.13%	60	87.50%	1	-75.00%			98
2007	24	9.09%	11	37.50%	6	500.00%	35	28.57%	47	-41.67%	2	100.00%			157
2008	16	-33.33%	14	27.27%	2	-66.67%	35	28.57%	47	-41.67%	2	100.00%			116
2009	16	0.00%	13	7.14%	5	150.00%	29	17.14%	36	-3.40%	2	0.00%			102
2010	15	-6.25%	17	30.77%	7	40.00%	17	41.38%	32	11.11%					88
2011	23	53.33%	23	35.29%	12	71.43%	19	11.76%	25	-1.88%					103
2012	25	8.70%	12	47.83%	5	-58.33%	27	42.11%	27	0.00%	16	700.00%			119
2013	15	-40.00%	7	41.67%			59	118.52%	36	33.33%	4	-75.00%	30		151
2014	39	160.00%	15	114.29%			89	50.85%	54	50.00%	14	250.00%	83.33%		273
2015	35	-10.26%	14	6.67%			63	29.21%	66	22.22%	7	-50.00%	35.45%		254
2016	27	-22.86%	9	35.71%	4	-20.00%	62	-1.59%	51	-22.73%	4	-42.86%	37.68%		198
2017	18	-33.33%	12	33.33%			71	14.52%	45	11.76%	10	150.00%	40.93%		191
2018	26	44.44%	12	0.00%	2	-50.00%	72	1.41%	44	-2.22%	10	0.00%	44.71%		195
2019	25	-3.85%	13	8.33%			57	20.83%	22	-50.00%	11	10.00%	75.86%		179
Total	362		188		47		681		577		85		318		2258

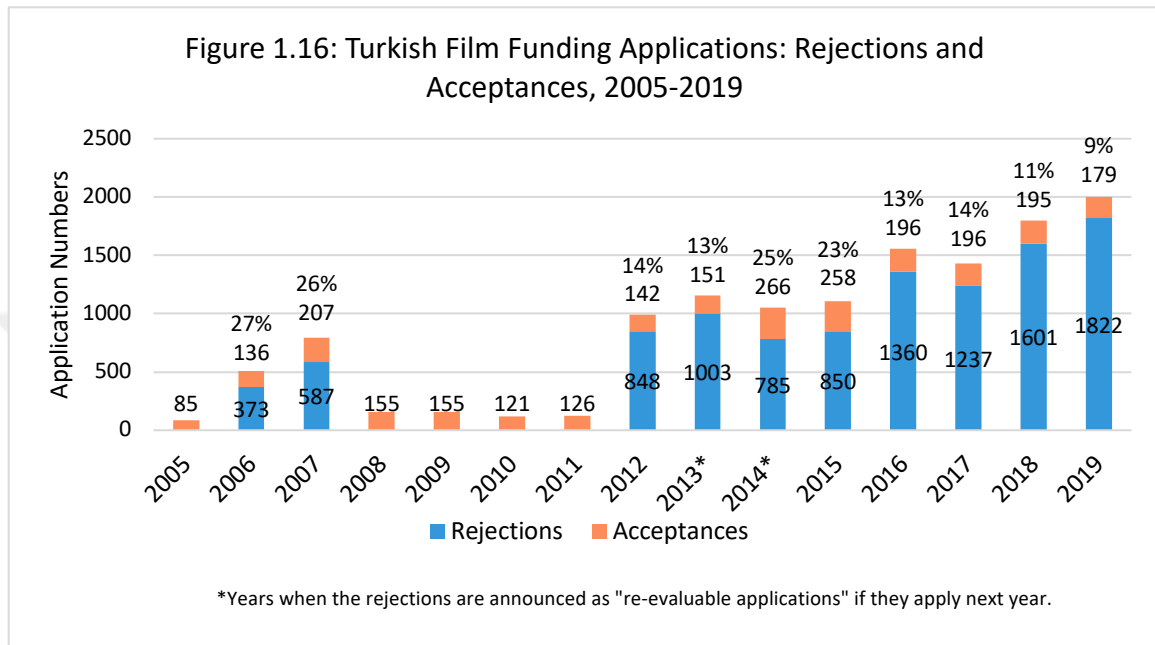
Table 1.2: Average Government Funding per Project by Category (Euros), 2005-2019														
Year	Feature Length Production		First Film Production		Post Production		Documentary Production		Screenplay		Animation		Short Film	
	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)	Projects	Change (%)
2005	€ 113.431		€ 93.146		€ 24.839		€ 16.846		€ 7.649		€ 22.252			
2006	€ 136.649	20.47%	€ 158.199	69.84%	€ 16.689	-32.81%	€ 17.718	5.18%	€ 4.202	-45.06%	€ 22.021	-1.04%		
2007	€ 157.706	15.41%	€ 116.864	-26.13%	€ 26.793	60.54%	€ 18.533	4.80%	€ 5.149	22.52%	€ 31.260	41.95%		
2008	€ 144.088	-8.63%	€ 106.060	-9.24%	€ 15.630	-41.66%	€ 20.429	10.23%	€ 4.916	-4.52%	€ 12.499	-60.02%		
2009	€ 139.832	-2.93%	€ 99.992	-5.72%	€ 28.498	82.33%	€ 33.250	62.76%	€ 7.915	60.99%				
2010	€ 162.689	16.35%	€ 99.261	-0.73%	€ 27.731	2.69%	€ 33.250	62.76%	€ 7.915	60.99%				
2011	€ 112.442	-30.89%	€ 95.576	3.71%	€ 31.249	12.69%	€ 15.086	-54.63%	€ 4.241	-46.41%				
2012	€ 140.324	24.80%	€ 89.485	-6.37%	€ 29.947	4.17%	€ 18.776	24.86%	€ 3.676	-3.33%	€ 7.941	36.46%		
2013	€ 153.005	9.04%	€ 106.789	19.34%			€ 13.301	29.16%	€ 2.814	w	€ 7.869	-0.92%	€ 3.784	
2014	€ 161.946	5.84%	€ 98.346	-7.91%			€ 12.277	-7.69%	€ 3.002	6.87%	€ 3.431	-56.40%	€ 2.946	-22.14%
2015	€ 170.514	5.29%	€ 97.740	-0.62%	€ 40.782	36.18%	€ 15.782	28.55%	€ 3.570	18.91%	€ 6.571	91.53%	€ 3.252	10.39%
2016	€ 207.858	21.90%	€ 139.680	42.91%	€ 40.782	36.18%	€ 17.408	10.30%	€ 3.436	-3.73%	€ 7.483	13.88%	€ 4.006	23.19%
2017	€ 260.634	25.39%	€ 126.276	-9.60%			€ 17.241	-0.96%	€ 2.931	-17.71%	€ 5.722	28.53%	€ 3.252	-18.83%
2018	€ 153.732	-41.02%	€ 107.871	-14.58%	€ 74.343	82.30%	€ 12.242	-28.99%	€ 2.020	-31.09%	€ 4.023	-29.69%	€ 2.455	-24.50%
2019	€ 145.165	-5.57%	€ 111.786	3.63%			€ 11.808	-3.55%	€ 1.678	-16.91%	€ 3.856	-4.15%	€ 2.270	-75.2%
Average	€ 157.334		€ 109.805		€ 31.650		€ 17.193		€ 4.086		€ 11.244		€ 3.138	

Similarly, in the animation category, there is a 700% increase in 2012. Since post-production and animation funds can be given as grants, the budget allocated for these categories is related to the number of applications and whether any submitted applications are found to be worth funding, as there are years when no post-production and/or animation funds are given. This is why average funding amounts for these categories are highly unstable and lack a systematic change. Short film, documentary, and screenplay funds are given in greater numbers than feature length projects, and they are mostly given as grants as well. Therefore, the Ministry tries to fund as many projects as they can according to the annual budget. This is why the average amount is changing every year with regard to the number of projects. This can be why in 2014, the stable increase we see in feature length film funds is not parallel to animation and short film, meaning that the increase in the number of funded projects causes a decrease in the average amount.

The main idea behind these annual changes is also at the center of circular motion and sustainable use of the capital. Feature length production is the main branch to generate an income for the funding scheme, since the funds are given as loans to be paid back to the scheme to support the main tax income. This is why these funding amounts and the number of funded projects are kept fairly stable: to balance the output and potential input. The circular motion is observable when the funding budget and number of funded films in all categories are examined. The potential financial intake from feature length production support might lead to productions in other categories with less commercial status; thus, the capital invested by the Ministry moves in a circular motion from the audience to commercial feature length production and lastly to non-commercial formats. As a result, multiple productions with different purposes in the industry can be realized, benefiting from the same investment.

To have a better understanding of the scheme itself and how the funding scheme became popular over the course of 15 years, rejections and acceptances also need to be considered. Since the Directorate of Cinema has not published any information regarding the total application numbers or a list of rejected applications, the dates between 2008 and 2011 lack the corresponding data. Still, there are some deductions we can make. The most important aspect is the fact that the total number of funding applications has a

steadily rising trend. The total application number of 509 in 2006 had quadrupled by 2019, with 2001 total applications in all categories. However, such popularity for the funding body also resulted in a decrease in acceptance rates, which is lowered from 26%



to around 9% as a result of the Ministry's reluctance to support a similar number of projects every year. 2012 and 2013 are also different compared to 2016 onwards, even though there is a similar acceptance rate. The reason behind the low acceptance rate in 2012 and 2013 is the number of funded projects being lower than in previous years, whereas 2016 and onwards is when the funding body became popular, probably due to 2014 being a year of high-volume funding.

Year	Feature Length			First Film			Post Production			Documentary			Animation			Screenplay			Short Film			Total
	Rejected	Accepted	Rate	Rejected	Accepted	Rate	Rejected	Accepted	Rate	Rejected	Accepted	Rate	Rejected	Accepted	Rate	Rejected	Accepted	Rate	Rejected	Accepted	Rate	
2005		36			8			3			47											94
2006	18	22	55,00%	15	8	34,78%	2	1	33,33%	89	31	25,83%	11	32	74,42%	121	4	3,20%				336
2007	37	24	39,34%	44	11	20,00%	15	6	28,57%	73	41	35,96%	4	60	93,75%	221	1	0,45%				500
2008		16			14			2			32			47			2					113
2009		16			13			5			34			36			2			6		112
2010		15			17			7			39			32						1		111
2011		23			23			12			58			25								141
2012	21	25	54,35%	42	12	22,22%	5	5	50,00%	267	42	13,59%	1	27	96,43%	295	16	5,14%	189	26	12,09%	952
2013*	22	15	40,54%	39	7	15,22%	14			300	22	6,83%	60	36	37,50%	294	4	1,34%	257	30	10,45%	1078
2014*	12	39	76,47%	18	15	45,45%	5			259	54	17,25%	21	54	72,00%	240	14	5,51%	216	55	20,30%	990
2015	52	35	40,23%	52	14	21,21%	10			274	49	15,17%	15	66	81,48%	250	7	2,72%	197	69	25,94%	1038
2016	139	27	16,27%	132	9	6,38%	12	4	25,00%	427	40	8,57%	24	51	68,00%	290	4	1,36%	304	43	12,39%	1367
2017	157	18	10,29%	124	12	8,82%	5			429	30	6,54%	18	45	71,43%	246	10	3,91%	231	34	12,83%	1202
2018	142	26	15,48%	166	12	6,74%	8	2	20,00%	461	40	7,98%	22	44	66,67%	356	10	2,73%	417	29	6,50%	1593
2019	130	25	16,13%	191	13	6,37%	9			571	38	6,24%	30	22	42,31%	403	11	2,66%	459	51	10,00%	1823
Total	730	362		823	188		85	47		3150	597		206	577		2716	85		2270	344		11450

Table 1.3: Film Funding Applications by Category: Rejections, Acceptances, and Acceptance Rates, 2005-2019

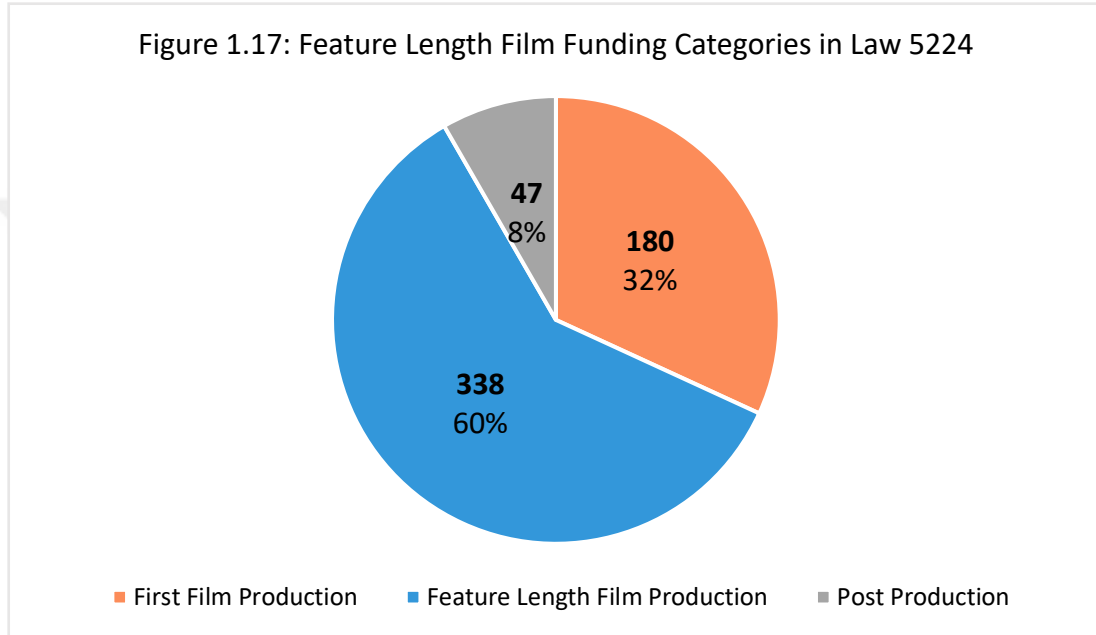
Category-specific acceptance rates are also useful to see how each category has different volumes of applications and, accordingly, acceptance rates. 2016 is the year when

acceptance rates for the feature length film production fund faced a significant drop, from around 40% to 16%, reflecting the growing interest among filmmakers. First film category also faces a similar drop, yet the acceptance rates for the years before 2016 are also not as high as feature length production. 2014 is the highest year in terms of acceptances, with 76% for feature length production and 45% for first film categories. As stated above regarding annual average amounts and number of funded projects, the post-production and animation categories lack a systemic change in acceptance rates as well. Especially for the post-production fund, there are years when no application is accepted, showing that the decision is related to the project itself rather than the overall application number. Animation has the highest acceptance rate, ranging from 37% to 93%, indicating the overall low application numbers and possibly the Ministry's desire to fund as many projects as possible in order to enhance the animation sector in Turkey. Short film, documentary, and screenplay funds have the highest application volume, increasing each year by a great degree. Yet, each category has different acceptance rates, even with similar application numbers, with short film being the highest and screenplay being the lowest. Acceptance rates in short film, documentary, and screenplay supports also show that it is less likely to be funded in these categories than feature length and animation production categories, as they are grants given to projects whose purpose is considered non-financial; therefore, they have high application volume but lower acceptance rates.

4.3.3. State Funded Feature Length Films

To be able to demonstrate the financial qualities that this thesis aims for, the focus will be shifted towards feature length funding only to allow discussion of box office and whether the Ministry's investments have a tangible, financial return in the industry. As shown in Figure 1.17, there are a total of 565 feature length films funded by the Ministry of Culture and Tourism between 2005 and 2019. If we look at the categories of feature film, namely film production, first film, and post-production, these categories have the largest number of funded films compared to other feature length support categories. Since these categories are mostly loans, the budget allocated for feature length support categories seems to be decided based on the financial risk each category entails. According to the aforementioned criteria, the Ministry evaluates applications based on their past success and the project's potential to circulate. Since debuting directors have fewer past works to

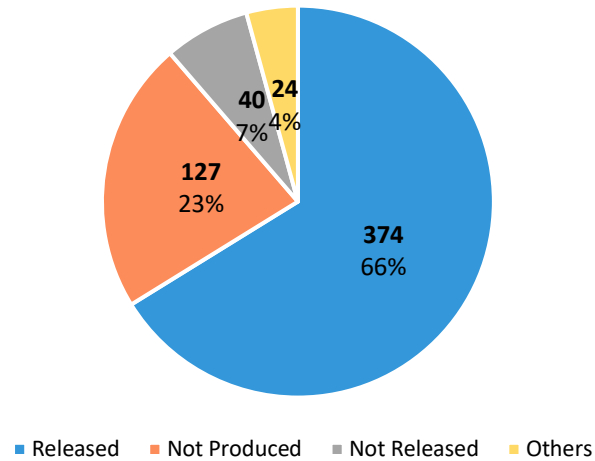
display, film production funds get a bigger share because previous achievements can lead to a potential future success, allowing the funded directors to pay the loan back. Nevertheless, the first film category carries more risk due to the lack of a previous work to evaluate, resulting in the Ministry deciding who to fund within the budgetary conditions and manageable risks.



In order to evaluate whether this sustainability perspective is achieved or has a tangible impact on the industry, we have to consult the position of funded films in the industry. 565 feature length films were funded between 2005 and 2019 in the categories of film production, first film, and post-production. Figure 1.18 further divides funded films into four categories: released, not released, not produced, and others, which means films that are waiting for release, in post-production, in the filming process, or films that have no information available. Among all funded films, 66% of them are released, 22% of them are not produced, and 7% of them are not released. These percentages can be interpreted, and have been by scholars (Erkılıç, 2008; Diker, 2020; Birincioğlu, 2019; Yetkiner, 2020), as an expression of the fund's inefficiency. The number of films that are not produced, 127, may address that funding the maximum of 50% of the budget, or 30% before the 2013 revision, is not enough to actualize a feature length film without securing the remaining capital through private financing or international co-production initiatives, which can be the case for these not produced films. Moreover, these percentages might

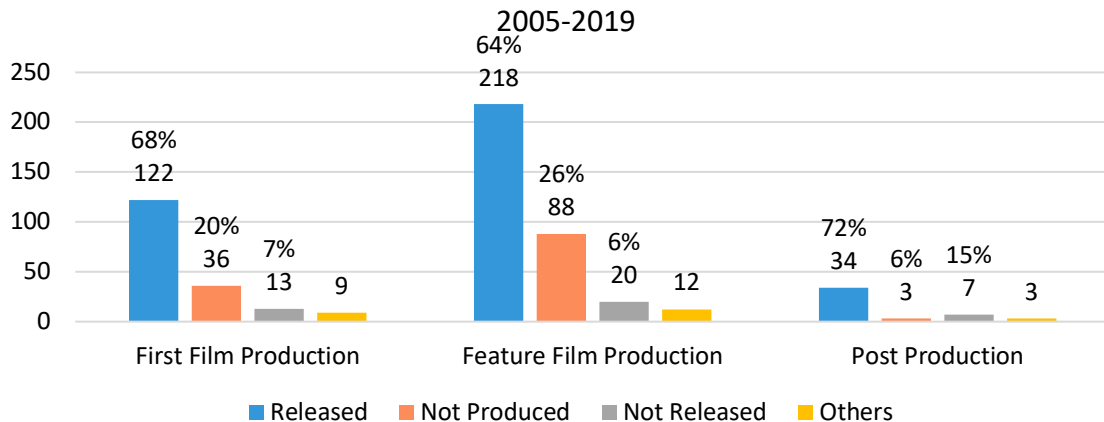
address the ineffectiveness of the selection process and the attention that committee members are able to show for each project.

Figure 1.18: Production Status of Government-Funded Films in Turkey, 2005-2019



The category-specific production status of the funded films is quite similar to the overall ratios, except for post-production, with the highest ratio for both released and not released films, which can be due to the low volume of funded projects in this category. The impact of the inability to release a funded film on a director's career trajectory is discussed in Chapter V. Released films are worth a closer look for the discussion about the box office in this chapter.

Figure 19: Film Production Status by Support Category in Turkey, 2005-2019



Evaluating the aim for a sustainable funding scheme requires a top-down portrait of the industry. Therefore, in the most basic sense, the taxed capital that the Ministry allocates for funding needs to be collected again, not only through the entertainment tax but also from the debtors of the feature length production supports. Table 2.4 presents a quite positive portrait of this concern, showing that the funded films generate enough income to cover, or even substantially exceed, the funding amount in most years. Furthermore, the profits are substantially greater than the losses. While 2005 showed the biggest profit of €10M, the largest loss was in 2015 at €4M. The overall profit and loss balance for the 15-year period examined here also shows an €80M profit. Therefore, what this table suggests is that funded films generate income as a result of the Ministry's investment, and these revenues are the result of successful circulation within the distribution and exhibition sectors. However, such a portrait might be misleading in that sense, as the overall picture lacks the details that can be gathered through collecting film-level box office performance.

Year	Total Box Office	Total Funding Amount	Funded Films Box Office	Gap
2005	€ 109.859.037	€ 4.903.191	€ 15.618.488	€ 10.715.297
2006	€ 135.329.819	€ 5.380.026	€ 9.193.016	€ 3.812.990
2007	€ 133.410.885	€ 6.730.761	€ 6.699.829	-€ 30.932
2008	€ 157.115.044	€ 5.128.697	€ 7.578.813	€ 2.450.116
2009	€ 154.044.792	€ 4.767.113	€ 3.514.092	-€ 1.253.021
2010	€ 175.723.987	€ 5.456.285	€ 3.245.743	-€ 2.210.542
2011	€ 171.718.345	€ 5.709.606	€ 6.899.710	€ 1.190.104
2012	€ 180.488.415	€ 5.587.489	€ 3.565.279	-€ 2.022.210
2013	€ 198.426.770	€ 4.073.631	€ 12.162.500	€ 8.088.869
2014	€ 224.853.657	€ 9.255.912	€ 6.869.841	-€ 2.386.071
2015	€ 224.680.946	€ 8.902.542	€ 4.044.283	-€ 4.858.259
2016	€ 207.035.334	€ 8.558.772	€ 17.445.199	€ 8.886.427
2017	€ 211.118.931	€ 7.792.342	€ 16.587.802	€ 8.795.460
2018	€ 156.869.619	€ 6.521.916	€ 10.610.285	€ 4.088.369
2019	€ 154.027.377	€ 5.950.508	€ 2.855.004	-€ 3.095.504
Total	€ 1.219.274.047	€ 45.221.336	€ 126.889.884	€ 81.668.548

Table 1.4: Turkish Cinema Box Office Performance, Government Funding Investment, and Return on Investment 2005-2019

Year	Top 2 Funded Films Revenue (€)	Remaining Films Revenue (€)	Revenue Concentration (%)
2005	€ 15.461.344	€ 157.144	98,99%
2006	€ 4.874.403	€ 4.318.613	53,02%
2007	€ 5.408.600	€ 1.291.229	80,73%
2008	€ 4.751.548	€ 2.827.265	62,70%
2009	€ 1.749.773	€ 1.764.319	49,79%
2010	€ 2.121.675	€ 1.124.068	65,37%
2011	€ 2.998.488	€ 3.901.222	43,46%
2012	€ 2.595.589	€ 969.690	72,80%
2013	€ 10.377.300	€ 1.785.200	85,32%
2014	€ 4.419.696	€ 2.450.145	64,33%
2015	€ 2.638.833	€ 1.405.450	65,25%
2016	€ 15.838.935	€ 1.606.264	90,79%
2017	€ 16.134.669	€ 453.133	97,27%
2018	€ 9.636.010	€ 974.275	90,82%
2019	€ 2.607.784	€ 247.220	91,34%

Table 1.5: Top-Performing vs. Other Funded Films: Revenue Distribution (Euros)

The reason why Table 1.4 might be misleading lies in Table 1.5, showing the sum of the two highest-grossing funded films at the box office and comparing it with the rest. As is obvious in the table, the financial success is not shared between all funded films but comes solely from the highest-grossing ones. There are no years when the top two highest-grossing films cover less than 50% of the overall revenue. In 2005, for instance, *Babam ve Oğlum* (Çağan Irmak, 2005) had a €15M box office return, covering more than 90% of the entire box office return of funded films in 2005. Similarly, in 2016, *Dağ 2* (Alper Çağlar, 2016) made €12.158.196 and the second highest return, *İftarlık Gazoz* (Yüksel Aksu, 2016) made €3.680.739 at the box office. Their combination covered 90% of the entire box office, and the other 28 films shared the remaining €1,5M. Therefore, even though the combined box office of funded films seems to financially rise over the budget, this does not mean that the Ministry managed to retrieve the loan. There are only two funded films released in 2005 that managed to make enough income to pay the loan back: *Babam ve Oğlum* and *İki Genç Kız*, whose funding amounts are respectively, €119.282 and €29.820. Thus, their combined payment is no more than €150.000, meaning that the Ministry has lost €4.754.088 as a result of funded projects that failed to make their expected returns. Table 2.6 might be consulted to see how much of the funding amount is repaid each year. Since it is impossible to know the budget of each film and what percentage of that budget the Ministry agreed to fund, the ones whose box office is higher than the funding amount are deemed “repayable” for this study, even though the

filmmakers only pay if there is enough box office return after the expenses. Hence, the table is admittedly optimistic, knowing that a box office higher than the funding does not exactly mean that the applicant will be able to pay the loan. Nonetheless, it still demonstrates the overall situation in terms of the proportion of “successful” vs. “unsuccessful” funding.

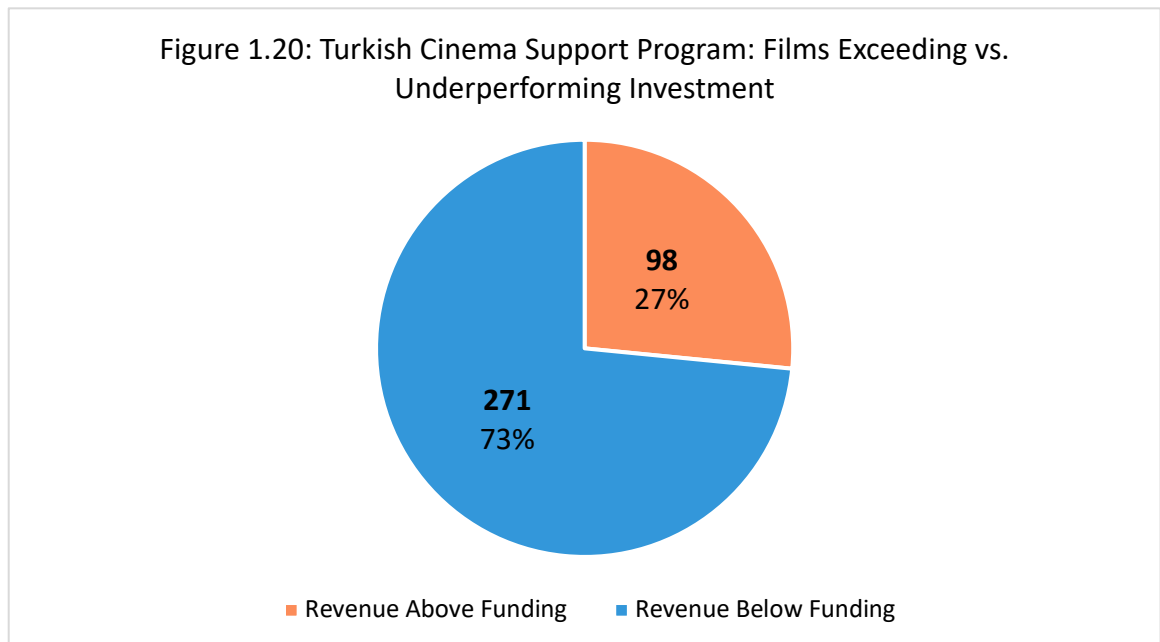
Even within the optimistic approach, there are no years between 2005 and 2019 that the feature length film production loans can be fully repaid by the applicants. There are only three years - 2006, 2007, and 2010, when more than half of the funded films managed to gross more than the funding, which does not necessarily indicate a form of success as the Ministry defines in the criteria of Law 5224. Most of these years, what seems to be the case is that a couple of funded films have a tremendous financial return, while the rest share what remains. In 2017, for example, only one film, *Ayla* (Sıtkı Can Ulkay, 2017), made more than the recouped amount and potentially repaid the loan with €16.004.472 at the box office, being the second highest-grossing film of that year. The remaining box office return of funded films, €400.000, is shared by 26 films, resulting in not only the Ministry losing €5M, but also 26 financially unsuccessful films whose producers/directors will face three possible consequences. They either wait three years as a suspension to apply for funding again, struggle to pay the loan back, or apply to festivals in case they win an award that allows them to lift the suspension. In such cases, which constitute the vast majority of funded features, the overall conditions lack the envisioned sustainability both from the Ministry’s perspective and the filmmaker’s career trajectories.

Checking the overall box office performance of funded films closely supports the lack of financial success for funded films. Figure 1.20 shows how many of the 369 funded and released films have managed to have a financial return that exceeds the Ministry’s funding. Only 25% of all released funded films released between 2005 – 2019 managed to reach this threshold. As stated above, grossing over the funding amount is not a definite criterion for showing financial success, as the debtor should make more than the funding in order to both pay the expenses and repay the funding loan. Yet, the charts still

suggest how unfortunate the funded films are at the box office, even within this optimistically basic criterion. Therefore, the issue surrounding the funding body and its position in the industry is not only the failure to release a funded film, but also the potential financial failure after the release. Therefore, without neglecting the fact that Law 5224 allows production, the surrounding systems of distribution and exhibition seem to hinder success in terms of both releasability and success at the box office, which calls for a closer look at the distribution industry in Turkey. Other interrogations regarding the box office of the funded films similarly address the issue of how they financially perform at the box office.

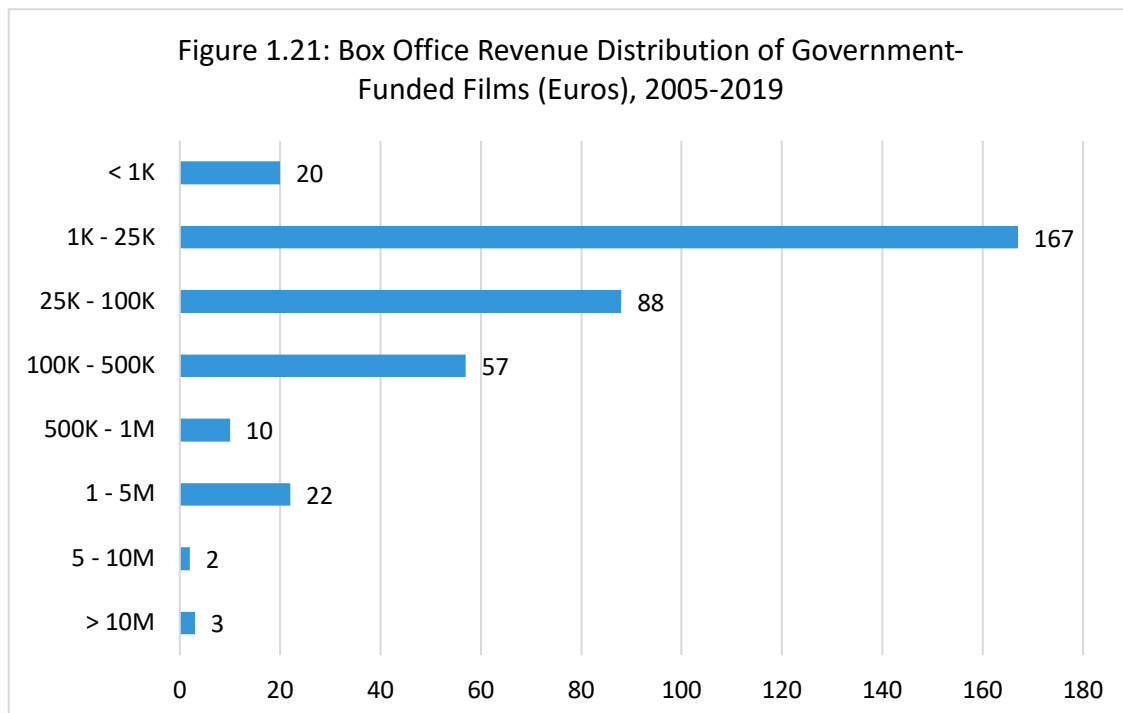
Year	Total Feature Films Funded	Films Exceeding Investment	Repayment Potential	Total Feature Length Funding	Revenue Gap (€)	Loan Recovery Rate (%)
2005	6	2	€ 149.102	€ 4.903.191	-€ 4.754.089	3,04%
2006	12	8	€ 1.031.665	€ 4.288.555	-€ 3.256.890	24,06%
2007	13	7	€ 971.555	€ 5.231.203	-€ 4.259.648	18,57%
2008	16	7	€ 1.166.464	€ 3.821.515	-€ 2.655.051	30,52%
2009	28	10	€ 898.014	€ 3.679.701	-€ 2.781.687	24,40%
2010	14	9	€ 651.875	€ 4.321.897	-€ 3.670.022	15,08%
2011	26	8	€ 1.050.180	€ 5.159.399	-€ 4.109.219	20,35%
2012	16	6	€ 630.069	€ 4.731.644	-€ 4.101.575	13,32%
2013	28	8	€ 1.192.043	€ 3.042.600	-€ 1.850.557	39,18%
2014	37	10	€ 1.529.652	€ 7.791.094	-€ 6.261.442	19,63%
2015	28	5	€ 1.212.532	€ 7.336.354	-€ 6.123.822	16,53%
2016	30	5	€ 628.036	€ 7.032.413	-€ 6.404.377	8,93%
2017	27	1	€ 363.434	€ 6.206.719	-€ 5.843.285	5,86%
2018	25	4	€ 1.018.757	€ 5.440.178	-€ 4.421.421	18,73%
2019	19	2	€ 262.940	€ 5.082.346	-€ 4.819.406	5,17%

Table 1.6: Feature Length Film Support: Loan Repayment Potential and Investment Recovery, 2005-2019



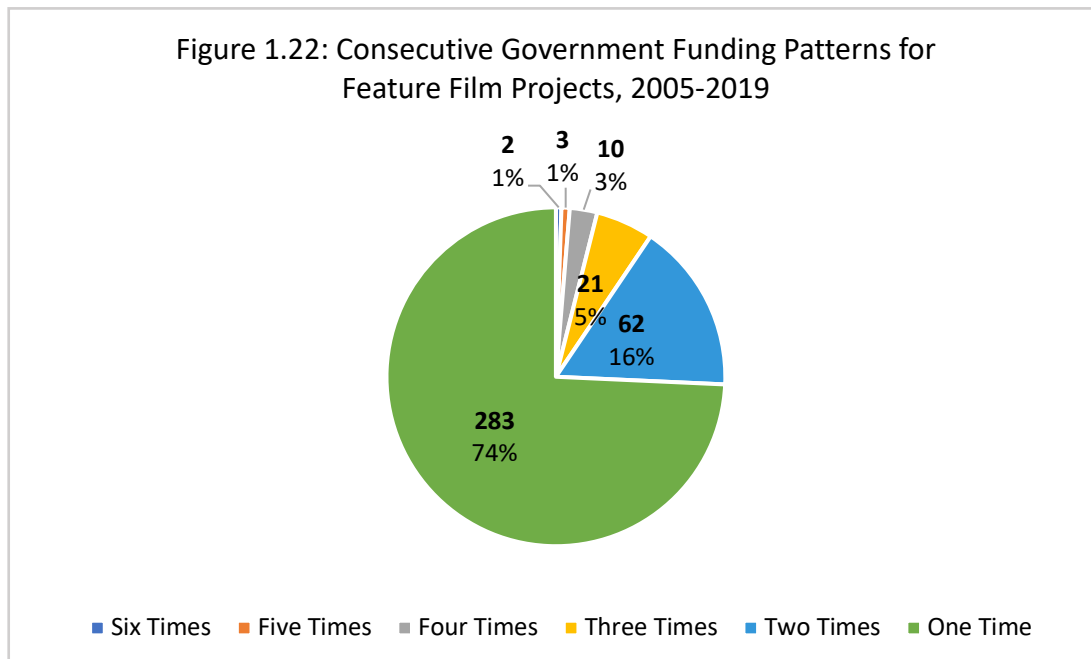
As Figure 1.20 shows, around half of the released funded films have a financial return of less than €25.000. The other half is divided across a wide range, but intensely polarized. Only 37 films made more than €500.000, and the remaining 40% is scattered around the middle, ranging between €25.000 to €100.00. While a few films get the lion's share of success, the rest share a small slice and fail to achieve even the minimum requirement to repay the loan.

The lion's share is even more obvious if we were to look at the top 10 most financially successful funded films. Their box office is €75.033.768 combined, which accounts for 59% of the entire box office of all funded films between 2005 – 2019. This not only underscores the polarization of the Turkish film industry but also points out an oligopoly in distribution. Four of the top 10 grossing funded films are distributed by CGV Mars, with revenue totaling €35.447.832, which accounts for 27% ownership of the total revenue of films. Özen Film, in their competition with CGV Mars, managed to secure three films in the top 10 with €22.108.438 in return with 17% ownership. Even in the top 10, the ownership of capital is polarized between CGV Mars and Özen Film, whose combined market share in the top 10 highest-grossing funded films is 45%. While the Ministry expects success from funded films, such polarization presents an obstacle to financial success, which then affects the chance of consecutive funding.



4.3.4. Consecutive Funding

Figure 1.22 displays consecutive fundings organized by director, showing how many times a director's feature length film projects are accepted more than once. There are 409 directors in total whose film is funded through Law 5224, yet 28 of them are unknown as their films are not produced and lack director information. Thus, of 381 known directors, 283 are funded only once, which accounts for approximately three-quarters of all funded directors. Moreover, according to calculations on manually collected rejection data, 91 of 283 one-time funded directors, 32% of them, in fact applied for funding again, yet their applications were rejected. This percentage is not definite because not all rejection information is linked to a director, which indicates the possibility of a greater rate of one-time funded directors applying for funding again. Some of these directors applied more than once, sometimes for the same project, but were rejected. Consecutive funding is rare, and the financial or festival success of a director's first production has an impact on further applications, as the sustainability vision suggests. A detailed portrayal of financial success, consecutive funding, and its impact on the career trajectories of funded directors can be found in Chapter V. The polarity of box office performance also indicates the rarity of financial success, which points out a dead end, a film industry defined by its circle of failure rather than success, though one that is inescapably linked to the unsustainable circumstances within the oligopoly.



This low chance of having consecutive funding is related to the low chance of financial success among funded films. Since success is rare, consecutive funding is also bound to be rare because past success and achievements are evaluated by the state funding body. The paradox here is the question of cause and effect. Is it the failure of the majority that allows a few films to be successful, or does the lion's share hinder others from having a chance of success? To see one of the potential reasons why these films are financially unsuccessful, the answer lies beneath the distribution and the infamous oligopoly.

4.4. Distribution and Oligopoly

The concentrated circumstances in Turkish cinema are even more observable in the market share percentages of distribution companies. Even though it is discussed by countless scholars, Rıdvan Şentürk argues that the oligopoly issue in Turkish cinema is no longer valid: “the problem of monopolization in distribution, which was highlighted in the previous period research, was largely resolved in the period between 2016 and 2020” (Şentürk, 2022, p. 44). Despite such claims, the annual market share data of distribution companies continues to display a highly concentrated market, with a handful of key players shifting in and out of the top spots in the industry. Table 2.8 consists of all distribution companies active during 2005 – 2019 and have a minimum of 1% market share. As one can see from the table, the biggest companies control most of the capital, while smaller companies share what little remains.

Companies	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
CGV Mars										6,3	30,2	29,9	36,2	43,5	18,6
Özen Film	34,5	30,8	18,1	27,2	19,5	12,1	15,6	1,2							
UIP Türkiye	23,8	17,0	25,2	33,9	14,4	29,3	33,2	32,1	45,5	31,2	28,4	28,9	26,5	18,5	22,1
CJ ENM														10,6	36,0
Pinema	1,6			1,9	8,7	12,8	5,3	8,8	6,5	7,1	11,1	2,7	5,4		
Tiglon				4,0	18,4	17,9	19,7	35,3	25,9	17,4					
Medyavizy	4,2	2,2	11,4	4,9	12,5	6,7	2,9	3,0	1,6	2,0					
KenDa	5,1	26,8	8,1	1,9											
Cinefilm				5,2	6,1	3,1				1,8	1,2				
Bir Film	1,0	1,7	2,5	2,2						1,4	2,1	2,2	1,6	2,2	0,0
Warner	28,4	18,7	28,2	14,3	18,1	17,8	20,9	16,9	17,4	19,3	11,1	17,5	17,0	9,7	11,4
M3 Film								1,2		1,5					
TME Films										6,0	11,3	15,0	9,7	12,5	5,6
Chantier			1,3	1,3	1,0			1,2	1,3	4,8	2,6	2,5	2,2		2,1
Best Line			1,3												
35 Milim			2,0	2,6											
CineGroup					1,1										
UNP		1,3	1,9												
Others	1,4	1,6	0,2	0,6	0,3	0,4	2,5	0,3	1,8	1,3	1,8	1,3	1,4	3,0	4,2

Table 1.7: Turkish Film Distribution Market: Company Market Shares by Year (%), 2005-2019

However, who controls the majority of the market is altered year by year. Özen Film, for example, had the most market share between 2005 – 2009, yet lost its power dramatically

around 2011 as a result of the merger between Mars and AFM, which turned them into the leading exhibition company (Şentürk, 41). Similarly, Tiglon faced sudden changes in terms of their control in the film distribution scene between 2008 - 2014, declaring bankruptcy in 2015, just a year after ranking the third biggest distribution company. CGV. Mars, after their entrance into the distribution sector and sudden growth due to the already established cinema exhibition chain, and acquisition by the South Korean distribution, exhibition, and production conglomerate CJ ENM in 2016, is still the leading distribution company and the cinema chain. Despite their separate distribution practice, CJ ENM and CGV Mars have the same parent company, CJ Group. UIP Türkiye is the direct subsidiary of Universal and Paramount Studios, similar to Warner Bros. Türkiye. Therefore, they mostly distribute popular Hollywood productions in Turkey, with occasional distribution of popular Turkish cinema too. Therefore, the distribution industry is not only concentrated in terms of market share but also determines which producers will control the majority of the market, which alters what company is in charge in a year without changing the oligopolist practices. Since the distribution industry is private, its practice is unlikely to share the Ministry's public interest in circulating funded films.

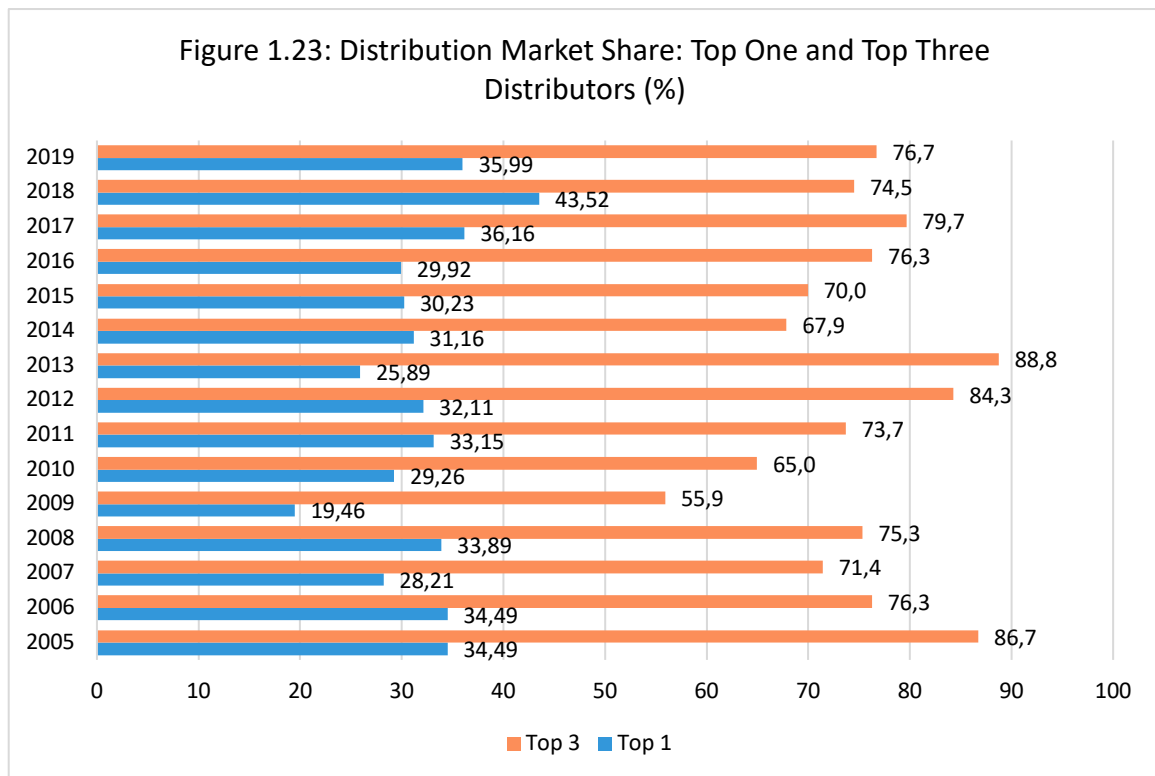
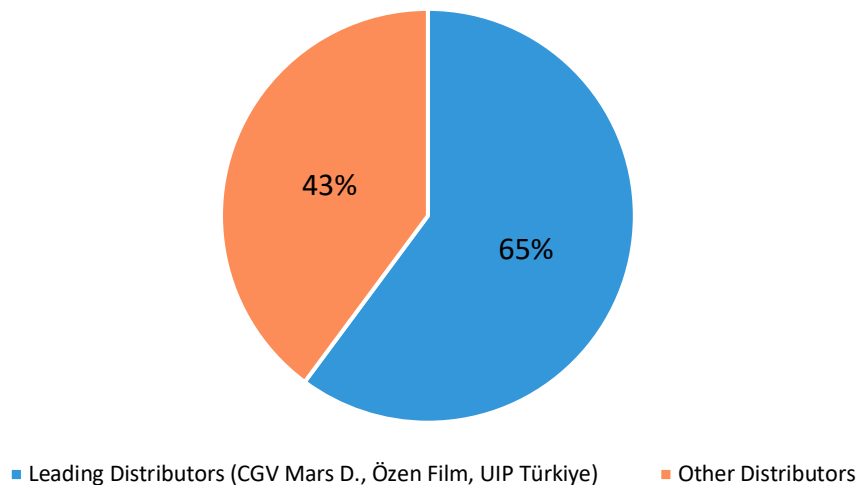


Figure 1.23 compares the three biggest distribution companies with the rest in terms of market share percentages, emphasizing the oligopoly that controls the distribution of films. The top three companies controlled over 70% of distribution in most years between 2005 – 2019. The least concentrated year is 2009, with five companies having similar market control. The rest is extremely concentrated, especially in 2013, with UIP Türkiye having 45% market share, and in 2018 and 2019, with CGV Mars and CJ ENM having more than 50% share combined. Nonetheless, as box office concentration for funded films suggests, such an oligopoly has an impact on the funded films market performance, how the overall scheme works, and how funded directors are bound to fail, as this thesis argues.

4.4.1. Distribution of State Funded Films

A surface-level look at the distribution of funded films, likewise to any industrial interrogation, indicates optimism. Looking at the average hall and audience numbers that funded films seemingly reach, a funded film should be available in 60 halls, to a nationwide audience of over 100.000 people. However, this is not even close to the current availability at the box office, as more than 250 of the funded released films are distributed in fewer than 60 halls to less than 100.000 audience. The overall concentration is similarly observable among funded films, with further implications for the funding body's rules and expectations.

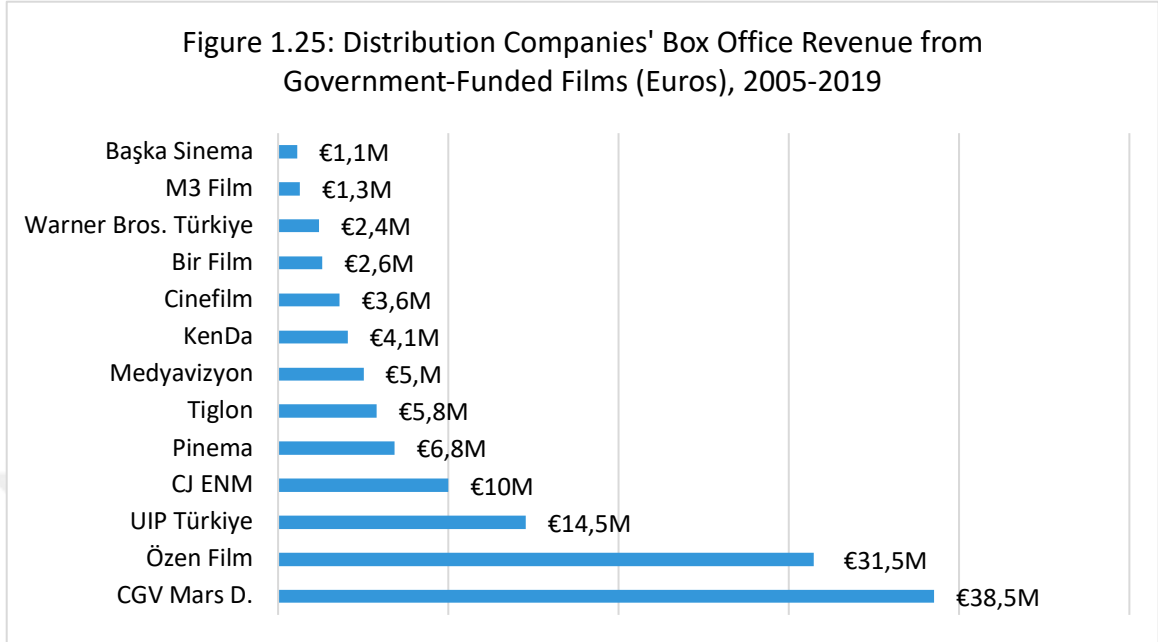
Figure 1.24: Box Office Revenue Concentration: Top 3 vs. Other Distribution Companies, 2005-2019



Distribution companies that had a financial return of over 1 million demonstrate the concentration. While CGV Mars is the leading distribution company with €38M total return, the third-ranking company had less than half of what CGV Mars managed to achieve, and the rest even less. The concentration is similar to the overall image of the distribution industry, with the top three controlling over half the industry, while the remaining companies share what is left. The number of films that these companies have distributed is also important: Özen Film distributed 44 funded films, and it is the second biggest company in funded film distribution. Nevertheless, the second and third companies in terms of the number of funded films distributed are Tiglon and M3, with 40 films each. Despite this high volume of distribution, they do not register any financial returns. Despite comparable numbers of distributed films, Özen Film, Tiglon, and M3's box office returns are far apart. On the other hand, UIP Türkiye distributed 12 funded films, yet managed to circulate them in a way that made €14M in total. Therefore, the number of distributions is not directly related to financial return, as visible in Başka Sinema, M3, and Bir Film's practice with funded films in limited circulation.

There are two aspects behind this concentrated scheme. First, the more market share a company has, the more exhibition chains they can access. CGV Mars, with their own leader exhibition chain, or Özen Film's financial success in their competition with Hollywood subsidiaries before 2011, led these companies to be able to circulate films freely, and decide on how long and in how many halls these films will stay available. Especially, CGV Mars' vertical integration enables them to distribute films in their own chains, without assuming a high risk of failure. Accordingly, funded directors/producers' desire to be distributed by these companies because of their access and resources, which will also impact their future funding applications and careers.

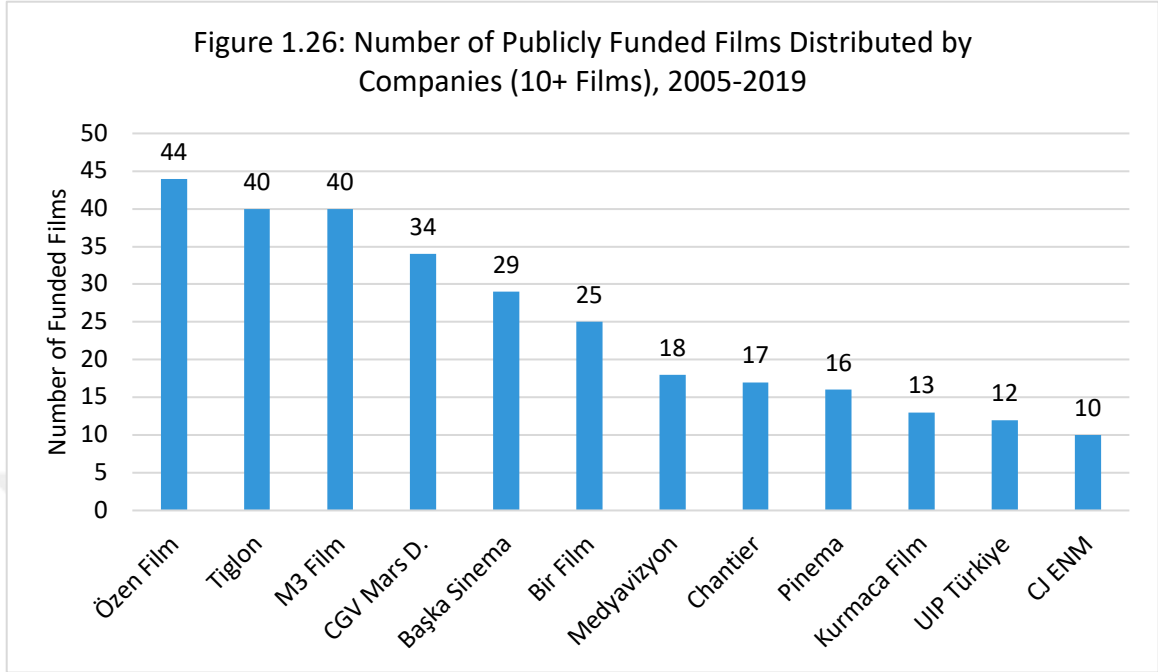
CGV Mars is a prime example of vertical integration, especially after CJ ENM bought it. Vertical integration is the combination of production, distribution, and exhibition under the same company. CGV Mars has a wide exhibition chain under their control. They own 124 halls in 45 locations, namely Paribu Cineverse, Avşar, CineGolds, Cinefora, Cinemarine, and World Cinezone (www.marsmedia.com). Moreover, they also act as distributors and control a large market share of distribution in Turkey. Once they are acquired by CJ ENM, their vertical integration is completed due to CJ ENM's film



production activities. For example, *Aile Arasında* (2017) is produced by BKM and CJ ENM, and also distributed by CJ ENM across the exhibition chain that CGV Mars owns. Hence, *Aile Arasında* guaranteed success and sold 5.289.051 tickets. Özen Film also shows an example of vertical integration during the period they were in power, producing, distributing, and exhibiting films without partnering with other companies (Behlil, 2010). Recep İvedik (2008) is an example of their vertically integrated practice, co-produced and distributed by Özen Film, which can be the reason behind their extreme blockbuster status.

Vertical integration is similar to oligopoly in its power to determine the players who can access the market (Birincioğlu, 2019) and manage the risk for them by guaranteeing visibility (Çetin-Erus, 2007). Also, these antidemocratic practices in the film industry enable similar “themes and images” to circulate and hinder new players’ inclusion and establishment (Diker, 2020). This thesis argues similarly from a perspective regarding public funding. Oligopoly and distribution prevent the potential for success for funded filmmakers due to their extensive control over distribution and exhibition. Therefore, it damages sustainability by determining who will be financially successful and who will fail to meet the Ministry’s expectations and face obstacles regarding career establishment.

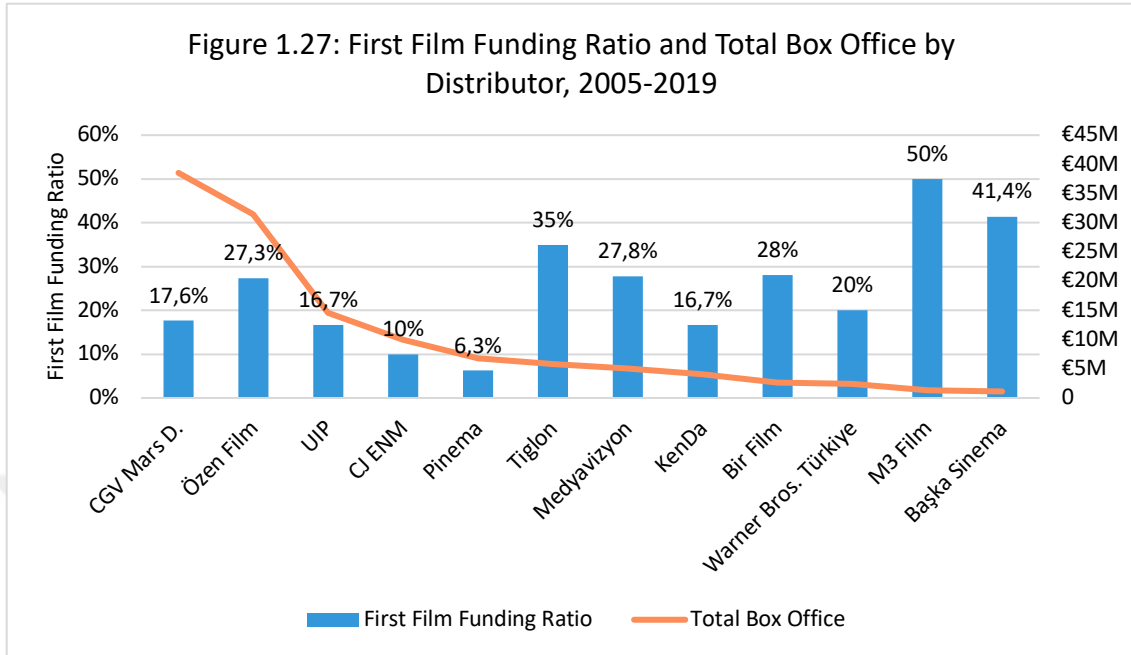
For companies with less market share, not only the company but also the funded filmmaker assumes the risk of financial failure. The 10 most financially successful



films support this idea. Four of these films are distributed by CGV Mars, three by Özen Films, and the rest again by leading companies. There is only one film in the list distributed by a smaller company, Cinefilm. A majority of these funded films are either historical/nationalist dramas or have a successful, well-known director attached, such as Çağan Irmak, Yılmaz Erdoğan, or Yüksel Aksu.¹¹ Therefore, giant companies have the power to pick among funded films and grant them a chance of success, without taking many risks. Other companies, on the other hand, are obliged to choose what is left and take mutual risks with the funded filmmaker. While the distribution companies need films to circulate, funded directors need companies to reach out to meet the requirements, yet these circumstances are met only for the giants, famous directors, or a handful of lucky filmmakers.

The fact that distribution companies with large market control are able to choose among funded films as a risk management is more visible when it comes to first film funding. Looking at the companies that made over €1M in total from funded films, their coverage among debut directors is almost inversely proportional to their market control. M3 Film distributed 20 debut-funded directors, which accounts for 50% of their total distribution. Similarly, 41% of Başka Sinema's funded film distribution consists of first film funding,

¹¹ See appendix F for the full list.



and both companies show the least financial return from funding films among those returning over €1M. CJ ENM, UIP Türkiye, and CGV Mars, on the contrary, devoted only a small portion of their market share to debuting directors, respectively 10%, 16% and 17%. Therefore, the risk of first-time feature directors affects which company will distribute them, and this can be directly correlated to the improbability of success that funded films face, contrary to the Ministry's expectation and prerequisite for future funding. Yet, this circumstance is also a paradox. Are these small companies unable to take part in the industry with a larger market portion because of their investment in risky directors, or does their lack of market power result in their distribution practices being less financially successful, therefore creating financial risks for filmmakers?

The more a company has market power, the more it is able to choose what to circulate, for how long, and to whom. In a way, distribution decides who will be financially successful and visible to the public. However, such ability hinders some funded films from having a chance of success if they are not distributed by the giants and left to work with smaller companies with limited ability to circulate them. This results in a dead end for both smaller companies and funded filmmakers because while funded filmmakers get a smaller chance to be financially successful, pay the loan back, and accordingly, get funded again, smaller companies are also unable to grow and gain greater control over their distribution practices.

In the end, every player in the industry fails at their aim. The small distribution companies cannot circulate their film catalog, funded filmmakers cannot prove success and secure a budget for the future, and the Ministry cannot implement the sustainability they envision in principle. All that is left is a circle of expectation without opportunity.



CHAPTER V

EXPECTATION WITHOUT OPPORTUNITY: CAREER TRAJECTORY ANALYSIS OF FUNDED DIRECTORS

This chapter expands on the 15-year trends visible in the data that are discussed in Chapter IV with a narrower focus, aiming here for a micro-level application to directors' career trajectories. The reason why this section of the research is narrowed down is to be able to look at director-level career trajectories and correlate different aspects, such as financial success, production volume, and longevity, with funding patterns and instances of consecutive funding. The main concern is to figure out the connection between career establishment and the national funding body, and to see whether Law 5224 maintains production in a sustainable way, enabling directors to have a sustainable career trajectory that they can continue to produce. Therefore, the director-level approach should not be confused with auteur studies. This section of the study, like previous chapters, avoids any form of visual, thematic, genre-wise, or other content analyses. The sole approach is industrial and financial, leaving questions of theme and content to others (Allen & Gomery, 1985). Similarly, festivals are also kept out of the equation in this section of the study in order to be able to focus on the basic finance and economy of film funding at the production stage rather than the exhibition stage. Certain findings of a festival-based study of the funding body may prove some of the implications here false or insufficient, since if the finance is one half of Law 5224 and career establishment in Turkey, the other half is undoubtedly film festivals.

5.1 Dataset Description

With an attempt to lay out the correlation between financial success, career establishment, production activity, and Law 5224, the dataset should contain not only the funded films but also other privately financed films of the funded directors. Therefore, a combined dataset is created. There are three main sources for this dataset: Yamaç Okur's *List of Films Funded by the Ministry of Culture and Tourism* and annual funding committee evaluation announcements for funded films, TMDb (The Movie Database) for full filmographies, and Box Office Türkiye for box office information. Tools and methods used to collect and merge separate datasets are explained in the methodology section.

The dataset contains information regarding directors funded between 2005 – 2019 in two main support categories: feature length production support and first film production support. Post-production support is excluded in this chapter to provide a comparison of directors in two funding categories. Post-production support diverges from these two categories in terms of funding amounts and the number of funded films, alongside its varying form as a loan or grant. Therefore, only directors in two support categories related to feature length film production are taken into account, except the last section, where the entire scheme of Law 5224 regarding feature length production is in focus rather than the comparison of the two categories.

Full filmographies of funded directors are listed in their entirety, yet no time-period limits are applied for privately financed films for two reasons. First, the career state of directors when they applied for funding for the first time is significant to see whether the Ministry's emphasis on past success and achievements is observable. The directors who were funded in the early years of funding have films released before 2005. Thus, the dataset is enlarged to include full filmographies. Similarly, a considerable number of films funded in 2019 were not released in the same year. Their release schedules are scattered after 2019, and excluding those would result in false reports about these films' current status. Also, when looking at the director's production activity after funding, excluding films released after 2019 would also curtail full results. Therefore, during collecting filmographies, no time-span filter is used even though the study only takes into account directors funded between 2005-2019.

Rejection numbers are the least beneficial data because of their non-standardized announcement format. While some rejections are shared with director names, a great majority of rejected feature length applications are only announced with the production company information. Therefore, they are impossible to match with directors unless the director and the company are namesakes. Rejections would play a more central role if the entire data were usable, yet the lack of clarity in the assignment of responsible data prevented their use, except for very minor references.

For the funded projects that have two or more directors, each director is processed separately, and each funded film is recorded twice as a unit of different directors. Also, some of the funded films that were not produced lack director information; therefore, they are excluded from the study. This is the reason why the number of funded projects is different in this section than in Chapter IV. While Chapter IV looks at funded projects per application regardless of the number of directors attached, this section utilizes them with their director ties to be able to study each director separately.

Main Categories	Number of Projects	Support Categories	Number of Projects	Number of Directors
Funded	555	First Film	178	172
Not Funded	1158	Feature Length	330	176
Rejection	322	Post-Production	47	34
Total	2035	Total	555	382

Table 2.1: Corpus: Total Film Output and Rejected Applications, Number of Feature Film Projects by Support Category, Number of Funded Directors by Support Category

The dataset consists of 2,035 films, including funded, not funded, and rejected projects. There are 555 funded, 1158 not funded, and 322 rejected projects. Out of the 555 funded projects, 178 of them are first film category projects, 330 are in feature length film support, and 47 are post-production support. 382 directors are funded across these three categories, yet only feature length production and first film categories are included for comparison. There are 172 directors funded through the first film production category, 176 through feature length production, and 34 through post-production.

This chapter is divided into five main sections and two sub-sections according to the support category in focus. The first section is about films released before the first funding. This section shows the career stage of directors when they got their first funding by looking at the number of films they released and the box office average. By the number of films directors released before funding, their career stage at first funding is divided into three categories: debut directors (no film before funding), early career directors (no more than two films before funding), and established directors (more than three films before funding). Since the first film support is exclusive to debut directors, their career stage before funding is unsearchable; therefore, only feature length production category is taken into account for the section dedicated to directors' career stages before funding.

The second section is about the first funding instances, divided into two sub-sections according to support categories. Based on the career stages, this part focuses on the project's status of the first funding projects, whether it is released, not released, or not produced. Then, their level of financial success is outlined by the box office average of first funded films for each director and divided into four categories. Namely, major success for $\geq \text{€}500,000$, moderate success for $\text{€}100,000 - \text{€}499,999$, minor success for $\text{€}50,000 - \text{€}99,999$, and no success for $< \text{€}50,000$ box office average. $\text{€}50,000$ is considered a useful cut-off point as the average funding amount for first film support is $\text{€}100,000$, while feature length production funding average is $\text{€}150,000$, as discussed in Chapter IV. Thus, returning $\text{€}50,000$ or less at the box office would most probably trigger the exclusion rule that prevents directors from applying for funding for three years. Consecutive funding is added to the analysis by dividing instances into three categories, namely one-time for directors funded only once, repeat for twice, and multiple for three or more times. These groups are aligned in parallel with one another for different levels of analysis.

Next is the director's further production activity, specifically whether they continued production after the first funded film or not. There are three categories, directors who did not release their first film and stopped filmmaking, directors whose first film was realized but their filmmaking career ended, and directors who continued filmmaking. The exact number of feature films released after the first funding is also provided to see the

production consistency of these directors. Deriving from the full filmographies, directors' production volume during their filmmaking career is also calculated and divided into four types: low volume for directors with 1-3 films in their filmographies, medium for 4-7 films, high for 8-15 films, and very high for more than 16 films.

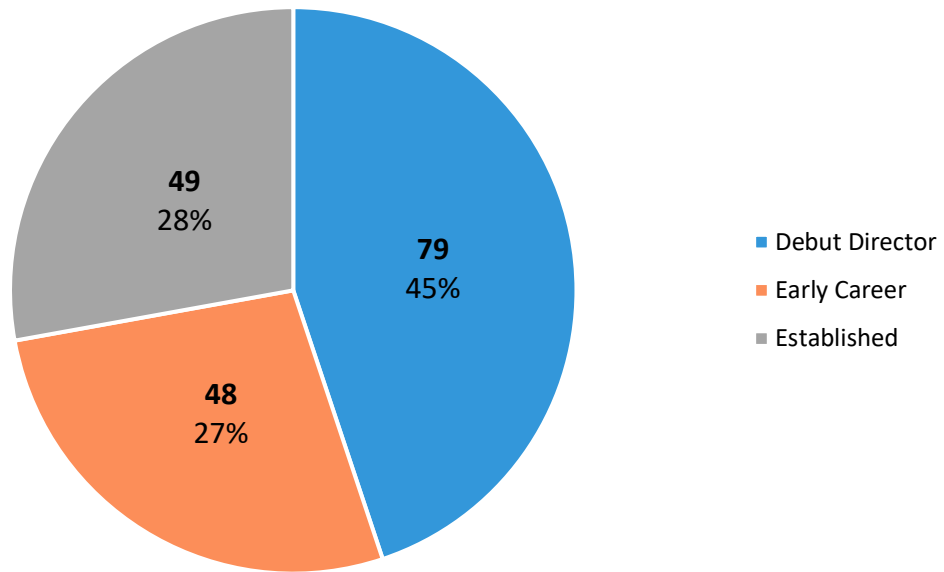
The last part of this section is about one-time funded directors and their further production consistency, divided into two groups. The first group is one-time funded directors whose first funded film is released, and the second group is directors whose first film is not released. The number of films that one-time funded directors managed to produce without the Ministry's support is highlighted.

After following the same framework for two support categories, the focus is shifted towards distribution. First, the number of films each company distributes, as well as their revenues, is listed. Then, career stage and success rate calculations are studied in parallel with distribution companies to see the correlations between the success/career stages of directors and distribution companies. The purpose is to correlate the outcomes after the first funding with the distribution companies, aiming thus to clarify how distribution companies affect funded directors. The final section provides a more holistic look at consecutive funding, as all three categories will be studied as a whole in terms of consecutive funding, production consistency, and success rates.

5.2. Feature Length Production Support: Career Stage Before Funding

The number of films that funded directors have in their filmography at the time of first funding shows the career status of directors seeking funding. As stated above, career status has three categories: debut (no feature film before), early career (1-2 feature films before), and established (3+ feature films before). Out of 172 directors whose first funding is from the feature length production category, 79 of them are debuting directors, accounting for 45%. There are a similar number of early career and established directors, respectively 48 and 49, each accounting for just over 27%. Therefore, it is observable that the majority of funded directors in the feature length category are, in fact, debuting directors. Even though the box office average might be directly correlated to the financial success of established directors, box office calculations might be misleading. Since many

Figure 2.1: Career Stage of Directors at First Government Funding, 2005-2019



established directors (67,35%) and early career directors (43,75%) are funded in the early years of the funding program, between 2005- 2010, it is hard to take box office averages for them as some of the films released before 2005 lack box office records. Even when box office records are accessible, the 2005 redenomination of the Turkish Lira, the removal of six zeros, complicates monetary studies of the era before 2005. Also, as the Euro is used as the main currency in this study, box office records before 1999 require conversion from other European currencies or shifting entirely to United States dollars, which again complicates the overall structure. Therefore, implications regarding box office can be misleading, yet might provide a surface-level understanding of financial levels between an early career director and an established director. The total list is also provided for a detailed breakdown.

Career Stage	Average Box Office Before Funding
Early Career	₺863.082
Established	₺1.152.390

Table 2.2: Average Box Office Performance of Directors Before First Government Funding by Career Stage

No Film	79
One Film	36
Two Films	12
Three Films	12
Four Films	6
Five Films	6
Six Films	2
Seven Films	3
Eight Films	1
Nine Films	2
Ten Films	4
Ten+ Films	13
Total Directors	176

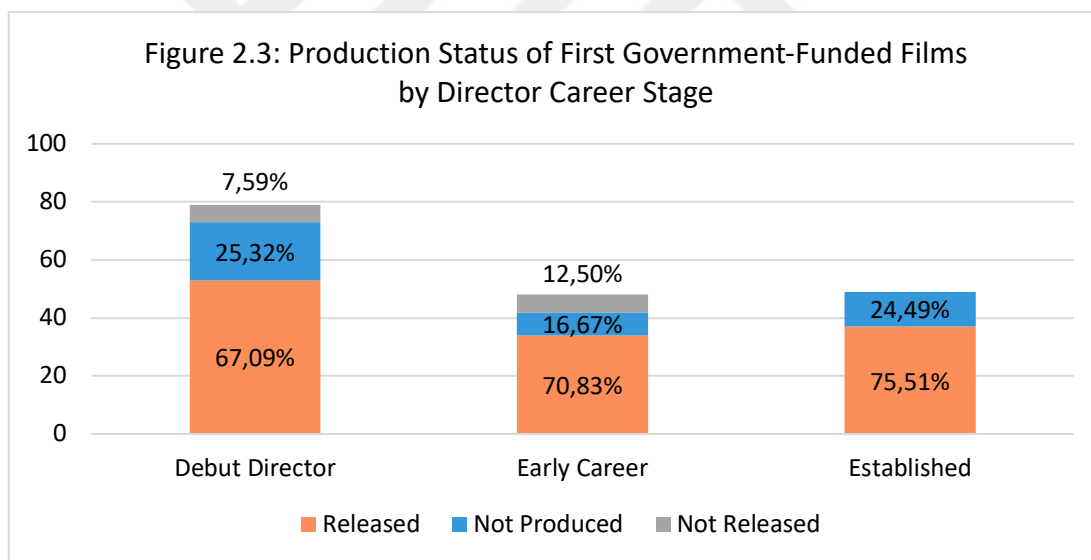
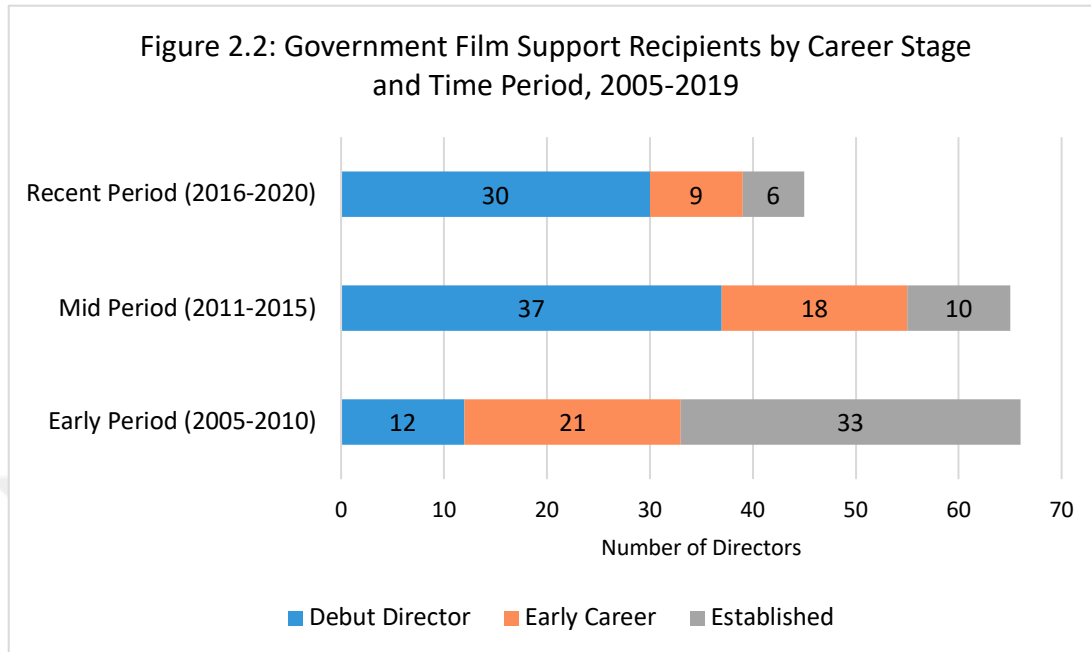
Table 2.3: Funded Director's Film Output Before First Government Funding

5.2.1 First Funding and the Aftermath

The first aspect in focus is project status, whether the first funded project are realized and reached the public or not, and career status adds another dimension to this query. The largest percentage of released first funding films belongs to established directors. 75% of established directors managed to release their first funded film in feature length production category. Early career directors, similar to established directors, released 70% of their first fundings, while debut directors have the least percentage with 67%.

Moreover, debut directors also have the biggest proportion of non-produced films with 25%. What is important in this figure is the fact that all 49 established directors manage to release all of their completed projects, meaning that even though completion is a problem at all career stages, finding a distributor does not seem to be an issue for established directors. While 7% of debut directors did not release their films, this ratio is 12% for early career directors, suggesting that the distribution issue is most pressing for directors who applied to the funding scheme during their early career stages.

Financial success is hard to define and put into a standard that is easy and reliable to study. Yet, it is also a decisive factor in directors' career establishment as it can create further public funding potential and allow directors to access private resources.



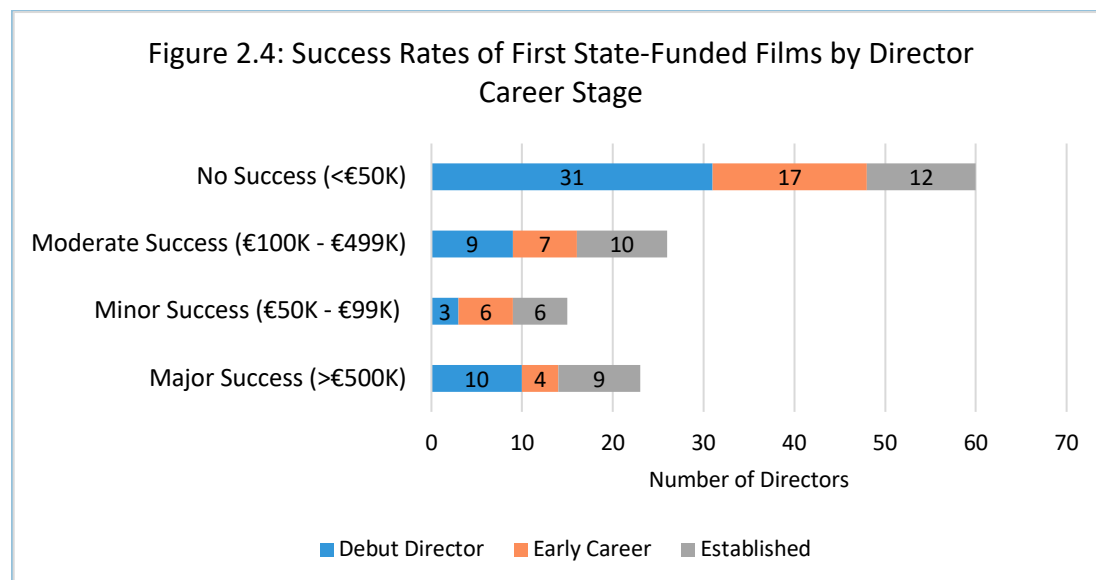
Examining success along with career stages shows some patterns that explain the position of directors in different career stages in the industry. Out of 124 released films, established directors expectedly have the largest share of box office, and their pre-funding box office performance complements their financial success during the first funding instance. Nevertheless, early career directors are again the least financially successful group in terms of average box office intake of each director. This image of their financial state is counterintuitive because what might be expected is debut directors having the least box office average. Categorizing box office average in the form of

success categories is more beneficial to standardize and define financial success according to the peer group.

Debut Director	€ 775.448
Early Career	€ 426.695
Established	€ 1.239.431

Table 2.4: Average Box Office Performance of First Government-Funded Films by Director Career Stage (Euros)

In order to create a framework to study financial success, four success categories are created according to each director's box office intake average: no success, minor success, moderate success, and major success, each defined in detail above. As an overview, a little less than 50% of all released first fundings fall into the no success portion, meaning that almost half of the released first funded films returned less than the €50.000 average. Regarding career stage-specific numbers, as with all the other financial parameters, established directors have the highest rate of major and moderate success with, respectively, 24% for major and 27% for moderate success, while also accounting for the least no success level with 32%. No success among debut directors is much higher with 58%, even though the major success among this group is fairly close to that of established directors with 18%. Early career directors' no success level is close to debut ones, around 50%, yet they have the least major success with 11%.



The success levels also support the argument that preserving the state of financial success is harder than achieving it in the first place. There are financially successful debut and

early career directors, yet they cover a minority of the full portrayal. In both groups, combining no and minor success levels accounts for 64% for debut and 67% for early careers, meaning nearly two-thirds of early career and debut directors risk falling into the exclusion penalty. The main difference between debut and early career directors is that the success level at the debut stage is more polarized, 77% of them are either grouped as majorly successful or not successful, without being distributed equally across all levels of success. Hence, the overall box office average numbers look as if debut directors are more financially stable than early career directors. However, the reason behind this is that a few major successes blank out the greater majority of failures.

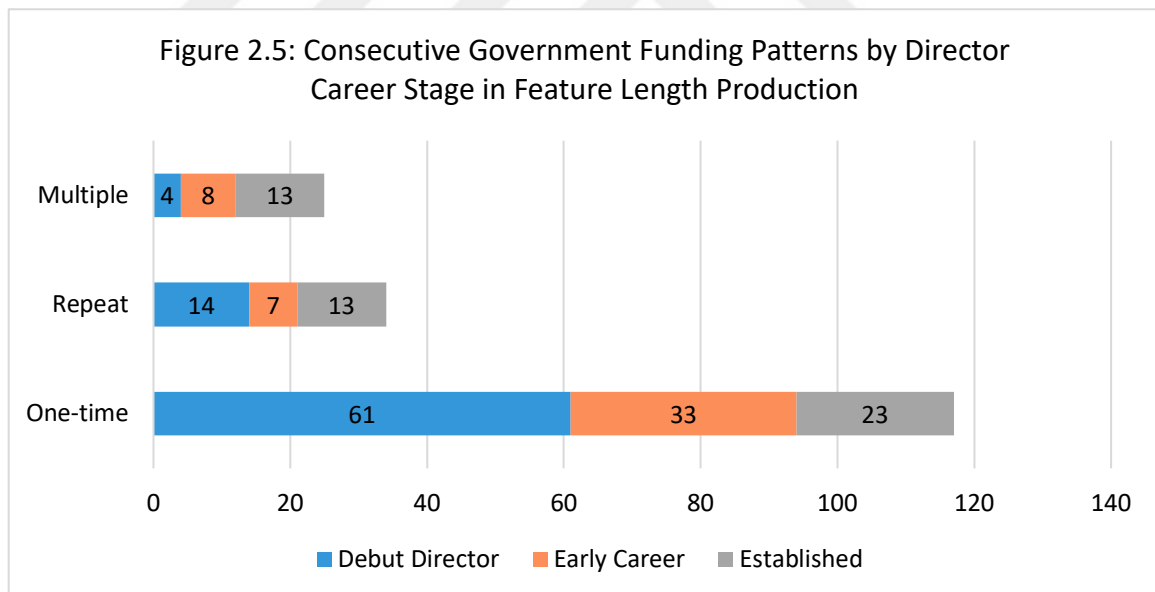
This is why when debut directors are compared to early career directors by the combination of successful vs unsuccessful levels (minor + no / moderate + major), their percentages account for a very close result. Success levels of directors at the early career stage are more evenly distributed than debut directors; there are fewer no success examples, but also fewer major success examples. Therefore, debut director seems to manage to return greater amounts at the box office than early career directors, yet the vast majority of them are financially unsuccessful, which showcases the overall unsustainability. The established directors display a good example of non-polarized distribution, as each level has a similar number of directors. However, the concentration in the debut director category especially means that only a few of these directors manage to find further possibilities for the longevity of their careers because the more there is polarization, the less it is sustainable, and it dilutes the number of established and early career directors actively working in the industry. Since Law 5224 requires success references as an application evaluation, adding consecutive funding to the portrayal displays why it is harder to sustain a career in the industry than to enter it.

5.2.2 Consecutive Funding in Feature Length Production Support Category

Whether directors in all three career stages are funded consecutively or not is crucial to the sustainability of the funding scheme. The optimal scenario would lead to sustainable career trajectories through further funding that enables directors to actively take part in the industry. Nonetheless, consecutive funding, like financial success, is rare in both debut and early career director groups. Consecutive funding is divided into three levels:

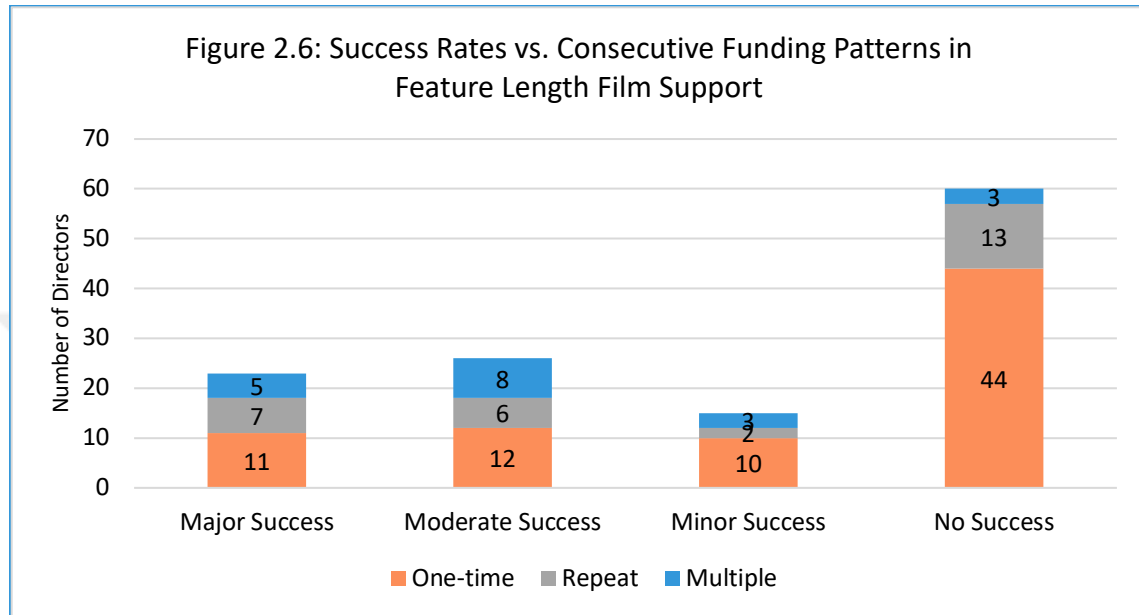
one-time, repeat, and multiple. Established directors have the highest ratio of multiple and repeat funding, with each covering 26% of them. Thus, fewer than half of the established directors are funded only once. Conversely, debut and early career directors have substantially greater numbers falling into the one-time funded category, debut directors with 77,22% and early career directors with 68,75%. The polarization of debut directors is also visible in consecutive funding because only 5% of debut directors are funded more than twice. Early career directors have similar numbers of repeat and multiple fundings, yet the majority of them are funded for a single project.

The rarity of financial success among publicly funded directors is reflected in the consecutive funding calculations. As debut directors are more separated between major and minor success levels, consecutive funding is also polarized between one-time and multiple consecutive funding levels. This is why when it comes to established directors, consecutive funding instances are also more evenly distributed than in other career

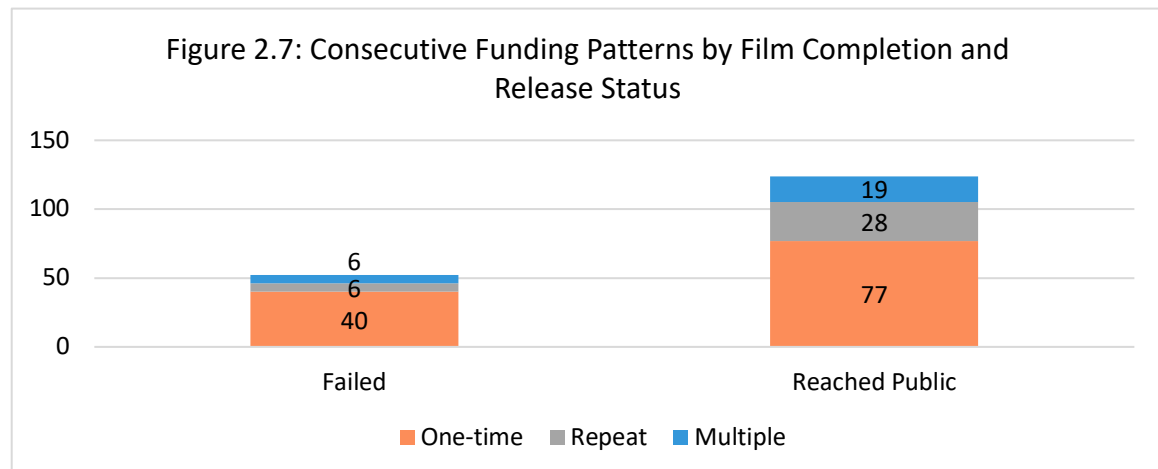


stages. More importantly, this table supports Law 5224's ability to let directors enter the industry, while also demonstrating the inability to provide career longevity through funding. The percentage of one-time funding in all career stages is 66%, meaning that close to one-third of directors' career trajectories see no further support from the Ministry after the first instance. Knowing that the Ministry funds an average of around 25- 30 films annually through this category, one-third of directors being funded only once indicates that the scheme helps new directors enter each year, but rarely provides further

resources that help establish them in the industry. Looking at consecutive funding alongside success level points out the importance of financial success in obtaining further funding.



The importance of success for further funding is visible in Figure 2.6. The major success group has the biggest share of repeated funding, while the moderate success has the largest share of multiple funding. More than half of the directors who achieved financial success in their first funded films managed to secure further funding. Yet, in the lower success categories, this percentage drops to 30% for minor and 25% for no success levels. Therefore, securing further funding from the Ministry is obviously more probable when the first funded film is financially profitable. Hence, one-time funding is by far more common in lower success levels, with 66% for minor and 73% for no success categories.

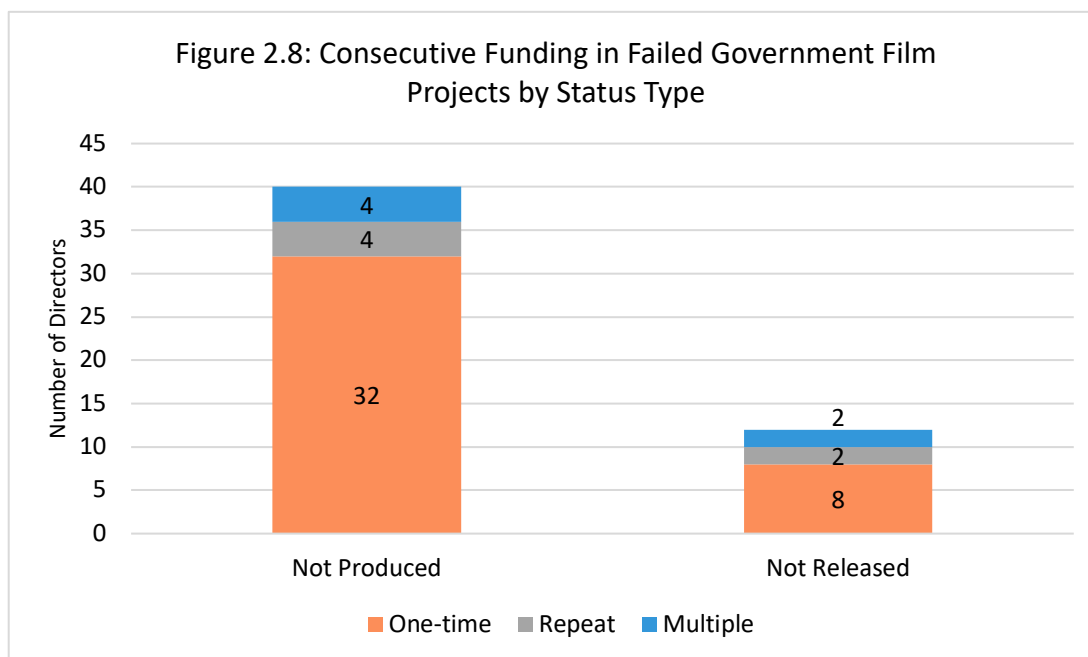


Nonetheless, the reflection of financial success in consecutive funding does not apply to all success levels evenly. While, expectedly, one-time funded directors comprise the majority of no and minor success groups, single funding is not substantially rare in higher success categories. Directors in the low success groups account for more than 65% of the one-time funding instances, yet over 45% of the major and moderate success groups are also funded only once. Although there is a 30% gap between the rate of one-time funding in low and high success groups, both success groups have a considerable ratio for one-time funding, yet their reasons are not the same. Achieving major and moderate success of an early film in a director's career might lead to other paths for production besides a repeat application to Law 5224. Hence, directors in major success levels might benefit from private finance methods through production companies instead of applying for public funding, whereas directors of other success levels may lack such opportunities for further projects. Martin Kanzler in *The Turkish Film Industry: Key Developments 2004 To 2013* supports this idea by arguing that commercial success can lead directors to pursue private resources for further production capabilities rather than public funding initiatives (Kanzler, 2015, p. 4). This is why the repeated funding percentage is very close between no success and moderate success, while also multiple funding numbers are close between minor success and major success levels. Before moving on to production volume and career consistency as next steps, considering non-released films in the context of consecutive funding further emphasizes the importance of success.

Apart from 124 directors whose films were released, 52 of them did not manage to release their first funded films, accounting for 30% of the total number of directors. If we were to consider this as a separate success level, it would be the second largest group, after the no success category. Thus, what happens to these directors who are outside of the success boundaries is important. One-third of the directors whose first funding project has failed to circulate are funded only once. The remaining 25% are evenly distributed among multiple and repeated funding patterns. While the gap in the repeated pattern between failed and released films is 10%, multiple funding instances are closer with a 4% gap. However, more than half of the directors whose first films failed to circulate yet still managed to secure further funding are established directors, 7 out of 12 to be exact. There are only two debut and three early career directors having a similar chance. Thus, the

filmography acting as a reference of success is visible here, as directors with more past experiences - and thus potentially more achievements - manage to secure funding even though their first funding experiences are failures. Yet debut and early career directors' first funding experience works as the ultimate reference for success and achievement, which shapes the possibility of further funding completely. These seven directors account for 12% of the total number of repeatedly and multiply funded directors, yet the same ratio is 5% for early career directors and 3% for debut directors, which documents the success mentality and importance of past reference.

Narrowing the focus down to only not released and not produced films supports the importance of past success references for future funding possibilities. One-time funding is much more common among not produced films, by a little less than 25%. Multiple and repeated funding only includes 10% of directors whose first funding is not produced, yet the same percentage is 16% for not released films. Therefore, production seems to be more crucial than release, which is also stated in the law itself in “Principles Regarding Payment Methods for Support”, article 19. The Ministry pays the film production support in three parts, 30% at the start of production and 40% during filming.



Applicants are obliged to hand over the finished film afterwards to the General Directorate of Cinema to receive the remaining 30% of the funding amount (Law No. 5225, article 19). However, applicants receive the full funding regardless of whether it is

released or not. It is necessary to emphasize that both commercial release and completion are mandatory in the law and regulation texts, yet the project status determines the percentage of funding being paid to the applicants. This is probably why further funding is more common among not released films than not produced examples. While a completed but not theatrically released film can pursue festival presence or other exhibition windows such as home video or SVOD platforms to lift the penalty by generating revenue, uncompleted projects only have the option to reimburse the loan or wait for three years before applying for further funding.

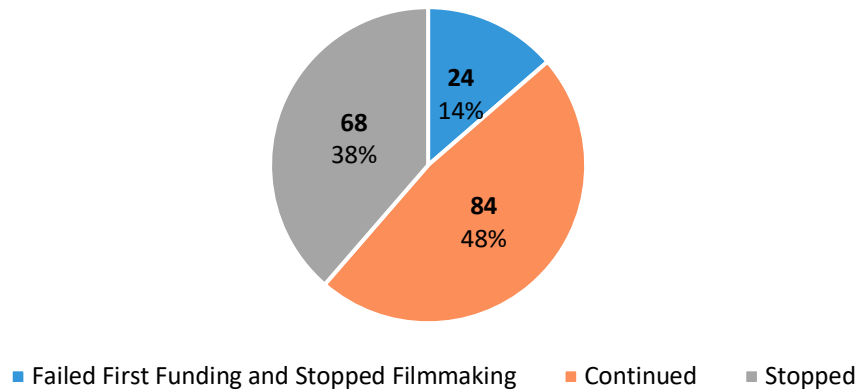
Knowing that all established directors who completed production also distributed the films, the same seven directors actually comprise the great majority of directors funded consecutively despite an incomplete first funding. Hence, there is only one director who did not produce their first funded film and went on to receive repeated support. Moreover, not released project status only consists of early and debut career directors, and only one debut director is funded after a failed release, bringing the total number to two. This means that out of 26 debut directors who either did not release or produce their first funded films, only two managed to get one more project supported through the Ministry.

5.2.3. Career Longevity and Further Production

The optimal path for a funded director after first funding is to continue producing more films to establish themselves more firmly in the industry. Hence, the number of films that a director releases after the initial funding is crucial to understand the production consistency and career longevity of these directors. Besides the impact of consecutive funding, evaluated in the previous section, production consistency is significant to further evaluate Law 5224's ability to enhance career development after the first funding.

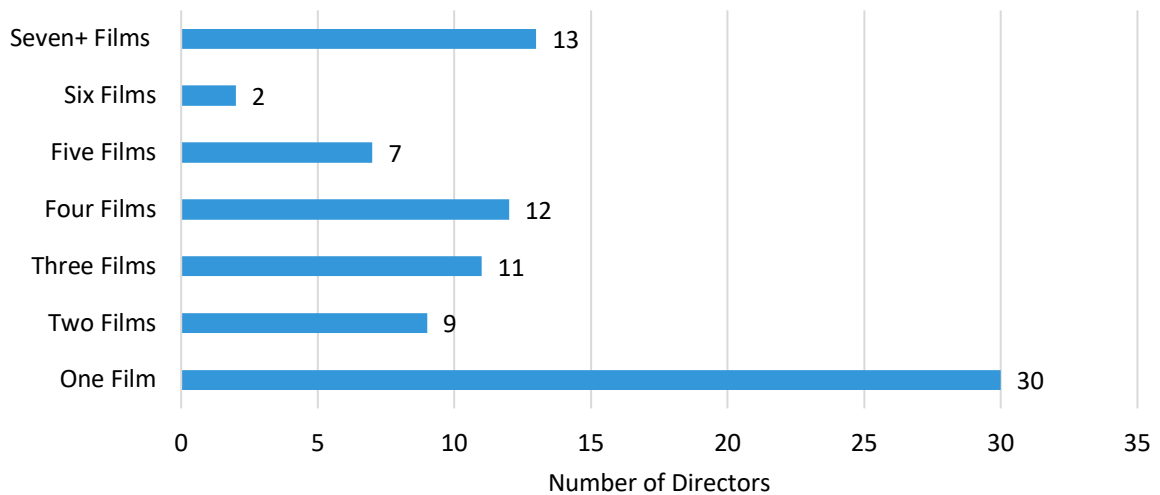
The first view of the Figure 2.9 reveals that roughly half of the funded directors' careers effectively end after the first funded film. For 24 of these directors, filmmaking as a career path was only an attempt, as they did not release their funded film. Only 84 of the funded directors released at least one more film after the first funding. Yet the ability to make one more film does not guarantee career establishment; the exact number of films each director makes after first funding in Figure 2.10 enlightens the actual career

Figure 2.9: Director Career Continuation Patterns After First Government Funding



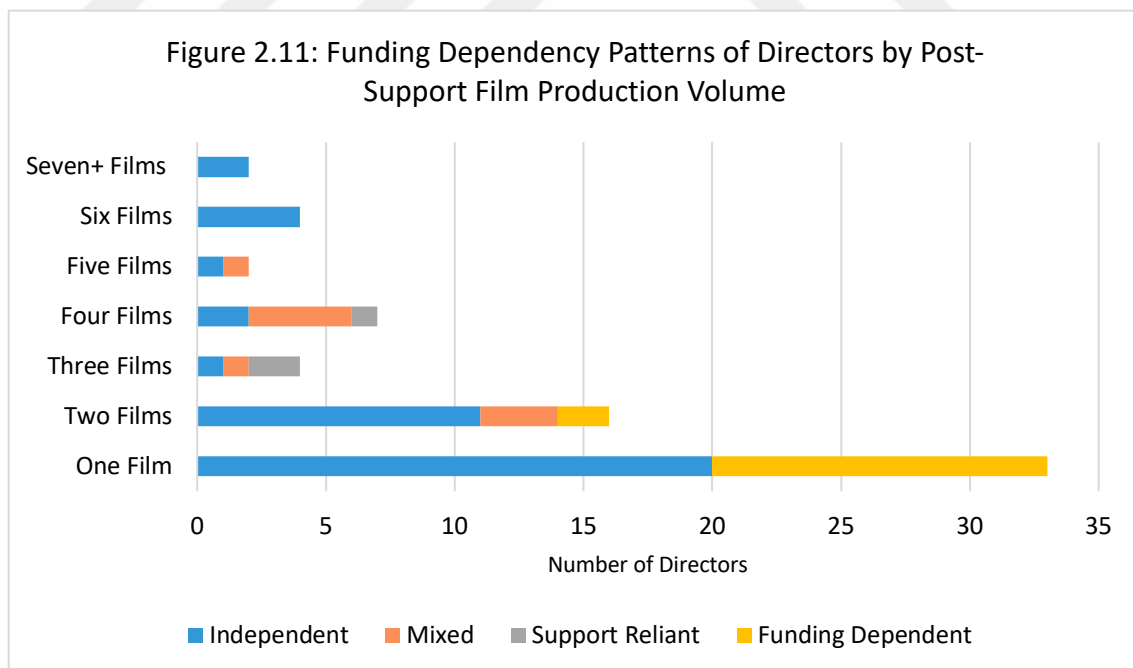
longevity. Thirty directors made only one film after the funding, which accounts for 35% of the total directors who continued production. Hence, the actual career longevity picture shows that only 30% of funded directors can be considered as continuous or career filmmakers, with two or more films in their post-funding filmography.

Figure 2.10: Filmmaker Career Output Following Initial Government Film Support



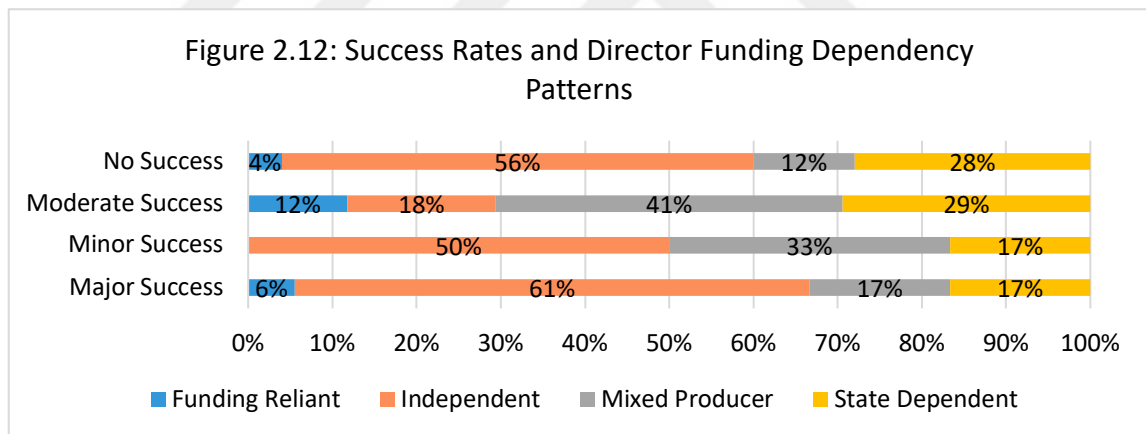
Consecutive funding should be added to the picture to evaluate Law 5224 as contrary to the bigger industry picture, given how many of these directors' career longevity is supported by the Ministry. Yet, the funding pattern framework used before might not be able to portray this in detail, as funding patterns tell how frequently a director is funded

rather than what percentage of a director's filmography is funded. Therefore, funding dependency is calculated by dividing the total number of films released after the first funding by the total number of funded projects. Then, results are divided into four categories: independent (0-25%), mixed (26-50%), funding reliant (51-75%), and support dependent (76-100%). The final picture complies with the preceding interpretations, including clear evidence that funding dependency is inversely proportional to career establishment. The more films a director has in their filmography, the more dependent they are on public funding because, as can be seen in Figure 2.11, funding dependency decreases as the number of films a director released after first funding increases. There is no director who released more than six films after the first funding and is also highly dependent on state funding, meaning that these directors were funded, at most, for one quarter of their entire post-funding filmography. Also, the percentage of independent directors exceeds 70% for directors having four or five films after their first funding. Except for directors with six films, which accounts for two directors only, funding reliant and state dependent categories drop down to 15%.



The overall proportion of funding dependency and career longevity points to the fact that %50 of the funded directors work independently after the first funding. While a portion of them potentially stop seeking funding by choice, the majority of directors working

independently prove that Law 5224 alone cannot secure further production possibilities. Moreover, adding success rates of first funding briefly to the equation, Figure 2.12, also shows the majority of both no success and major success directors who started to work independently after their first funding. Hence, directors situated at the opposite poles of success are not funded, but potentially because of reasons outlined above, financially successful directors might not need public support to continue working in the industry. Therefore, each filter dilutes the total number of funded directors into smaller numbers, showing the fewness in the number of directors managing to continue working, contrary to the initial number of directors who entered the industry through Law 5224. While less than half of funded directors can continue taking part in the industry after first funding with one more subsequent film, adding funding's impact divides it into another half, resulting in a very small intersection of visible career longevity and the impact of Law 5224.



5.2.4. Career Longevity of One-Time Funded Directors

Even though filmmaking as a career trajectory is hard to navigate and establish on a strong basis, there are a handful of directors who managed to sustain production despite being funded only once. Thus, looking at the number of one-time funded directors and how many of them were able to exist as directors is significant for the further evaluation of public funding's importance in career establishment. Out of 117 directors with single funding, 40 managed to continue production without funding. Thus, while 34% of those continued, the remaining 76% either ended their career with one released film or did not even manage to release their first funded production, as can be seen in Figure 2.13. This

picture supports the importance of public funding on career longevity, owing to the small portion having continuous production after the first funding.

Figure 2.13: Career Trajectories Government-Funded Directors, One-Time Funded Only

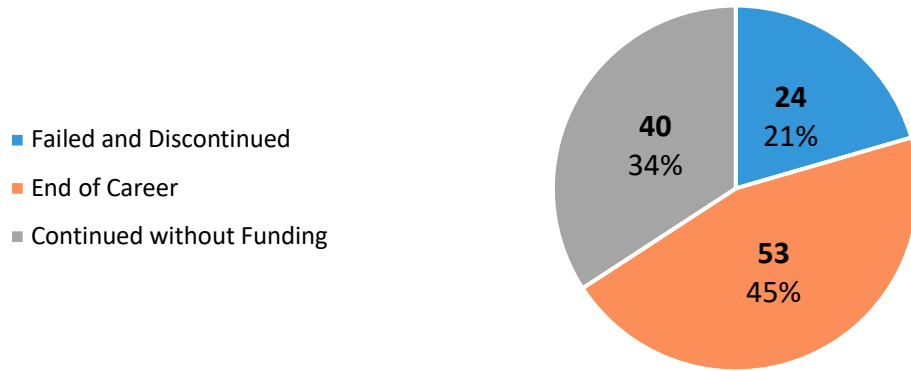
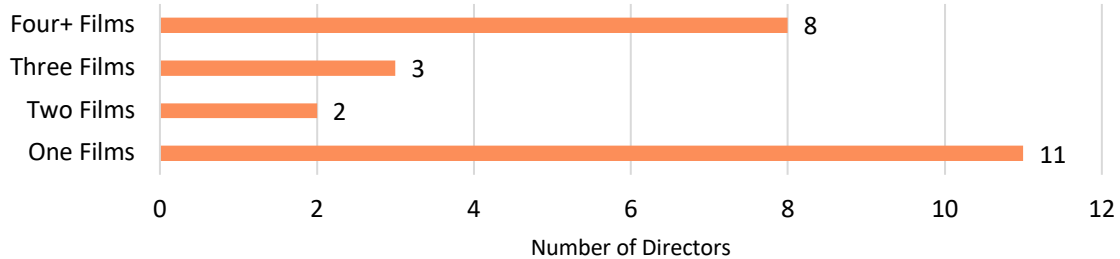
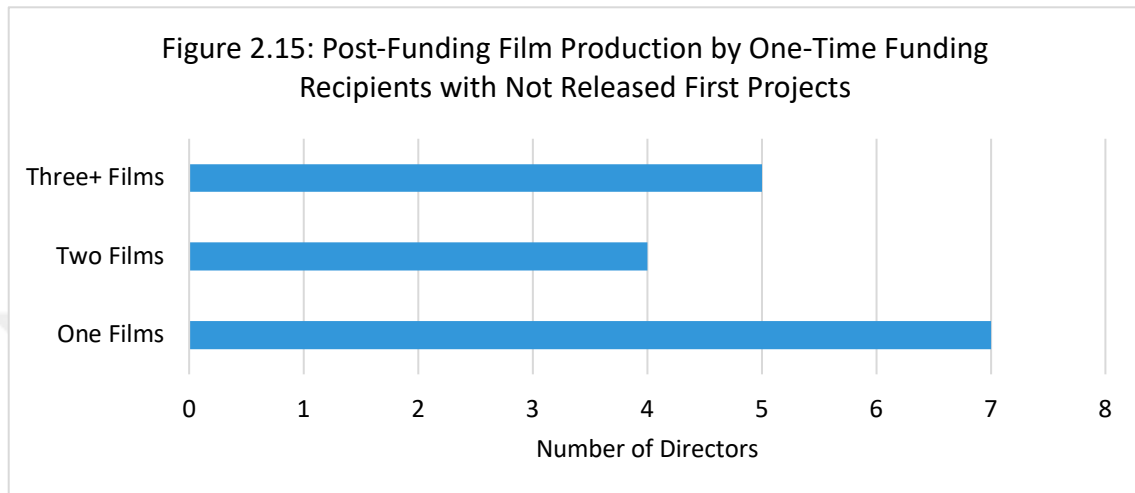


Figure 2.14: Post-Funding Film Production by One-Time Funding Recipients with Successful First Projects



The exact number has meaning beyond the surface look since 45% of those who continued filmmaking without funding manage to release one film after their publicly funded career spark. Therefore, taking part in the industry with further production possibilities is even rarer among one-time funded directors with notable exceptions. For example, Mehmet Ada Öztekin, whose project named *Mahmut ile Meryem* (Mahmut and Meryem, 2013) is funded in the feature length production category, did not secure any funding afterwards. *Mahmut ile Meryem* falls into the moderate success category with more than €200.000 box office, yet Öztekin's next application for the same category support was rejected in 2015. Still, Öztekin released seven more films afterwards, ranking him as the most active director in this category. Some examples from his filmography include *7. Koğuştaki Mucize* (Miracle in Cell No. 7, 2019), and recent *Atatürk 1881-1919*

(2023, 2024) series. Yet Öztekin is an exception, and the majority of one-time funded directors still either have one film in their filmography or their first funded films have not even been realized.



The inability to release the first film, either because of incompleteness or distribution issues, leads to minimal career longevity. Only 16 directors whose projects failed to reach the public managed to release more films. The ratio of those who made a single subsequent film is similar to the previous director group, 43% with seven directors. Yet in terms of numbers, only nine one-time funded directors managed to continue making more than one film following a failed first funding attempt, thus summarizing the overall success prerequisite for both further funding and career longevity. However, there are again some exceptions. Onur Ünlü's funding application for a film titled *Bankası* (Bank), which may have been an earlier version of *Kırık Kalpler Bankası* (The Bank of Broken Hearts, 2017), was funded but not released in 2008. Ünlü released 15 more films afterwards, such as *Sen Aydınlatırsın Geceyi* (Thou Gild'st the Even, 2013) and *İtirazım Var* (Let's Sin, 2014). Even though Ünlü has one of the largest production volumes among all the directors that are within the scope of the research, the more likely outcome of a failure to realize a funded project would have been a limited production ability, similar to what happened to the remaining majority.

Feature length film production support category is not exclusive to debut directors, yet the fact that debut directors comprise the majority makes focusing on first funding instances a suitable approach to evaluate how Law 5224 is placed within other tangential

industrial factors that shape career trajectories. The importance of financial success is visible in almost every angle of sight, from career status to consecutive funding possibilities. Rarity and hardships to achieve success, along with the Law 5224's limited ability to improve on lower success levels, lead to turbulent career trajectories and longevity issues for most of the directors because the majority of funded directors fall under the low success categories. Thus, consecutive funding becomes rare, and the impact of Law 5224 on emerging directors' career longevity and establishment declines. The reason why the results show this as an issue for director's career establishment is not that the funding body's past success and achievement criteria is faulty, but rather that it is not fully compatible with the high ratio of emerging directors seeking support through the feature length production support, even when there is another category, first-film production support, exclusive only for debut directors.

5.3. First Film Production Support: Career Stage After Funding

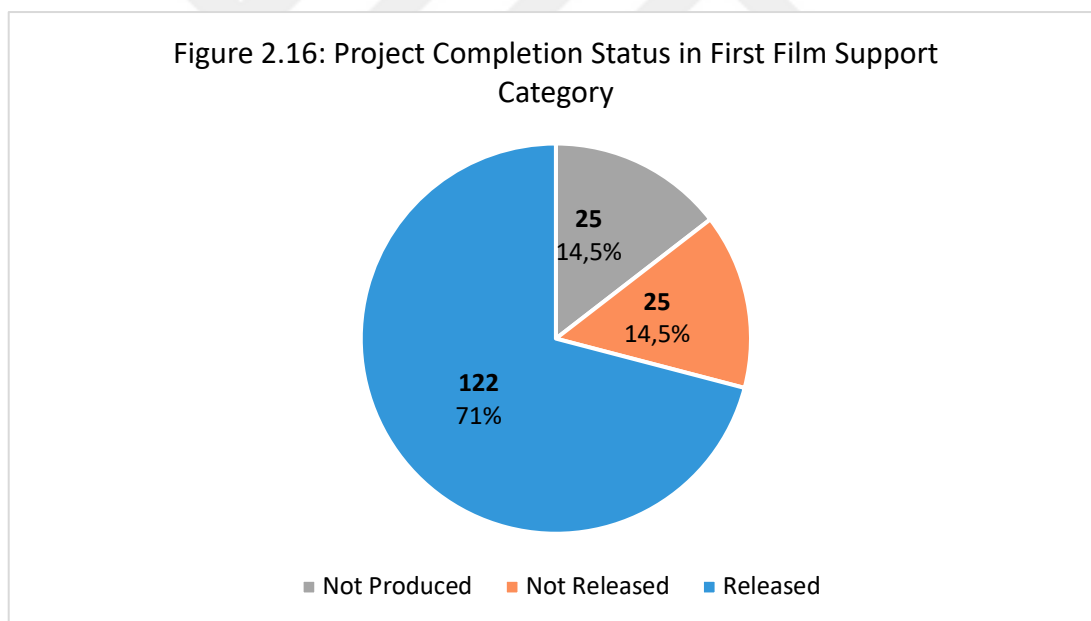
As the title of the category suggests, first film production support exclusively aims at prospective directors who seek support in order to join the industry. Thus, all applicants of this category are also debut directors, rendering examination of career status inapplicable. What might have worked as a different career status approach is to look at the shorts and documentaries these directors made in the past, since a first film category applicant needs to have made at least two short films or one documentary. However, the current framework of this study does not allow for adding these works because shorts and documentaries are not reliably recorded in the databases, nor is there a collected archive that would make these productions publicly available in the long term. Therefore, all 172 directors in this category are considered equal in terms of the past works they made, the awards they got, or the festivals they attended.

5.3.1. Project Status

Project status of first funding instances shows whether first funding instances in this support category have released or have failed to reach the public. As Figure 2.16 shows, the great majority of directors managed to release their debut works. Thus, the rate of completion and successful circulation is 71%, while only the remaining 29% failed at either completion or circulation. Comparing this to the previously analyzed feature length

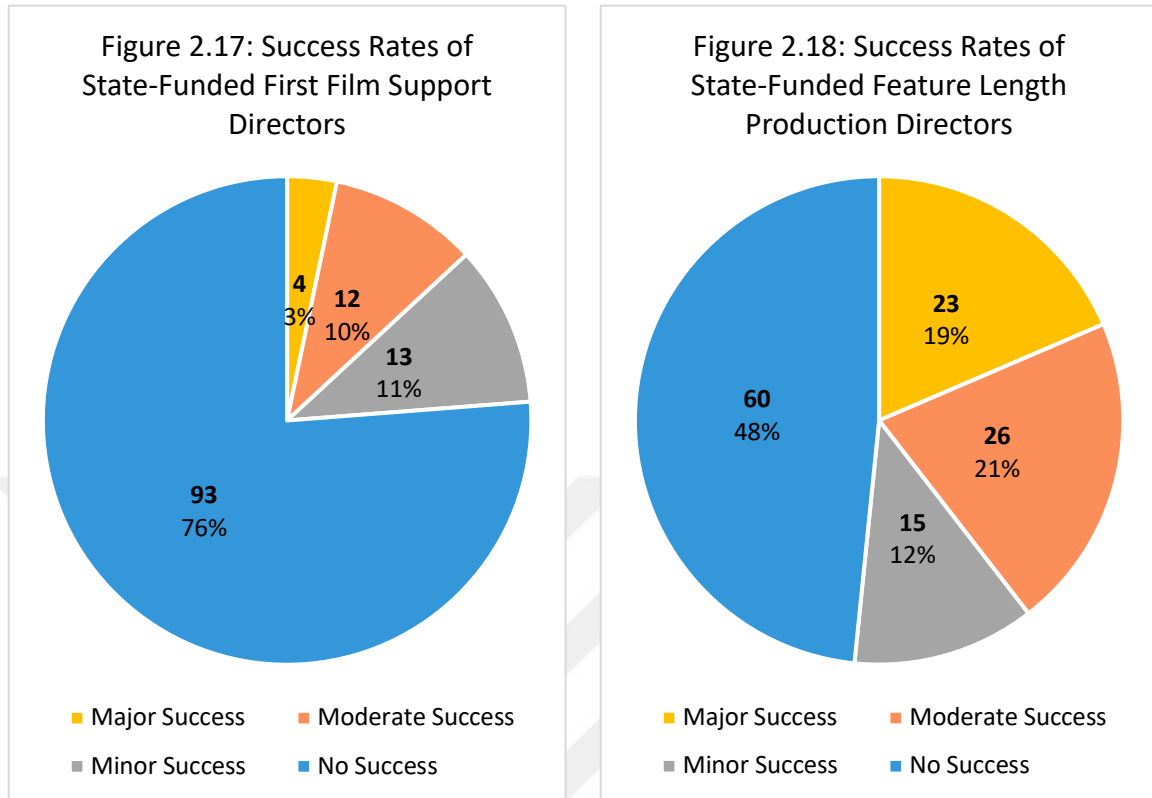
film production category results in a very similar picture. Yet what makes the examination of the project status of first film production support fruitful is the direct comparisons between debut directors of feature length production support to examine the position of debut directors after first funding supported through different categories.

Out of 172 directors, 122 of them released their first funded films. Comparing directors in first film funding with debut directors in feature length production shows the difference between their success rates and career trajectories. The main difference between the first film and feature length support categories is the difference in major and no success groups. Financial success is still polarized, yet the concentration is even more visible, meaning that the ratio of no success directors is almost 30% higher than it is under the feature length production support category. Also, the percentage of major success directors is 20% lower in the first film production support. Therefore, the first



outcome is that financial success is even rarer by a great degree, since even the combination of directors with moderate and major successes accounts for 13% of all 122 directors. The same combination makes up 40% of directors funded in the feature length production support. Yet, the fact that all directors in first-film production support are debut feature directors makes the direct comparison less reliable.

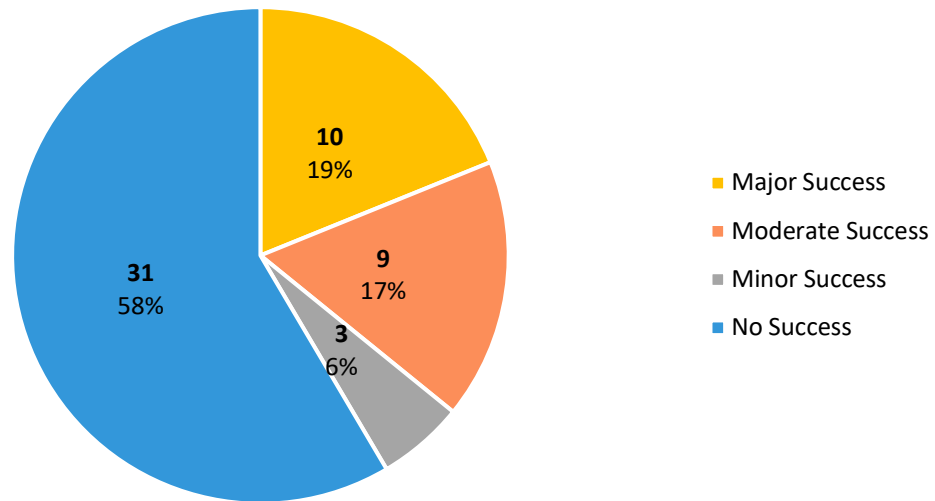
Comparing only debut directors leads to a better comparison, yet the picture is not very different. Even when only debut directors are taken into account, there is a clear



difference in the success rates between the two support categories. 58% of debut directors fall into the no success category, reducing the difference only to 20%. Yet in the major success group, there are a greater number of debut directors achieving major financial success in the feature length funding category, making up 19% of the total 53 directors. Hence, even when only debut directors are compared, there is a distinct gap in the ratio of financial success. Unsuccessful theatrical runs are much more prevalent in the first film funding category.

Box office averages depict this picture even more thoroughly, since categorizing financial success does not show the exact difference in average revenues that debut feature directors make. Echoing once again the overall ideas on concentration and polarity that are revisited repeatedly in this research, the box office adds another dimension to the concentrated distribution of financial success among debut directors, along with the difference between the two funding categories. Even though the difference is quite low in moderate and minor success levels, there is a greater gap in major and no success levels. The average box office of a major success director with first film production support is € 2.329.217. The same amount is € 16.017.952 for debut directors with feature length

Figure 2.19: Success Rates of Debut Directors in Feature Length Production Support



production support; thus, the gap is €14M. This gap is not only in the number of successful directors but also in the average box office amounts they had. However, pointing out the concentration, not all directors contribute to the high box office average among debut directors in feature length production support category. Sitk1 Can Ulkay's *Ayla* (2017) is a major with €16M box office performance. The second highest box office intake is €4M. Hence, *Ayla* makes the average hit the ceiling, and removing it from the calculations neutralizes the difference (€2.356.174). While including *Ayla* shows the difference in the potential of success in two categories, excluding it demonstrates the micro concentrations in smaller director groups.

Directors in no success groups also have a gap in their box office averages, yet to a quite subtle degree. While an average no success debut director in feature length support returns around €15.148, directors in the first film production support category return €8.096. Therefore, a financially unsuccessful director in one category basically doubles the amount that another unsuccessful director returns in the other category. The overall box office portrayal of debut directors in different categories supports both the concentration of financial return, even in small director groups, but more importantly, points out the inherent financial gap between different funding categories. The potential reasons for this gap are addressed in the section devoted to distribution.

Success Rates and Box Office Average of First Film Production Support Directors		Success Rates and Box Office Average of Feature Length Production Support, Debut Directors	
Major Success	€ 2.329.217	Major Success	€ 16.017.952
Moderate Success	€ 141.873	Moderate Success	€ 222.928
Minor Success	€ 68.718	Minor Success	€ 67.120
No Success	€ 8.096	No Success	€ 15.148

Table 2.5: Success Rates and Average Box Office Revenue: First Film vs. Feature Length Support for Debut Directors (Euros)

5.3.2. Consecutive Funding in First Film Production Support

As stated above, Law 5224's ability to impact career longevity through further funding possibilities is crucial. Moreover, the fact that all directors funded in this category are debuting makes it even more significant. Consecutive funding is categorized the same as the feature length production support section: one-time, repeat, and multiple. One-time funding makes up the majority of directors in this category with a ratio considerably bigger than the feature length support category. Out of 172 total directors, 135 of them are funded once, which accounts for 79% of all directors in this category. The same amount is 66% in feature length funding support; thus, the one-time funding pattern is more common in first film funding by 13%. Accordingly, other pattern types, multiple and repeat, are higher in feature length production since the rate for repeated funding is 15% and 6% for multiple funding. Therefore, in a similar proportion to the success rate, one-time funding is quite prevalent in this category. Directors debuting with this support category are predominantly funded only once, while a few of the remaining got a second chance. Yet comparing consecutive funding patterns in first film production support to debuting feature length support directors shows similarities.

Funding patterns in first film production support and debut directors in feature length production support turn out quite similar. Especially, one-time funding instances only have 2% gap; similarly, the multiple funding ratio is almost the same. Therefore, the main implication must be that debut directors essentially get one-time funding. Consecutive funding is rarest in this director group, similarly to the rarity of financial success. Investigating financial state alongside consecutive funding proves this argument since

Figure 2.20: Consecutive Government Funding Patterns in First Film Production Support Category

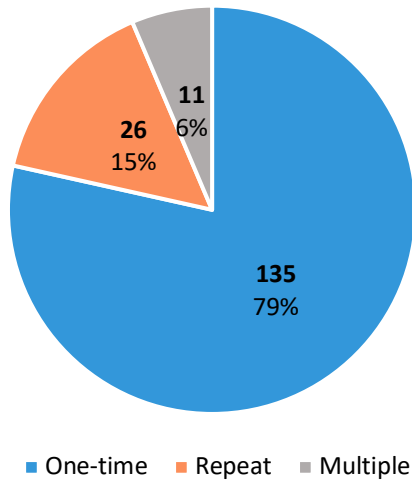
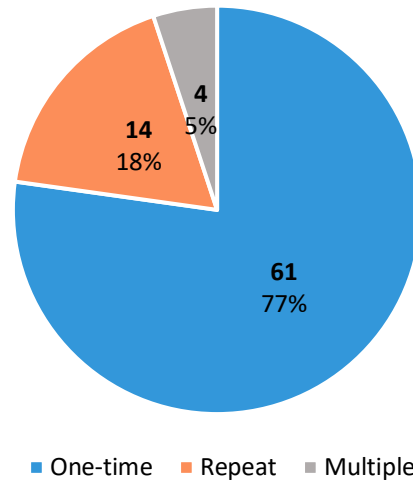
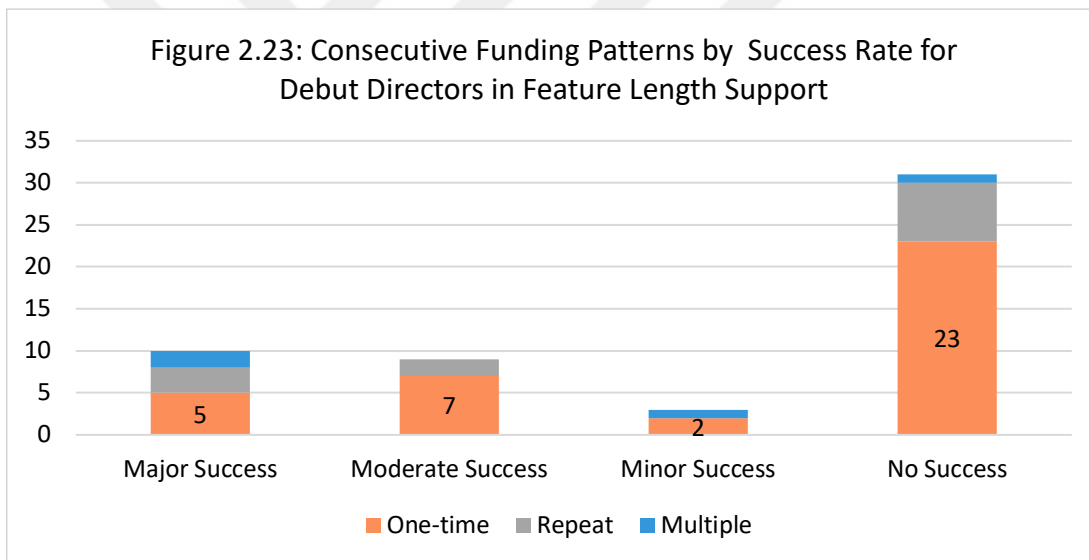
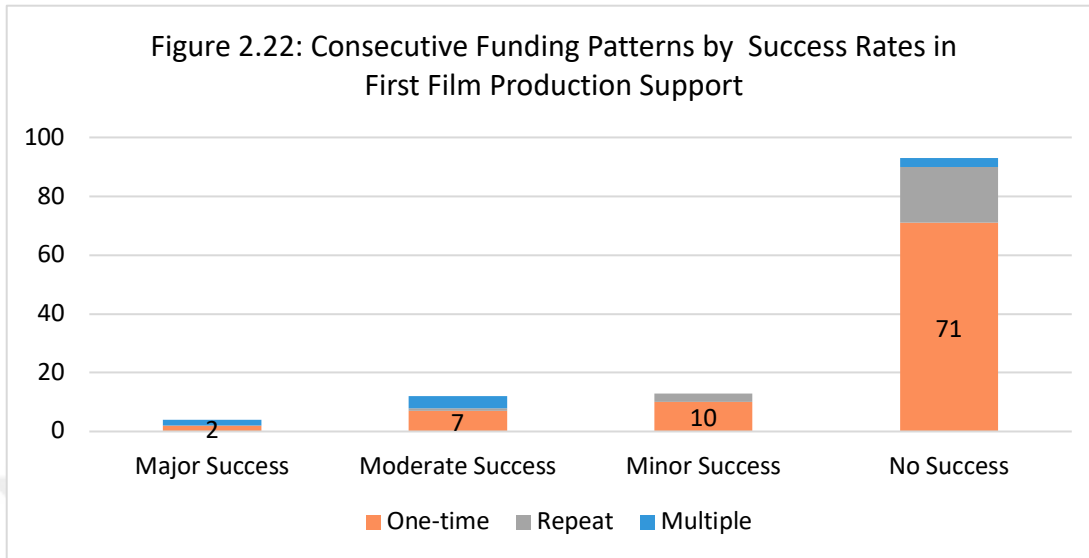


Figure 2.21: Consecutive Government Funding Patterns for Debut Directors in Feature Length Production Support



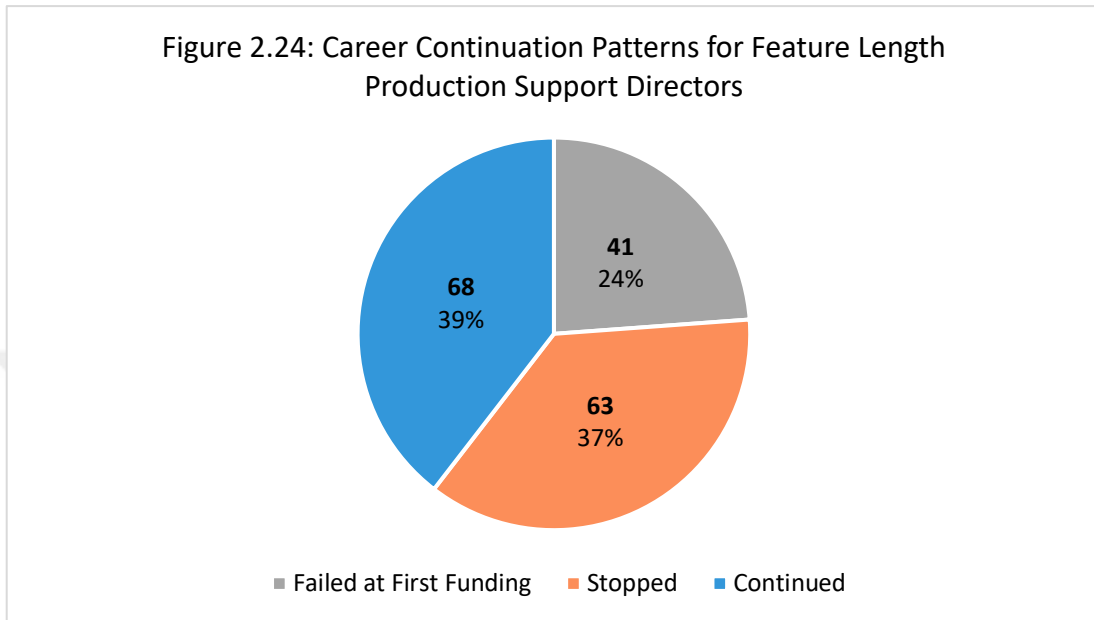
consecutive funding in the no success category is not only quite rare but also has very similar proportions compared to debut feature length production support directors. One-time funding accounts for just over 70% of the no success group in both categories. Yet single funding is not only prevalent in lower success categories, the majority of major and moderate success levels also comprise mostly one-time funding; hence, multiple funding is rare regardless of the success level, especially at polar levels, complementing the idea of a successful director's probability to pursue private resources. Categorizing success under different categories is useful to understand the correlation between financial success and consecutive funding, yet it also excludes the films that have not been released or produced.

Project status is also an important factor in consecutive funding, to see whether the project status of funded debut works is a criterion for further funding. As shown in Figure 2.22, 90% of directors who are funded in the first film production category and are unable to realize their debut works receive no further funding. However, like all figures related to consecutive funding, directors who reached the public also have prevalently high percentage of one-time funding, around 73%. Thus, despite the gap, both categories of directors were predominantly funded only once. Debut directors in feature length support category also have very similar high rates of one-time funding. 93% of debut



feature support directors who failed to circulate their film are funded once. This rate declines to 70% when they release their work. Directors of both support categories have very similar rates for one-time funding, which emphasizes that the inability to complete or circulate a debut work causes much less chance for further funding. If project status were considered as a level of success, it would make the second largest group in both of these debuting director categories. Hence, if no success directors and directors with a failed debut work rarely receive further funding, this means that 83% of first film funded directors and 72% of debut directors in feature length film fail to hardly secure a second chance of funding. According to this picture, one would rightly doubt these directors'

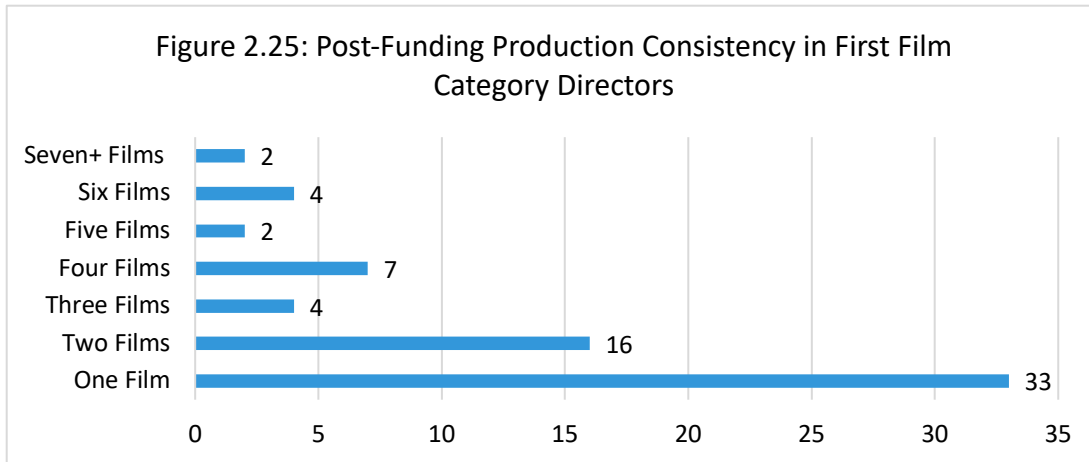
ability to produce further films since the great majority of those are unable to continue without public support.



5.3.3. Career Longevity and Further Production

The initial look at production consistency of directors funded in the first film funding category is similar to feature length production support, since the majority of funded directors cannot situate themselves in the industry. Under 40% directors continue to produce after funding. While 36% of those released their debut work, the remaining 23% did not even release their debut work. In raw numbers, only 68 directors continued production after receiving first film production support. However, 33 of those directors released only one additional film after funding, which means the rate of directors making more than one film after funding is 20%. Figure 2.25 shows a detailed breakdown of production consistency after funding. The first film funding category has a lower continuation rate than feature length production support. The comparison to debut feature length production directors is also very similar to this category. While 39% of them made at least one more film, the rate of those who made more than one film is 20%.

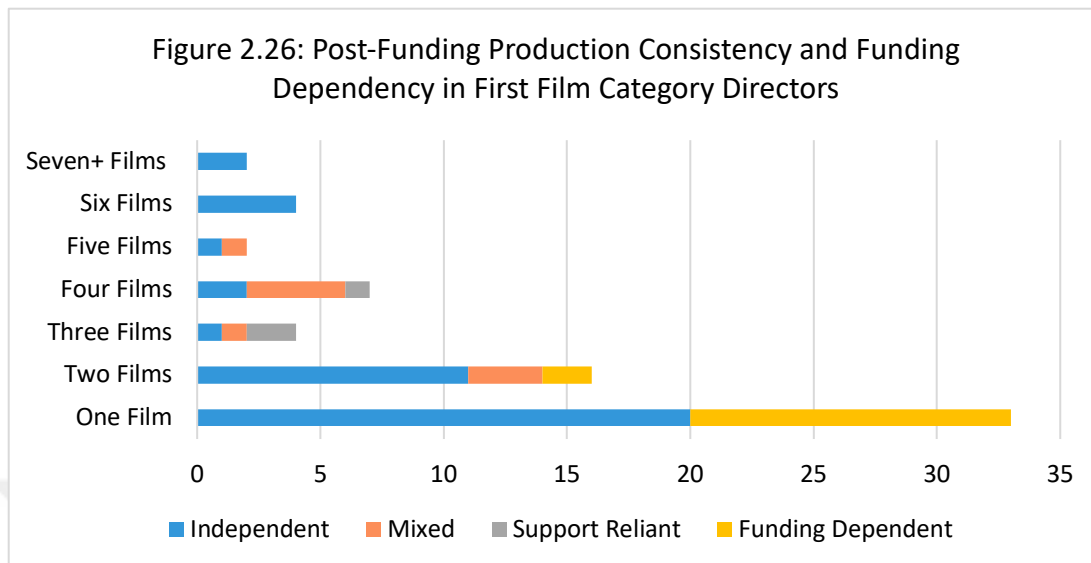
The funding reliance of these directors accompanies the consecutive funding figures. Those who are able to produce after first funding mainly work independently, meaning the financial support they achieve for their post-funding filmography is less than 25%,



which can be correlated to the rarity of consecutive funding. The breakdown of Law 5224's impact on production consistency in Figure 2.26 portrays this rarity to a greater degree. More than half of the directors independently released one film after funding, hence the majority of directors who were able to continue production made films with private sources rather than public funding. The rate of independent directors is even larger among directors who made more than one film, and only two of them built filmographies that are nearly fully dependent on state funding. The dependency on funding is inversely proportional to the number of film directors made after funding. Directors who made six or more films are almost entirely reliant on funding, as all of them are categorized as independent. Similar to the argument in previous sections, this inverse proportion means that directors in their early career need public support more than others, most probably because private financing paths are clearer for established directors. However, consecutive funding and accordingly Law 5224's impact on career longevity is limited, and this applies not only to first funding support since 60% of debut directors in the feature length production category also shift to independent production after first funding.

5.3.4. Career Longevity of One-Time Funded Directors

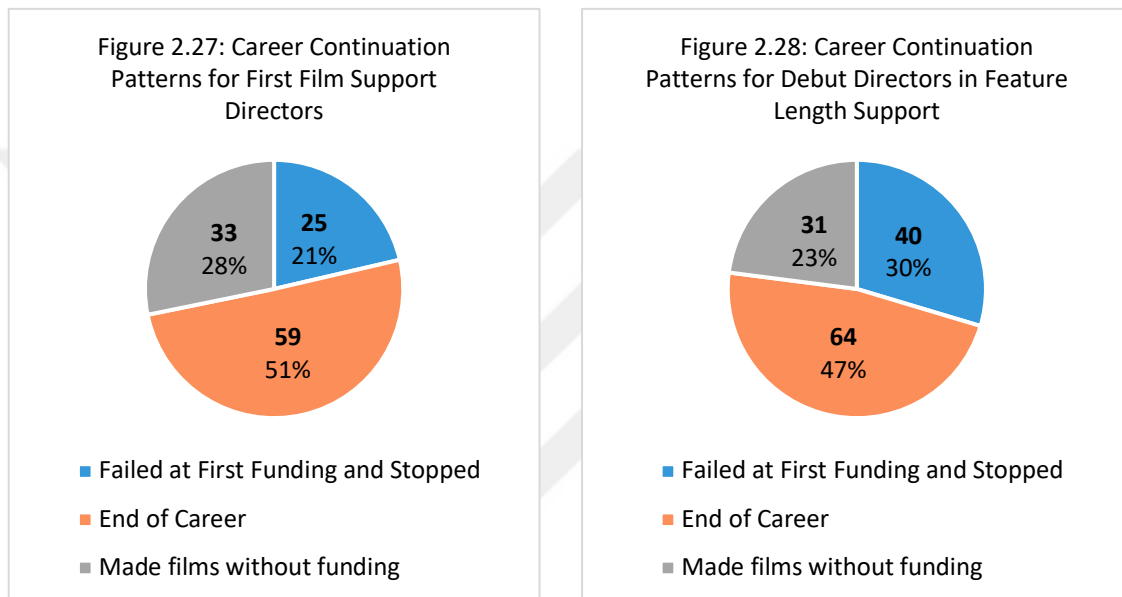
The number of one-time funding is much higher in the first film funding category than feature length film production, even when the comparison is limited to only debut directors. These directors were funded once, then continued making more than one film without public support. Thus, career longevity is bound to independent sources for them, and a one-time funded director's ability to maintain their filmmaking career with private



resources supports the hardships of maintaining a filmmaking career without public support. Only a small percentage of one-time funded directors manage to continue production without support after the initial funding, as can be seen in Figure 2.27. Out of 135 one-time funded directors, 47% of them only released the first film funding as their debut work and stopped production afterwards. 30% of those failed at completing or distributing their debut works and consequently stopped production altogether. Therefore, only 31 of them, which make up 22% of the total, continue making films without funding. Further excluding those who only made one film reduces this ratio to 10% with 14 directors. Therefore, the great majority of one-time funded directors are unable to shape career trajectories that allow them to continue production. Those who managed to follow private ways have very short career trajectories since the percentage of directors who manage to make more than after their first film funding is 10%.

Even though continuous production rates are far less common for directors in the first film support category than feature length production, comparing it only with debut directors shows quite a resemblance in other aspects. The majority of debut directors in feature length production category also rarely make further films. Just over half of those also stopped filmmaking entirely or did not release any films until the date of this research. Again, this confirms that debut directors are rarely able to produce more films after the initial funding. Separating directors whose debut works are not released or completed further reduces the number so much that only five directors whose first funded

film failed to reach the public managed to produce at least one more film without funding. While four of them only made one further film, one director released two films after funding. Law 5224 might work as a career spark, yet the majority lack further production abilities and career trajectories that establish their career status. Moreover, funded debut works do not work as a base for further production and contribution, especially when it is not supported by further funding.



The entire section on the first film funding and the comparison with debut directors in the feature length production category demonstrates that many aspects of Law 5224 are working in a misalignment in terms of what is expected and what is possible for directors. The rates of financial success, consecutive funding, and production consistency fall short of allowing most of the directors to get a foothold in the Turkish film industry. All of these aspects are interrelated, indicating that financial success, consecutive funding, and career longevity are different nodes in the same chain of determinants for career establishment and longevity. Although feature length funding and first film funding seem to differ from one another at first glance, further filtering of debut directors shows the similarities between support categories. Knowing that the number of early career and established directors is lower than that of debut directors, especially if the two categories are combined, the results gathered from debut directors actually have more representative value than other career stages.

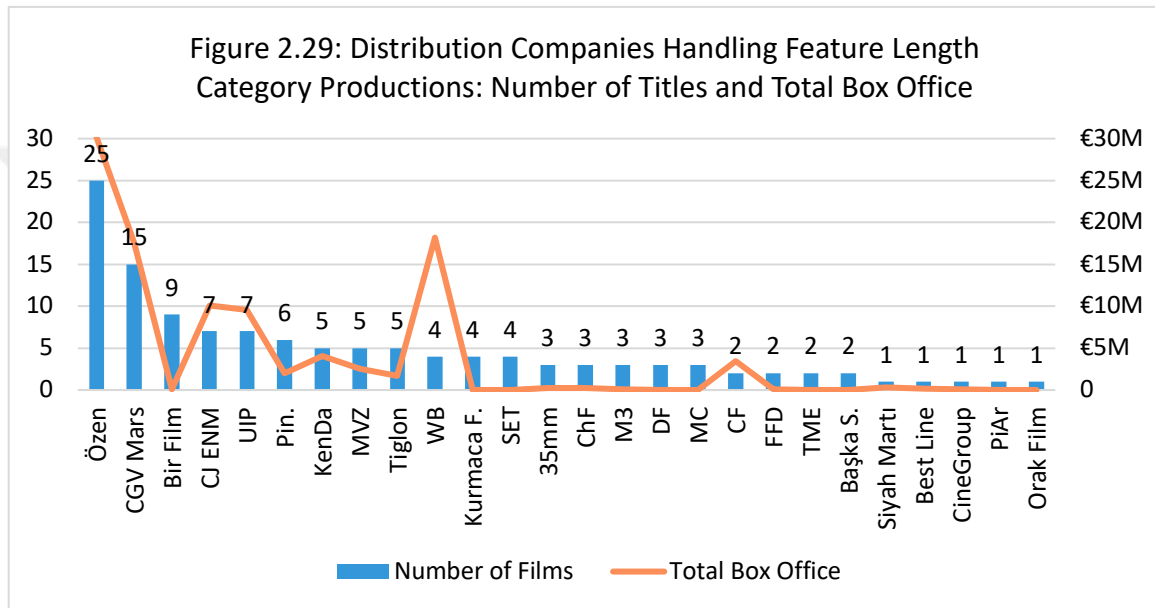
Moreover, there are not enough signs for the relationship between financial success and consecutive funding that would allow us to argue that financial success is preliminarily rewarded with more funding. However, this does not refute the Ministry's intention to favor successful projects because the applicant's choice might be shifting towards private financial sources after a successful theatrical run rather than seeking further funding, similarly to Kanzler's argument (2014, p. 41).

Financially unsuccessful directors or directors whose first film was not released have a minimal rate for consecutive funding and production consistency. This picture is even worse for one-time funded directors because the great majority of them cannot continue filmmaking without getting further funding. Given that one-time funding makes up the majority of directors in both support categories, the situation of one-time directors is again more representative than other smaller director groups. Therefore, Law 5224 only makes sense when different aspects are considered in parallel with one another, and the overall picture displays hardships to maintain the career spark ignited by Turkey's only public funding body. If financial success is important, both for the research and the industrial landscape, a separate section is devoted to distribution as an accompaniment to the aspects analyzed in this chapter, and the bigger distribution section is in Chapter IV.

5.4. Comparing Distribution Practices in Both Support Categories

Distribution patterns of funded films are examined in Chapter IV in detail. The patterns that certain distribution companies follow in terms of the films they choose to distribute are the main focus of this section, and the intersections of these patterns with the aforementioned director categories. The entirety of this section is also carried out in a comparative fashion between two support categories: feature length production and first film production. The most important figure is the company's revenues since it is directly correlated to the difference in potential returns between the two categories. When including only first funded productions, the total of 124 films funded in the feature length production support is distributed by 26 distribution companies. Özen Film has the most profit with €30.128.672 by distributing 25 of these films. In second place, Warner Bros. Türkiye profited €18.198.076, but the number of films circulated by Warner is not even close to Özen's, since they only circulated four films. The extreme gap between these two

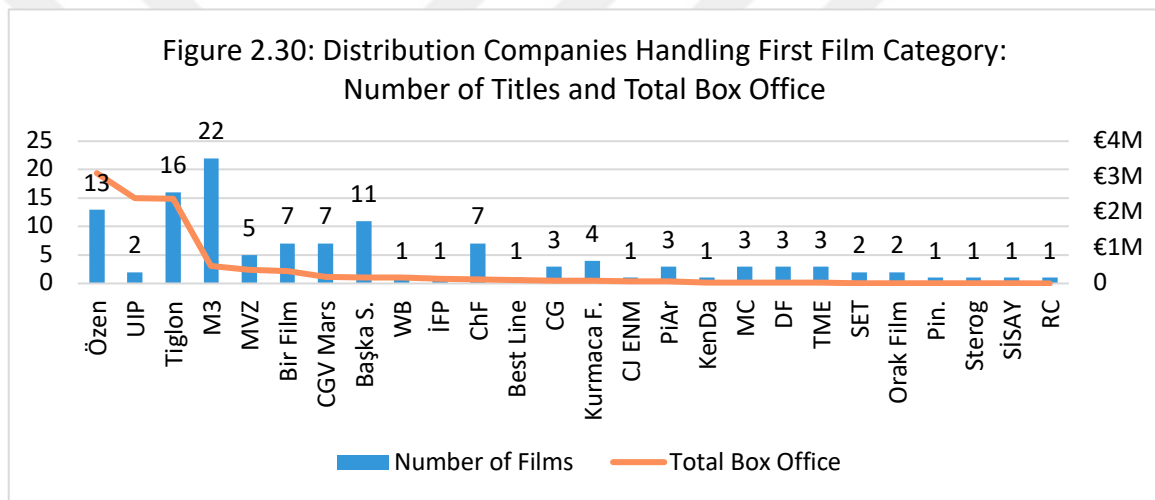
companies' affiliated films shows the concentration of capital distributed between different companies. Financial profit is not fully related to the number of films distributed; it is more related to films themselves because 88% Warner's financial success comes from Sıtkı Can Ulkay's *Ayla* only. CGV Mars is the third company in terms of profit with €17.600.242 by handling 15 films. The rest of the companies distributed fewer than 10 films and returned less at the box office.



The disconnection between the number of films and box office revenues is even more visible when companies with minimal market share are examined, and the best example for this is Bir Film. They distributed nine films, which means that they are the third most active company in handling funded films. Contrarily, their box office profit is €93.445. Therefore, Bir Film returns an average of €10.000 from a funded film, whereas Özen Film returns €1.2 M. The facet of oligopoly is not visible in the number of films each company distributes, but it is clear in the revenue they generate.

First film production support has a very similar figure and demonstrates a similar discord between the number of films and the revenue. The most profitable company is again Özen Film, but with less revenue and a smaller number of films. They made €3.100.516 with 13 films. The second place is UIP Türkiye, and their position is very similar to Warner Bros. Türkiye with a revenue of €2.401.615 by dealing with only two films. Given that both Warner Bros Türkiye and UIP are Hollywood subsidiaries, their

distribution volume mostly consists of blockbuster Hollywood productions. However, they still managed to return a considerable amount with a very limited domestic distribution. Sorting companies by the number of films shows that M3 distributed the most number of films to a great degree. They circulated 22 films but managed to return €488.582 only. A similar gap is visible in other companies too, such as Başka Sinema's €73.528 with 11 films, and Chantier made €109.266 with seven films. These companies distributed more funded films, yet the revenue is much less than UIP or Warner Bros., supporting the argument that their market share allows them to choose among the plethora of films while smaller companies struggle to deal with the rest.



This argument needs to correlate success rates to company size, along with the ability to pick successful films. Out of 25 films that Özen Film distributed, they distributed the most number of majorly successful films with nine, yet they also circulated 9 of the no success films. Eight of these major successes were released before 2010, aligning with the time when Özen Film peaked in the industry. The no success films they circulated belong to the post-2011 era, when Özen dramatically lost its market share. Other giant companies or subsidiaries of international conglomerates have distributed at least one major success. CJ ENM, for instance, worked with three majorly successful films; therefore, they are high on the list of financial returns compared to smaller companies. All films that are distributed by Bir Film fall into the no success category. Similarly, Set, Kurmaca, MC Film, M3, and many other small companies distributed either minor or no success films.

The mentality is similar in the first film production category, even though the financial success is rarer. Out of 22 films that Bir Film circulated, 19 had no success, while 3 had minor success. Başka Sinema handled 10 no success films and one minor success film. All seven films of Chantier fall into the no success category. There are only four major success films, and they are distributed by Özen, Tiglon, and UIP. The fact that there are fewer financially successful films in this category allows companies to return less than the feature length category. Yet, this rarity does not seem to hinder them from carefully choosing what to circulate for a better chance of financial success. This rarity also enhances the concentration since when a smaller number of films are picked by the giants, what is left is most probably financially failed film. Thus, smaller companies work with far less financial return despite dealing with higher numbers of films.

Comparing the first film funding debut feature length support directors has the potential to show the importance of career status for distribution companies. Özen distributed 14 films of established directors. As stated at the beginning of this chapter, the majority of established directors involved with funding before 2010, which complies with the era when Özen was powerful. Thus, Özen Film distributed the majority of established directors because of its market power, especially in domestic films.

Companies working with debut directors are different from the first film production funding category. While the majority of first film directors are distributed by smaller companies, CGV Mars distributed the most number of debut directors in feature length film production funding category. The activity of smaller companies like Başka Sinema, M3 Film, or Bir Film is minimal compared to their performance in the first film production support. A potential reason why the distribution scene for debut directors in these categories is different can be revealed through the box office performance of early career directors. As stated earlier in this chapter, early career directors have the lowest box office average, and the difference in distribution patterns explains why. Many of the established directors worked with Özen Film, and those who did not mostly worked with UIP or CGV Mars instead, which led them to better box office performance. Similarly, a proportion of debut directors also worked with the same companies and achieved better average box office intakes, yet still less than established directors. Early career directors,

on the other hand, are distributed by smaller companies, thus ending with less box office performance due to the limited market control these companies have.

What Law 5224 expects from funded directors and its feasibility in the industry are affected by the market control certain distribution companies hold, especially regarding the possibility of financial success. Although, as stated earlier, these issues are clearly correlated, it is not clear where to assign cause versus effect. Are less “worthy” films relegated to subpar distribution, or is a subpar distribution system failing potentially successful films? However, what is obvious in film distribution in Turkey is the concentration and unequal release provided for filmmakers, which is the sole reason why it is paradoxical. The major gap between the release patterns that each company can afford makes it harder to compare which party affects the other. However, the possible correlation between the success rates of debut directors and the companies that distributed these films suggests a potential answer. The difference in success rates of debut directors in different support categories displays the power that certain companies have and what it can lead to in terms of financial success. The unequal circulation leads to unequal access to capital; therefore, it creates different circumstances for success. While those who are distributed by the majors have relatively more access to the audience, and accordingly the box office, the rest do not even have a chance to be successful. This unequal chance leads to further problems in accessing repeat funding and production consistency of directors and influences how Law 5224 impacts the bigger industrial picture in Turkey.

5.5. Final Holistic Overview of Law 5224, All Film and All Directors

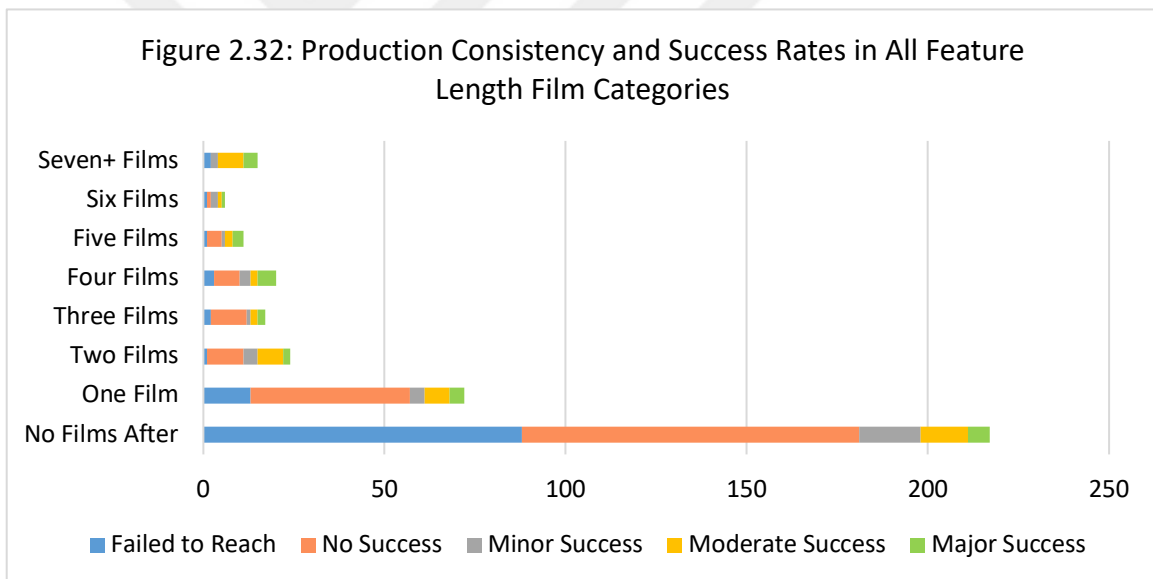
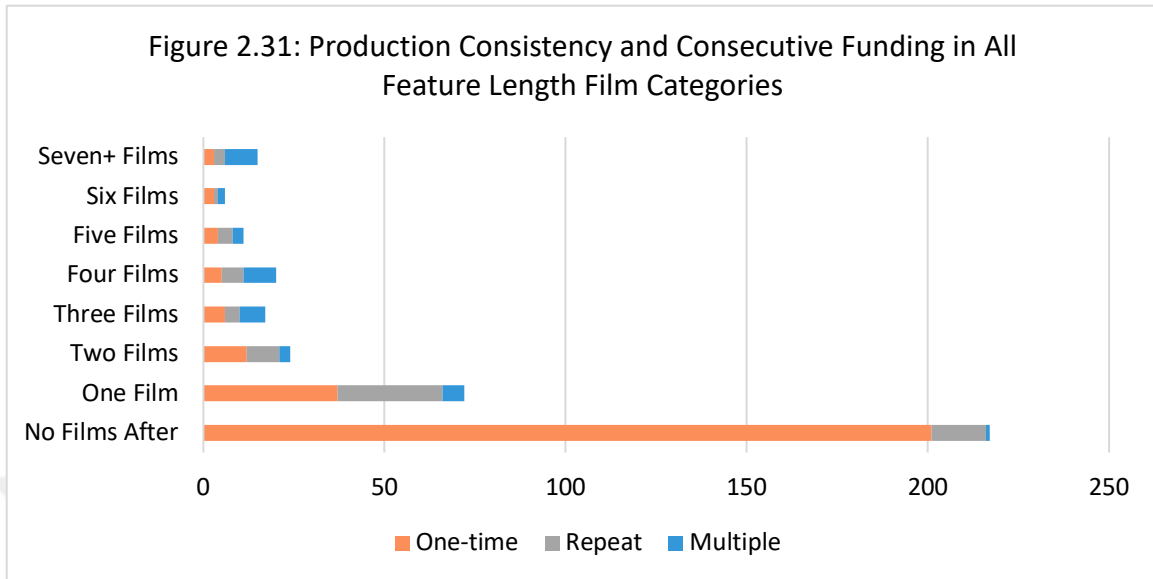
A final holistic look at Law 5224 regarding the abovementioned frameworks without categorical comparisons is important to view the funding body as a whole, since the issues are representative of the overall system. Moreover, such an approach acts as a conclusion that ties the main aspects studied earlier into a more comprehensible argument. The angle here follows two main aspects: consecutive funding and career longevity. Consecutive funding is examined with production consistency and production volume of directors in order to interrogate the funding’s impact on career formation. Due to the unreliability of available data, rejections are excluded from this section too. This is

the only section of this chapter that includes post-production funding for better inclusivity and a more holistic view.

Consecutive funding is one of the main concerns of this research since its impact on career consistency is observable, and the holistic study supports these concerns. There are 382 directors funded in three categories, and 271 of them are funded only once, including those whose first funding is not released. Repeated and multiple funding instances are relatively low, respectively 71 and 40. Therefore, 71% of funded directors were funded just once. This rate supports the idea that the circumstances of the majority represent the situations in the bigger systematic picture. The detailed breakdown summarizes the rarity of consecutive funding in Law 5224. Yet the rate of multiple and repeated funding is not increasing systemically in proportion to production consistency. While multiple funding is visible in directors who have released seven or more films, this rate is lower in directors with five or six films. Even though further funding is more visible in directors with a better production rate, it is still not directly proportional.

Success levels follow a similar pattern. Most of the directors who made no films after funding consist of directors with no success, minor success, and whose first funded film was not released. Moreover, the ratio of these directors also coincides with the rate of one-time funding. Therefore, there is a clear relation between financial success, further funding, and consecutive production. Directors who are financially unsuccessful during their first funded films are most likely to be unable to produce more films, mainly because further funding rarely applies to them. This creates an intersection of one-time directors who were unsuccessful at their first funding and also unable to make more films, and the majority of funded directors fall under this intersection.

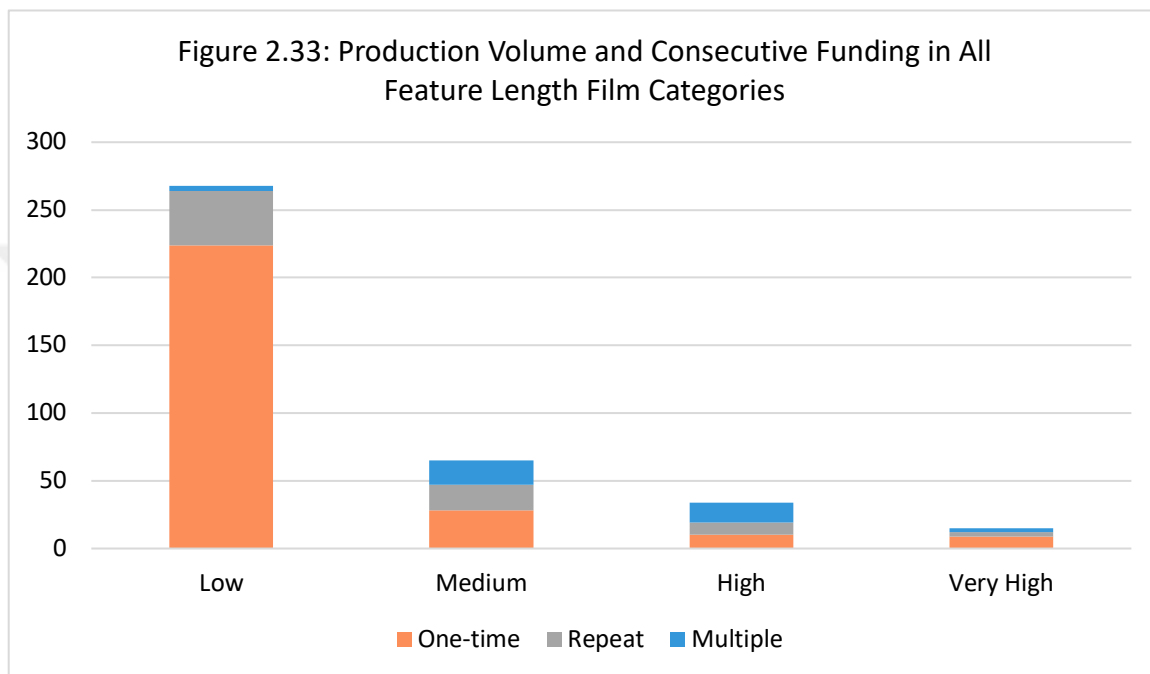
Production volume of directors situates these circumstances in a much bigger picture. Production volume has four categories in terms of the number of films each funded director has in their filmography, without any limitations on period and support category. Like production consistency, production volume also demonstrates the rarity of consecutive funding for directors of low volumes. 83% of these directors are funded only once, and the ratio of multiple funding is the lowest among directors with low production volume. In medium and high-volume directors, repeat and multiple funding patterns



make up almost half of the total; thus, one-time funding is less prevalent for them. Yet in the very high volume category, one-time also makes up the majority of directors with 60%. Therefore, consecutive funding is not common on either end of the spectrum. It is only distinguishable in medium and high categories. However, given how slight the percentage of further production after funding is, it is hard to argue that directors in the low production volume category reach larger production volumes. In fact, almost 90% of directors in low production volume were already involved with funding for their debut projects, whereas 72% of the directors in high and medium production volume were already established directors at the time of their first funding. Therefore, being involved

with funding hardly alters the group they belong to. These groups represent the entire funding system rather than certain distinct groups over a set period.

I believe one of the most representative figures in this section is Figure 2.33, since it overlays the main issue in career establishment in one graph. Looking at the two poles of



the production volume, there are no directors involved with funding in an early career or debut stage, but then they reached a very high production volume. Furthermore, 87% of directors who debuted through Law 5224 still fall under the low production volume category. The rate of debut directors in medium volume is less than 11%, while their rate in high volume is less than 1%. These rates put further emphasis the career state that a director involved in funding maintains throughout their career. Career establishment through public funding is extremely rare, and this is the reason why the majority of funded directors are debut directors, as Law 5224 helps them with their first films, but it falls short for future projects. Given that the rate of continuing production without funding is also rare, these debut directors cannot find the necessary resources to establish their place in the industry and sustain their position as debut or early career directors. Since one might counterargue that a portion of these directors might be involved with the funding body in recent dates, pointing out the possibility that a director funded in 2019 might need more time to produce more, especially due to the COVID-19 outbreak. Still,

even when we exclude those who participated in the funding scheme after 2016, reducing the total number of directors to 291, the portion of debut directors falling under the low production category is still 85%. Time needs to be taken into account, but these results formed over the 15-year-long period are so notable that time alone cannot be the reason behind unsustainability in the Turkish film industry.

What this chapter aims to do is to zoom in on the industrial circumstances that are outlined earlier in the thesis. The aim of Law 5224, along with the implementation of success in the selection criteria, is the backbone of this research. Chapter V's purpose is to add to the wider economics of film funding laid out in Chapter IV. Therefore, the narrowed focus in Chapter V enables the display of the true impact of Law 5224 among filmmakers who sought it at some point in their careers. Hence, public funding acts as a filter to focus on funded directors, which allows this research to focus on the impacts on the career trajectories.

Once funded directors are separated and their filmographies are listed, certain categorizations and director groupings reveal the aforementioned circumstances, which points to many aspects that are interrelatedly inherent in the industry. The most important implication is the fact that it is substantially harder for one to improve on their career path than to get it started. As both chapters show, Law 5224 successfully funds projects and sparks filmmaking careers for the first time, not only with the first film production support but also feature length production support. However, these debut projects are rarely followed by future projects to create a sustainable career path. While Law 5224 lacks a consecutive funding routine, it is even harder to produce more without any financial help after the spark. The lack of consecutive funding can be explained by the majority of unsuccessful projects in the funded films collection, yet the gap between the two poles of success is evidently related to distribution, which indicates that the oligopoly that drives film distribution in the Turkish market holds a similarly determinative position for career success as the ability to fund early-career projects.

The oligopoly in distribution leads to entirely different release patterns in terms of the wideness and volume of distribution. While the stronger companies are able to provide weeks of visibility in numerous cinema halls, smaller companies are only able to provide

a shorter circulation, both because of their limited capabilities and the risk they can afford to take. Hence, the gap between what a giant company has to offer is considerably larger than the capabilities of smaller companies. This leads to the market becoming concentrated, as these giants control the market on their own account. Therefore, the concentration on the distribution market causes another concentration on financial success in funded directors. Since distribution controls not only the flow of content but also money, a more robust distribution is more likely to lead to a stronger box office performance. Accordingly, those who are unable to work with these companies have less of a chance to achieve financial success.

This rarity of financial success influences the overall manner of work in Law 5224. The emphasis on past achievements, along with the potential for a project to circulate, relies on a disingenuous presentation of what is possible in the industry. The idea of sustainable production is logical and optimistic; however, the concentration on how the capital flows makes a filmmaking career, especially as directors, inherently unsustainable. Therefore, this situation becomes observable in the systematics of Law 5224 beyond what the law and regulations aim at. There are countless new, emerging directors joining the Turkish film industry through our only public funding body, yet every further path after debut works leads to unsustainability because financial failure is an imperative of concentrated distribution. Hence, the Ministry's desire to circulate funded films and create sustainable career trajectories through a selection process fails, as the great majority falls short of requirements. Consecutive funding, continuous production, and career establishment after funding are rare because these are aspects of the wider industrial chains of events, leading feature length production support to have a majority of debut directors despite part of its stated purpose being to enhance existing ones. These industrial circumstances are beyond the control of directors, yet their impact is felt within the career formations they undergo, and this chapter is an attempt to reveal these issues along with the impacts they had within the boundaries of public film funding in Turkey.

CHAPTER VI

CONCLUSION

The growth potential in the Turkish film industry is remarkable when compared to European industries. While pan-European level industrial growth is around 35% at the EU level, Talavera calculated growth in Turkey as 180%, surpassing the entire continent by a more than comfortable margin (Hammett-Jamart et al., 2018, p. 30). The impact of public funding on this major growth is visible on the surface level, since it maintains production and allows new, emerging directors to enter the industry. What seems to be the issue here is misalignment between what the Ministry expects and what is possible in the industry.

It is impossible to locate a single cause-and-effect relation that summarizes the industrial circumstances that are in play, both in general and specific to Law 5224. For example, the cultural, or for some political, agenda of the Ministry or the funding committee may also contribute to the unsustainable structure of the Turkish film industry. In terms of the industry as a whole and the specific contribution of Law 5224, there is no single smoking gun that kills careers, and no magic wand that anoints new industry stars. Distribution, circulation, and broader economic realities – such as inflation, recession, or overall leisure spending – concurrently shape film economics in Turkey. Still, distribution is designed to control or respond to relationships between the supply of films and audience demands. Hence, the focus on distribution is not meant to downplay the importance of these other factors, but rather to isolate the most quantifiable component of Law 5224 as an indicator of its efficiency.

The Ministry's seemingly logical and beneficial expectation of success from the funded films does not align with the industrial circumstances because of how distribution shapes

the circulation potential of films. Although circulation is a part of the evaluation criteria of Law 5224, the inability to meet the Ministry's expectations leads to exclusion from the funding body for a set time period, and it also impacts a director's strengths during further applications due to the evaluation of past achievements and experiences.

Therefore, what is expected from funded directors does not align with what the industrial landscape offers to them. The private oligopoly in distribution has a decisive value in shaping and granting success for the minority of films by providing stronger circulation to them. This is why what the Ministry expects does not align with the inherent oligopoly in distribution and makes sustainable production impossible for the players in the industry.

Many scholars and film industry professionals have similarly argued these ideas in the past. They accept the fact that funded films become invisible at the box office as a result of poor distribution patterns, correlated to oligopoly and polarity of the audience (Birincioglu, 2019; Yetiner, 2020; Akbulut, 2016; Kanzler, 2014). What this thesis adds to this discussion is a more detailed portrayal of this situation in terms of data collection, layout, and analysis. As Andrew Spicer points out, "the task of economic film history is to construct models, derived from more general economic analyses, which identify the industry's basic conditions of supply and demand and then evaluate its market structure, conduct, and performance" (Spicer, p. 429). As an economic film industry study aiming to narrate public funding's position in the Turkish film industry, the industrial statistics offered in this research regarding public funding have a representative value of the wider industrial circumstances, due to Law 5224 being the only funding scheme. Therefore, since "the production of industrial statistics and the work of measuring and documentation is a key mechanism in an industry formalization" (Govil, p.537), this study's coverage represents the wider industry formalization in Turkey despite its sole focus on public funding.

In order to reveal the necessary cause-and-effect relations between public funding and the wider Turkish film industry, and/or provide the landscape on an easy-to-understand basis, this thesis followed a top-down structure. The first aspect of Chapter IV focuses on the industrial growth of Turkish cinema. The reason why public funding and career trajectory analysis in Chapter V draws from the economic size of the Turkish cinema is to show that

this growth may be visible on the surface yet concerns regarding unsustainability arise after a deeper study.

After the detailed breakdown of the law and regulation texts, the focus shifts towards the dataset of public funding, namely funding budgets, the number of funded films, and average funding amounts per project. This section covers the entire funding scheme without excluding any support category. Therefore, it allows comparisons between feature length projects and other formats such as documentary, short, screenplay, or animation. This comparison shows that the funding amounts and number of funded projects each year follow the sustainability vision outlined in the rules and expectations in Law 5224. While feature length projects are loans given in larger amounts to fewer projects, a much greater number of projects are funded in other format categories, also with smaller amounts per project. This shows that the Ministry expects feature length films to have a tangible financial return and repay the loan in the given time, so that the Ministry can fund projects through other support categories with less financial expectations. This seems to be the reason why feature length film categories are loans, while other categories are grants.

The importance of the financial success of funded feature length films in the foundation of this research, as this work solely focuses on the economic history of Law 5224. Therefore, further sections draw from this economic importance and evaluate Law 5224's position in the Turkish film industry by having a separate chapter for career trajectory analysis.

Chapter V, with a micro-director-level approach, reveals the career trajectories of funded directors and instances where directors managed to leverage their career as a director after first funding through either further state aids or private resources. Directors are separated into different groups by their financial success, career stage, project status, production volume after funding, or dependency on Law 5224. Hence, Chapter V offers a closer look at career formation as directors through public funding in different feature-length support categories. The findings from Chapter V complement those of Chapter IV, as they both show the unsustainable structure in the Turkish film industry. Further

production through either further funding or private resources is very rare, showing the hardships to sustain one's career as a director after initial funding.

In both sections on distribution in both Chapter IV and Chapter V, the most visible aspect is the oligopoly. The film distribution industry in Turkey is controlled by a handful of companies, which choose what to circulate, to where, and for how long. Thus, these companies also determine the potential viability of a film after its theatrical run through their wide, vertically integrated exhibition chains. Films that end up with smaller companies have a much lower chance of financial success.

Such oligopoly and vertical integration in Turkey not only affect the film distribution industry, but also misalign with the Ministry's expectation of success for funded directors, resulting in unsustainability in Turkish directors' ability to establish their filmmaking careers. As distribution companies choose which films and whose films to widely circulate, there is a polarity of success among funded directors; while a handful of outliers make tremendous box office returns, the majority end up being financial failures.

In short, the Ministry keeps funding new directors every year, without providing further support for career establishment. However, oligopoly in distribution hinders the potential for success, preventing directors from being able to apply for funding again and seek private resources for their next production. This leads to unsustainability since Law 5224's operation only covers production but fails to further support distribution or exhibition practices, and funded films fail to situate themselves in the industry. The 2019 revision of Law 5224 started to support exhibition chains, yet this period lacks the necessary dataset to be included in this thesis.

4.1. Limitations

The paucity of data regarding the Turkish film industry is also the key limitation in the study. The Ministry does not share funding evaluations as a database, but rather via annual documents that remain accessible online for a short period of time. This format hinders certain historical overviews because accessing the past requires consulting manually collected, unofficial databases. Thus, aspects that are not collected remain inaccessible. For instance, Yamaç Okur's collection made this study possible, yet it only contains feature length films. Therefore, a potential future addition covering

documentaries or works of other formats requires manual collection from annual Ministry announcements. These announcements are also collected and shared by Okur, but they have their own hardships in studying.

Manual, unofficial collections add a measure of unreliability to Turkish film industry studies. Regardless of how much care is put into these collections, similarly to the collection created for this research, an unofficial collection cannot provide the reliability that an official database can. Hence, studies regarding Law 5224 are bound to be more unreliable than a study of Eurimages due to the required human intervention. Even though Okur's collection of annual announcements makes studies of countless perspectives possible, there are certain lost years in his collection. For example, the 2010/2 announcement is lost and inaccessible today because the document from the Ministry is inaccessible. There is only one announcement available for 2013, leaving questions about whether there were any other announcements made that year. Because we cannot trace back easily, historical studies of Law 5224 are limited to what is available.

Even when the accessible data is used, the way they are organized also hinders certain aspects from being included. For example, how the Ministry announces accepted and rejected applications differs each year. While the early announcements are formatted as lists, more recent ones are tables. Yet different years also have different table formats, some of them include more information about projects, such as their directors and company, some tables only include company attachment. This is why Chapter V is limited in not using rejections, since only a minority of rejection data can be attached to a director. Moreover, rejection data is not available every year. The Ministry did not share any rejection information for 2005, 2008, 2009, 2010, and 2011. Therefore, we cannot know the acceptance rates or make any other inference regarding rejections for these years. 2013 and 2014 are also different from the rest of the announcements, since rejections are rendered as "reevaluable projects" even though their number is very close to the rejection number of adjacent years. Thus, adding rejection to a study is limited to the available information.

The lack of data is not particular to funding but is visible in the entire industry. *Box Office Türkiye* is quite helpful for any industrial study as it offers box office and release

information on almost all modern Turkish films. It also has no alternative, since trying to achieve this information from foreign box office/admission sources such as *Box Office Mojo* or even the Council of Europe's official database *Lumiere* shows unreliable results. Foreign resources cannot provide full and reliable information regarding the domestic Turkish cinema. However, without neglecting its importance, Box Office Türkiye does not provide API access. Hence, any study regarding the box office tends to be manual, which makes it unsystematic and slightly unreliable due to human intervention. A possible bulk access provided by Box Office Türkiye would help contribute to Turkish industry studies in more reliable ways.

4.2. Recommendations for Future Research

The most obvious addition to this study is adding festivals to the equation. Law 5224 favors not only financial success, but also festival invitations or awards. Since festivals have different cultural values and are separate fields of study, a festival-based study of Law 5224 would enlighten the festival aspect, too.

This research is entirely economic; thus, it excludes questions of other fields, such as public funding's cultural or political contexts. Hence, future research focusing on the cultural theorization of public funding in Turkey would add further nuance to the economic implications. Moreover, different methodologies would also deepen the career trajectory angle. Interviewing directors directly would lead to more certain results in terms of how Law 5224 shapes one's career journey. Also, a content analysis study examining patterns in genre, themes, or aesthetics would also reveal the aesthetic and thematic understandings of state funded films.

I believe the most necessary addition is focusing on funded women directors. Even though the early plans for this research included a separate chapter for women directors, it was excluded due to time and length concerns. The reason why it is necessary is not that industrial circumstances are working entirely differently for them, but rather the impact of these situations might have led to different issues. The scarcity of women directors in the industry calls for a study revealing potential reasons why, and a similar framework to this study, yet only focusing on women directors, might address the fact

that similar circumstances cause dire circumstances for women directors' ability to enter the industry and to establish their career trajectories.

One further angle can be having exhibition as a separate aspect in the industry rather than a combined part of distribution. Putting emphasis on location, examining where funded films exhibit can lead to further understanding of financial success. Studying the cities and types of venues, along with the financial performance of funded films, can add another dimension to what is possible and what is not. How a funded film performs in arthouse contrary to multiplex cinemas can lead to both location-wise release patterns of funded films, along with how location impacts the potential of circulation. Further additions can cover funded films' overseas circulation based on the *Lumiere* database, or their presence in SVOD platforms, adding different dimensions to exhibition and its impact. Yet, data access to location, detailed exhibition, or SVOD release is an obstacle that needs a fix first.

4.3. Last Words

This thesis departs from a very simple idea: the alignment between Law 5224 and the wider Turkish film industry. Even though it leaves some aspects behind, as recommended for future research, the simple departure leads to certain implications and ideas regarding both public funding in Turkey and the Turkish film industry in general. As a result of its methodological framework being economic film history, its data collection and data layout value sometimes outweigh its analytical strengths. Yet each work regarding the Turkish film industry may lead to further analyses of the same data, similar to how this research is a derivative of a handful of past research. The accumulation of ideas and implications is crucial for scholarly space with strong foundations, yet industry studies in Turkey provide limited predecessors to build upon. To build a stronger base for industry studies in Turkey, not only more studies but also data centers created by independent organizations are required.

All aspects discussed in this research are not faults of certain organizations or groups but circumstances of complex and deeply interconnected relations, yet pointing out that these issues are everyone's duty, from academics to industry workers. The distant placement of film academia and the filmmaking community leads to miscommunication and hinders

potential improvements of the Turkish film industry. When this distance is shortened, further discussions are possible within different groups in the industry, leading to an enhanced workplace. What can be done is to establish an independent film institute that acts as a bridge between thinkers and creators, therefore pointing out the issues in an accessible platform, consisting of both the people who define issues and the people who can solve them. Then, the circumstances discussed here, or in any other scholarly, journalistic, or industrial work, could make sense and lead to actual solutions. Until such a platform is established, these discussions will fail to lead to improvements that genuinely create a sustainable production and distribution industry. This is why the arguments here are actually re-articulations of the past. The circumstances of the past remain today, and each industry study articulates similar arguments with different methods or theories, yet the change they can lead to is debatable. The hope is to communicate with all actors in the industry and progress into a better future for Turkish cinema with more possibilities and chances for all industry workers. It is only when these issues can be resolved, and the Turkish cinema can provide a sustainable environment where reasonable expectations are aligned with equal opportunities for everyone.

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APPENDICES

Appendix A. Fetch_Filmographies.py

Fetch filmographies of filmmakers from TMDb API and save to CSV.

TMDb API key removed for security and filmmaker list is shortened for illustration.

```
import csv
import time
import traceback
import requests
from tmdbv3api import TMDb, Person

# --- Config ---
TMDB_API_KEY = 'YOUR_API_KEY_HERE'
LANGUAGE = 'tr-TR'
SHORT_DELAY = 2
LONG_DELAY = 60
BATCH_SIZE = 10
SAVE_FILE = 'filmmakers_films.csv'
AUTOSAVE_FILE = 'autosave_filmmakers_films.csv'

# --- TMDb Setup ---
tmdb = TMDb()
tmdb.api_key = TMDB_API_KEY
tmdb.language = LANGUAGE
person_api = Person()

# --- API Connection Test ---
def test_tmdb_connection():
    try:
        r = requests.get("https://api.themoviedb.org/3/configuration",
                        params={'api_key': TMDB_API_KEY, 'timeout':10})
        if r.status_code == 200:
            print("✅ TMDb API connection OK.")
            return True
        else:
            print(f"❌ TMDb API responded with {r.status_code}")
            return False
    except Exception as e:
        print(f"❌ API connection failed: {e}")
        return False

# --- Retry Wrapper ---
def with_retry(func, args=(), kwargs={}, retries=3, delay=4):
```

```

for attempt in range(1, retries + 1):
    try:
        result = func(*args, **kwargs)
        if result is None:
            raise ValueError("Empty result (possible rate limit)")
        return result
    except Exception as e:
        print(f"⚠️ Retry {attempt} failed: {e}")
        traceback.print_exc()
        if attempt < retries:
            time.sleep(delay)
        else:
            print(f"❌ Max retries reached.")
            return None

# --- Film Fetching ---
def get_films_for_filmmaker(name):
    search_results = with_retry(person_api.search, args=(name,))
    if not search_results:
        return None, []

    person_obj = list(search_results)[0]
    print(f"📄 Found: {person_obj.name} (ID: {person_obj.id})")

    credits = with_retry(person_api.movie_credits,
args=(person_obj.id,))
    if not credits:
        return person_obj.id, []

    films = []
    for credit in credits.get('crew', []):
        if credit.get('job', '').lower() == 'director':
            title = credit.get('title') or credit.get('name',
'Unknown')
            release_date = credit.get('release_date', 'Unknown')
            films.append((title, release_date))

    return person_obj.id, sorted(films, key=lambda x: x[1] or '')

# --- CSV Save ---
def save_films_to_csv(data, filename):
    with open(filename, 'w', newline='', encoding='utf-8') as csvfile:
        writer = csv.writer(csvfile)
        writer.writerow(['Filmmaker', 'Person ID', 'Film Title',
'Release Date'])
        for filmmaker, (person_id, films) in data.items():
            if films:
                for title, release_date in films:
                    writer.writerow([filmmaker, person_id, title,
release_date])
            else:
                writer.writerow([filmmaker, person_id or '', '', ''])
    print(f"💾 Saved: {filename}")

# --- Main Execution ---
if __name__ == "__main__":

```

```

if not test_tmdb_connection():
    print("🚫 Exiting. No TMDb access.")
    exit(1)

# SAMPLE LIST (shortened for appendix)
filmmakers = ["545839"]

films_by_filmmaker = {}
total = len(filmmakers)

for batch_start in range(0, total, BATCH_SIZE):
    batch = filmmakers[batch_start:batch_start + BATCH_SIZE]
    print(f"\n🚀 Processing batch {batch_start // BATCH_SIZE + 1}
({len(batch)} people)...\n")

    for idx, director in enumerate(batch, 1):
        print(f"🔍 [{batch_start + idx}/{total}] {director}")
        try:
            person_id, films = get_films_for_filmmaker(director)
        except Exception as e:
            print(f"❌ Error fetching {director}: {e}")
            traceback.print_exc()
            person_id, films = None, []
        films_by_filmmaker[director] = (person_id, films)
        time.sleep(SHORT_DELAY)

    save_films_to_csv(films_by_filmmaker, AUTOSAVE_FILE)

    if batch_start + BATCH_SIZE < total:
        print(f"⌚ Waiting {LONG_DELAY} seconds before next
batch...\n")
        time.sleep(LONG_DELAY)

    save_films_to_csv(films_by_filmmaker, SAVE_FILE)
    print("✅ Fetch_Filmographies.py completed successfully!")

```

Appendix B. Dataset_Merger.py

Merge film datasets while preserving original primary dataset.

```
import pandas as pd
import os

# --- Placeholder file paths ---
PRIMARY_FILMS_FILE = 'PRIMARY_FILMS_FILE.xlsx'
REFERENCE_FILMS_FILE = 'REFERENCE_FILMS_FILE.xlsx'
MERGED_OUTPUT_FILE = 'MERGED_OUTPUT_FILE.csv'

print("🚀 Starting film data merger - Preserving Original Data...")
print("=" * 50)

# --- Step 1: Load primary Excel (preserve structure) ---
if not os.path.exists(PRIMARY_FILMS_FILE):
    print(f"❌ File not found: {PRIMARY_FILMS_FILE}")
    exit(1)

xls1 = pd.ExcelFile(PRIMARY_FILMS_FILE)
all_filmmakers_data = []

for sheet_name in xls1.sheet_names:
    try:
        df_sheet = pd.read_excel(xls1, sheet_name=sheet_name)
        if df_sheet.shape[1] == 0:
            continue
        all_filmmakers_data.append(df_sheet)
    except:
        continue

if not all_filmmakers_data:
    print(f"❌ No usable data found in primary file!")
    exit(1)

df_filmmakers_original = pd.concat(all_filmmakers_data,
    ignore_index=True)
original_columns = list(df_filmmakers_original.columns)
match_col_index = 2 if len(original_columns) >= 3 else 0
match_col_name = original_columns[match_col_index]

# --- Step 2: Load reference Excel ---
if not os.path.exists(REFERENCE_FILMS_FILE):
    print(f"❌ File not found: {REFERENCE_FILMS_FILE}")
    exit(1)

xls2 = pd.ExcelFile(REFERENCE_FILMS_FILE)
all_details_data = []

for sheet_name in xls2.sheet_names:
```

```

try:
    df_sheet = pd.read_excel(xls2, sheet_name=sheet_name)
    if df_sheet.shape[1] == 0:
        continue
    target_indices = [0, 2, 3, 4, 5, 6, 7]
    available_indices = [i for i in target_indices if i <
df_sheet.shape[1]]
    df_selected = df_sheet.iloc[:, available_indices]
    all_details_data.append(df_selected)
except:
    continue

if not all_details_data:
    print("❌ No usable data found in reference file!")
    exit(1)

df_details = pd.concat(all_details_data, ignore_index=True)

# --- Step 3: Copy primary dataset as result ---
result_df = df_filmmakers_original.copy()
filmmakers_match_series =
df_filmmakers_original[match_col_name].astype(str).str.lower().str.strip()
details_match_series = df_details.iloc[:,
0].astype(str).str.lower().str.strip()

# --- Step 4: Add new columns from reference ---
details_columns = list(df_details.columns)
new_columns = []

for i in range(1, len(details_columns)):
    new_col_name = f"{details_columns[i]}_from_details"
    new_columns.append(new_col_name)
    result_df[new_col_name] = None

matches_found = 0

for idx, film_title_clean in filmmakers_match_series.items():
    if pd.isna(film_title_clean) or film_title_clean in ['nan', '']:
        continue
    match_indices = details_match_series[details_match_series ==
film_title_clean].index
    if len(match_indices) > 0:
        match_idx = match_indices[0]
        for i, new_col_name in enumerate(new_columns):
            details_col_idx = i + 1
            if details_col_idx < len(details_columns):
                result_df.at[idx, new_col_name] =
df_details.iloc[match_idx, details_col_idx]
            matches_found += 1

# --- Step 5: Save merged output ---
result_df.to_csv(MERGED_OUTPUT_FILE, index=False, encoding='utf-8')

print("🎉 Dataset merger completed!")
print(f"✅ Output saved to: {MERGED_OUTPUT_FILE}")

```

```
print(f"    Original columns preserved:  
{len(df_filmmakers_original.columns)}")  
print(f"    New columns added: {len(new_columns)}")  
print(f"    Matches found: {matches_found}")
```



Appendix C. Split_FilmName_and_Date.py

Splits film name and release date from a combined column in Excel sheets.

```
import pandas as pd
import re
# --- Placeholder file paths ---
INPUT_FILE = 'INPUT_EXCEL_FILE.xlsx'
OUTPUT_FILE = 'OUTPUT_EXCEL_FILE.xlsx'

# --- Turkish month names for date detection ---
months = [
    "Ocak", "Şubat", "Mart", "Nisan", "Mayıs", "Haziran",
    "Temmuz", "Ağustos", "Eylül", "Ekim", "Kasım", "Aralık"
]
date_regex =
re.compile(rf'(\d{{1,2}})\s+({"|".join(months)})\s+(\d{{4}})$',
re.IGNORECASE)

# --- Function to split film name and release date ---
def split_name_and_date(text):
    if pd.isna(text):
        return pd.Series([None, None])
    text = str(text).strip()
    match = date_regex.search(text)
    if match:
        return pd.Series([text[:match.start()].strip(),
match.group(0)])
    return pd.Series([text, None])

# --- Process each sheet ---
xls = pd.ExcelFile(INPUT_FILE)

with pd.ExcelWriter(OUTPUT_FILE, engine='openpyxl') as writer:
    for sheet_name in xls.sheet_names:
        df = pd.read_excel(xls, sheet_name=sheet_name)

        split_cols = df[df.columns[1]].apply(split_name_and_date)
        split_cols.columns = ['Film Name', 'Release Date']

        df.insert(2, 'Film Name', split_cols['Film Name'])
        df.insert(3, 'Release Date', split_cols['Release Date'])

        df.to_excel(writer, sheet_name=sheet_name, index=False)

print(f"✅ Processed column B in all sheets and saved to {OUTPUT_FILE}")
```

Appendix D. Dataset_Merger_Unmatched_Rows.py

Compares two datasets and merges rows that are not present in the full dataset.

Used to double-check if the dataset contains all necessary information.

```
import pandas as pd
from openpyxl import Workbook

# --- Placeholder file paths ---
MY_ALL_FILE = 'MY_ALL_FILE.xlsx'
ALL_FUNDED_FILE = 'ALL_FUNDED_FILE.xlsx'
OUTPUT_FILE = 'MERGED_OUTPUT.xlsx'

# --- Load files (no headers) ---
my_all = pd.read_excel(MY_ALL_FILE, header=None)
all_funded = pd.read_excel(ALL_FUNDED_FILE, header=None)

my_all_col_c = my_all[2].astype(str).str.strip()
all_funded_col_c = all_funded[2].astype(str).str.strip()

# --- Identify unmatched rows ---
unmatched_rows = all_funded[~all_funded_col_c.isin(my_all_col_c)]

# --- Combine primary + unmatched reference rows ---
combined_rows = my_all.values.tolist() + unmatched_rows.iloc[:,
:12].values.tolist()

# --- Save to new Excel file ---
wb = Workbook()
ws = wb.active
for row in combined_rows:
    ws.append(row)

wb.save(OUTPUT_FILE)
print(f"✅ Merged dataset saved to {OUTPUT_FILE}")
```

Appendix E. Sort_By_Director_and_Year.py

Sorts Excel dataset by director and then by release year.

Used for data organization.

```
import pandas as pd

def main():
    # --- Placeholder file paths ---
    INPUT_FILE = 'INPUT_EXCEL_FILE.xlsx'
    OUTPUT_FILE = 'OUTPUT_EXCEL_FILE.xlsx'

    df = pd.read_excel(INPUT_FILE)
    df['Director'] = df['Director'].astype(str).str.strip()

    # --- Parse year safely ---
    def parse_year(x):
        try:
            x_str = str(x).strip()
            if len(x_str) == 4 and x_str.isdigit():
                return int(x_str)
            return 9999 # Invalid/missing years go last
        except:
            return 9999

    df['Year_sort'] = df['Release Year (TMDB)'].apply(parse_year)

    # --- Preserve first appearance order of directors ---
    first_appearance = df.groupby('Director').apply(lambda g:
g.index.min()).to_dict()
    df['Director_first_pos'] = df['Director'].map(first_appearance)

    # --- Sort and drop helper columns ---
    df_sorted = df.sort_values(by=['Director_first_pos', 'Year_sort'],
kind='stable')
    df_sorted = df_sorted.drop(columns=['Year_sort',
'Director_first_pos'])

    df_sorted.to_excel(OUTPUT_FILE, index=False)
    print(f"✅ Done! Sorted file saved as '{OUTPUT_FILE}'.")

if __name__ == "__main__":
    main()
```

Appendix F. Top 10 Most Successful Funded Films

Director	Title	Year Funded	Funding Amount (Euros)	Release Date	Box Office (Euros)	Distribution Company
Sıtkı Can Ulkay	Ayla	2017	€ 363.434	27.10.2017	€ 16.004.472	CGV Mars D.
Çağan Irmak	Babam ve Oğlum	2005	€ 119.282	18.11.2005	€ 15.190.604	Özen Film
Alper Çağlar	Dağ 2	2016	€ 134.445	4.11.2016	€ 12.158.196	CGV Mars D.
Yılmaz Erdoğan	Kelebeğin Rüyası	2013	€ 215.973	22.02.2013	€ 8.255.200	UIP Türkiye
Ahmet Katıksız	Bizim İçin Şampiyon	2018	€ 176.208	7.12.2018	€ 6.031.585	CJ ENM
Mustafa Şevki Doğan	Son Osmanlı Yandım Ali	2006	€ 220.933	19.01.2007	€ 4.255.951	Özen Film
Yüksel Aksu	İftarlık Gazoz	2013	€ 246.503	29.01.2016	€ 3.680.739	CGV Mars D.
İsmail Fidan	Rafadan Tayfa Dehliz Macerası	2016	€ 209.136	26.10.2018	€ 3.604.425	CGV Mars D.
Müfit Saçınıtı	Mandıra Filozofu	2013	€ 98.754	4.04.2014	€ 3.190.714	Cinefilm
Murat Saraçoğlu, Özhan Eren	120	2007	€ 223.851	15.02.2008	€ 2.661.883	Özen Film