

POSITION PAPER¹

“Turkish Dramas & their Impact on Local Drama Industry”

INTRODUCTION –

Vibrancy inherent in life will always carve for change. And market remains a potent medium for articulating and fulfilling this demand for change. Case in point is the onslaught of Turkish soap operas on local channels in recent years. Under the grab of protectionism, an unholy coalition of local production houses and channel operators was able to get the Indian channels banned on local cable. However, the smell of money from some other direction broke this tactical alliance in 2012. In that faithful year, Urdu-1, a new entertainment TV channel, launched an Urdu-dubbed Turkish series ‘*Ishq-e-Mamnu*’. It proved itself a marketing masterstroke for a new entrant in a cluttered channel market. From a slow start, the Turkish soap was able to grab the rating of 11.79 for its last episode, a record that remained unbroken since December 2012.

With the success of *Ishq-e-Mamnu*, more channels started buying Turkish serials for broadcast. At this point, the interests of production houses and channel operators started diverging. It was making economic sense for channel operators to buy a high quality Turkish production at an average per episode price of \$2,500. Whereas, a locally-produced episode can cost up to 4-times of this price. While losing on competition, local production houses started gearing themselves into action. United Producers Association (UPA), an umbrella organization of production houses and artists, had waged protests against foreign content at Karachi and Lahore press clubs. Their plea remains simple that these foreign dramas should not be shown during prime time, i.e. 1900-2200 hrs. Rationale was the same, as advocated by the coalition of producers and operators against Indian channels, which was endangerment of our culture and hurting of local employment.

Unfortunately, this time producers’ plea fell on deaf ears at PEMRA. Channel operators proved themselves to be the better proponents of market competition. However, we do understand that their support for foreign content remains limited till it is shown on their channels only with no foreign channel allowed on local cable. Situation has become very clear now; Turkish dramas are here to stay on our channels. Local production houses have to live with them, meaning they either have to compete or just perish.

Question is now that why we are picking up an issue, which appears to have been resolved in favor of the market. As supporters of competition, we do understand that market creates casualties. However, matter of the fact is that without the process of *Creative Destruction*, the intrinsic human demand for change cannot be met. Our purpose of discussing this issue is two-fold, first is to establish the fact that Turkish dramas has established their ascendancy in disparate regions on competitive basis not on government crutches. And second is to counter our local producers’ argument that Turkish dramas are selling on showing more skin. If this is the case, then why are they popular in Southern European regions, where showing of skin cannot be considered a point of differentiation?

¹ This position paper is written by Mr. Zia Bandy, dated 25th January 2014



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There is definitely something more to these Turkish soaps beyond financial considerations, which include the quality of the product itself. They must be meeting some unmet demands of their audience scattered in Middle East, Balkans, Central Asia and now in Pakistan. We will strive to comprehend the dynamics of Turkish drama industry and its comparative points of influence in three countries as Egypt, Greece and Bulgaria. It will facilitate us in testing the strengths of our liberal principles of supporting open societies and markets for expanding human liberties. We might be able to suggest some path for our local production houses to prosper in the open world of markets. Let us begin our journey of exploration.

EXPLORATION –

History of exports of Turkish soaps is not very old. It just started in 2007, with the selling of TV serial ‘*Gumus*’ (named ‘Noor’ in Arabic) to MBC, a Dubai-based media conglomerate. The serial itself was not much successful in Turkey. However, its Arabic-dubbed version caught the attention of Arabic-speaking viewership like a wild fire. Its last episode had a viewership exceeding 85 million. The success of *Gumus* opened the floodgates for the exports of Turkish TV serials. In 2013 only, Turkey has earned over USD 150 million by selling 100 plus TV serials to over 50 countries. These serials have not only augmented the soft image of Turkey, but have also enhanced the flow of foreign tourists in the country desirous to explore the settings and locations of their favorite dramas.

We need to see here that what is so special about Turkey, which differentiates its drama offerings from other countries. With around 81 inhabitants, Turkey is the 18th most populous country of the world. It can be termed as a middle income country, with per capita income hovering around USD 10,000. It is a predominantly Muslim country, who makes 99.8% of its population. Economy is well-diversified, which is not dependent on extractive industries. Its dynamic businesses are competing with the best in Europe. We may ask here that there are countries similar to Turkey around the world, then why they are not able to match the success of the Turkish soaps. There are no straight answers to this quandary. It could be a mix of economic, social and political reasoning. However, the inherent competitive nature of the Turkish drama industry is beyond question.

There are five big TV networks in Turkey that competes with each other in the drama segment. Intensity of competition among them can be gauged from the fact that on average Turkey produces 60 TV serials every year, among which half of the serials never proceed beyond 6 episodes, as rating wars force the broadcasters to take them off the air. Production standards have reached to the level, where cost of producing one episode is now averaging USD 100,000 and beyond. Producers are able to recoup bulk of their investments from the domestic market. Thereafter, they extract more revenues by selling these dramas in multiple markets in different countries. In the early exporting years, Turkish producers were earning USD 500-800 per episode in the export market. As demand rises, so the price range increases. Now the average price range of one episode has reached to USD 2,000-20,000. This strong market is attracting more talent and money in the Turkish drama industry, which is definitely driving its strength from its creativity and not from some government subsidy.

Drama remains a creative product, hence for comprehending its universal appeal, one need to understand the dynamics of its viewership. And for this purpose, we have chosen the three major markets of Turkish soaps, which are Egypt,



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Greece and Bulgaria. A point of coincidence in this selection is that all these countries have a history of hostile relations with Turkey. And Turkish language is not the prevalent language in any of these countries. However, the soft power of Turkish dramas has made an enormous impact in softening past perceptions about Turkey in its foreign viewership.

Let us talk about Egypt, the largest Arab country with a population of 85 million. It is considered as the cultural heart of Arabic-speaking world. Egypt has a dynamic film and drama industry. We can take the case of Egypt as microcosm of the unmet demands of Arabic-speaking viewership. As per our research, women in Egypt as in other Arab countries are the main viewing segment of Turkish soaps. It is not only the pretty faces, attractive locations or captivating plot that has gripped the attention of Egyptian women. It is the strong character of Turkish women, as depicted in their dramas, which they desire to emulate. The submissive or vamp women of the Egyptian dramas stand no match to a Turkish female protagonist, who seems more contemporary and confident of herself. Turkish dramas have created a cultural shift in Egypt, where a female viewer can identify with another Muslim woman in demanding respect and love on her own accord. Religious scholars in the Arab world have condemned the so called depravity shown in the Turkish dramas. However, they are unable to put a dent in their popularity. Egyptian drama industry is recognizing the fact that Turkish soaps have a better hand on the pulse of Egyptian women. No government protection can save them from extinction for long in an increasingly connected world. Political turmoil of recent years in Egypt has also contributed to the popularity of Turkish soaps, as they are fulfilling the contemporary demands of an emancipated society from the clutches of an autocratic regime.

Greece, the arch rival of Turkey, has witnessed rising popularity of Turkish soaps in recent years. An interesting point to note here is that in Greece Turkish soaps are not dubbed in Greek language, but shown with Greek subtitles. It has indeed created a demand for learning Turkish words among Greek viewership. Now, Greece is not a poor developing country. It is a developed and high income country with a per capita income of USD 23,000. However, entry of Turkish soaps in Greece has an economic angle. In the aftermath of 2008 economic crisis, it became difficult for Greek drama producers to sustain the high per hour cost of around 80,000 Euros. It made economic sense for the Greek channel operators to buy the similar quality Turkish drama serial at a per episode cost of 7,000 Euros. However, money remains only one part of the equation. The point of contemplation here is that Greece remains a more modern and contemporary society than Turkey. Here, the anomaly of the demands of women viewership in Egypt cannot be applied. For Greek viewership, Turkish soaps offer them the realm of their past society. One may call it nostalgia, however Turkish depiction of conservative values of family loyalty and respect for elders have emerged as a selling proposition in Greece. It seems interesting that the same Turkish soap is fulfilling different cultural demands of disparate societies. Far right in Greece has not been that condescending towards Turkish soaps. Greek broadcasters of Turkish have been facing threats from Greek racist groups. Even church leaders have given statements against the Turkish soaps. However, it has not affected the popularity of these dramas in general Greek viewership. On average 1.2 million viewers in Greece tune in to watch each episode of *Gumus*.

Our last example pertains to Bulgaria, a small Southern European country with a population of just 7 million. It has purchased 27 Turkish soaps, making it the second largest buyer of Turkish soaps after Kazakhstan. Now, how is it possible for a country, which has remained a Turkish colony for 500 years and doesn't have much fond memories of its



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occupation? Let us dig a bit more about Bulgaria. The country remained under an iron curtain of a Communist regime for 45 years till 1989. During the Communist rule, no foreign entertainment content was shown on the only government-run TV channel available for Bulgarians. In the nineties, Bulgarian TV started showing Brazilian soaps. These soaps became instant hit among Bulgarian viewers, who were carving for something different. And then Turkish soaps entered the scene in 2000s. As happened elsewhere, ratings of Turkish soaps exceeded any other show on Bulgarian channels. Famous Turkish soap, Fatmagul regularly holds 60% of audience share in Bulgaria. Latin American soaps have gone out of favor of Bulgarian viewership. Often quoted difference remains the characterization of women in Turkish soap, which is more assertive as compare to women role in Brazilian dramas. From a hostile perception of Turkey, Bulgarians have started perceiving the country as more contemporary comfortable with a conservative orientation and emphasis on family values. It appears that Southeastern Europeans remain in awe of the family attachment, as shown in Turkish soaps.

We remain cognizant of the fact that a brief position paper, like this, cannot fathom the depth of social, economic and political reasoning of the popularity of Turkish soaps in different cultures, religions and milieu of people. However, a broader awareness of the happenings in the target regions can be created. It facilitates our understanding of the similarities across borders and their respective efforts in resolving the underlying issues.

Our exploration journey has established certain facts for our local drama industry. Turkish soap operas are the creation of market efforts. It is indeed the innovative capacity of Turkish drama industry, which enables it to create a product that retains an appeal in disparate markets. It is the power of the content that prevailed. We should give credit to the creative ingenuity of the Turkish script writers and directors, who have taken the pulse of the commoners' desires in a much better manner.

POSITION –

In line with our liberal principles, we hereby declare our support for the broadcast of Turkish soap operas on local channels on equal grounds with domestic productions. We advocate the right of a viewer for having maximum choices and liberty to choose on his own accord. We do not condone the view of culture is in danger. In our opinion, it is more of an economic interest of the market players, which is in danger. The purpose of this emotional blackmail is to corner the market by reducing options of the viewers. A vibrant culture will create its own space in the market. And a potent example in this regard can be give of that of Punjabi culture in India, where Punjabi-speakers makes just under 3% of its population. However, at any given point of time, 50% of the top Bollywood charts comprises of Punjabi songs.

We oppose any interference by PEMRA to give any priority treatment to local producers. We understand that purpose of any such interference remains more to safe guard the financial interest of the entrenched entities than promoting greater competitiveness. Technological advancements may make access to desired content borderless for a small minority in this country. We must remember here that majority of our viewership remain captive to cable networks, where powerful market players in collusion with government can restrict their access at any time. Freedom to choice remains a political struggle and it has to be taken like that, otherwise we can lose it without even knowing it sometimes.



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ACTION –

In the light of our findings, we have reached a conclusion that sustenance in the competitive commercial drama field requires high level of ingenuity and creativity. Roots of the Turkish dramas lie in their own culture. It is the ability of Turkish writers to transcend the cultural differences in creating a product that oozes universality. From Karachi to Athens and Cairo to Almatay, it captivates the audience attention to the next happening in the serial.

Every culture has its own stories to tell, which can grab the focus of people across regions. Pakistani producers have to look inside them for creating such stories with universal appeal. There is indeed no shortcut. Government protection can only delay the inevitable for a shorter period of time in this increasingly integrated world. Communists and traditionalists have failed to stop the onslaught of these slick and *depraved* productions in their countries. Results for the proponents of protectionism will not be different in our country.

Government may be lobbied for relaxing the censor code for local productions. They deserved the same grounds, as provided to imported productions. However, we understand that opening up of channel market has already resulted in stretching the vague censor guidelines in production. Rising competition, whether from in-country or abroad, will push the limits in an evolutionary manner. Point for action remains to face competition head on and induce an indigenous process of *Creative Destruction*.