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THE EFFECT OF NETFLIX -AS MEDIA SERVICE PROVIDER AND PRODUCER- ENTRY
INTO TURKEY MARKET ON LOCAL CONTENT PRODUCTION PROCESSES:
CASE STUDY NETFLIX ORIGINAL SERIES 50 M2

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The Effect Of Netflix -As Media Service Provider And
Producer- Entry Into Turkey Market On Local Content
Production Processes:
Case Study Netflix Original Series 50 M2

Medya Hizmet Sağlayıcı Ve Yapımcı Netflix'in Türkiye'ye Girişinin
Lokal İçerik Üretim Süreçlerine Etkisi:
Netflix Orijinal Dizisi 50 M2 Örnek Çalışması

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LIST OF ABBREVIATIONS

AVOD	Advertisement Based Video on Demand
BKM	Beşiktaş Kültür Merkezi
CEO	Chief Executive Officer
CFO	Chief Financial Officer
DVD	Digital Versatile Disc
IPTV	Internet Protocol Television
iTV	Interactive Television
OTT	Over The Top
SVOD	Subscription Video On Demand
USA	United States Of Amerika
VOD	Video On Demand

ABSTRACT

The representation and success of Turkish TV series in the international market have continued to increase in the last ten years. However, digital platforms, which have become a part of social life with the effect of digitalization, provide the opportunity to exist in a common medium for films and series, which are the products of different cultures and production conditions. In recent years, digital television and platforms broadcasting over the internet have become increasingly common. With the help of the entry of an international platform like Netflix into the Turkish market in 2018, Turkish TV series had the opportunity to find a place on the same platforms as their counterparts without an intermediary. The effects of these partnerships began to show a presence in the domestic market, whose serial production practice is highly improved. Production models, technical capacity, and structural processes are some prominent areas affected by this partnership. This thesis tries to understand the effect of global streaming and production company Netflix on the local production process in Turkey. 50 M2 that one of Netflix's original products produced in Turkey is chosen as the case study expediently frame of the thesis. Since this study is industrial research that investigates the production practices.

Keywords: online streaming, television serials, Netflix, creative processes, production practices, production processes

ÖZET

Türkiye dizilerinin son on yılda uluslararası pazarda temsiliyeti ve başarısı artarak devam ediyor. Fakat dijitalleşmenin de etkisiyle sosyal yaşamın bir parçası haline gelen dijital platformlar farklı kültürlerin ve üretim şartlarının ürünü olan film ve dizilere ortak bir mecrada var olma fırsatı sağlıyor. Son yıllarda dijital televizyon ve internet üzerinden yayın yapan platformlar gittikçe yaygınlaşmaktadır. Ve 2018 yılında Netflix gibi uluslararası bir platformun da Türkiye pazarına girmesiyle Türkiye dizileri muadilleri ile aynı platformlarda aracısız yer bulma fırsatı yakaladı. Dizi üretim pratiği oldukça gelişmiş iç pazarda bu ortaklıkların etkileri hissedilmeye başlandı. Üretim modelleri, teknik kapasite ve yapısal süreçler bu ortaklıktan etkilenen belirgin alanlardan bazıları. Bu tez ile bir hizmet sağlayıcı ve yapımcı olarak Netflix'in Türkiye dizi üretim süreçlerine etkisi çalışılmıştır. Bu çalışma kapsamında BKM ve Netflix Türkiye'nin ilk orijinal dizisi 50 M2 örnek çalışma olarak incelenmiştir.

Anahtar Sözcükler; dijital platformlar, televizyon dizileri, Netflix, Netflix Turkey, yaratıcı süreçler, üretim pratikleri, prodüksiyon süreçleri.

INTRODUCTION

With the covid pandemic, which has affected the whole world since 2020, social life has come to a stop almost all around the world. Especially in the first period of the pandemic, the most outstanding call of the states was that the citizens stay at home. This unpredictable process has enabled digital platforms to be included in people's daily lives quickly, as if by magic touch. More content has been consumed than ever before in this period. People had tried to find a way to spend time in their homes to deal with pandemic routines. Therefore, they had started to spend time watching films or series. All kinds of content had become remarkable rapidly. People had begun to be interested in content on digital platforms.

Therefore, there has been a significant increase in the number of members of the platforms.

Digital platforms were on the agenda of Turkey also before the pandemic although pandemic conditions cause an explosion to consume content on digital mediums. The first digital platform was established in Turkey with the launch of BluTv, a subsidiary of Doğan Holding, in 2018. Afterward, Netflix Turkey entry into the market, and it had started production content. Successful Turkish storytellers and the tv industry had opened a door for digital platform investments.

After the blow of Turkish cinema in the 80s, the film industry in Turkey had been on the rise since the end of the 1990s. Big-budget movies began to be created in movie theaters with high box office. The big leap came with the increasing number of Turkish TV series after private TV channels started broadcasting. Turkish storytelling has turned into a Turkish series phenomenon that has spread all over the world. Despite the restrictions due to Turkish policy and long durations, it has become a highly demanded export product due to its dramatic narrative and technical quality. The revenue from the exported TV series grew exponentially. TV series export revenue, which was only 10 million dollars in 2008, reached 300 million dollars in 2016. Even though the Middle East, the Balkans and Eastern

Europe, North Africa, South America, and Central Asia are the markets where we are the strongest in TV series exports, the Turkish series are exported to 142 countries.

This significant success has enabled the establishment of digital platforms that could ensure content diversity and offer the audience a new viewing habit by using technological opportunities. It has also led to global companies such as Netflix wanting to incorporate domestic content produced in Turkey. Thus, in 2018, Netflix Turkey started its activities in the local market.

A new process in the industry has started with Netflix Turkey's announcement that it will produce its original content after its launch. They were affected by the entry of a new and global player into the market, although reflexes, approaches, and rules are highly advanced in the production of TV series in Turkey. While some of these effects caused considerable transformations, some of them did not create very significant results due to the nature of the market itself. It was considered a significant step for the development of storytelling and production quality on a global scale. Domestic production studios were faced with a different management system as they incorporated international production processes into their domestic production processes.

50 M2 is one of the Netflix Original series produced in Turkey by BKM production company. BKM recognize as one of the biggest production companies in the local market. It has almost more than 80 movies in its archives and also they continue to produce new content. Because of that BKM has a company culture and has local market reflexes. With the 50 m2 production progress, they had experienced cooperation with global production structures. Therefore BKM's first Netflix original series is chosen to understand the effect of Netflix.

Then, this thesis tries to understand the effect of global streaming and production company Netflix on the local production process in Turkey. 50 M2 that one of

Netflix's original products produced in Turkey are chosen as the case study expediently frame of the thesis. Since this study is industrial research that investigates the production practices, relies on a theoretical framework of production studies supported by interviews that were made with people who work for this industry. 9 semi-structured in-depth interviews were made with scriptwriter and director of 50 M2, producers, production professionals of the content of a Netflix original series 50 M2, and CEO and CFO of BKM production company. The interviewees were asked a different set of questions depending on their working scop. Interviews were done in Turkish then translated into English. Most of the interviews were conducted face to face but some of them were conducted via online meeting tools. Interviewees are those who take an active role in positions in the production process and worked for at least one traditional television serial or film. Attendants are professionals whose working progresses has been affected directly by Netflix production policies because of their performance scope. Qualitative research conducted face-to-face interviews had provided important data. In addition, it should be taken into consideration that the data collected from semi-structured in-depth interviews are based on the experiences of the individuals.

1. OVERVIEW OF DIGITAL TELEVISION BROADCASTING

Broadcasting' is an old term that found a new technological application and meaning in the early 20th century. It was used to describe the transmission effect of wireless telephony, a technology that extended wired telephony by providing links between two transmission-reception points without the necessity of lines (above or below ground or water) to make the connection. (Scannel, 2005) In the '50s, after world war 2, a new phenomenon called "everyday life" has emerged. This is the beginning of 'the age of television'. The public has started consuming television content to enjoy as part of their ordinary, everyday life. Programs that will correspond to the whole of daily life, match broadcast, newcasting, and series broadcasts began to be made. With these broadcasts, which enabled the public to

be a part of a social event when they were in their home living room, television was integrated into daily life depending on the personal preferences of the individual.

In the course of time, the production of television is assessable as having the far-reaching potential to shape and inform the views and values of individuals and society at large. The 'lifestyle' content often reflects and propagates what might be seen as weighted agendas. With the enrichment of the broadcasting program of television, also production companies have become a significant part of the increasing fame of the television phenomenon. Demanding for creative content had expanded after television broadcasting has spread. Television is an industry that historically has been dominated by broadcasters. Although the characteristics and circumstances of the industry vary from one country to another, one of the features that are widely shared is the production of content.

Accordingly, production companies and their content have become an important part of the industry. Such companies had aimed to hunt the most creative content for tv. Content that could have the capacity of being popular was the most valuable content for the sector. With the aim of making the most-watched content, the producers and television channels began to follow certain templates over time. It is seen that the television series produced since the 1970s, when television began to become widespread in Turkey too, are very similar to each other in terms of subject, production, and genre. The main reason for this situation is the effort of the producers to appeal to all segments of society. Producers aim to reach the content they produce to a wide segment of society. (Söğüt, 2020) Because the biggest source of income for television channels is advertising revenues. What increases a channel's advertising revenue depends on the program rating in which that ad takes place. Content with a high rating has a higher value in tv commercials section. For this reason, channel managers want all their content to be works that receive high ratings and are watched by a broad segment of society.

This is one of the factors that causes channel managers to be wary of different content, new creators like outcoming writers or directors, actors, and genres. Due

to this advertisement-based economic model, the evaluations about the quality or success of the content remain in the context of rating. For reason that Television broadcasting, with an advertising-based business model, pursued the most popular content. The most popular content, that is, the most-watched content, became the most revenue-generating content, and this caused the creative side of the content to lose importance its power over time when compare with popularity.

After a while, these conservative approaches affected the creativeness and variety of television content by the reason of most popular concept is not mean also it is most creative. Nonetheless, depending on the advancement of internet technology, new media mediums had begun to supplant television broadcasting.

It is could mention that available two types of broadcasting systems are called analog and digital. The analog tv broadcast is the transmission of sound and moving picture frames utilizing analog signals. (Akaydin, 2014)

Digital television Technologies has emerged after in 1985 improvements that are parallel with global television technologies scope. Japan and some European countries digital television over satellite and cable networks with various standards they have developed has signaled that they are ready to broadcast. After the 90s, digital technology cheapening of the market has allowed digital television broadcasting to be practiced economically. Official work about digital television broadcasting kicked off in Bonn in 1993. It has initiated with the participation of 20 countries within the scope of the Digital Video Broadcasting Project. Digital television broadcasting started as satellite broadcasting in 1994 and became widespread rapidly. (Kuyucu, 2021)

In virtue of the digitization of image and sound in digital broadcasting, it became possible to carry the same content over different networks such as cable, satellite, and terrestrial broadcasting. Digital technologies have provided integration with

information technologies by means of their data compression, copying and storage features. (Yaman, 2017)

Thanks to the technical possibilities of digital television broadcasting, new generation broadcasting applications such as IP Tv, pay-TV applications, VoD, and OTT could be implemented. These concepts could be summarized as follow;

IPTV: IPTV is defined as the secure and reliable delivery to subscribers of entertainment video and related services by The Alliance for Telecommunications Industry Solutions (ATIS). These services may include, for example, Live TV, Video On Demand (VOD) and Interactive TV (iTV). These services are delivered across an access agnostic, packet-switched network that employs the IP protocol to transport the audio, video and control signals. In contrast to video over the public Internet, with IPTV deployments, network security and performance are tightly managed to ensure a superior entertainment experience, resulting in a compelling business environment for content providers, advertisers and customers alike.

VoD: Video on demand (VOD) is the service of sending pre-recorded videos and broadcasts to users on a server/device only. (Vod Altyapı Hizmeti, n.d.) In contradistinction to traditional broadcast channels and media outlets that demand consumers to view content on their schedule, VOD streaming allows ensuring audiences access videos at their leisure and from any compatible device. Streaming services like Netflix, Disney+, and Hulu could be shown as an example of VOD platforms. (Krings, 2021) VOD services also could provide having a collection of purchased, rented, or recorded from VOD service content.

OTT: OTT platforms could be expounded as platforms which is stream live video content over the internet instead of cable or satellite, as traditional TV does. OTTs are only restricted to streaming online content at the time of broadcast. They cannot be accessed after the live stream is over. The biggest difference between OTT and VOD derive from the way they transmit data. While OTT is only restricted to transmission over the internet, VOD services could use cable and satellite as well. (Smridhi, 2021)

Pay TV: Pay tv applications: Pay Tv is a service providing noncommercial television programming (such as recent movies and entertainment specials) by means of a scrambled signal to subscribers who are provided with a decoder.

Digital broadcasting platforms became "the future of television" with the effects of digital era improvements too. And they transform industry that has a new media ecosystem wherein TV changes in several levels concurrently. Broadcasting have moved from analog to digital, from scheduled broadcasts to on-demand TV on the internet. (Digital Transformation in Media, 2017)

This transformation has opened up a new opportunity for the reconfiguration of the relationship between content and the consumer. Nowadays SVoD services like Netflix offering on-demand content have become an increasingly important touchpoint for audiences. (Gillian Doyle, 2017)

Digitalization and new media platforms have not only changed the way people consume news, seek information, listen to music, interact with their friends or gains, but also change the television watching behavior of the audience.

Especially thanks to the internet, television has become a major part of the worldwide shift in the production and consumption of audiovisual content. (Kuyucu, 2021) With these new trends mediated by digital media, new forms of presentation emerge where users can express themselves adequately, create their own media menus individually, and add something from themselves to the information flow. (Durmaz, 1999)

Digital broadcasting could provide customization for audiences on the contrary traditional tv broadcasting. Customization can be considered as a way of improving the user experience, recognizing the user, and showing that they remember her. While the same content determined in television broadcasting is presented to the entire audience, in digital broadcasting, the audience is free to make their own choice. With the connectivity brought by the Internet, personalized content produced to be published on digital platforms is being adopted more and more every

day. For this reason, platforms strive to produce different types of products in order to diversify their content library. Considering that the platforms have a membership-based business model, it will be possible to say that the diversity of content also directly affects the number of members. The increase in content that is produced in a variety of genres provides that brings together users with different tastes and preferences on the same platform. High-quality, premium content, characterized by excessive rights fees such as live sports and Hollywood blockbusters has proven its strategic importance in helping digital television platforms to build a substantial subscriber base. (Evens, 2010)

With the development of digital broadcasting, the borders in the television industry began to expand. The period of content consumption, in which national broadcasts were at the forefront, was replaced by a system that can be reached by international audiences instantly. Before the extensive content portfolio provided by digital platforms, it was not easy to access global content for the local market. Either they could watch using illegal streaming services, or the audience could reach after the licenses of the series when programs could be bought and broadcast by local distributors. It had been causing that often audience who are from another country could be reached original content in their countries much later than the global release date of the content. The speed provided by the internet infrastructure of the digital platforms also helped to spread the content of movies and TV series to the whole world at the same time through digital platforms. Since digital platforms produce and distribute their original content, the new era also facilitated the audience's access to different content through a single platform.

From the past to the present, the most influential digital channels on television has been digital streaming platforms. These platforms are part of today's digital media ecosystem. Moreover, they have significant effects on the television and film industries. In addition, these platforms also shape the popular culture around them. Digital streaming platforms that provide the consumer freedom of choosing their preference about content and time provide experiences different from traditional

linear television broadcasting. (Kuyucu, 2021) While the traditional television audience does not have the chance to direct the television program, the digital platform users are more active and have the chance to direct the program. (Taşdelen & Kesim, 2014)

Online viewing broke the obligation of viewers to watch only at home and in a certain period. It became a significant step to changes for television channel strategies. The value of content had depended on the measurement of ratings. The changing business model and advertising revenue with video-on-demand platforms affected the transformation and evaluation of the content. Digital platforms could provide intimate communication to the viewer. That intimate relationship makes digital platforms is the screen that has the most appropriate products in terms of personalized content, including location-based recommendations. (Gali Einav, 2015)

With the development of digital television broadcasting both in Turkey and in the world, a new commercial sector has emerged. In this way, the number of digital broadcasting platforms increased and new services started to be offered to users. Thereby, new competition emerged. Then the platforms improved their service quality and broadcast content to increase the number of subscribers started to develop. Mihalis Kuyucu adds that in his article called ‘‘the digital transformation experienced by traditional television and its effects’’ with quotation of E. A Seçmen as follow; *today, the Internet has directed the goals of broadcasting television to an internationally based understanding. Broadcasting can be done with an internet-based being able to see what can be done has paved the way for reaching masses or networks.*

2. LOCAL BROADCASTING PLATFORMS THAT HAVE CARRYING ON A BUSINESS IN TURKEY

2.1: BluTv

“Internet Television of Turkey”

BluTv was established in 2015 as a part of Doğan Holding A.Ş. BluTv is a media provider by real-time data flow and VoD, and also it is the first local digital platform in Turkey. Blu TV, which was financed by the family business during its establishment, then started to feed its economic capital with a monthly subscription fee and new investments. (Dikkol, March/2020)

In Ümit Varol for his master's thesis (Transformation in television broadcast from traditional to the internet: the case of Turkey), an in-depth interview with Deniz Oflaz stated that Blu TV has founded with the motivation of "creating a world adapted to the times, not only in terms of technology but also in terms of content, to build tomorrow and to differentiate in this context." She added that Blu TV aims to be innovative, to keep up with the times, and to create an entertainment-oriented world by getting rid of news and politics. In the same interview, Oflaz stated that the target audience of BluTv is a younger audience or the audience that is bored and disconnected from television content, and cannot find what they want anymore.

Blu Tv had got supported by Doğan Holding financially because it was a part of the Doğan Media Group, during its establishment, but they did not continue this financial support afterward. For this reason, their core income gains from subscriptions. The subscription model is preferenced by the Blu Tv as a business model. A subscription model is a type of service where users usually pay a fixed amount per month for content such as movies, serials, documentaries or stand-up shows, giving users the opportunity to watch at any time. Users have unlimited access to movies/series for a certain period of time like a month. Subscribers have to pay monthly to continue their subscription. Contents can be watched as ad- free as a consequence of the subscription fee. The contents are updated because that the

content library continues to get wide month by month. Apart from that, it is offered that the right to a 7-day free trial BluTV. (Sapmaz, Türkiye'nin 'televizyon' devrimi: Fi, Masum, Görünen Adam, 2019)

Aydın Doğan Yalçındağ, CEO of BluTV, explain that BluTV founding purpose was to lead this change in Turkey in a world where television viewing habits are changing. One of the essential advantages of BluTV was the ability to use the content owned by Doğan Media Group in its catalog when Blu TV has founded.¹

The borders that dominate mainstream television broadcasts have begun to change with the developments in the internet and communication technologies. Blu Tv is the first local broadcasting platform with has a different business model than free tv was the first implementer to produce projects that go beyond the methods dictated by the economic model of television. Sarp Kalfaoğlu² who was content executive interpreted changes of production a digital series by this means;

"It is much more difficult to make a season with 45 or 60 minutes instead of 120 or 150 minutes, 8 or 10 episodes instead of 36 episodes, in terms of the number and duration of episodes. More precisely, this work has a very subtle rhythm. You know where to finish the job right from the start. You promise a much more 'essence' job, much shorter. And in that limited time, every detail becomes very important. You cannot allow a single sequence, a single scene, to be absurd and useless. Whatever the type and temperament of the job, every detail from start to finish should serve that genre and temperament. This episode didn't happen, you don't have the luxury of saying we'll get it together next time." (Sapmaz, Türkiye'nin 'televizyon' devrimi: Fi, Masum, Görünen Adam, 2017)

¹ Doğan Media Group has sold to Demirören Holding in March 2018.

Written and visual media organs including Fanatik, Doğan News Agency, Kanal D, CNN Türk Hürriyet and D Smart were transferred to Demirören Holding.

² Sarp Kalfaoğlu, Content Executive in BluTV between the years of 2016-2018

BluTV's first original internet series Innocent was released in 2017. A series of 8 episodes, Innocent was a series written by Berkun Oya and directed by Seren Yüce. It was adapted from the play "Bayrak" written by Berkun Oya. Blu Tv has taken its first growth step by expanding to the Middle East and North Africa since 2018. And he continued to extend his catalog after that first step. In 2019, Discovery Inc. invested in BluTV, Turkey's first local online video viewing platform, and became a 35 percent shareholder of BluTV with this investment. With this strategic partnership, all content from Discovery's iconic global and local brands and Eurosport's premium sports broadcasts have been added to BluTV's broadcast catalog. (Ulukan, 2021) Twozero Ventures also bought 2.77 percent of BluTV's shares on the day of the sale. (Girişim sermayesi fonu Twozero Ventures, BluTV'ye %2.77 ortak oldu, 2021) Continuing to grow with international partnerships and investments, BluTv also continues to produce its original content.

2.2: Puhu Tv

Doğuş Media group, which started its activities with NTV in 1999; operates in many areas of the media, from TV to the Internet, from radio to digital broadcasts. Puhu Tv is a media provider that was established in 2016 as part of Doğuş Holding and provides services over the internet. In addition to the application broadcasts that can be accessed via computers, mobile devices and smart televisions, it offers domestic and foreign content in the genres of movies, TV series, and children.

Puhu TV differs from its counterparts with its feature of being a free platform. Due to this feature, it can appeal to all kinds of socioeconomic groups. Puhu Tv makes it possible to access Doğuş Group's television content over and over again without paying any fee. It also allows all the contents in it to be consumed again and again. It is possible to reach all series that have been shown on Star TV screens since 1999. In this way, it provides the opportunity to access content that is not currently on the air.

Doğuş Media Group Sales President Ateş İnce describes Puhu TV's positioning as "being the online address of the most popular domestic TV series and movies".

Like many platforms that offer an online television experience, Puhu TV can be consumed anytime, anywhere, in any way. Puhu TV also earns income from the advertisements it receives, like all other websites on the internet. Puhu Tv is an Advertisement Based Video on Demand (AVoD) platform. Therefore, it has an economic structuring basis like a traditional television channel. It provides a significant portion of its income through the sponsorship agreements made for the content it publishes and the advertisements they receive on that content. Therefore they do not require a subscription or a monthly fee; their business model relies on the advertisements meaning their major source of income is the revenue that comes from the advertisements. Financial income has been gained by the embedded marketing method. The ads run every 15-20 minutes and are unskipped. In addition, advertising is created by incorporating elements like the clothes that the characters wear, the products they eat, the cars they ride into the narrative. (ÇAĞIL & KARA, 2019)

However, if users become members with the option to become a member, platforms offer the most appropriate interface by processing data according to user preferences such as Netflix. The first original content of Puhu Tv that is Fi featured on 31 March 2017. After that, the platform's second significant content was "Şahsiyet". One of the successful Turkish actors who is Haluk Bilginer has become the first Emmy winner actor in Turkey with a role on Şahsiyet. He has won the prize in the category of Best Performance By an Actor at the 2019 International Emmys. Despite, Puhu realizing considerable popüler and successful content; it stopped production after the production of three original serials: Fi-Çi (2017-2018), Dip (2018), and Şahsiyet (2018).

Puhu Tv is increasing the income of those structures by putting television content back into the consumption cycle in the Turkish economy. At the same time, the content produced by the platform under its roof is presented to the international

market while increasing the value of these media contents and expanding its revenue range.

2.3: Exxen

“Sign up now, start watching on mobile, tablet, computer, anytime, anywhere on exxen.com, Google Play, App Store, Apple TV and Android TV.”

It is the online content platform of Exxen Acun Media group, which started broadcasting on January 1, 2021. It had established by Acun Ilıcalı and Qatari shareholders. If The platform, which has a membership fee requirement, however, offers advertising and ad-free features in all its content. Users are offered a separate payment plan for ad-free content and one for content with the ad. In this respect, it differs from BluTv and PuhuTv. Exxen draws attention to this policy, since there is no advertising content on the platforms that provide an income model through membership fees. Acun Ilıcalı, who participated in the program of Candaş Tolga Işık on the Haber Global channel on September 14, 2021, said that the number of members of Exxen is close to 1 million. It could express platform does not have a large global content library since it offers completely domestic content. One of its remarkable moves was the transfer of popular content on youtube, a free broadcasting platform, and content producers to the SVoD platform. This is one of the factors determining the target audience, which underlined Exxon's desire to stay local in its content preferences.

For this reason, while creating the Exxen catalog, Acun Ilıcalı chose the programs and persona that the people of Turkey follow on social media. Unlike other digital platforms, Acun Ilıcalı, known for her successful TV program on traditional television channels, also used show programs for the launch of Exxen. (Zehir, 2020)

"Konuşanlar" , had been broadcast on YouTube before, prepared by the Hasan Can Kaya, was one of the first transfer of Exxen.³

Likewise, the reality show presented by Enis Arıkan, who is widely followed on social media, can be an example of Exxen's desire to include names with social media power. In addition, exxen has invested in original content. One of the projects that attracted attention in the 2021 season was Şeref Bey TV series. Ali Atay made the design of the series. One of the leading roles was Haluk Bilginer, who is also internationally known. It also published the continuation of the children's and youth series, Sihirli Annem, whose old episodes were popular and watched on social media. (Acun Ilıcalı'nın Exxen'inde yayınlanacak yapımlar, 2020)

The second attention-grabbing step in content strategy was that platform buy broadcasting rights in Turkey of some leagues. Exxen, which bought the broadcasting rights of UEFA Champions League, Europa League and Conference league matches for the 2021 season, also created a sports package for these matches. Users who have previously signed up can access these screenings by paying the sports package fee. Or, users who do not prefer all access for TV series and movies can only purchase the sports package.

2.4: Gain

"Quality time, Valuable content"

GAIN was founded in 2019 by Gökçe Akpınar within Beyn Danışmanlık with a capital of 50,000,000 TL. Gain is a new generation video content platform that consists of educational and entertaining short videos that are generally intended to be watched on mobile devices. Gain has explained what it is on the official website as follow;

3

https://www.exxen.com/tr/detail/serie/konusanlar/22377?gclid=Cj0KCQiAwqCOBhCdARIsAEPyW9KJ4lONbOGRW89gSOMLbAdUz7sTn6AT9VGYPJclVAOvKe9HUy3lbsaAtUGEALw_wcB

It is a new generation content platform that consists of reformer, entertaining short and long content that gives importance to different sounds, other colors, and valuable time. In addition to domestic and foreign TV series and movies, documentaries, news, music, sports, entertainment programs, live broadcasts are also included in the content list for you to spend quality time. (Gain Nedir? , n.d.)

Unlike other content platforms, since it does not offer a smart TV application and is followed only on mobile, more short content is included. It presented a world similar to Instagram-Youtube such as short content (about 10-15 minutes), short series, interviews, documentaries, concerts, short films, news. (Bonomo, 2021) Gain, which started broadcasting on mobile devices, began to serve broadcasting free of charge, unlike other digital broadcasting platforms. Launched on December 30, 2020, the platform entered the market with short-form content such as 10 thousand steps and therapist. Gain has shown that it embarked on a different strategy from its competitors in a period when screen times got shorter by preferring short-form. It has announced that it will switch to the subscription system with the Premium feature on April 7, 2021, after a free about four months. However, in this new period, it maintains free access to some programs on the platform, unlike its competitor.

3.THE EFFECT OF NETFLIX TURKEY ON THE FILMING PROCESS OF 50 M2, BKM'S FIRST NETFLIX ORIGINAL SERIES PROJECT

3.1. Netflix and Netflix Original

Netflix was born from Reed Hastings ve Marc Randolph sending DVD by mail idea. They posted DVDs to themselves to test their idea's applicability. When the DVD was reached to them without any damages they have decided to create a website to rent and sell DVDs. Netflix was established as an online DVD rental

service in 1998. It had been the first online DVD selling and rental service. In 1999 Netflix transitioned to a new subscription model for its users. This model was provided with unlimited rentals. In favor of this new business model, an unlimited DVD rental service was offered to subscribers with no deadlines, late fees, or monthly rental limits. Customization innovation in 2000 has been one of the milestones by which Netflix would be turned into a phenomenon in digital broadcasting. Although Design and interface features are the same, its algorithm creates different versions of Netflix for each user. This personalized movie recommendation system had using members' ratings on past titles to accurately predict future choices. When 2003 had come, Netflix has got more than one million subscribers. The second significant step gone to today's Netflix phenomenon was the implementation of the broadcast feature that allows members to watch TV series and movies instantly in 2007. After 5 years, Netflix has reached 25 million subscribers and has begun to carry on business in the united kingdom, Ireland, and Nordic Countries in 2012.

Netflix continued to improve its technological and strategical infrastructure until 2013. However, The year 2013 became a game-changer for the entertainment sector globally. Netflix executives decided to enter also as a producer in broadcasting and they had released d the first Netflix original series *House of Cards*. Investment in original content which started with *House of Cards* (2013-2018) has been the most important and influential aggressive expansion strategy of Netflix since 2011. At that time Netflix was only acquiring content territory by territory mostly from the major U.S. (Vitrinel, 2018)

Netflix, which distributes series and movies that it was not Netflix's original product before this date was commissioned in partnership with other broadcasters. With together Netflix's original brand, Netflix started to demand the all global right to production, in the opposite condition they decided not to purchase. (Netflix, n.d.)

Netflix does not use the "original" label to classify content according to its textual properties. This label is a name Netflix gives to projects produced in local markets

(outside the USA). Netflix original is a label used by Netflix for works produced by purchasing exclusive streaming rights. Netflix is expanding its catalog with different purchasing models. For this reason, when it buys TV series and movies that have been broadcast on different platforms before, it uses this label to define its rights on the products and to differentiate the works it purchases in this way. Unlike television, Netflix produces projects in various genres and formats as a producer. But it can not be said that it gives its original effect only to the projects it is produced or co-produced. Netflix can also buy the finished projects to be released with the original label that it is not involved in the production process, which is completely ready for publication. This label states that the distribution and display rights of the said content also belong to Netflix. One of the contents of Turkey is *Bir Başkadır* can be given as an example of one of the projects purchased in this way. Or, it broadcasted projects such as *The Gift* and *Protector*, which is part of the entire production process with the original label. It is also possible to say that the “original” label is more dependent on the strategic partnership and business planning of the stakeholders in this process, rather than the structure of the content.

Another significant and recent feature that Netflix has taken in pleasing its users is introducing to its customers "binge" watching possibility. Binge-watching is the concept that most strongly points back to Netflix's past as mail-order DVD rental store. Ever since Netflix has established as a DVD rental service, it has had a policy that encouraged binge-watching in order to pay extra fees for consumers during the rental period. The Netflix subscription service debuts had offered members unlimited DVD rentals without due dates, late fees, or monthly rental limits in 1999. Users had the right to make unlimited rentals for a month by this way. It was the first step to encourage users to binge-watching. And then, this form of consumption, which comes from the institution history, has become one of the strategies that it attaches importance to while Netflix turns into a world giant.

This form of watching "binge-watching", which encourages the audience to finish a season in a single night or in record time has also begun to transform the watching

culture. Instead of watching the TV series that broadcasting according to the made scheduled by the TV executives, the audience started to prefer content on the digital platforms provided they chose their own watching time. This new consumption habit has also taken place in the social lives of the audience. It has also become a part of small talk in social life.

The question "Did you watch yesterday?", which is a part of the general watching habit, has been replaced by common patterns in social life such as "don't give spoilers!" "Have you finished the series?"

One of Netflix's structural strengths is customization. To support Netflix binge-watching, it pays attention to care to offer customized content for each user. it customizes its content with its algorithm infrastructure for every single user. In this way, it offers its users an interface that suits their preferences. Therefore, subscribers' preferences, ratings about the content, watching devices, and screen times are collected as data. Then, it processes this data in its algorithm system and offers a list of suggestions for each user, series, and movie content that they may like. It is also possible to access content that is not on the home page by using the search option. (Netflix'in Öneriler Sistemi Nasıl Çalışıyor?, n.d.)

In addition, thanks to its algorithm that processes big data, Netflix increases the viewing time by offering customized content to each subscriber according to enjoy watching on the platform.

Hence, the subscribers can continue to enjoy the consumption by choosing is encountered movies and TV series that are in the style they like. With a large global audience, the algorithm creating personalized content, and money to produce high-quality content in more markets, this is changing.

Whether the content is liked by the audience or not is measured by algorithms too. It can be measured audience spent on how long the screen time, after which part they give up to go on, and how many minutes they watch the content. The success of a series is determined by the results obtained in the first 28 days after the show's broadcast. Policies such as Netflix's evaluation of the success of the content

according to the numbers, and whether the creative products are considered successful or unsuccessful depending on the screen time, also cause the platform to receive criticism from time to time that its products are insufficient in terms of creativity.

To summarize, The emergence of these new players of subscription-based online video services (SVOD for subscription video-on-demand) implies first and foremost, major changes in cultural practices with regard to the consumption of movies: massive offer of films and a multitude of choice of sites and screens to watch them, disappearance of some intermediaries such as movie theatre managers or distributors, introduction of new intermediaries like right aggregators, advent of new services such as recommendations, personalization of the offer (algorithms phenomenon). (Vitrinel, 2018) Netflix is also one of these popular and has a wide range of influence SVOD platforms.

Netflix's success stems from several factors. It has proved to be a very adaptive business, which steps in rhythm with technology and latest developments, being among the first to implement the newest concepts and, thus, becoming a model for other businesses. (Oat, Analysis of Netflix architecture and business model, 2013) Netflix both adapted to, and created, significant changes in how media is produced, distributed, and viewed. The Netflix template has become the gold standard in Internet television. The template is based on five major topics. Internet networks have to be consumer-centric., Internet networks have to innovate on the intersection between technology and the consumer.

The buzz around Internet networks comes from original programming, Original programming brings subscribers to an Internet network, syndicated long-tail content keeps them there. Internet networks are both global and local. These five topics have set the foundation for what is becoming an intense, crowded, and mature internet network category. (Oat, Netflix and the Development of the Internet Television Network, 2016)

3.2. Short History of BKM and The Process of Entering Netflix Into The Turkey Local Market

One of Turkey's big studios is BKM A.Ş is a company operating in the Turkish entertainment industry for over 25 years. BKM was established on 11 November 1994 with the conversion of Beşiktaş Mistik cinema into a theatre. (bkmonline.net, n.d.)Afterward, it started to organize national and international organizations with BKM Organization. And then BKM Film was founded in 2000. And with his first work, Vizonte, which was released in 2001, it was achieved a very high box office success of 3.308.120 viewers. (BoxOffice Turkiye, n.d.) The interest in domestic content in the cinema sector, which started to lose speed after the Yeşilçam, gradually had decreased. Until the movie Eşkiya, which was released in the 1996-97 season, the audience had been not shown interest in domestic content. "Eşkiya" was a breaking point for the reversal of this process, for the audience to show interest in domestic content, and to increase production for high-quality domestic movies and being popular domestic films at least as international movies. (Erus, 2007) In addition to its success at the box office, Vizonte had taken a significant position in the Turkish cinema industry because of specialty such as being a high budget production, to be that have been created a plateau for the set, also getting together international and national professionals in a common project. It is one of the important movies which has taken draw the Turkish film industry's quality standard to the West.

After the Vizonte, a new era was started for the BKM Film Company. It has continued to produce tens of movies for the local market and also the domestic audience. Then in 2016, Netflix has decided to enter the Turkish market and they announce that their product could be reached in Turkey on Netflix Turkey. When the sector face this new player on market, BKM had been having more than 80

movies in their library. Because of a wide range of portfolios, BKM was being of the first company to sell content for the Netflix Turkey platform.⁴

The strategy here was different, as the early days of Netflix Turkey coincided with a period when content labeled as "original" was not started to be produced. Their first operation was that Netflix turkey content diversity gets increased.

After NetflixTurkey was reached in Turkey, it started to buy domestic content. In this process, BKM started its professional relations with NetflixTurkey by selling 20 movies of content.

The cinema crisis which emerged in that dates caused a change in the box office dates of the movie Sazan Sarmalı and was decided that it was broadcast on Netflix shortly after release.⁵ This created a big agenda in Turkey and there was an increase in the number of Netflix Turkey subscribers. (Semercioğlu, 2019) Netflix played the role of the publisher of Organize İşler Sazan Sarmalı, whose production rights all belonged to BKM.

Afterward, Netflix Turkey announced that she prepared her first original content in 2017. (Netflix.com, n.d.) The first domestic content that started broadcasting with the Netflix original label was "Protector". Netflix that adding previously published domestic series to its library, has taken a new step by starting to produce original content.

Thus, it was started to buy original content from Turkey as well as all over the world. This step directly affected both the competitive conditions of the local market and the production processes. It was accepted as a new medium that has emerged for writers to tell their stories that they could not narrate because stuck in the traditional limits of television, especially during the creative process. And this development was a step that excited industry stakeholders. Also, it was considered

⁴ Cansu Aydın, Producer and Sales Specialist in BKM

⁵ Cansu Aydın, Producer and Sales Specialist in BKM

a significant step for the development of storytelling and production quality on a global scale. In addition, domestic production studios were faced with a different management system as they incorporated international production processes into their domestic production processes.

4. CASE STUDY: 50 M2

4.1. Pre-Production

BKM defines itself as a company operating in the international market, selling the domestic content it produced too before the Netflix partnership process to be reproduced in different countries of the world.

BKM was a company that mainly produces films for the domestic market, but also realized its films in 9 different countries (Azerbaijan, Kazakhstan, Austria, Australia, Netherlands, Germany, Belgium, France, England) apart from Turkey before pandemic.⁶ Due to the fact that the BKM's production criteria comply with international criteria, content sales had been made to platforms in different parts of the world too before Netflix entered the local market. For this reason, it is stated by company professionals that there are no major problems in entering a joint production process with an international stakeholder such as Netflix and adapting to this partnership. For two company too, BKM and Netflix, the production process separate into three part as pre-prodcution, production and post production. Since This common strategy, there is not emerge a meaningful difference as structural between lokal and international production process.

The pre-production process consists of the creation of the idea, the beginning and completion of the script, the creation of the production strategies of the film/series, the determination of the set locations, and the creation of the implementation budget of the film.

⁶ Cansu Aydın, in-depth interview, December 2, 2021.

The careful and systematic follow-up of this preliminary preparation process from the very beginning minimizes the risks regarding the production processes of the film.

Netflix as a company broadcasting in 190 countries, has clear very systematically follow up policies and tools to be control over dozens of different teams, sets and production cultures at the same time. Onur Çakır, who has been serving as the line producer of BKM films for many years and is the line producer in 50 M2, interprets this situation as follows;

“ Film making is preparation work. The pre-preparation processes could have been neglected sometimes before the Netflix rules. It could have been some approaches such as we could do it on set, we could handle it on filming or post. But over time, this was replaced by working processes designed according to the international system. The transformation in business life in Turkey was also towards that global approaches. This transformation already had started in local before Netflix Turkey entering in local market. However, Netflix supported its development and spreading. Thanks to the financial opportunity it provided, these regulations became easier to be implemented. Pre-production processes have become sustainable thanks to their financial strength, such as giving full payment to team during the preparation phase.”⁷

Thanks to its financial strength, Netflix can finance the preliminary preparation processes as full time. Therefore this allowed the teams to allocate as much time as necessary for preliminary preparation. This also had provide the entire filming process to be thoroughly planned from the start to end. Thus, it minimized the risks that the set crews might face during the shooting. Onur Çakır expresses the effect of this situation on the set as follows:

⁷ Onur Çakır, in-depth interview, December 6, 2021.

*“ In our Yeşilçam tradition, the power holder was this director, in the foreign system he was a producer. You must act in accordance with the producer's budget and design. On the contrary, you cannot make changes. But we had such examples. A cinematographer could change the angles he had prepared in the preliminary preparation, 180 degrees. This is actually unacceptable under normal circumstances. But in the traditional approach, we could not object to this much. But you can't slide even 10 cm in the foreign system, they say that you should have said this in preparation. This, of course, allowed the set processes to flow as planned and an approach in which an institutional structure stands out, not individuals.”*⁸

A new concept also was gone into industry associated with beginning to produce turkish content by netflix. That concept is label of “netflix original”. Netflix presents its series content produced in foreign markets where it operates, as Netflix Original. Netflix started to publish ‘Netflix Originals’, acquiring exclusive international licensing rights to Lilyhammer that Its first ‘Netflix Original’, Lilyhammer was first licensed and later co-produced with Norwegian Public Service Broadcaster NRK, which had previously only been shown in Norway, and getting involved in the production as co-producer of the series. The following year would see Netflix publish its first in-house productions, House of Cards, Hemlock Grove, Orange is the New Black, and season 4 of Arrested Development. (Netflix as Transnational Broadcaster, 2018) Afterward, with the expanding fields of activity in different parts of the world, Netflix's original labeled contents also increased rapidly.

The first Netflix original project announced upon entering the Turkish market was Protector. Following this, BKM's first Netflix original series was 50 M2, after The Gift and Love 101 series. That means a new ownership strategy. BKM, which previously produced films for the theatrical, had to establish different ownership

⁸ Onur Çakır, in-depth interview, December 6, 2021.

with 50 M2. Cansu Aydın, one of the producers and sales specialists of BKM, summarizes this ownership relationship as follows.

“Realizing content with the Original label means that Netflix buys this movie as if it was made by own and only shows it on their platforms. In other words, it is a job that they commission. This model works like this. After selling the idea to Netflix, you do the production and work on a commission. In other words, the local producer becomes a subcontractor of Netflix”

Since this situation directly affects the ownership and rights of the property. It also changes the ownership right of the local production companies on the project. The local production company sells the work it produces, the series or the movie, to Netflix with all its rights. This situation provides a different structure than the entire film and the rights belong to the producer. Cansu Aydın explained the strategic decision in the 50 M2 sales process and the perspective of the BKM film department on this process in an in-depth interview as follows.

“ This is not a method BKM likes very much. Because when that happens, you become an implementing company. But BKM is a producer company. In other words, it is a company that makes its own decisions, spends its money from its equity, and likes to work with a system that puts all the money that it gains in its safe. Because the profit rates there are much higher.. ”

However, this strategic and commercial agreement also has positive aspects for companies. The film is goods produced by a production company at very high costs. This situation creates audience demand to recovery costs at the box office. If being under the desired number of audience means the film's failure.

That is a risky situation. But when it has sold to Netflix with a commission, companies and investors do not experience a short-term commercial risk regarding the project. The executive producer of 50 M2 Faruk Özerten, explained that the

differences between the financial risk of theatrical movies and Netflix movies/series as follow;

“The material and moral rewards of producing content for platforms are different. In a commercial sense, it can be said that it is safer to be on the Netflix platform. The financial risk is low. You have a contract, and according to that contract, it is clear what the producer and the actor will receive and under what conditions they will work. The cinema is open to surprises. A theatrical movie could be watched by millions or just only 300 thousand. BKM also had such films. Because of that, production movies to the box office could be a little more nervous practice.”⁹

4.1.1. Screenwriting Process

The international recognition of Turkish storytelling has begun long before Netflix Turkey's operations in the Turkish market.

The Series of Gümüş¹⁰ was the early one of getting international selling success in the market. With the help of Gumus, Turkish local content interest is increased dramatically especially in middle east markets. In the following years, increasing international selling graph improved speedily and local tv series and content market recorded the significant growth.

According to Izzet Pinto's¹¹ comment published in The Guardian, the upward course of dizi imperialism began with Binbir Gece in 2006 (1001 Nights). At the time, another Turkish show, Gümüş (Silver), was already a hit in the Middle East, but it was 1001 Nights that became a truly global success. Wherever 1001 Nights was sold – in almost 80 countries – it was a rating smash.

⁹ Faruk Özerten, in-depth interview, December 28, 2021

¹⁰ Gümüş is a Turkish television series that was broadcast on January 20, 2005. its genre is romance and drama. It consists of 3 seasons and 100 episodes in total.

¹¹ İzzet Pinto is the founder of the Istanbul-based Global Agency, which bills itself as the “world’s leading independent TV content distributor for global markets.

After Gumus and 1001 Nights, lots of successful content was produced and also sold abroad. However, The Magnificent Century has become another turning point for the reputation and popularity of Turkish tv content. After Gumus and 1001 Nights, lots of successful content was produced and also sold abroad. However, The Magnificent Century that was realized in 2011 has become another turning point for the reputation and popularity of Turkish tv content. The expanding market volume and the sales possibilities in the international market enabled a project design that would require a large investment. A large project design and financial investment have been made on an unprecedented scale. This investment has also paid off. Turkish TV series have also become a local and international phenomenon in the last ten years. (Sayın, n.d.) (İnanılmaz Ama Gerçek Dünyanın Neredeyse Yarısı Sen Çal Kapımı İzliyor, n.d.) (Uçtuk, 2019)

The domestic content that turned into this phenomenon and met with the audience was also essential for Netflix Global. They have not wanted to miss the potential of the Turkish market. Pelin Diştaş, Netflix Turkey content director, conveyed her views on this subject in a statement she made to Anadolu Agency in 2019 as follows:

“TV series exports started about 10 years ago when the first domestic productions were sold in a package to the Middle East geography. Turkish productions appealed to a wide audience with their quality, the stories they told, their acting performances, and their emotional elements. In the next stage, the interest in the Middle East was followed by Eastern Europe, and Latin American countries, and finally European countries. Now the goal is to ensure that Turkish TV series are watched all over the world. We, as Netflix, are trying to contribute to this goal by showing Turkish TV series and movies in 190 countries.” (Şeref, aa.com.tr, 2019)

With Netflix Turkey starting its operations and entering the process of making series, the way for Turkish series narration to be carried to the world platform and

shown in 190 countries at the same time has been paved. Netflix Turkey has continued to establish partnerships with different local production companies after making Protektor and The Gift. They have given importance to having a variety of content. Also working together with the various production companies that give services in the local market is one of the company strategies that featured. Because of that, they had pursued to buy lots of content from different companies after their premier content "The Gift" and "Protector". Pelin Diştaş has explained Netflix Turkey's acquisition strategy for regarding Turkish TV series that the world is interested in following;

“Turkey is a very significant country for us. Therefore, when choosing the productions we will invest in, we attach importance to the fact that the story we will tell contains local elements, reflects the local culture, and is from us. Furthermore, we attach importance to avoiding repeating projects that have been many times before. Our ambition is to tell new and different stories.” (Şeref, Netflix Türkiye: Kültürel birikimimizi anlatacak senaristlere, oyunculara ve yönetmenlere sahibiz, 2019)

Burak Aksak, the screenwriter of Leyla and Mecnun has become a phenomenon among Turkish TV series, and BKM's project is one of the projects they bought in 50 M2, considering it suitable for this context. Burak Aksak states that he has started working in 2015 with this story to be broadcast on a television channel. Even though the project entered the preliminary preparation due to the structural processes related to the television conditions and durations, it could not realize. Later on, after BKM presented this project to Netflix, Netflix, who was interested in the story, gave the approval of the process after the project presentation made by Burak Aksak. The screenwriting process of 50 m2 that has already been designed substantially in 2015 has begun. The pre-production process was given a start officially with this step.

The scenario is one of the most imperative parts of the entire product and pre-production process. Therefore, It is one of the most critical issues of Netflix too. For this reason, while preparing the script, care is taken to read it by more than one reader and to give dramaturgical feedback. Burak Aksak stated that the writing process of the 50 m2 area was also like this. He summarized the follow-up of the writing process as follows;

‘‘After an episode has written, we had read and evaluated it with the BKM team. Then, if some changes are necessary to the script, we would make them and had sent them to Netflix. And then Netflix's feedback had awaited for this episode.’’

Burak Aksak, who stated that Netflix professionals were involved in the entire writing process of 50 M2, remarks that it has good and bad sides. He states this way of follow-up can more easily prevent possible problems in the scenario with the help of different perspectives. However, he adds that such a follow-up system can prolong the writing process because of intervening reading times. He remarks that the long time between the writing of the episodes can spoil the energy and emotion of the story. Aksak states that as a screenwriter, he quickly got used to writing screenplays simultaneously with shooting and that this Netflix writing tempo sometimes negatively affects her feelings.

In digital series projects, the scriptwriting of the entire season has finished before the shooting begins. By this means, the transformation of the whole story has known. Also, the completed script ensures that the character transformations in the story could be seen from the very beginning. For these reasons, this writing strategy can be a factor that facilitates both the production process and the actors' interpretation of those characters. However, this is not possible especially in the production processes of Turkish television series.

Since the revenue model of Turkish television series is related to the ratings, free TV channels cannot financially support a series if it cannot reach the targeted ratings for the whole season. The fate of a TV series cannot be determined at the beginning.

For this reason, even if a rough draft story is determined, it is not possible to complete all the seasons' narratives. But Burak Aksak, who says that this situation also has positive aspects, lists them as follows;

“First of all, if you write humorous stories, you should follow the agendas of daily life. When you finish writing a series before shooting, following the current humor of life is not possible. In addition, when you write weekly, you can make changes within the episodes according to the performances of the actors or the reactions of the audience.

It is not possible in digital series projects. That can squeeze you into a narrower creative space too.”

After the entire eight-episode first season of the 50 m2 series was written, production process was set. In the local markets it enters, Netflix first tries to reach the local of that market and then the global audience. For this reason, they define their content strategy as "from local to global". Burak Aksak, the screenwriter of 50 m2, states that he does not find this motto very applicable.

Executive producer Faruk Özerten, on the other hand, stated that the works produced in the Turkish market are not yet working to reach a global impact, but that the content has a chance to reach a global target audience due to a large number of users of the platform. Faruk Özerten had explained his opinion as follow;

“There has not been a Netflix Turkey project that has made an extensive impact globally until now. On the other hand, every job that broadcasts on the platform has the chance to reach millions of people in 190 countries one-on-one. It is very significant. Before the global digital streaming

platforms commenced operating, international sales too were an option to reach an international audience and market for local industry. However, it could be taking time. But when it is on Netflix or any other platform, it can be seen immediately. It is a pass to a global. Turkish TV series are the most traveling TV series after American TV series. It is also the reason behind the decision of Netflix to enter Turkey. So far, they have done works that made a sound locally, but in the near term, there will be works that will make a global impact.''¹²

Selin Özyürek, as a Head of Digital Marketing in BKM, mentioned that Netflix Turkey is confused about the motto from local to global especially. She remarks as follow;

''They mention that local success will bring global success. However, they prefer to globally famous cast in original content because it is a factor that makes easier traveled content. I think these two are conflicted. There are talented local actors and actresses although they're not famous globally.''¹³

Aksak, who stated that the story of 50 M2 is very local, added that some integrations made at the request of Netflix Turkey managers deformed the story and moved away from its locality and sincere feeling. After the series aired, some supported this comment among the audience. Some audience comments are published that the show was getting away from emotion to comply with Netflix demands and algorithms. (eksisozluk.com, 2021)

Cansu Aydın, one of the Producers of BKM, made the following comment on this approach of Netflix in addition to Burak Aksak's observation;

''They tried to turn the scenario into a system that Netflix viewers are used to in more netflix standards in 50 M2. That was not exactly what was

¹² Faruk Özerten, in-depth interview, December 28, 2021.

¹³ Selin Özyürek, in-depth interview, December 1, 2021

originally written. Since this takes the story away from the Burak Aksak codes and style, the core audience follow Burak Aksak also taken an aversion to the script. It was an administrative failure given by netflix. Netflix has always tried to incorporate an event into action rather than watching a straight situation story. While trying to keep the excitement at the ceiling, I think they ignore the naive side of the story..''

Burak Aksak adds that kind of approach is not applicable for a work such as 50 M2 that has already been prepared and designed to a large extent. He states that a new story that has not been framed before should be designed together from the beginning for such an approach to be implemented more soundly.

He adds for 50 M2 that; the changing in the script that does after the finished creating process is spoiled the structure of the story. Aksak remakes that the part that he is not satisfied with within this joint project with Netflix is the disruptions in the scriptwriting processes. He also states that the team that started the co-design process due to the expansion of the netflix turkey team changed while the process continued. He states that there were coordination problems with the new team that came while actually to agree at the common point at the beginning. He states that some perspective differences negatively affect the scriptwriting process too.

With the entry of Netflix Turkey into the market, it has been thought that another thing that would positively affect the content would be the freedom that would be experienced in the creative field. Since it was believed that a mechanism like RTÜK, which controls Turkish televisions, would not be available in digital, it was thought that the content could become freer. However, it was seen that this area of freedom would not be as wide as expected after the international digital platforms operating in the domestic market were also required to be licensed by RTÜK. (Çalışkan N. , 2019) While other content was more affected by this restriction, 50 M2 became works that were not subject to extensive regulation due to its story

structure. Burak Aksak states that the restriction that surprised him the most during the process was the comments that Netflix did not want to see smoking. He states that due to their insistence on this issue, they have to change the whole structure for changing a scene that has smoking at the request of Netflix.

However, Burak Aksak states that he has seen cigarette scenes in other Netflix's projects after 50 m2 and that she is surprised that this approach varies from project to project. He adds that he thinks this is since the shooting processes of the 50 m2 series coincided with a transition period when the platform could not establish its exact strategy.

Faruk Özerten¹⁴ says that Netflix, like many other institutions, has its red lines. But he states that this is not in the form of general rules or sanctions. And he adds that it can change based on content.

4.2. Production Process

4.2.1.Financing Approaches

The tv series in Turkey generally is a commodity that composed by production companies and sold to free tv. Therefore tv channels could transpose financial risks to these companies. It could be said that the production companies that have proven their success are more advantageous as the tv channels are selective about whom they work with due to their high financial risks. Although agreements with production companies are signed for thirteen episodes, television channels have the right to cancel their arrangement at any time. (Bulut, 2016) It would not be wrong to say that it is not very possible for upcoming professionals especially show up from the creative field to have a presence in the Turkish TV series industry without strong companies behind them. But on the other hand, it is not easy to say that these purchasing decisions are taken with a very systematic mechanism.

¹⁴ Executive Producer of 50 M2

Due to the variability of the rating system, it is not possible to anticipate projects that will continue for at least one season on the screen and will not fail financially. Cumulative production costs emerge because of reasons like increasing duration time of episodes, absence of studios to build a setup like in Hollywood. These reasons increase the commercial risk of a series failing on-screen. Despite these considerable risks, there is a possibility the series that had been released on television will be discontinued broadcasting after two or three episodes. These conditions can be an initial financial failure for companies as it weakens the possibility of overseas sales. This uncertainty can prevent the industry and professionals working in the industry from foreseeing the plans for their private and professional lives. Executive producer Faruk Özerten explains the point of view of professionals on this issue as follows:

“TV series production can be an endless journey. It can continue for 39 episodes, 80 episodes, or three episodes. In a movie, we shoot in a limited time of four weeks, ten weeks, and five months, whatever. To shoot a drama on a digital platform is a bit like shooting a feature-length, with a slightly longer duration. We know when it will end, our agreements and contracts are accordingly. If an actor accepts to begin a TV series, she might spend a few years there. But when it comes to a digital series, she can complete the shooting in a shorter time. It is the same for me. The work plan of the digital streaming series is distinct. Therefore we can foresee from beginning to end. We can plan our lives accordingly.”

However, depending on Netflix's licensing policy, this risk is minimized. As Netflix buys the entire season and bears its entire financial burden, it minimizes financial risks for both the employees and the production company. For this reason, this corporate environment provided by Netflix can cause it to be preferred for creatives that produce content in return for financial gain.

Faruk Özerten states that both screenwriters and producers can produce several digital series for a year instead of producing television series. He explains that the

financial and moral returns of this are more affirmative. He adds that television content will have to undergo a structural change in this context.

CEO OF BKM Zümrüt Arol Bekçe has explained this environment as follow,

“TV series has hard processes to move forward financially and effort. With the investment made by Netflix, everyone gets the reward of their hard work. Secondly, besides getting the reward of his labor, Netflix production structures also give a very planned life for professionals who work in the industry.”

She adds that if the television series is successful, it provides a significant income to the actors and the producer. However, Z.Bekçe¹⁵ states that professionals, especially actors and actresses, had to face up to a very intense labor-intensive process in return for this gain. She underlines that in addition to their financial reward, they have to work almost six days a week, where they cannot plan their lives. Whereas on in a certain time, it could be eight or ten weeks, Netflix the shooting could be completed. In this context, she adds, "I think Netflix is very feasible when the effort is evaluated with the return rate."

Due to the increasing costs of free tv series, there is an increasing financial risk. The income taken in exchange for this substantial risk is satisfactory for both the producer, the tv channel, and the actor. Netflix's purchases model provides a less risky financial condition for local producers. However, when Netflix buys a film or series, there could be some changes with the ownership of the product. At this point, production companies need to make managerial decisions. In this regard, Zümrüt Arol Bekçe states that the products to be made for both mediums are different. She adds that while deciding on the medium, a decision is taken by considering the financial and structural pros and cons. She explains in these words;

¹⁵ Zümrüt Arol Bekçe, CEO of BKM, in-depth interview, December 29, 2021.

“Choosing one of the mediums Netflix or TV is a project-based decision. Holding a successful series on the free channel is a lot more profitable financially. But not every story can be told on television. Therefore digital platforms are more effective mediums for some niches themes or genres. That's why it's important to have both channels for the market.”

In addition, Z. Arol Bekçe adds that the competition that emerged with the entry of Netflix into the local market is also beneficial for the domestic market. Because Netflix is the first international digital platform to enter the local market, it was the first company to initiate the change and influence the market. But also other platforms that are preparing to enter the market will have different effects for local too. Zümürüt Arol Bekçe evaluates these effects as follows;

“After Netflix, other platforms such as Amazon, DisneyPlus will enter the market. In this case, I guess that the competition that international platforms will experience in the local market will also be good. Because monopoly is not a positive thing for market balance. It is important to establish the supply-demand equilibrium in the economy. Having only one player to determine demand can force market conditions. It can affect price policy. Being that Netflix is the only international platform could be something that weakened the competitiveness of the producer. After other platforms enter the local market, the sales area will expand for the producer.”

BKM has preferred to produce 50 M2 for a digital platform rather than a television due to its structure and language of expression. Since it is the first series made with Netflix, all ownership rights have been left to Netflix. However, in the projects discussed later, Netflix may devise different partnership models as it has known the market and the conditions of the local market more closely. Z.Arol Bekçe states that the ownership of certain rights, such as the right to sell free TV, is being discussed in future BKM projects with Netflix Turkey.

In addition to financial structure, Netflix Turkey stands out for being very systematic in the financial follow-up part, is a considerable operation for daily function. Adnan Erkut Gul¹⁶, CFO of BKM, stated that the paperwork was intently investigated by Netflix teams throughout the entire 50 m2 financial process. He remarked that the approved invoice of each expenditure is uploaded to an application/tool used for budget control. He pointed out that with the help of this system, communication between field teams and corporation accounting was carried out more efficiently. He stated that after the partnership with Netflix, BKM is in the process of starting some applications to carry out financial follow-up and accounting transactions in its in-house projects. This discipline in Netflix's business following system is tangible effects on local production processes.

4.2.2. Production Process

As a result of giving enormous importance to the pre-preparation processes, Netflix minimizes instant problems during production. Burak Aksak interpreted this as follows; “ Actually, because of that approach and working method, you complete entire production in pre-preparation step in theoretically. ”

Burak Aksak is as both the scriptwriter and the director states that the production progress started very clear, since the venues, costumes, and the universe of 50 M2 were determined from the very beginning with all the details.

Another thing Netflix prefers is to have two different directors shoot for 50 M2. Selçuk Aydemir has directed the first four episodes. Burak Aksak has completed the last four episodes. Burak Aksak states that he does not know the reason for that approach. However, he remarks that this choice is not beneficial for the 50 m2 project. He expressed her opinion on this matter as follows;

¹⁶ Adnan Erkut Gül, personal communication, December 29, 2021.

“This choice became something that divided the universe and tone. Selcuk, who directed the first four episodes, of course, wanted to protect the world I wrote. I understand totally. If I had directed the whole season, I might have noticed some lacking on the set and changed it. But I think that Selçuk could not interfere with some things because he was worried about protecting the world I wrote. I have only said that for a few points.”¹⁷

In the production process of the 50 m2 project, the intertwining method had preferred, unlike the Turkish TV drama practice. The script of the entire season had been aforethought of as a movie script. The production calendar was planned according to this perception.

This is a system preferred by Netflix when planning production, as it reduces the production cost. However, the director/screenwriter Burak Aksak, who also said that this had some negative aspects too, explained as follows;

“I think the interweaving of four episodes lowers the spirit of a project. I guess that it gets decreased the performance of the actor, the set crew, the writer, the director. It's been affected everyone's performance. In terms of timing, it was like we shot four episodes in a month. It was short production progress. It was produced like a free-tv series. It was difficult”¹⁸

Burak Aksak, who states that this shooting system also is implemented on domestic platforms, says that he thinks this method will also affect the writing phase. He stated that it might cause the content to be written and planned applicable on this system. He remarks that he foresees the content will write in a way that should have been created with minimum cost, minimum workforce and, maximum player performance to be more desirable in this system.

¹⁷ Burak Aksak, in-depth interview, December 10, 2021.

¹⁸ Burak Aksak, in-depth interview, December 10, 2021.

Netflix pays maximum attention to international standards and some global rules in its production processes. Technical competence is a must in these internationally competitive projects. All content published on the same platform must be of a minimum quality standard for Netflix quality policies. It has a positive effect on technical equipment usages and, likewise, it could help establish technical conditions in the markets where Netflix operates conforming to international standards. However, the professionals in BKM who take a role in the production process of m2 state that they do not face some new demand for technical advice from Netflix since BKM always follows global technical standards to produce its local projects before the cooperation of Netflix progress.

In an in-depth interview with BKM CEO Zümrüt Arol Bekçe, she stated that they look at Netflix from the same managerial perspective. She said that the standards of BKM sets are unique, working comfort is like those of Netflix. Zümrüt Arol remarked that there was no conflict between Netflix and BKM during the 50 M2 work process. She mentioned that Netflix did not have any requests on any subject that has not been implemented in BKM before. One of the BKM in-house producers Cansu Aydın summarized state in mentioned that there was no significant difference between BKM quality standards and Netflix quality standards. However, she emphasized technical standard in the industry varies from production company to production company, and she indicated there are positive effects of Netflix standards on the industry, even if there is no noticeable technical support directly to BKM. Then also she added as follow;

‘I think that this stable and compact structure brought by Netflix has caused a general development in the sector as it has spread to other companies. It has turned into a system where better post-production could be done under better working conditions and technically better materials. Therefore, I think it has such benefit to the industry. Since all production companies wanted to do business in Netflix standards, they started working to attainment Netflix quality standards. Netflix trained and developed local teams in the field with Netflix teams. I think it is beneficial for the sector in

the way of employment and technological infrastructure. ‘¹⁹

In addition, working hours, insurances, job security on set, and working in a healthy environment are other topics Netflix management gives significant attention. Movies sets are entirely busy working environments. It has to complete the target within the specified time by working with more than 200 people. These working conditions can also create high stress and pressure. They have an attentive approach to prevent this stressful environment from causing mobbing on employees. The current working conditions on Turkish TV series sets were regulated by the intense effort of the industrial union before the Netflix operation started. According to this regulation, in the movie sets; daily working time is a maximum of 12 hours, weekly working time is a maximum of 72 hours. The workweek consists of a maximum of 6 days of work and 1 day of the repo. Weekly overtime is 6 hours. A maximum of 16 hours can be worked per day. When Netflix entered the market, working hours on the sets were already implemented in the Turkish TV series sector as determined by the union. These rights, which have already been won by the local struggle of the sector employees, are applied at the maximum level in almost every set. For this reason, line producer Onur akır states that Netflix has no direct influence on this issue. BKM Production Coordinator Berk Akman²⁰ remarks that despite Netflix being not a direct rule-maker in labor conditions, it has a positive effect on the spread of healthy working conditions and implementation of these conditions. Onur akır states that the most distinctive difference of working on a Netflix set is the sensitivity of the institution to combating mobbing in the business environment. He explains the reflection of her sensitivities about mobbing on the film set as follows:

‘‘Film sets are business environments people work pressured. Because production is a process that must be completed in a solid and short time,

¹⁹ Cansu Aydın, in-depth interview, December 2, 2021.

²⁰ Berk Akman, in-house producer BKM and production coordinator of 50 M2, in-depth interview December 6, 2021.

depending on external factors, with many variables competing with racing against time. It proceeds oppressively.

Affairs could not be negotiated. Sets are not democratic environments. It can cause some tensions and carelessness. Netflix has a hotline to prevent such unwanted situations. Independent. The whole team is informed about this before beginning production. Netflix says that If you have a complaint, don't feel alone and contact us per this hotline. And the system is working. It is debatable how well it works, but it does.

It had a transformative effect on me as well. While I could raising voice recklessly, I am more attentive now. ’’²¹

In addition, transparency is one of the things that an extensive company such as Netflix gives the most important for the whole process to flow completely as planned, Netflix want employees at all levels to report in the appropriate workflow. In this process, they manage the process jointly in regular communication with the executive producers of the productions.

This paperwork habit, which is not very common in the industry, helps the whole process to proceed in a controlled way from the very beginning to the end. F. Özerten, 50 m2 executive producer, summarized this way of working as follows;

“Structurally, Netflix's most apparent difference is its reporting and communication operation. It is a very transparent operation. Day by day, all developments were well or bad, financial improvements were good or bad, they were followed and communicated individually. That's why we routinely had regular weekly or more frequent meetings with both the production team and the creative team (both by Netflix and BKM professionals). The 50m2 making process was a process that we took by evaluating the developments weekly and by talking and discussing one-on-one with the platform officials. This approach is the most different from the

²¹ Onur Çakır, in-depth interview, December 6, 2021.

process in the local. Because while there is event-based communication in the local area, there is a routine communication calendar here. An executive producer like me has regular meetings in his life, such as a finance meeting every Wednesday at two o'clock.

They have a guideline to follow. When working in harmony with them, actually saves time for the future.’’²²

4.3. Post-Production Process

4.3.1. Post Production

The post-production process is mean that handling the entire materials of the film before it becomes the finished product. In this process, visual and auditory materials such as images, sounds, photographs obtained during the production phase are transformed into a meaningful and predicted form in the Pre-Production phase with the help of computer and specially produced hardware and software. Although it may seem like the last stage of a movie or series making process, the post-production enforcement starts in the pre-production process and continues during the production process too. With some of the plans decided during the preparation phase of the film, the work of the post team begins. In the post-production phase, not only video editing is done. At the same time, visual and auditory effects are added to the film, color enhancement and editing are done if necessary.

This is how it managed the post-production processes of the films it made at BKM until now. It has completed the post-production process of all films with a manager who followed and managed this process. Nazife Cantürk as a post production supervisor defines post production process as follow;

‘‘The offline montage begins first. Then music and sound processes begin, translation processes start, and effects processes begin. Coloring begins,

²² Faruk Özerten, in-depth interview, December 28, 2021.

usually near the end of the effects. And the final mixing is done with the last finished picture. Before the mixing process, all effects must be completed and placed in the film. Because when the final mix launch, all online operations must be completed. ’’²³

Nazife Cantürk stated that although BKM has an established system since it has been operating in the field of film production for many years, there are some changes in the way the post-production teams work with Netflix.

BKM carries out its post-production processes by receiving freelance services from a third-party company. This method had also followed in 50 m2 post-production. The 50 m2 post-production had completed in 1000volt studios. In the in-depth interview, Nazife Cantürk stated that the difference between this process and the previous film production processes is the timing of the post teams' involvement in the project and their follow-up disciplines. Nazife Cantürk stated that in productions within BKM, the post-production team generally does not start full-time work with the shooting or the preparation process of the film. She stated that first of all, the script was read by post-production crews then a post calendar is created in theatrical movies too. N. Cantürk added that If the supervisor needed to be on the shoot, the post-production officer could be on the set but that the post-production team used to start working at a particular stage of the offline editing in the following processes. But she stated that this working order has changed with Netflix. She stated that post-production teams also started working full-time from the very beginning. She stated that all the footage shot in Netflix projects was uploaded to a closed and security-protected system used by Netflix on the same night.

She said all the daily footage was watched daily by Netflix and the post-production team. In this way, it is aimed to start offline editing with raw images designed from the ground up. She stated that if there is a glitch other than what is planned during the pre-preparation process, solve the problem by re-shooting without leaving it to the post process. Nazife Cantürk, who stated that with this working style, post-

²³ Nazife Cantürk, post-production supervisor in BKM, in-depth interview, January 5, 2022.

production processes can be used for creative works as they should be, summarized her opinion as follows;

‘‘Recently, post-production operations had moved away from the creative side. The post-production process had used to be accepted as cleaning up technical issues. Netflix follow-up strategies prevented this problematic pattern. Only the operations that need to be applied in the post-production could be done, and it is possible to progress in a more planned and programmed manner Through Netflix’s control and follow-up system.’’²⁴

Netflix has a common demand for quality control and technical competence for its different content purchased from the whole world over. For this reason, utmost care is taken to ensure that each project complies with the Netflix quality standard. It is valid for Netflix Turkey content. For this reason, there is a standard that Netflix follows the demands of the post-production process. Nazife Cantürk defines this as doing the highest quality work possible. She states that, they work according to a guidebook determined by Netflix and that equipment with technical competence which they deem appropriate should be used for this quality standard. She summarized these demands as follows;

‘‘The cameras to be used are certain. At least a 4k or 6k resolution image is a must. You cannot use some cameras used for low-budget jobs. For example, if it is shooting with a drone camera, lighter cameras should be used. The ratio of the footage taken with this type of camera in the movie or the episode is also definite. You need to use one of the cameras in the determined by Netflix. If you have a request other than this, it is not accepted.’’

²⁴ Nazife Cantürk, in-depth interview, January 5, 2022.

BKM defines itself as a company that has always taken care of using advanced technological technical equipment since its first film "Vizontele". For this reason, she adds that since this technological equipment is already used in BKM, the post-production process in the 50 M2 processes is not affected technically, but follow-up applications that relieve the post process in terms of work follow-up and discipline.

‘‘The latest technology has always been used in the post-production process at BKM. If the technical conditions in Turkey did not allow, we did some post-production processes at ARRI²⁵ in Munich. Therefore, it did not cause a dominant change in BKM. We also had used to set some unwritten rules and settle them. Recently, we have stretched these rules because we have been making too many films. I can say that we remembered these rules with 50 M2.’’

We are in an age where the post-production process has developed substantially with digital technologies. Thanks to these technological developments, magnificent projects can be done with incredible visual effects and designs. However, Nazife Cantürk stated that this digitalization has some negative aspects within the sector. She also remarked that there might be some problems such as too many repetitions and not giving enough importance to pre-preparation, since there is no film cost like in the 35 mm film era, thanks to digital shooting. She added that this situation has turned into a cliché like "we'll fix it in the post", which makes the job of post-production teams more difficult. However, she stated that due to the follow-up strategies used by Netflix in their projects, some shooting mistakes were not ignored since daily monitoring was done and they were requested to be re-shot without leaving to the post-production process. She stated that it was defined as a positive effect on the work of post-production teams.

²⁵ ARRI Media is Germany's largest post-production facility, providing the highest level of creative and technical services. <https://www.arrimedia.de/en/home/>

In addition, Nazife Cantürk stated that the entry of an international platform such as Netflix into the domestic market creates new job opportunities for trained and talented people. She stated that the post-production officer working in the 50 M2 process started to work full time with Netflix through the joint business with Netflix and the network provided for this occasion. She added that Netflix and similar global companies create important opportunities for talented people in Turkey to develop an international career and that she thinks this is very important.

4.3.2. Marketing Process of 50M2

After Netflix provides local content to its users, it aims to continue to attract the attention of the audience by implementing local communication applications for the series or movies on the platform. After entering the Turkish market, Netflix started to produce certain advertisements for the TV series and programs in its content. In this direction, Netflix's localization of the product and promoting the product to the audience/consumer with local advertising messages show that it uses the local advertising strategy, one of the global advertising strategies. For that matter, it is possible to say that the global advertising strategy of Netflix, a global brand, is "being local." (Gülmez, 2019)

Considering the culture and lifestyle of the country in which it operates, it designs the marketing process in order to announce the TV series or movies in its content to the audience and to create a "will to watch" in the audience for those TV series or movies.

Netflix carries out the promotion process for original Netflix projects in Turkey with its in-house teams. Selin Özyürek, Head of Digital in BKM, stated that this process started with the preliminary preparation of the film in deep- interview. She remarked that the Netflix Turkey marketing team has begun to create ideas for the market after the emergence of the episodes. She says that during the 50 M2 production process, all promotional materials such as teasers were determined by

NetflixTurkey. She briefly summarizes the marketing strategy of Netflix Turkey for 50 M2 as follows;

‘‘After the entire series had been completed, they released a teaser a month and a half before the release date. Netflix did not share posters. They applied active marketing process for the week before release date and two weeks after the series aired.’’²⁶

On January 15, 2020, it was announced that the shooting started with a short video featuring the screenwriter and director Burak Aksak and the actors.²⁷ And then there was not a very active promotion process while the shooting was going on. The release date has also been affected since the production progress got a little longer due to the pandemic. And when the production process of 50 M2 has been completed and is ready for broadcast, the planned broadcast day has been announced. The broadcast date of the 50 m2 series, which will release on January 27, 2021, was announced on December 28, 2020, with a post made on social media accounts.²⁸

These promotional materials were prepared under the responsibility of Netflix and published in accordance with the strategy determined by the marketing team of Netflix Turkey. Later, the BKM digital marketing team also supported these posts by re-sharing them on the official social media channels of the company.

After this promotion process, when asked how BKM's in-house strategy for movies differs from this Netflix strategy, Selin Özyürek states that BKM shared teasers much earlier than the release date when releasing films. Selin Özyürek states that It will be able ineffective to promote if marketing materials share too early. Because there is a variety of content to serve the audience in market. Therefore she remarks that she support Netflix's promotion schedules.

²⁶ Selin Özyürek, in-depth interview, December 1, 2021.

²⁷ <https://www.instagram.com/p/B7VYZImrbk/>

²⁸ <https://www.instagram.com/p/CJVR81aAETZ/>

That's why it's strategically right for Netflix to plan more aggressively as the release date approaches, she adds. She added that Netflix specifically included Turkish executives in their marketing teams, for a global company to do marketing in the local market and to capture the target audience culturally. Selin Özyürek also stated that in a market with a lot of content and intense competition, one of Netflix's biggest strengths is its financial strength in delivering each project to the right target audience. To explain this, she gave an example of one of the contents of BKM called “Sen Hiç Ateşböceği Gördün Mü?”

“The fact that their budget is very high shows itself in the marketing process. For example, we never did a scenario integration. It integrated firefly effects into the most-watched shows during the promotional period of Sen Hiç Ateşböceği Gördün Mü? integrated them into their scenarios.”²⁹

²⁹ Selin Özyürek, in-depth interview, December 1, 2021.

CONCLUSION

Digital streaming platforms are increasingly becoming an important media outlet worldwide for audiovisual content. For the past years with the introduction of VoD platforms into the Turkish market, the Turkish serial industry and its practices have been transformed. In addition, with the entry of Netflix turkey to the market, the period of creating content for a global target audience has begun for local companies. Netflix Turkey started its activities as of 2018 and then Netflix's original content started to be made. These contents were products produced by domestic production companies by Netflix global's principles. This caused some unconventional effects in the production processes and sector structure of the production companies.

The effect of Netflix Turkey on production processes and local market reflexes, the changes for the creative crew with the online streaming platforms were investigated. To investigate this new progress and its practices 9 semi-structured in-depth interviews were conducted with the people who work for the serial industry in Turkey and also 50 M2 Netflix Original series.

The Turkish TV series industry is one of the successful markets that has made a name for itself around the world. Turkey is the second most series export country after America. Due to the increasing export rates over the years, there are several advanced production practices and some established systems. However, since this established order was not around an institutional structure, there were some problems as the set discipline was mostly based on the master-apprentice relationship.

One of the most significant effects of Netflix on the industry is the disciplined workflow and corporate structure. In the interviews, all participants define working in the original Netflix series as regular work follow-up and planning. It is one of the results to take from the interviews that keeping an archive, paperwork follow-

up, and the clarity of the workflow positively affects the serial production processes. It is possible to say that Netflix's corporate business system is an effect that will transform the uncertain and event-based approach that stands out in the industry.

Netflix doesn't accept substandard structures in areas such as job security, the rights of labor, set comfort that can be different from international producers. For this reason, Netflix stipulates that the production company, with which it will realize its original project, offers a working environment suitable for these conditions. Interviewees stated that Netflix's work environment rules did not have an exact effect on BKM because the work environment of BKM, the production company of the 50 m2 series, which is considered as a case study, is the same as Netflix. On the other hand, the same participant stated that this healthy working environment, which is demanded, will spread to the entire industry since all production companies will want to sell content to these global companies in the future.

There is a common quality standard in every content by Netflix Turkey. Therefore, it demands that all products comply with those quality standards. In this context, local producers have to use equipment that meets the quality standards set by Netflix. Netflix also paves the way for accessing technologies that cannot be accessed due to financial problems in the sector, as it also provides the financial support that is a condition of using this equipment. The series, 50 M2, discussed in this study was content produced by a company that had the financial power to access high-quality technical equipment. For this reason, they stated that they are already using the high-tech equipment preferred by international colleagues demanded by Netflix and for all BKM projects. The participants who worked in BKM for various levels remarked that Netflix had not had a critical effect on the high-tech hardware used by BKM. However, again, the participants stated that although this support has not a critics effects on their projects, Netflix's technological quality standards demands will have a very positive effect on the small production companies in the market. This way, small-scale producers will also have access to the equipment they need to produce high-quality work.

Due to the financial support provided by Netflix and other platforms, the way to tell stories that cannot be released on TV will be the paved way in time. The financial risk posed by the rating system and long durations of episodes on television series caused that production companies could not make production decisions easily. Netflix and other digital platforms would help minimize this critical financial risk for production companies in the next days.

According to the findings obtained from the interviews conducted for this study, it is concluded that the duration of the Netflix series also directly affects the working conditions. The fact that Netflix completes the series whole season production for a period like a movie production and releases all season episodes together also helps to create a regular shooting schedule. It can help that both set workers, actors could have a more organized personal and social life.

This planned and regular living pattern will create difficulties in team building for television series in the long run and that the interest of professionals in working on the television series may decrease is one of the effects of Netflix that emerged in the interviews. In the interviews, the professionals who work in the production part of the series-making process stated that with the increase in digital platforms, the opportunity to work in several different jobs a year. This means both a regular income and a more flexible personal life. Therefore, it is one of the results that it may be difficult to find a technical team who will want to work on television sets if these contents increase.

Netflix Turkey, which wants to reach a global audience with local stories, could not use this motto correctly in every task is one of the findings from the study. Netflix is a company that segments its target audience with user data. But when it enters the local market, it must understand the demands of that market and the local audience. For this reason, it may be those correct directions are not given at some points in local storytelling. In the interviews with the screenwriter Burak Aksak, it

has concluded that the 50 m2 series discussed in this thesis study can be an example of this.

In addition to being a global company, Netflix also respects the rules and sanctions of the country in which it operates. Netflix prefers to avoid conflict with these rules. It tries to adapt to the restrictions or regulations of the countries themselves. But of course, as a content provider, it doesn't have the same drastic restrictions as television channels in Turkey. For this reason, Netflix appears as one of the new channels to tell the stories of the minorities and disadvantaged groups that cannot find a place on television. In the same context, it paves the way for the production of different genres, which could not be made because it did not receive much attention on television. It is interpreted as one of the positive effects of Netflix in terms of increasing diversity for Turkish storytelling. It appears to be an effect that increases the likelihood of creators who can find a medium for their different stories to write and direct the kind of stories they can both get financially for and want to make.

The fact that Netflix and other global platforms are preparing to enter the market after finding a place in the market as a content purchasing channel besides box Office and television channels. So, it becomes a factor to increase competition. And then, the production companies and content creators have new ways to actualize their projects. It could be said that there are different business plans and profitability ratios of producing content for TV and making content for digital platforms such as Netflix. However, the fact that television series have high risks despite their high profitability is not a risk that every producer or production company can afford. Therefore, it is not easy for young professionals who don't have serious equity to produce new content and be involved in the tv series production. Screenwriters and directors who have not been recognized well taking a significant role to exist in the sector for these investments which carry great risks is a low possibility. However, due to Netflix's company policy and acquisition opportunity, new names can have equal rights and conditions with recognized companies. Creating a space

where young talents and storytellers can show themselves is interpreted as one of the positive effects of Netflix on the Turkish TV and TV series industry.

In addition to all these, the entry of foreign investors into the market increased the demand for content. These increasing demands diversify the existing job opportunities. Also, It has increased economic sustainability for working people in this industry and who are part of the supply chain.



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