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POPULATION ECOLOGY AND LOCAL SPECIALIST FILM PRODUCTION  
ORGANIZATIONS IN TURKISH FILM INDUSTRY

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Population Ecology and Local Specialist Film Production Organizations in Turkish  
Film Industry

Popülasyon Ekolojisi ve Türk Film Endüstrisi'ndeki Yerel Uzman Film Yapım  
Organizasyonları

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## ABSTRACT

The increase in the number of films, audience, and box-office revenues since the beginning of the 2000's attracted attention to the Turkish film industry. This expansion can be rationalized with the domination of oligopoly of large organizations, which are called "generalist" organizations in the Population Ecology Theory. As claimed by the resource partitioning model (Carroll, 1985), parallel to the increased number of generalist organizations, the number of specialist organizations increases as well. Similarly, the Density Dependence Model (Hannan, 1986) posits that an increase in the density of organizations within an environment results in the increase of formation of new organizations. In the case of the Turkish film industry, the increased density in terms of the number of film organizations resulted in the emergence of specialist film organizations. In addition to this, the presence and visibility of Turkish films in various international film festivals are also remarkable. Therefore, this study focuses on local specialist film production organizations. The data of local film organizations is collected from the website of Box Office Türkiye ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)). Data about the awards of the production organizations is collected from a list prepared by Yamaç Okur. The study starts in 2005 when the General Directorate of Cinema began to support independent film producers with financial resources, and ends in 2019 when the COVID-19 Pandemic emerged. The software Populus is utilized to check the Density Dependence Model with the Turkish film industry data. Additionally, interviews are conducted to ensure the validity of the study. Lastly, the common assets of the "survived" ones are studied. As a result, the survival of a local specialist film production organization depends on the past experiences and network of the founder, or that organization produces films of its founder or only a single director.

**Keywords:** Population Ecology, Density Dependency, Local Specialist Film Production Organizations, The Turkish Film Industry, Survival

## ÖZET

2000'li yılların başından itibaren film sayısı, seyirci sayısı ve gişe gelirlerindeki artış dikkatleri Türk sinema sektörünün üzerine çekti. Bu büyüme, Popülasyon Ekolojisi Teorisi'ne göre (Carroll, 1985) “genelci” organizasyonlar olarak adlandırılan büyük kuruluşların oligopolünün egemenliği ile rasyonelleştirilebilir. Nihayetinde, genelci organizasyonların sayısındaki artışa paralel olarak, Kaynak Bölümleme Modeli'nin önerdiği gibi uzman organizasyonların sayısı da artmaktadır. Benzer şekilde, Yoğunluk Bağımlılık Modeli (Hannan, 1986), genelci organizasyonların yoğunluğunun artmasının uzman organizasyonların sayısında artışa neden olduğunu varsaymaktadır. Türk film endüstrisi örneğinde, genelci film organizasyonlarının hakimiyeti ve artan yoğunluğu, uzmanlaşmış film organizasyonlarının ortaya çıkmasına neden oldu. Bunun yanı sıra, Türk filmlerinin çeşitli uluslararası film festivallerindeki varlığı ve görünürlüğü de dikkat çekicidir. Bu nedenle, bu çalışma yerel uzman film yapım organizasyonlarına odaklanmaktadır. Yerel film organizasyonlarının verileri, Box Office Türkiye'nin web sitesinden ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)) alınmaktadır. Yerel uzman film yapım organizasyonlarının uluslararası film festivallerindeki varlıkları ve ödülleri, Yamaç Okur'un hazırladığı online listeden kontrol edilmiştir. Bu araştırmanın zaman aralığı, Sinema Genel Müdürlüğü'nün bağımsız film yapımcılarına kamu kaynağı sağladığı ilk yıl olan 2005'ten başlamakta ve COVID-19 Pandemisi'nin ortaya çıktığı yıl olan 2019'da sona ermektedir. Yoğunluk Bağımlılık Modeli'ni Türk film endüstrisi verileriyle çalışmak için Populus yazılımı kullanılmıştır. Son olarak “sürdürülebilir” olanların ortak özellikleri incelenmiştir. Sonuç olarak, yerel bir uzman film üretim organizasyonunun sürdürülebilirliği, kurucunun geçmiş deneyimleri ve sektördeki kişisel bağlantıları ya da o kuruluş ya kurucusunun ya da sadece bir yönetmenin filmlerini çekmesine bağlıdır.

**Anahtar Kelimeler:** Popülasyon Ekolojisi, Yoğunluk Bağımlılığı, Yerel Uzman Film Yapım Organizasyonları, Türk Film Endüstrisi, Hayatta Kalma

## INTRODUCTION

It is noteworthy that the Turkish film industry has been growing since the beginning of the 2000's. This expansion can be seen from the increased number of films produced. The number of films produced by local film production organizations was 213 in 2005. It increased to 452 in 2019. Additionally, the number of audiences was 15.633,747 in 2005 and increased to 37.699,637 in 2019. Another noteworthy increase is seen in total box-office revenues. It was 100.905,570 TL in 2005, and it increased to 594.312,786 TL in 2019 ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)).

The growth in the Turkish film industry can be explained by the domination of oligopoly of large organizations. This domination of hierarchical network structure is examined by Kalemci and Özen (2011). Once regional distributors dominated network structure of the organization of the industry value chain transformed with the opening of the industry to the foreign investments in 1989 (Kalemci & Özen, 2011). On the other hand, the number of small, specialist, independent film organizations was also increasing. In addition, the awarded Turkish films by international film festivals and organizations are also on the rise. Therefore, attention must be paid to those award-winning independent films and their producers as much as the major, mainstream films and their producers.

In the Population Ecology Theory, the organizations which are competing in a variety of domains simultaneously are called "generalists". On the other hand, the organizations focusing on only one or a limited few domains are called "specialists" (Carroll, 1985). The Resource Partitioning Model posits that as the dominance of hierarchical/generalist organizations increases, the emergence of specialist, small organizations increases as well. Deriving from here, the main research question of this study is whether the concentration of film organizations resulted in the emergence of independent, specialist film organizations in Türkiye? In Türkiye, there are five generalist film producers and distributors: Özen Film, United International Pictures (UIP), Warner Bros., Kenda and Mars Cinema Group. On the other hand, the number

of specialist film producers is changing rapidly. Accordingly, another research question is whether these local specialist film production organizations can survive or not.

From this departure point, the specialist-independent and generalist-mainstream film organizations are examined in this study. It is vital to define what an independent/specialist is at first. The definition of independent film varies according to different scholars. Even in some cases, “independent” is used as a synonym for “arthouse”. Süalp (Antrakt, 2003) discusses five properties of an independent film. The first one is the anti-hierarchical production organization and division of labor. The second is the diverse expression styles and rupture from the traditional ones. The following one is to have disquiet during the production and be able to reflect this disquiet to the audience. The fourth is to perceive the audiences as active and participant rather than just as numbers at the box-office. Finally, the last one is to be distant from capitalist, commercial, and consumption-based mass production. In this study, “independent” is used instead of hierarchical network structure. Independent film production and distribution can be perceived as opposition to a vertically integrated organizational structure. As opposed to vertical integration, the funding mechanisms of these independent film organizations differ from the ones of mainstream film organizations. The financial resources of independent film organizations are individual producer’s own financial funding, crowdfunding, and contribution from the General Directorate of Cinema or other national/international funds.

The film organizations being the unit of analysis, there are three different types of film organizations in the U.S.A. according to their strategies within the population under examination. The classification of film organizations is taken from Meziar and Meziar (2000). The first type is a vertically integrated organization, “generalist producer-distributor”, acting as mainstream. The following are “specialist producer” and “specialist distributor” organizations, which can be called independent. The data of organizations is gathered from the Box Office Türkiye website ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)). All organizations are listed according to their activities in the

film industry value chain. The ones involved in both production and distribution are called “generalist producer-distributor”. In addition to this, only film producers are called “specialist producer”, and only film distributors are labeled as “specialist distributor”. In the case of the Turkish film industry, there is no “specialist distributor”. Therefore, the focus is on specialist film production organizations in Türkiye.

The temporal scope of the study begins with the year 2005 and ends with the year 2019. The main reason why the year 2005 is chosen as the starting point of this study is that in that year, the General Directorate of Cinema began to provide and institutionalize public funds to independent film producers. The time period of the study ends in 2019 because of the COVID-19 Pandemic. The pandemic started at the beginning of 2020. Because of it, there appeared a gap in film production as it happened in any realm of our lives.

In the second chapter, the theoretical background of the study is focused. Following that, in the third chapter, an overview of Population Ecology literature is provided by referring to the empirical studies conducted in the field.

Since the context of this study is the Turkish film industry, in the fourth chapter the history and changes in the film industry value chain are evaluated. In order to understand the structure of the Turkish film industry better, the change in the organization of the film industry value chain throughout time is explained. To do that, Kalemci and Özen (2011) study is utilized. The study focuses on the effects of globalization on the quality and diffusion of movie theaters. Film production, distribution, and screening stages are studied for two different periods, before and after the entrance of U.S.A. film organizations to the Turkish film industry. According to historical studies, the Turkish film industry was not a sector until the 1950s (Erkılıç, 2003; Evren, 2005). It was all about screening movies, but not producing them. Regional distributors dominated the network structure before the opening of the industry to foreign direct investment in 1989. After the opening for foreign direct investment, the big U.S.A. film organizations dominated the hierarchical network structure. Beginning in the mid-1990s, the Turkish small production organizations

benefited from Eurimages funds, television channel sponsorships, and the Ministry of Culture support. United International Pictures (UIP), Warner Bros. Pictures, and Özen Film became the dominant distributor organizations in Türkiye. Consequently, the organization structure of the Turkish film industry changed from “network organization” to “hierarchical network organization” (Kalemci & Özen, 2011).

The Turkish film industry was far from being an industry at the beginning. Until the end of the 1930's, there were only two Turkish film production organizations, Kemal Film, and İpek Film. It took its industry appearance between 1949 and 1959 with the introduction of other production companies, directors, and new films. However, the industry was still missing big studios and technical equipment. So, it was still dependent on the foreign film industry. It was mostly imported films still. The effects of the protests of 1968 were felt until the end of the 1980's not only in Turkish film production but also in foreign film productions. The entrance of television to the houses decreased the demand for movie theaters. The crisis during the 1990's affected Turkish film production in a negative way. Also, the audience being the main driving force for the film industry, could not support local productions. After the January 24 Resolutions, as Esen (2010) called the “1987 Hollywood coup d'état” the American film production companies Majors (Universal Pictures, Paramount Pictures, Warner Bros. Pictures, Walt Disney Studios, and Sony Pictures) took over the Turkish movie theaters with the 1989 Foreign Investment Law. As the law allowed foreign organizations to establish their distribution organizations, those Majors established their distribution networks. As a result, screenings of foreign movies increased (Kalemci & Özen, 2011). From that point, foreign companies' dominance at the distribution refrained local films from being screened at movie theaters (Scognamillo, 2010).

Since the law No. 5224 of July 14, 2004, on the Evaluation, Classification and Support of Cinema Films, was passed 613 independent films were supported by the General Directorate of Cinema. However, this increase in the number of films was not

observed at the same rate as the number of audiences. The ratio of the number of screened films to the number of audiences was decreasing (Kalemci & Özen, 2011:72).

Following the above explanations on the Turkish film industry, it is clear that there is an inevitable domination of the U.S.A. in the Turkish film industry. Therefore, it is important to observe both similarities and differences between the industries of the two countries. The main difference between the two industries is that Turkish cinema is initiated and supported by the state from the beginning. Instead, the American cinema was established by entrepreneurs. It goes without saying but there is a scale gap between the two industries. Therefore, the two industries are compared periodically and structurally. By comparing the two industries, it would be clear to see the state's vital role in the film industry.

The data for this study is collected from the website of Box Office Türkiye ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)). The data consists of films produced and distributed in Türkiye between 2005 and 2019 (inclusive). The producers of these films, distributors, year of production, revenues, number of audiences, and founding of specialist film organizations are utilized in the analysis of the study. All the data is collected for local organizations first. Since there is no indication of being local or foreign on the website of Box Office Türkiye, all organizations were coded as “local” or “foreign” manually by checking their websites and searching through the web. Only specialist film production organizations are taken as samples. 810 local specialist film production organizations existed during the time period of this study.

The software Populus is used for meeting the theoretical framework with industry data. According to the Density-Dependence Population Growth simulation, the carrying capacity of the population of the Turkish film production organizations has not reached yet. Following that, data is classified and explored further to explore which specialist film production organizations have more survival chances. Since this study is searching for whether local specialist film production organizations survive or not, an index is calculated and called the “productivity index”. Then five criteria are set to catch “survived” local specialist film production organizations. These criteria are

(1) the first film must be before 2019, (2) the last film must be after 2005, (3) must produce at least one film between 2005 and 2019 (inclusive), (4) not producing as mass producers, (5) the average lifetime is being four years or above. Out of 810 local specialist film production organizations, only 46 of them fit those criteria. In addition to that, 46 “survived” local specialist film production organizations were checked from an online list (<https://docs.google.com/spreadsheets/d/13LzvmuU4kXrxKqZzivjvMxbSubMQp-StaObYHEFSMdg/edit#gid=1490444625>), prepared by Yamaç Okur, who is currently a producer at Ay Yapım and was also a member at the Support Committee at the Ministry of Culture. The list is inclusive in terms of both time period and major festivals, whether their films take part in film festivals or not. 12 local specialist film production organizations took place in various international film festivals during the timeframe of the study. When the common properties of these 12 organizations are checked, the founder seems to have a pivotal role in ensuring the survival of the independent film production organizations. Additionally, three interviews were conducted. The analyzed content of the interviews is grouped under five categories. These categories are (1) film companies that produce films by the founder or a single director seem to have more chances of survival. (2) The number and the rate of one-year lived producers are increasing. (3) The Turkish independent film production organizations are similar to the French independent film production model. (4) The Turkish independent film production model is not sustainable. (5) Digital platforms affected the independent film production in Türkiye.

This study is composed of eight main chapters. In the first chapter, the introduction of the thesis is provided. In the second chapter, it is aimed to provide a theoretical framework for a better understanding of the results of this study. The following chapter provides various empirical studies with the given theoretical framework. After that, in the fourth chapter, the Turkish film industry, beginning from its first days, is portrayed. The Turkish film industry’s comparison with Hollywood is represented. Additionally, the French film industry is compared with the Turkish film

industry. In the following chapters, the methodology, findings, and discussion of the study are explained. Lastly, the study is finalized with the conclusion.



## **THEORETICAL BACKGROUND**

### **2.1. THE POPULATION ECOLOGY OF ORGANIZATIONS**

Michael T. Hannan and John Freeman (1977) asked the question “Why are there so many kinds of organizations?” in their article that is similar to the question “Why are there so many kinds of animals?” in a bioecology article (Hutchinson, 1959). In order to answer this question, from organizational ecology perspective (Hannan & Freeman, 1977; Hannan & Freeman, 1989) organizational life cycles of organizations are examined as if the organizations are like any living organism in biology. Organizational birth, growth, decline, and death are the stages of the organizational life cycle of different organizational forms.

In the organizational ecology field, organizations are studied in populations, that compete for the same set of resources within the same environment. Organizations sharing the same resource pool are called “populations of organizations”. The particular set of resources in which organizations flourish is called “niche”. The emphasis is on the organizational population while discussing what is niche in organizational ecology. A niche is a set of environmental conditions in which a population of organizations can survive (Hutchinson, 1978; Hannan and Freeman, 1989). Accordingly, an organization to be founded in a specific niche means that the resources of that niche increase in order to feed that form of organization (Hannan & Freeman, 1989:125). Wide niches are occupied by generalist organizations while narrow niches are occupied by specialist organizations (Carroll, 1985).

The diversity of organizational forms as well as the coexistence of these different forms are studied by this perspective by examining the distributions of generalist and specialist organizations in several industries. According to Hannan and Freeman (1987), it is essential to study specialist organizations for various reasons. One of the reasons is that a new organizational form leads to organizational diversity. In addition to that, since continuous changes take place in the environment, the same

form of organizations can only survive for a definite time period. The main reason for that is resources are limited within the environment. Once the changes arise in the environment, existing organizational forms will be replaced by or coexist with the new organizational forms. As a result, dominated by one or few organizational forms will be replaced, and before-neglected fragments of the society will be seen and satisfied as well.

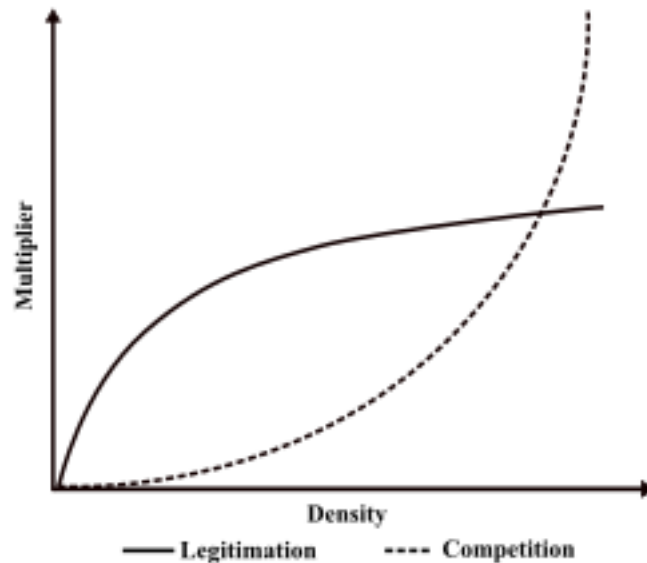
From Population Ecology perspective, there are three main approaches to define the founding of new specialist organizations: Density Dependence (Hannan, 1986), Resource Partitioning Theory (Carroll, 1985), and Niche Formation (Hutchinson, 1957). The Density Dependence Theory (Hannan, 1986) defends that the relationship between the number of organizations in a population (density) and the formation of new organizations is curvilinear. Resource Partitioning Theory defends that mature industries are dominated by few organizations with generalist strategies in order to utilize the central resources such as broad-based customers. As a result of this strategy, peripheral resources, such as a narrow base of customers are freed; so, newly founding specialist organizations can exploit these peripheral resources (Swaminathan, 1998). The niche formation approach argues that in an industry new niches are formed as the outcome of environmental discontinuities such as the introduction of new technology or consumer preference changes. These new niches are opportunities for specialist organizations to flourish (Swaminathan, 1998).

### **2.1.1. Density Dependence**

Population Ecology formulates models to describe long-term changes in populations (Hannan & Freeman, 1989) by defining changes in the density, such as increases and decreases in the number of organizations in a population, as the outcome of two evolutionary forces (cooperation and competition). This is called the Density Dependence Model (Hannan & Carroll, 1992).

According to Hannan and Carroll (1992) cooperation is characterized as social processes of legitimation. In the initial phase of a new organizational form, the actions of this new organizational form practices may not be accepted as legitimate because there exists no consistency at the beginning. As seen in Figure 2.1, in this phase, the addition of every new organization, and the increase in population density have an effect in a cooperative way such as being able to compete with established organizations in an effective way. This means population growth increases the survival rate of the organizations.

**Figure 2.1 Legitimacy and Competition**

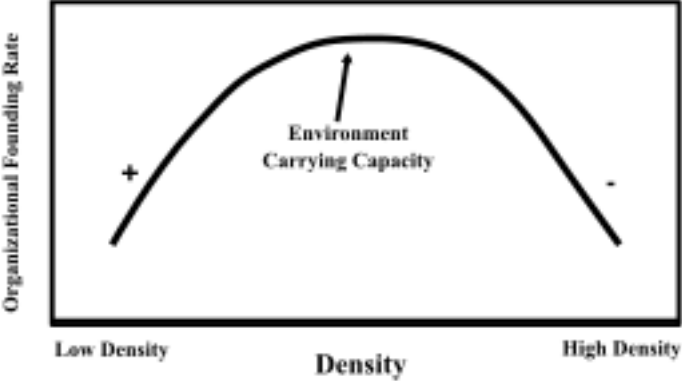


Source: Carroll, 1997

As the organizations grow in number within a population, their legitimacy becomes well acknowledged. Then legitimacy is not a problem for organizations anymore. After a while, since the resources are limited within the environment, organizations begin to face increasing competition. Because the environmental

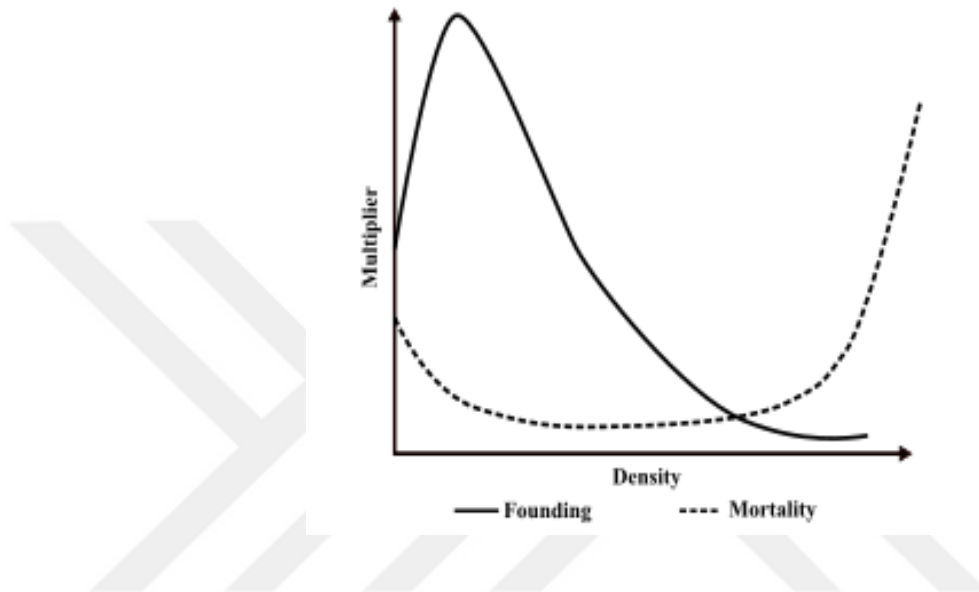
carrying capacity is stable over time, it becomes more difficult for organizations to exist. To be more specific, as it is stated by Hannan and Freeman (1987: 912) “A carrying capacity for a form of organization is the limit on the size of an organizational population that can be sustained in society.” It can be seen from Figure 2.2. From that point, increased population density affects the survival of organizations in a negative way. Consequently, it can be said that the founding rate of organizations has an inverted U-shape as shown in Figure 2.3. When increased density reaches the environmental carrying capacity, the before-legitimation process reverses into a competitive one, and then the founding rates lower and mortality rates increase.

**Figure 2.2 Carrying Capacity**



Source: Carroll, 1997

**Figure 2.3 Density Dependence**



Source: Carroll, 1997

In organizational populations, as stated above, density dependence is the result of the effects of both cooperation and competition. Accordingly, the founding and death rates of organizations are affected by the number of existing organizations within a population, which is the density.

In the early examples of density dependence, competition is perceived as a dimension of the density of the population. This type of competition is called “diffuse” (Carroll, 1997). The reason is that within the same environment, each organization competes equally for the limited existing resources. The various characteristics of single organizations are not taken into account in the early models of density dependence. In the later studies of Population Ecology, the competition among organizations within a population becomes a more multifaceted and realistic representation than just a simple one (Carroll, 1997). In these recent models, attention is paid to clarifying the possibility of competition to occur among heterogeneous

organizations and to clarify the impact of competition. The difference among organizations affects and structure the competitive environment of the population.

In studying the Density Dependence Model on organizational subpopulations, two issues must be considered. The first issue is that organizational forms need to define population boundaries. The second issue is that certain organizational forms must be specified accurately in terms of the geographical level of analysis. It is vital to choose the geographical level of analysis where most of the competition takes place.

The Density Dependence Model can be used for studying generalist and specialist film organizations in Türkiye. In terms of the first issue, the boundaries are definite for both specialist and generalist film organizations. Specialist organizations are different from those of mass producers in the Turkish film industry. For instance, unlike generalist organizations, specialists purposely stay small. Being responsive to changes in the environment and an easily manageable internal structure are some of the advantages of being small in size. Additionally, the marketing strategy of specialist film organizations differs from those of generalist film organizations. Instead of mass advertising campaigns, specialist film organizations benefit from word-of-mouth communication and positive comments from movie critics. For the second one, a national level of analysis should be done while studying the Density Dependence Model. As a result, the Turkish film production organizations are focused.

Carroll and Hannan (1989b) also claim that if organizations are born at high density rates, then they experience higher mortality rates. This is because high-density during the time of founding means greater competition. Selection is exercised through limited resources within the environment. According to Carroll and Hannan (1989b), this “liability of scarcity” may force new organizations to become weak competitors. Following this, “the tight niche-packing” argument defends that in a high-density environment, new organizations exploit the periphery resources. If they approach to center resources, it will bring them a higher mortality risk. Further, the ones successfully approaching resources in the center will face even higher mortality risk.

### **2.1.2. Resource Partitioning**

The likelihood of organizations competing with each other depends on their differences. This type of competition is called “localized” competition (Hannan & Freeman, 1977). It takes different names with minor variances in multiple approaches such as localized competition, Resource Partitioning Theory, and Niche Overlap Theory (Baum & Haverman, 1997). What is common to all three approaches is that they all defend that different parts of the “resource space” (Carroll, 1985) are in the interest of organizations within a population. According to the first approach, localized competition (Baum & Mezias, 1992), competition over the same set of customers will be more likely to occur among organizations with similar sizes, locations, and prices for the products. The degree of similarity in terms of size, location, or price for the product sets the level of competition in this approach.

Categorization of organizations into two groups depending on their size and type of products as large-scale generalists and small-scale specialists is the second approach, the Resource Partitioning Theory (Carroll, 1985; Carroll & Swaminathan 1992, 1998). According to this theory (different from localized competition), two groups of organizations compete with similar types of organizations as well as different ones. Generalists’ competitive power over specialist organizations stems from the reason that generalists utilize large amounts of resources. With the aim of maximizing profit, generalist organizations target the “center of the market”, where the largest amount of resources rest. The higher the amount of resources occupied by generalists, the fewer niches will be available for the specialists. However, freed resources that are located in the periphery by generalists led to the founding of specialist firms to exploit these peripheral resources (Swaminathan, 1998).

Resource Partitioning Theory also defends that specialist and generalist organizations can co-exist without interrupting each other, because they exist in different resource spaces. In other words, it is expected that market concentration and the founding of specialist organizations have a positive relationship (Carroll, 1985). It

is stated by Hannan and Freeman (1977) that generalist organizations focus on a broad base of customers and; therefore, offer a broad range of services or products. On the other hand, when compared to generalists, specialist organizations offer a narrow range of services or products that address a narrow base of customers. Additionally, Carroll (1985) specified that small generalist organizations are eliminated by large generalist organizations. As a result, large generalists dominate the markets, and some resources are freed in the periphery as described above. Consequently, specialist organizations proliferate in the market by utilizing the free resources at the periphery. As it is also stated by Swaminathan (1995:663):

High concentration in the market implies that specialists can draw on peripheral resources without entering into direct competition with generalists. Increasing levels of market concentration frees more peripheral resources. Existing specialists may grow and survive longer by exploring such resources. The increased availability of peripheral resources may also facilitate the founding of specialist organizations. (Swaminathan, 1995:663)

The Resource Partitioning Theory explains the founding and mortality of organizations differently from traditional industrial economics theories (Lomi, 1991). Different from Resource Partitioning Theory, traditional industrial economics theories do not concern themselves with organizational forms. The effects of concentrated markets on generalist and specialist organizations are different. For traditional economics theories, regardless of the organizational forms, concentrated markets cannot be perceived as a welcoming environment for founding new organizations. On the other hand, as mentioned by Resource Partitioning Theory, concentrated markets, and generalist organizations discourage other generalist organizations from entering the market. Generalist concentrated markets encourage the founding of specialist organizations.

### **2.1.2.1 Liability of Newness**

Stinchcombe (1965) states that new organizations are inclined to fail more when compared to older, well-established organizations. The main reason is that new organizations cannot get as much advantage of the limited resources within the environment as the organizations with long tenure. In addition to this, the selection process may favor the older and well-established organizations with specific internal and external routines, repeated interaction, structural inertia, high reliability, or accountability (Hannan & Freeman, 1984). Low levels of legitimacy and incapability of effective competition against established organizations can be added to the list of reasons why new organizations suffer from a greater risk of failure than old and well-established ones. Therefore, the failure rate of new organizations is higher than that of old ones. This high rate of hazard of mortality may stem from not only the age of organizations but also the size of organizations, “liability of smallness” (Aldrich & Auster, 1986; Freeman & Hannan, 1983). It is adequate to state that there exists the dominance of larger organizations over their environment which is composed of resources and other organizations.

### **2.1.3. Niche Formation**

The evolution and mortality of specialist organizations are studied with niche formation. The niche formation approach describes the emergence, growth, and failure of specialist organizations with exogenous factors, such as basic technological improvements and changes in consumer tastes (Tushman & Anderson, 1986).

In addition to niche formation, niche width, and niche overlap theories are utilized to examine the mortality of specialist organizations. In the early niche literature, a niche in a broad “resource space” is defined as the product market (Freeman & Hannan, 1983), the consumer market (Carroll & Swaminathan, 2000), or the technological market (Podolny, Stuart, and Hannan, 1996). Hannan et al. (2007)

conceptualized a niche in an audience space. For this study, the conceptualization of audience space seems more relevant for film industry analysis. The reason is that the amount of resources that a film organization can get from its niche is mainly determined by the audience. From this departure point, it can be expected that if niche width, which is measured by demand from the audience, increases then the founding rate of specialist organizations will increase.

Niche is also defined by the organizational ecology perspective as “the space of N-dimensional resources within which a population of organizations can exist” (Hutchinson, 1957). The “range of the environmental dimensions across which a population exists” (Carroll, 1985:1266) defines the width of a niche. Therefore, generalists operate in a wider niche when compared to specialists who have narrower resources in a particular environmental condition (Carroll, 1985).

Niche overlap theory recognizes the relationship between the similarity of organizations and competition (as localized competition does). However, its focus is on the market that each organization operates in rather than the organizational characteristics differences or the products as the previous one does. For instance, according to Baum and Singh (1994a, 1994b), focusing on the different age groups of children in the case of a population of daycare centers in Canada, the level of niche overlap is high depending on the high similarity level of the age groups. As a result of that, the competitive intensity will be high as well.

In this study, from Population Ecology (Hannan & Freeman, 1977) generalist and specialist organizations (Carroll, 1985) terms are utilized to conceptualize the presence of different film organizations in the Turkish film industry. As stated by Hannan and Freeman (1987) it is vital to study special organizations for organizational diversity, the main focus of this study is the Turkish specialist film production organizations. Among the three approaches which explain the emergence of organizations, since niche formation explains the formation of a niche by exogenous factors, the first two approaches are utilized. First, the Density Dependence Model (Hannan, 1986) was utilized to understand the emergence of Turkish specialist film

production organizations. It is checked whether the Turkish film industry reaches its carrying capacity (Hannan & Freeman, 1987:912) or not. Second, under the Resource Partitioning Theory (Carroll, 1985), the liability of newness, which explains that new organizations are more prone to fail when they are compared to old ones, is utilized to explain the high number of one-year lived Turkish specialist film production film organizations.



## **LITERATURE REVIEW**

The focus of this study is specialist film production organizations. Their emergence and their survival conditions are in the interest of this study. The main research question of this study is whether the concentration of film organizations resulted in the emergence of independent, specialist film production organizations in Türkiye. The following research question is whether these local specialist film production organizations can survive or not? Therefore, the purpose of this literature review is to analyze the studies which utilized a theoretical framework concerning the emergence and survival of specialist organizations in various industries. With this aim, studies done by employing the Resource Partitioning Theory, Density Dependence Model, and niche formation approach will be focused on in this section. The application of these theories in as many industries as possible is reviewed. The industries in which these studies are done are not just film production organizations but also newspaper publishers, restaurants, voluntary associations, labor unions, brewers, credit unions, automobile producers, biotechnology companies, health care organizations, telephone companies, hotels, banks, wineries, construction companies, and television broadcasters.

### **3.1. RESOURCE PARTITIONING THEORY**

Glenn R. Carroll in 1985 studied 2,808 American local newspaper organizations in 7 cities of the United States between the years 1800-1975. Carroll stated that focusing on only large organizations results in an incomplete analytical framework. Therefore, he expands the examination to all organizations in the industry as being large and small, generalist and specialist.

Newspaper chains faced an increased share of the market from 1920 to 1976 in the United States. The reason for this was economies of scale. High production costs of the first copy only decline for additional copies to the marginal cost. It is very similar

to the advertising costs. Advertisers can reach larger numbers of readers by advertising in one large paper than some other smaller ones. In addition to that, since larger newspapers can be printed for lower cost because of economies of scale, it is cheaper to advertise on larger ones. As a result of this, larger newspaper organizations survive, whereas smaller ones disappear. This leads to the concentration of the market in the long run.

When this concentration is revisited, according to Bagdikian (1977) just examining the failure patterns of dailies can be deceiving because the increased founding and disintegration of chains neutralize these patterns. It is also misleading to consider the chains as one group. The reason is that they are not a uniformed organization. They may show many similarities, but they are all self-interested corporations. As a result of treating each chain as an independent firm, the newspaper industry would be seen as less concentrated.

It is also misleading to focus on dailies. The reason is that there are more varied organizations, which publish different kinds of newspapers. They are smaller and also publish less frequently than daily newspapers since their audiences are more specialized as ethnic and religious groups, neighborhood, political, and professional communities.

Newspaper organizations from an ecological perspective can be grouped as generalists and specialists. Large newspaper organizations are mostly vertically integrated, that is they undertake diverse types of activities such as producing, printing, distributing, and promoting. Whereas small newspaper organizations are dedicated to producing for a specific audience, such as an ethnic or neighborhood community, they tend to be specialized vertically. In terms of organizational ecology, niche width (Freeman & Hannan, 1983) for those two types of organizations is different. Large newspaper organizations, and generalists, compete in a broad range of domains simultaneously. On the contrary, small newspaper organizations focus on only one or a few domains at the same time. It is also shown with the historical data that the average

size of generalist newspapers is larger in monopolistic local markets than they are in competitive local markets.

The data used for statistical analysis was collected for the period of 175 years (1800-1975) from seven randomly selected American metropolitan areas of different sources. For each of the 2,808 newspaper organizations, birth, death, and last observation dates were recorded. Since 504 of these were censored, using a linear regression model with the dependent variable of organizational longevity would bias the model's estimates. Therefore, a stochastic hazard function is used to test the model. Makeham's stochastic model is utilized to interpret the age-dependent process.

In the Resource Partitioning Model, the level of resource concentration in the mass market is the important independent variable. In the newspaper industry, consumers and advertisers are the two critical resources. The researcher computed the Gini index of inequality, which is used to estimate concentration levels, independently for each resource variable at five-year intervals.

According to the Resource Partitioning Model, the generalist organizations would increase, and the specialist organizations would decrease at the time of increased concentration of the general mass market. Therefore, the researcher split the data into generalist and specialist newspaper organizations. Tuma's (1980) maximum likelihood program is used to test the model.

The results were in line with the predictions of the Resource Partitioning Model. When the concentration level increases, generalist newspaper organizations die faster than specialist newspaper organizations. In addition to this, the researcher included the population size of the local environment as a control variable since the competitive process would be sensitive to the size of the market. As a result of this, as expected, the outcome once agreed with the Resource Partitioning Model, as the size of the local market did not change the process.

At the end of the research, it is shown that not only the large and dominant newspaper organizations but also the small and specialized newspaper organizations are important for the complete analysis of the industry. The researcher proved that

specialist newspaper organizations respond differently, as death rates go down, than generalist organizations, as death rates go up, to concentrated markets. The mechanism behind the specialists' growth is the contribution of this research, as it was only known that the number of specialist organizations were increasing.

Alessandro Lomi (1995) examined from 1964 to 1988 the effects of location dependence and unobserved heterogeneity on founding rates of rural cooperative banks in Italy. It is because geographical barriers, localized resource environments, and processes of legitimation and competition depending on geographical boundaries affect the evolutionary dynamics of organizational populations. Therefore, there are two reasons why the researcher focused on the effects of location dependence and unobserved heterogeneity at the founding phase. First, there is not much theoretical study on the role of spatial factors on organizational founding. There only exist studies with different levels with different studies (Barnett & Carroll, 1987; Baum and Mezias, 1992; Freeman & Lomi, 1994). Second, although there are some studies about the unobserved heterogeneity effects on organizational mortality (Freeman, Carroll, and Hannan, 1983; Hannan, 1988; Peterson & Koput, 1991), there is no research on the effects of unobserved heterogeneity for organizational founding rates.

The population of Italian rural cooperative banks of 13 geographical regions is selected because of three main reasons. First, the well-documented heterogeneity in social and economic conditions enables us to study the effects of unobservable factors linked to location dependence on organizational founding rates. Second, since these specialist banking organizations cannot expand beyond their local levels, they are very sensitive to localized processes of legitimation and competition. Third, complete and accurate data allowed for the analysis of founding rates. Out of 13 regions of the sample, four are located in the north, three are located in the center, five are located in the south and one is an island region. This sample encompasses 91 percent of all rural cooperative banks (RCBs) in Italy. Data on founding activity is from the official publications of the Banca d'Italia. Data about covariates are from the Italian National

Institute of Statistics (ISTAT) and a statistical bulletin published by the Italian Ministry of Labor and Social Security.

The density of rural cooperative banks is measured at the regional level. The environmental covariates to control observable differences in economic, social, and competitive conditions are included such as agricultural employment, the number of branches of popular cooperative banks existing in the region, the total number of cooperative organizations in the macro-area, the total value of bank deposits in the region, and the total number of mergers and acquisitions among rural cooperative banks. The Poisson regression model is utilized to estimate these covariates' effects on founding probabilities.

The level of analysis is important because density can affect the organizational founding process across different levels of analysis. According to the findings of the study, although the legitimation does not differ across models of local and nonlocal, competition is almost seven times stronger at the regional level than it is at the national level. The population of rural cooperative banks can be separated into two distinct heterogeneous segments in terms of the relationship between location, density, and organizational founding rates, which is density-dependent competition. At the first heterogeneous segment, the relationship between density and founding rates is comparatively flat from its peak until the maximum density point. This means the founding rate descends almost 10 percent from the peak where density reaches its maximum. In the second segment, the founding rate descends to almost 88 percent. This shows that in this heterogeneous segment, the competition is stronger. Although these two segments are notably different in terms of density-dependence competition, they are similar when it comes to legitimation. The maximum founding rate is 72 percent larger than the rate at minimum density for the first segment. It is 78 percent larger for the second segment. In Addition to these, there is evidence that the resource partitioning effect acts similarly across different levels of analysis. According to the researcher, future studies need to explore the results in a more detailed analysis.

Baum and Haverman (1997) focused on the Manhattan hotel industry years between 1898 and 1990 to analyze two distinct perspectives, differentiation, and agglomeration, to define the choice of entrepreneurs for product and geographic location. The researchers' concern was how similar an organization is to the others that are nearest to it. In addition to this, researchers take each organization as being distinct from each other in terms of three dimensions: geographic location, price, and size. Whereas the ecological perspective classically accepts foundings as homogenous. From a differentiation perspective, the threat of direct competition sets apart similar competitor firms; but complementary differences get dissimilar firms closer, which is called localized competition from in ecological perspective. As Hawley (1950: 201-203) described, organizations differentiate to eliminate competitive pressures. Hawley (1950:209) also defined two different forms of mutualism as commensalism and symbiosis. The former is positive interdependence based on supplementary similarities; whereas the latter is interdependence based on complementary differences. On the other hand, from an agglomeration perspective, similar competitors get closer to benefitting from spillovers of competitors. As a result, hoteliers prefer to locate new hotels close to established hotels similar with one dimension such as price. This is done to take advantage of agglomeration economies. On the other hand, hoteliers prefer to locate new hotels close to established hotels different from other product dimensions such as size. The reason for this is to get away from the localized competition and form complementary differences.

According to the information above, the first hypothesis of the study is: "New organizations choose positions on product and geographic dimensions of organizational domain that differentiate them from incumbents. The more similar new entrants are to incumbents in terms of product offerings, the further they choose to locate geographically from incumbents, and the closer new entrants are to incumbents in terms of geographic location, the more different the products they choose to offer." (Baum & Haverman, 1997:309).

Shared infrastructure and information externalities being two agglomeration

economies lead organizations to locate close to established other similar organizations. From this departure point, the second hypothesis is: “New organizations choose positions on product and geographic dimensions of organizational domain close to those of established firms. The more similar new entrants are to established firms in terms of product offerings, the closer they choose to locate to established firms, and the closer new entrants are to established firms in terms of geographic location, the more similar the products they choose to sell.” (Baum & Haverman, 1997:312). The last emphasis is about the mixture of these first two hypotheses of differentiation and agglomeration. Therefore, the third hypothesis is: “new organizations choose positions on product dimensions of the organizational domain that trade-off effects of localized competition with incumbents on some dimensions for benefits of agglomeration economies on others. The more similar new entrants are to neighboring established firms on some product dimensions, the further they choose to locate from neighboring established firms on other product dimensions.” (Baum & Haverman, 1997:313). The data encompasses 614 transient Manhattan hotels. Researchers excluded residential hotels serving long-term or permanent guests. The main data source is Hotel Red Book for the research. Other three additional sources are the Manhattan Classified Directory (Yellow Pages), the Annual Directory of the Hotel Association of New York City and the Hotel and Travel Index. Three basic service categories are used for hotels as economy, mid-price, and luxury. The variables of the study are geographic, size and price distances, which are calculated by Euclidean distances to neighbors. Control variables for the model are hotel characteristics such as size, price, and geographic location and environmental characteristics such as hotel density of Manhattan as well as annual gross national product (GNP). Three-stage least squares (3SLS) and generalized method of moments (GMM) estimation models are utilized. The results of the study do not completely support either the first differentiation hypothesis or the second agglomeration hypothesis. These two opposing hypotheses are partially supported. The tendency of new hotels is to be located geographically close to established hotels with similarly priced and differently sized ones.

Carroll and Swaminathan (2000) studied brewing firms in the United States from 1938 to the end of 1997 to investigate the dynamics behind the rise and proliferation of microbreweries. 2,251 breweries that make or sell malt beverages in the United States are analyzed for the time period given. Both quantitative and qualitative research methods are utilized in an effort to study the founding and mortality rates. Researchers used the Resource Partitioning Model and offered revisions about the two major parts of the theory. First, for the broader application of the theory, a model of scale-based selection can be utilized for the analysis of scale competition among mass producers. Second, in the case of mechanisms that lead to resource partitioning, for creating the specialist niche, organizational form identity has a vital function.

According to the study, the U.S. brewers exceeded the number of German brewers for the first time in at least two centuries. As it is known, Germany is the country where beer is consumed at the highest rate. The role of microbrewery is worth noticing; because almost all breweries founded in the last 20 years are associated with the “microbrewery movement”. These breweries are small and specialized. They brought new kinds of malt beverages to the American market. Some scholars overlook this renewal movement. For instance, in his book, Porter (1980) gives the brewing industry as an example of barriers to entry. According to Porter (1980: p.9) “In the brewing industry, product differentiation is coupled with economies of scale in production, marketing and distribution to create high barriers”. Sociologists like Perrow (1986: pp.211-13) also defend the same argument for other industries, which are dominated by a few large firms. Contrary to this, there are also organizational sociologists (Peterson & Berger 1975; Carroll 1985; Powell 1985) who propose the reverse as the dynamics could lead specialist organizations to emerge in mature and concentrated industries.

The first hypothesis of the study is ”under conditions for resource partitioning, as the market concentration rises, the founding rates of specialist organizations will rise (a) and the mortality rates of specialist organizations will fall, (b) where the (necessary

but not sufficient) conditions for the operation of resource partitioning process include a finite and heterogeneous organizational resource environment, the existence of scale advantages for generalists organizations, and limits on the target range and adaptability of both specialist and generalist formal organizations.” Second hypothesis is “under scale-based competition, the greater a firm’s aggregate distance from larger competitors on a size gradient, the higher its organizational mortality rate.” Third one is “under resource partitioning based on identity, the legitimation effects of specialist organizational form density depend on the form’s normative valuation relative to identity claims (a) and its social visibility (b).”

Although the primary source for the research was the volume *American Breweries* by Bull, Friedrich, and Gottschalk (1984), the researchers verified the data from various other resources, such as published annual lists of brewing firms, web pages of both individual companies and sites that cover the brewing industry. The variables are organizational form (mass producer, microbrewery, brewpub, or contract brewer); size (production capacity); number of sites (for brewpubs only); and also, a dummy variable to verify whether the brewery was in operation at the beginning of the period. The aggregate counts of density; foundings and deaths for all years are calculated. Standard modeling frameworks are used to estimate models of organizational founding and failure rates since these events are rare and directed by stochastic processes. For founding rates, the organization population is taken as the unit of analysis. If the data were overdispersed, researchers would have used the Poisson regression model or negative binomial regression models to analyze. However, the overdispersion in data is because of the zero foundings for some years. Therefore, researchers used zero-inflated Poisson in this study. The LIMDEP package is operated to estimate the effects of covariates.

For mortality rates, organization is taken as the unit of analysis. Piecewise constant rate model is operationalized to estimate the organizational death rates. The TDA package is used to estimate the effects of covariates in models. According to the findings of the study, hypothesis 1a is confirmed as the founding rates of specialist

organizational foundings increased with the market concentration. At the same time, hypothesis 3 about the form identity argument is supported. For microbreweries and brewpubs, density has a positive effect on founding, which is called the legitimation process. On the other hand, the effect of density for contract brewers differs. Hypothesis 2 is also confirmed as can be seen from “smaller” mass producers’ failures. As Kitsock (1999: p.65) said, they are “too big to be small, and too small to be big”. Hypothesis 3, about the specialist organizational mortality, resulted in differences in the organizational forms. Mortality of microbreweries declines with concentration, which is parallel with hypothesis 1b. It is the same with brewpubs and contract brewers, but the significance drops as the firm ages. Density-based legitimation effects on specialist mortality results are also mostly inline with hypothesis 3. Microbreweries and brewpubs’ density effect is strong and negative. It means, that as these forms proliferate, they become legitimized. However, there could not be found any legitimation from density evidence for contract brewers. In the conclusion of the study, the findings of both qualitative and quantitative are inline with each other as the researchers stated “craftlike form identity plays a critical role in the appeal and life chances of specialist breweries”. It is also shown that the value of studying small organizations is worthwhile both economically and socially.

Mezias and Mezias (2000) studied increased foundings of specialist producers and specialist distributors as a result of the increased concentration of large generalist firms in the American film industry by using the Resource Partitioning Model. They also examined the specialists being more active in the creation of new film genres than those of generalists. Within the studied time period, 1912-1929, the American film industry experienced remarkable growth from a few annual releases to almost a thousand films (Mezias et al. 1996). From the beginning of the feature film industry, two kinds of organizational forms, generalists, and specialists, were present. In 1925, generalist film organizations were at their peak in terms of number. However, in 1929, generalists decreased by almost 50 percent in number and specialists were twice as generalists in number. It is researchers’ assertion that the freed resources from

generalist film organizations led to the emergence of specialist film organizations, which occupy the specialized niches with those resources. Therefore, the first hypothesis is: “Greater concentration levels among generalists will have a positive effect on founding events of specialists.” It is also important to test this hypothesis about Resource Partitioning Theory only after scale economies become significant. In this case, scale economies are reached by the spread of expensive film duplication equipment costs.

As Wade (1996) suggested small firms are more likely to innovate after a dominant technology has emerged. It is also true that the emergence of feature-length films allowed innovations in storyline, character, and theme development. Thus, the second hypothesis is: “Specialist firms will be more likely to participate in the creation of film genres.” 27 genres, during the first year that it appeared, are used to categorize films and their firms as innovators. For the research’s primary source of data, two volumes of the American Film Institute (AFI) Catalog of Motion Pictures: 1911-1920 and 1921-1930 are utilized to gather information about companies and their strategies. All firms between 1912 and 1929 that produced, distributed, or produced and distributed are included. The categories are generalist producer-distributors, specialist producers, and specialist distributors. The two dependent variables are producer foundings and distributor foundings. As an independent variable, concentration levels of generalist producer-distributors are calculated with respect to both production and distribution. In order to calculate two independent concentration levels for production and distribution, two GINI coefficients are used: production GINI and distribution GINI. Control variables for the analysis are density, density squared, mass, GNP, GNP growth, producer foundings lag, producer foundings lag squared, distributor foundings lag and distributor foundings lag. The Poisson Model and the negative binomial regression model (to correct a possible violation of assumption) are used to make the analysis with the LIMPED program (Greene 1989). The null hypothesis is: “There should be no difference between the proportion of specialists within the genre and the proportion of specialists in the population as a whole.” The alternative hypothesis: “The

difference between the proportion of specialists within the genre and in the population as a whole should be positive.” Sign test and Mann-Whitney-Wilcoxon non-parametric tests are utilized to assess the null and alternative hypotheses. The result of the models strongly supported the first hypothesis, which is that the increasing levels of concentration of generalists had a positive effect on the foundings of specialist film production and distribution. Likewise, all test results showed that specialists are more innovative than generalists in both the production and distribution of films.

Dobrev, Kim, and Hannan (2001) focused on automobile manufacturers in Britain, France, and Germany between the years 1885 and 1981 to assess the effects of concentration in the center of the market on organizational niche width and organizational mortality. According to the researchers, although firms with wide niches have advantages, they also face intense competition. As a result of competitive pressure, firms in wide niches are under threat of disbanding. At the same time, this competition also leads to organizational transformations, which eventually end up with resource partitioning. In the study, density dependence, resource partitioning, and structural inertia are utilized. According to the ecological perspective, when consumer preferences become concentrated, the center of the market grows with many large firms. These firms can exploit economies of scale and at the same time competition at the center intensifies. As a result of this, Density Dependence Theory proposes that mortality hazard increases. This mortality hazard is more obvious for specialist organizations. Because generalist organizations have broader niches enabling them to transfer their operations to less competitive regions when compared to specialists. Especially the changes in technical niches are subject to strong inertial pressures. Therefore, the strong structural inertia increases the risk of mortality.

Researchers focused on organizational niches with the aim of understanding how the effects of an organization’s position within an industry shape its life chances. As organizational niche theory posits (Freeman & Hannan 1983; Hannan 1989; Peli 1997) when the variation in the environment is high and coarse, the generalists have an advantageous position when compared with specialists. Following this, the study's first

hypothesis is “An organization’s hazard of mortality is a decreasing function of its niche width.” The second hypothesis is built on localized competition (Hannan & Freeman 1977; Barnet & Carroll 1987; Podolny, Stuart, and Hannan 1996; Han 1998) and density-dependent legitimation and competition (Hannan and Carroll 1992, 2000). The second hypothesis is “An organization’s mortality hazard is a positive increasing function of its niche-overlap density.” According to Hannan (1997), the effects of density on competition and legitimation are high in the early years of population growth and the effects decrease over time. Accordingly, the researchers’ third hypothesis is “The effect of niche-overlap density on an organization’s hazard of mortality declines with industry age.” As the structural inertia theory (Hannan & Freeman 1984) posits, changes in core features increase mortality hazards. From this departure point, researchers have two hypotheses. The fourth hypothesis is that “Change in an organization’s niche width increases its hazard of mortality.” The fifth hypothesis is that “Change in an organization’s absolute market position increases its hazard of mortality.” The next hypothesis is about the Resource Partitioning Theory (Carroll 1985). According to the researchers, changing the niche from the center to the periphery requires serious reorganization. Therefore, the sixth hypothesis says; “An organization’s likelihood of changing its niche width and position increases with its niche-overlap density.” In addition to these, depending on organizational learning literature especially with emphasis on the competency trap (Levitt & March, 1988), the seventh hypothesis is “The greater an organization’s experience with a type of change, the greater is its likelihood of repeating the same type of change and the lower is its likelihood of making other kinds of changes.” Lastly, relating organizational complexity with niche width for automobile manufacturers, the researchers stated that the “momentum of change” declines with complexity. The eighth hypothesis is “The effect of an organization’s experience with a type of change on its likelihood of repeating that change declines with the complexity of the organization.”

The data used in the research is a study of codes from worldwide reports of automobile historians and collectors, and also from two encyclopedias called Georgano

(1982) and Baldwin et al. (1987). 828 French, 373 German, and 995 British firms are included in the data. The dependent variable for the analysis is taken as disbanding or exiting to another industry. Niche width, one of the independent variables, is measured by the spread of engine capacity a firm produces in a given year. Another measurement is competitive intensity, which is taken as the number of organizations existing in the focal firm's niche. The reason is that this measurement is taken as proportional to niche-overlap density. The next measurement is position relative to the market center. The researchers set the center range between the lowest minimum and highest maximum engine capacity among the four largest firms. The market center is defined as the midpoint of this range. A firm's position is therefore its distance from this market center. Another measure is the change in niche width and position. The created dummy variable of niche-width change is taken as one if the firm's niche expanded or contracted at least 10 percent when compared to the preceding year. The last variable, organizational size is measured in terms of capacity and scale of operations. Annual production of automobiles reflected this measurement in the analysis. Researchers excluded from the analysis two world war years, because motor vehicle production was stopped for private use in these three countries. As a result of the analysis, hypothesis 1 and hypothesis 2 are strongly supported. Hypothesis 3 is also supported as expected that the estimated interaction of niche-overlap density and industry age is negative and significant for all three populations. As hypothesis 4 posits, with the increase of change, the hazard of mortality (disbanding or exit in this term) is increasing.

Anand Swaminathan (2001) examined the U.S.A. wine industry between 1941 and 1990 to investigate the founding and mortality rates of specialist organizations by extending the location-based Resource Partitioning Model by incorporating the role of identity of specialist and generalist organizations. Generalist and specialist organizations are interested in separate resource spaces for the traditional Resource Partitioning Model. According to Swaminathan (2001), generalist organizations can also flourish in specialist spaces as well as generalist ones by utilizing robust identities. He claims that these robust identities of generalists would lower the founding rate and

raise the mortality rate of specialist organizations. Identity-based resource partitioning with the impact of increased brand proliferation and advertising intensity of generalist organizations, hypotheses are tested in the study. Swaminathan (2001) called it a “farm winery” that is a small, specialist, and premium winery. These specialist wineries do not have enough resources to invest in mass-market advertising, unlike the generalist organizations. On the other hand, the generalist, mass production organizations were producing generic wines. It is also emphasized that emerging niches with the common sets of beliefs can lead to the legitimation of specialist organizational forms. This collective identity cannot be imitated by generalist organizations. In addition to that, as generalist organizations have a wide range of resources, they can adopt value-adding routines from the periphery (Leblebici et al., 1991). As a result of the characteristics of both generalist and specialist organizations, specialist organizations evolve in two ways. First, the authenticity of specialist organizations can increase their life chances. Second, the higher the generalist organizations have a robust identity, the lower the founding rate and the higher the mortality rate of specialist organizations.

There are three hypotheses tested in this study. The first hypothesis is about maintaining authenticity for specialist organizations. Hypothesis 1a is: “Mid-sized farm wineries will experience lower mortality rates than other farm wineries.” Hypothesis 1b is: “Farm wineries that own greater amounts of vineyard land will experience lower mortality rates than other farm wineries.” The second and third hypotheses are about achieving robustness for generalist organizations. The second one mentions that brand proliferation of generalists will lead to a robust identity for generalists and lower the growth of specialists. Hypothesis 2a is: “The greater the average number of brands per mass-producer winery, the lower the founding rate of farm wineries.” Hypothesis 2b is: “The greater the average number of brands per mass-producer winery, the higher the mortality rate of farm wineries.” The third one is about an increase in advertising spending with the aim of generating an image of quality that can lead to a robust identity. Therefore, hypothesis 3a is: “The greater the average advertising intensity of mass producer wineries, the lower the founding rate of farm

wineries.” Hypothesis 3b is: “The greater the average advertising intensity of mass producer wineries, the higher the mortality rate of farm wineries.”

The Density Dependence and Niche Formation Models are utilized to test hypotheses. Organizational characteristics such as size, vineyard ownership, product type, and mode of entry are also incorporated into the mortality model. Event count and event history data are examined to test the resource partitioning process. Event count models, negative multinomial models, are also utilized for founding rates and event history analysis is also used for mortality rates. The population of organizations is taken as a unit of analysis. The researcher used a random effects model since his data contain multiple time series. The chi-square likelihood ratio statistic test is used via a maximum likelihood estimation program with a statistical package TDA. The data of winemaking firms is obtained from annual directories of wineries, which are gathered together by Wines and Vines. Out of 1,711 farm wineries founded during the time period studied, because of missing firm data of independent variables, only 1,389 firms are used for the analyses. All hypotheses are supported, except Hypothesis 2b. The opposite of Hypothesis 2b, the more the brand proliferation of mass producers takes place, the less the mortality rate of farm wineries occurs. The study proved that the identity characteristics of both specialists and generalists affect the evolution of specialist organizations. Smallness and reputation for high quality, which are identified with vineyard ownership, are two characteristics of farm wineries that bring high performance. In addition to this, large farm wineries face higher mortality rates when compared to mid-sized wineries. Larger vineyard ownership among farm wineries is associated with a lower mortality rate. Last but not least, robust identity via brand proliferation and higher advertising of mass producers blurs the distinction between generalist and specialist organizations.

### **3.2. DENSITY DEPENDENCE**

Barnett and Carroll (1987) focused on the early telephone industry for the years between 1900 and 1917 in the United States, to study competition and mutualism between legally autonomous companies from an ecological perspective. By utilizing organizational mortality, growth, and technological capability models, researchers study organizational interdependence. The study is important because, in organizational ecology, mutualism and competition were not studied together.

From an ecological perspective, competition can be explained as, if the organizations affect each other in a negative way, then it can be said that they are competitive. On the other hand, if the organizations improve each other's position, then they are mutualistic. This mutualism can be between single organizations level or between populations of organizations level or even between communities of organizations level.

Scholars have different understandings about the environment. Traditional ecological theorists who defend that the environment is completely exogenous from organizations (Hawley, 1968), are followed by researchers (Hannan & Freeman, 1977) defending that in addition to the environment being exogenous, it also selects and favors some organizations with particular characteristics. There are also views saying that organizations actually control (Perrow, 1986), enact (Weick, 1979), and coupled with (Granovetter, 1985) the environment. It is researchers' suggestion that by analyzing the interdependencies among organizations, the environment of an organization could be determined.

The early telephone industry data of Johnson, Washington, and Iowa counties in southeast Iowa is studied for the analysis. Two types of telephone companies existed: mutual companies and commercial countries. The former is organized primarily by farmers and people living in rural areas. This mutual type raises money from its members in order to provide telephone service in a non-profit base. On the other hand, the latter is organized as any business firm with the aim of profit. To study

interdependence, researchers modeled the death rates of single organizations depending on the organizational population density following Hannan and Freeman (1988a, 1988b). In order to make clear the distinction between direct and diffuse interdependence, the density is calculated separately according to geographic proximity. “Local density” is defined as the number of companies operating within the same country. On the other hand, “non-local density” is the number of companies operating where that company does not operate.

For the organizational mortality, researchers utilized statistical constructs of the instantaneous rate of death. To model how the death rate is affected by organizational and environmental characteristics, the Gompertz model is used. Tuma’s (1979) maximum-likelihood program, RATE, is used to assess the model. The results of the analysis show that the death rate of the companies declines with age, which is called the liability of newness (Freeman, Carroll, and Hannan, 1983). Analysis with the dummy variables to indicate the type of the organization, commercial or mutual; issued stock, or offered long-distance service. As a result, the long-distance providers have lower death rates since these companies are financed by stock issues. Models 4 and 5 prove that company size has a negative effect on the death rate.

About the density dependence effect, the local density effect for commercial companies is positive. This means these companies are responsible for direct competition. In additions to this, the following variables do not have a statistically significant relationship with the rate of death: county size in square miles, number of farms, indexed farm value, number of asses per county, number of cattle per county, number of swine per county, indexed average wage per worker, number of dwellings, township population, and rural population.

The study showed that organization-level diffuse competition exists among telephone companies. It is seen that mutual forms grow better in geographically dispersed rural areas in number rather than in the size of single companies. Except at very high-density levels, mutual was commensal, decreasing the rate of death, with neighboring companies. Mutual forms were symbiotic as well because their presence

increases the probability of commercials offering long-distance service. On the other hand, commercial companies grow in the number of individuals working rather than proliferation in more densely populated areas. Since the commercials are ecologically dominant, they control important resources. As a result, their presence increases the death rates of neighboring companies. Contrary to that, their relationship with mutual companies is symbiotic. In conclusion, the researchers found that companies in separate geographical locations are found to be competitive with each other, regardless of organizational form. The two common organizational forms in the industry at the time of the study flourished in different niches and they were symbiotically related. In other words, single organizations have mutualistic relationships. At the same time, researchers found evidence that indirect competition existed among communities of organizations. In this way, the statements about the environment being in relationship with organizations are supported.

Carroll and Hannan (1989) studied the effects of density at the founding phase on organizational mortality rates. The researchers used five populations' data of the American labor unions (1936-1985), Argentinian newspapers (1800-1900), Irish newspapers (1800-1970), San Francisco region newspaper publishers (1840-1975), and the American brewers (1633-1988). The claim of the researchers is that high density at the founding phase leads new entrants to liability of resource scarcity. Since niches are occupied, new entrants must find themselves marginal resources.

There are two reasons why density is studied. First, simultaneous, and delayed effects of density can influence differently the life chances of organizations. Second, the growth of organizational populations can be better explained. As organizations grow, after reaching the peak some face sharp declines, and some sustain stability. Researchers state that different from other studies about density, this study focuses on the decline from the peak rather than the stability. At the time of the study, organizational ecology was focusing on the shape of the growth path until the peak (Hannan & Freeman, 1989), while this study concentrates on the decline from the peak.

In the research, the Density Dependence Model is used to study the rates of organizational founding and mortality. The researchers focused on two consequences of high density at the time of founding. The first one is “liability of resource scarcity” and the second one is “tight niche packing”. Liability of scarcity can be explained, as due to the high density at the founding phase, since resources are scarce, new organizations may not be able to end up with full-scale operations. The second consequence, tight niche packing, is that rather than highly exploited resources, new entrants compete for marginal resources. Even if new entrants successfully exploit those marginal ones, after some time, they will try to exploit the richer center resources. In this case, they will face competition with other specialized organizations with the same aim. As a result of this, the mortality rates for these organizations will be higher. Therefore, the effect of density at the founding phase is monotonic and positive. This means, the effect of high density is largest at young ages.

The five populations from three different countries of both market and non-market organizations differ from each other in terms of social contexts. Therefore, there are differences among some covariates for the analysis of mortality. For Argentinian, Irish, and San Francisco newspapers are counted and recorded at any time during the year as density of that year. Since political turmoil resulted in increased founding and those papers founded in turmoil periods had higher mortality rates, researchers included a dummy variable in the model of mortality for years of political turmoil.

The American labor unions are studied in five periods beginning in 1836, the beginning of national unionization. The following began in 1887, the formation of the American Federation of Labour (AFL); in 1932, legal protection to unions with the New Deal; in 1948 with the passage of the Taft-Hartley Act that eliminated some New Deal provisions; and lastly in 1955, with the merger of AFL and CIO. Researchers also involved a dummy variable for the years of economic depression and a pair of dummy variables to show whether a union is founded or separated from an existing union. Lastly, for brewing firms, in addition to the age of the firm, the number of foundings in the previous year, and the number of closures in the previous year; the researchers

added a dummy variable to deal with the state and federal prohibitions. In addition to these, the Gompertz Model is used for newspapers and breweries, and the Weibull Model is utilized for labor unions.

At the end of the study, as the predictions of liability of scarcity and niche packing predicted, at the founding phase, the mortality rate of all five populations is positively affected by density.

### **3.3. NICHE LITERATURE**

Freeman and Hannan (1983) studied 18 restaurant organizations in California cities to test the effects of environmental variability and niche width of organizational populations. The model they developed tests the environmental variations that affect the life chances of specialist and generalist organizations. In fine-grained environments, the death rates of generalists are higher than those of specialists, regardless of the level of variability. On the other hand, the death rates of generalists are less than those of specialists when environmental variation is coarse-grained and large.

Researchers utilized Levins' (1968) model for organizational analysis by using populations of restaurants in 18 California cities. Their aim is to describe the distributions of specialist and generalist organizations within social environments by using modern niche width theories, like Levins' Model. According to this model, in order to describe net mortality for different circumstances, birth and death rates must be studied individually. As a result, it would be deduced from the model whether the life expectancies of specialists and generalists differ within environments in the way it does in the niche theory. In this study, the effects of the combination of organizational and environmental characteristics on death rates are examined.

The effects of variations in demands for services are observed in this study. It is known that most restaurants are responsive to even small fluctuations in demand, such as differences in seasons, local events, fashions, fads, business cycles, etc.

Contrary to Levins' model of equilibrium distribution predictions, researchers focused on the impacts of various factors on death rates of organizational forms as specialists and generalists.

Researchers state six advantages of using restaurants to test the niche-width theory. First, since restaurants depend on local environments for capital, labor, and consumers, it is easier to specify variations in the environment. Second, it is crucial to study large populations existing within the same environment, because of widely varied death rates. Third, to distinguish grain and variability, all kinds of restaurants can be found in urban environments. Fourth, since restaurants have various forms and strategies, great variability of specialism and generalism can be found. Fifth, since restaurants have comparably short life expectancies, it is possible to study considerably short periods to have meaningful survival analysis. Lastly, complete lists of restaurants can be reached easily as in the *Yellow Pages*.

In the research design, the individual establishment is the unit of analysis. Out of 985 establishments, 788 cases are taken into account because some of them were branches of large chains and some of them were missing at least one key variable. The measurement of specialism and generalism depends on many dimensions that affect survival chances such as specializing in a type of cuisine, hours of operation, price range, diversity of items on the menu, and range of services. As a result 3 forms of organizations such as generalist, which has a general menu not limited to pizza or hamburgers or dominated by any ethnic cuisine, has seating in the restaurant and has an employee with a role as cook or chef; fast food, specialize in either pizza, hamburger, hot dogs, fried chicken, tacos, doughnuts, or ice cream; and specialist, limited to a specific ethnic cuisine with a limited menu.

In the model, the control variables are the size of establishment measures (number of employees, number of seats, number of meals served per week), age, the logarithm of gross sales, and characteristics of its local environment which are total restaurant sales, sales of each establishment, etc. Since only age and gross sales had systematic effects on death rates, only these two were included in the following

analysis. The maximum likelihood estimator models for these two variables are both reported separately, together, and also by excluding these in order not to lose many cases. Three different forms were collapsed into two as specialist and generalist rather than having a distinct form of fast food. The reason for that is fast food restaurants did not differ from other specialist restaurants in terms of the selection process.

The supported first hypothesis showed that the effects of environmental instability on organizational death rates differ according to the grain of typical variations. According to the second hypothesis, specialists are slightly favored in fine-grained environments that fluctuate greatly and have high variation. This is against the general view that any kind of environmental instability favors generalists. However, the finding is inline with the prediction of niche-width theory. It is also seen that the death rates decline with age.

Miller McPherson (1983) studied voluntary associations of 1977 in Omaha. Individuals, members being the most important resource for organizations, the study developed a model on the competition of social organization for members. Accordingly, characteristics of individuals such as socio-demographic variables, age, sex, and education level, are taken as different niche dimensions. In addition to socio-demographic characteristics, dimensions of time and space are also possible focuses of this study. Since organizations with intersecting niches are hiring from the same pool of potential members, the competition over this resource shows the distribution of organizational types within a community.

Attention needs to be paid to the nature of ecological competition in three points. First, different organizations can recruit from identical segments of the community at the same time without the awareness of others. This puts them in competition. Second, organizations carrying different activities can be in competition as well. The reason is that they can still recruit from the same segment of the community. One example given for this in the article is the workers in unions and factories. Finally, the time overlap results in direct competition. An example of this is

that before Christmas time, businesses ask for more overtime. As a result of this, voluntary organizations can have a drop in the presence of workers.

The inter-organizational competition is the focus of the study. The voluntary sector with the most members, who are free to move from one organization to another, is used for the model of the study. The second advantage of studying with the voluntary sector is that those voluntary ones are much more diverse when compared with profit-driven business organizations. Third, in the voluntary sector there exist no strict government regulations. So, the voluntary sector can focus more freely on organizational activities and member characteristics.

Following Hannan and Freeman (1977:934-36) types of organizations are treated as species, in order for the niche to be established. The dataset for organizations is obtained from the Nebraska Annual Social Indicators Survey (Johnson, 1977). The data is part of a long series of studies of voluntary affiliation and also has measures of organizational characteristics such as organization size. It is also part of a two-wave panel analysis, which allows testing the assumption of equilibrium. Omaha city was picked for the study with 521 people sample of very detailed information.

According to the data, it is seen that when specialists and generalists are in competition, specialists enter competition with generalists more than with specialists. In the case of generalists' competition, generalists compete with other generalists more when compared to specialists. Lastly, specialists do not enter competition with other specialists. The reason is that each specialist is concentrated on the resources of its own space and does not compete with other specialists.

### **3.3.1. Liability of Newness**

Freeman, Carroll, and Hannan (1983) studied three different organizations namely national labor unions, semiconductor electronics manufacturers, and newspaper publishing companies to test if there is liability of newness for each of them. Freeman et al. (1983) brings an alternative explanation for Stinchcombe's (1965) argument.

Stinchcombe defends that new organizations are exposed to the risk of failure more than older organizations. New organizations experience a liability of newness because they are unable to compete against established organizations as explained above. In addition to that, new ones lack high levels of legitimacy as well as they are only able to cooperate with strangers. Freeman et al.'s alternative explanation is that the liability of newness can be a liability of smallness. To test this, long time periods of organizational populations have been studied (Hannan & Freeman, 1977; Aldrich, 1979; Britain & Freeman, 1980; Carroll & Delacroix, 1982; Freeman & Hannan, 1983; Delacroix & Carroll, 1983). According to Freeman et al. (1983), it becomes important to include three different processes to comprehend the links between these processes. These processes are the process of development or internal transformation; the process of competition and selection in the environment; and interactions between transformational and selectional processes. As a result of this effort, Freeman et al.'s study tries to model development and selection in a unified framework about the liability of newness.

For the model, all organizations are taken as “alive” at the beginning stage. Dissolution or merger with other organizations is defined as “death”. Merger is viewed as death because at least the social structure of the organization has changed, and a type of social life has been lost. For instance, if a distinct unit is inserted into a larger organization, this means a loss of autonomy for the pre-distinct one.

Event-history data is collected for three organizational populations: national labor unions (1860-1980), manufacturers of semiconductors (1957-1979), and local newspaper publishing companies (1800-1975). Two of these populations, the American national labor unions, and the American local newspaper publishers have been studied over very long periods. The analysis of births, mergers, and deaths enabled researchers to define the effects of age and effects of historic time independently. The analysis of the last population of manufacturers of semiconductors, even though they are examined at a relatively short period when compared to the previous two, allowed us to observe great technological change as well as high rates of entry and exit of firms.

In the results of the analysis, researchers found via integrated hazard function that mortality is age-dependent for all three kinds of organization and decreases with age. Compared to the constant rate model and Gompertz Model, the Makeham Model fits the data more meaningfully. According to the Makeham Model, the highest death rates are observed for semiconductor firms. After them, newspaper death rates come, and the lowest death rates are at national labor unions. In the model, asymptotic death rates, which give us the rates that the process tends over time, is in the same order as for the death rates. Another important outcome from the Makeham model is the halving time of the liability of newness, meaning that the time when liability of newness wears off is the quickest for semiconductor manufacturers. Newspaper publishing organizations follow semiconductor manufacturers, and the longest wear-off time is “at the national labor unions.

In conclusion, the study revealed four results. The first of them is that death rates are higher at the early ages of those three different organizational populations than at later years, there is a liability of newness. Second, researchers found that there is a difference between dissolution and absorption by merger, two kinds of organizational deaths, in terms of the strength of age dependence. The liability of newness is stronger for the process of dissolution than the merger absorption process for newspaper firms. For labor unions, the case is reversed. Third, the effects of age and size can be separated by the researchers. For the national labor unions, the liability of newness and liability of smallness is viable according to the rate of dissolution. Fourth, with the integrated hazard function in historical time analysis, there seemed to be no strong historical variations.

Sorensen and Stuart (2000) studied in high-technology industries the relationship between organizational aging and the innovation process with samples from two different high-technology industries such as semiconductors and biotechnology. They also tried to explain the effects of aging on organizational functioning in organizational theory. At the time, current organizational ecologists were not able to conclude the debate about the effects of aging on organizational

functioning (Hannan, 1998). Therefore, this study of the relationship between age and organizational innovation contributes to the debate of organizational ecologists on the relationship between behavioral changes and organizational aging.

Organizational aging can be associated with two arguments. First, with the accumulated experience, older firms can innovate more often when compared to younger ones. In addition to that, those innovations of older ones may have greater importance as well. Second, the relationship between organizational aging and innovation would be a negative one. As the firms age, they would be less likely to innovate. The reason would be that old organizations might face difficulties in adjusting themselves to the technical developments, and radical changes within their environment. While established, old organizations tend to be better at producing incremental innovations along existing technological paths.

Researchers have four hypotheses. The first one is “Organizational age will be positively associated with the rate of innovation.” The second one is “When compared with young companies, older firms will show a greater tendency to build on their previous innovative activity.” The third one is “As firms age, their current-period innovations will elaborate and refine older areas of technology.” The final one is “In the broader industrial community, the innovations of older firms will be less influential on subsequent technology development than will those of their younger counterparts.”

For the semiconductor industry, the data of 150 companies were gathered from a consulting and information services firm, Dataquest. In the beginning, the biotechnology industry company data randomly selected 250 biotechnology firms, which were listed in the Corporate Technology Directory in 1988. The sample is reduced to 237 firms between 1987 and 1994, because of inconsistencies across data sources. For both samples from semiconductors and biotechnology firms, there exists a survivor bias. Because, the firms, which were founded and failed before the studied years are not included. U.S.A. patents were used from the records of the Micropatent “Patent Abstracts” CD series. The patents were matched with the firms in the sample.

For the patent-based measures of innovation, all the hypotheses were tested. The first hypothesis is tested with the model by utilizing the rate of patenting as a function of organizational age and other covariates. Except for the first hypothesis, for the analyses, patent citation data is utilized for testing. Stata 6.0 is used to estimate all models. Patent-rate models were used for the first two predictions. Cox Model and piecewise-constant rate models are utilized to increase the confidence of the results.

At the end of the study, researchers' both arguments are supported. First, even though it seems to be contradictory, as organizations age, with established routines and experiences, produce new innovations, patents in this case, when compared to new entrepreneurial firms. Second, the inventions of older organizations are less likely to match the current technological demands when compared to those of younger ones.

### **3.3.2. Carrying Capacity**

Martin Rauf (2000) focused on the healthcare sector in the United States between 1965 and 1994 to enhance the understanding of organizational diversity, especially focusing on the emergence of new organizational forms from an organizational ecology perspective.

Rauf (2000) stated that studying at the organizational community level has advantages such as access to data at the individual organization level. Therefore, he began with 90 forms as a candidate and then he eliminated some forms. These forms are the ones, that are not structurally autonomous from other health care organizations, called "quasi forms"; the ones, that are subtypes of organizational forms and already included in the list; the ones that exist on the periphery of the organizational community; and the ones classified as secondary dimensions in public data sources. After the elimination 48 forms are utilized as data sources for the analysis.

The researcher indicated that the timing of the emergence of organizational forms is not a sudden isolated event from the environment, but a process. Therefore, when clarifying the timing of emergence, attention must be paid to the processual

characters. Time periods, which lead to the creation of new forms are sometimes social movements by securing resources for development (Swaminathan & Wade, in press; DiMaggio 1991, pp.274-79); regulations identifying new forms as legitimized organizational roles (Tucker, Singh, and Meinhard 1990); and the recognition as offering unique employment niches for the labor market participants (Brint & Karabel 1991). As a result, the form emergence process may take many years. Rauf took the regulatory events to indicate the timings of the new form emergence because of the reason that the U.S. health care field is a highly institutionalized environment.

For the research, Rauf (2000) utilized the carrying capacity to characterize social demands for the emergence of new organizational forms. Following this, from a cultural view, the aggregate amount of discourse referring to attributes of a form identity can be a key factor in the success of new organizational forms. As a consequence, discourse can be perceived as a cultural carrying capacity for new organizational forms. Because social movements have a crucial role in drawing attention to a form of identity. They also secure resources to support that identity. Therefore, successful social movements can be perceived as actions increasing the carrying capacity of an organizational form. The quantitative discourse analysis is utilized to measure the organizational form identity differences. In addition to this, latent semantic analysis techniques are used to evaluate the location of form identities within a multidimensional space.

In the study, to estimate the dependent variable, form emergence, the independent variables, such as population density, mass, and carrying capacity are operationalized respectively as aggregated organization, human resource, and discourse counts. The Poisson regression model is operated to estimate the emergence of new forms using the software LIMDEP. Moreover, sensitivity analysis is done to check whether zero cells affect the results. The results showed, that due to the variations in the impact of carrying capacity, conclusions must be cautiously interpreted.

At the completion of the study, Rauf (2000) showed that the total number and the size of existing organizational forms affect the emergence of new forms in the

healthcare sector. As the density and the number of organizational populations increase, the legitimacy of new arrangements increases due to the corresponding identity attributes. However, after the niches become highly saturated, the emergence of new forms is discouraged because of the competition among existing organizations. That also shows, that even though the organizational identities of organizational forms are different, they are affected by the dynamics of competition. Correspondingly, that proves, the already known aspect, the factors, which are exogenous to community ecology as economic, political, legal, and cultural environments have an effect on the changes in organizational diversity.

### **3.4. SUMMARY OF THE LITERATURE REVIEW**

Literature is reviewed in order to define the main concepts about the specialist organizations for this study. The scope of this study is mainly to understand the emergence and survival of the local specialist film production organizations in Türkiye. Therefore theoretical background and literature review provided the necessary background knowledge to construct this study.

Regarding the Resource Partitioning Theory, the main emphasis is on the emergence of the specialist organizations. In order to analyze any industry, it is important to study the specialist organizations. As it is discussed by Carroll (1985), Mezas and Mezas (2000), Carroll and Swaminathan (2000), and Swaminathan (2001) the foundings of specialist organizations increase as the market concentrations increase. Lomi (1995), and Baum (1997) added the spatial and geographical aspects in the case of the emergence of specialist organizations. In addition to these, the study of Dobrev, Kim, and Hannan (2001) enhanced the literature on the hazard of mortality. Accordingly, as the organizations age, the hazard of mortality decreases. This study focusing on the emergence and survival of Turkish specialist film production organizations, used the above-mentioned studies as a guide.

Scholars such as Barnett and Carroll (1987) and Carroll and Hannan (1989) utilized the Density Dependence Model in explaining the emergence of specialist organizations. They agreed that the high density levels at the founding phase led to a liability for resource scarcity. As it is predicted, the mortality rates are high at the founding stage. In the Turkish film industry, the emergence of specialist film production organizations as well as the existence of one-year-lived film production organizations are viewed through these lenses.

As the organizations age, the rate of deaths declines. This liability of newness (Freeman, Carroll, and Hannan, 1983) is studied in different populations. Freeman, Carroll, and Hannan (1983) also brought up the issue of size. Liability of smallness as well as liability of newness is studied on various populations as labor unions. In the case of the Turkish film industry, although the size of organizations has not been focused on, it can be said that specialist film production organizations are smaller in size than generalist film organizations. Therefore, studies on the liability of smallness as well as the liability of newness are utilized by this study.

Innovations such as in the American feature film industry (Mezias & Mezias, 2000) and also in the American biotechnology companies (Sorensen and Stuart, 2000) are reviewed with an outcome as young and newly founded specialist organizations tend to innovate more likely to match current demands, innovations. In this study, innovating inline with demands is interpreted as finding a chance to be shown in international film festivals and getting awarded. Because organizations satisfy their needs and survive through innovations. Similarly, specialist film production organizations under examination in this study survive through international film festival screenings and awards.

When studies such as Freeman and Hannan (1983) focusing on the environment are taken into account, it is shown that any kind of environmental instability tends to favor generalist organizations, as Niche-Width Theory predicts. In an unstable environment such as Türkiye, in terms of economic, political, and legal, it does not favor specialist organizations. The high numbers and rates of one-year-lived local

specialist film production organizations are an example of this theory. In addition to the environment being unstable, the competition of organizations is also limited to just their own resource space as discussed by scholars such as McPherson (1983). Generalist organizations compete with other generalist organizations more than specialist organizations. When it comes to specialist organizations, they do not even compete with other specialist organizations. They try to survive in their own niche. This is also the case for Turkish specialist film production organizations.

Carrying capacity has been studied by different scholars such as Rauf (2000). The common outcome is that the existing number of organizations in a population affects the emergence of new organizations. Even after emergence, the survival of organizations in a population also depends on the total number of organizations in that population. Since there is a carrying capacity for any population, up until carrying capacity, the emergence and addition of any organization is not discouraged. After the carrying capacity is reached, emergence is affected negatively. For the Turkish film industry, it is tested in the methodology section, and it is seen that the carrying capacity is not yet reached.

## **THE TURKISH FILM INDUSTRY**

This chapter includes an overview of the Turkish film industry. The industry value chain is focused on. The change in the industry value chain is studied in two different periods before and after the entrance of U.S.A. film organizations following Kalemci and Özen's (2011) study. Since the U.S.A. film organizations are very influential on the Turkish film industry, a comparison of the U.S.A. film industry and the Turkish film industry is reviewed. Lastly, France, as with many other European countries, is the model for the Turkish independent film production industry. Therefore, a comparison between the French model and the Turkish model is made. At the end of the comparison, the survival of the support model in the Turkish film industry is mentioned.

### **4.1. ORGANIZATION OF FILM INDUSTRY VALUE CHAIN: A HISTORICAL PERSPECTIVE**

To understand the structure of the Turkish film industry, the change in the organization of the industry value chain needs to be examined. The industry value chain is composed of production, distribution, and screening stages. Idea development is the beginning of all those stages. It is followed by finance. Finance sources for the Turkish film industry are sponsorships from television channels, the Turkish Ministry of Culture funds, sponsors, and Eurimages support (Yılmazok, 2010:88). Kalemci and Özen (2011) studied how the organization of the industry value chain in the Turkish film industry is affected by globalization. In the article, the years between 1950 and 2006 are examined from a historical institutionalist approach to understand the quality, quantity, and geographical diffusion of movie theaters. One outcome of the study is that the organization of the industry value chain changed from regional distributors dominated network structure to a big U.S.A. film organizations dominated hierarchical network structure with the opening of the industry to foreign direct investment in 1989. They

also found out that in big cities, movie theaters with single screens are replaced with multiplex film theaters. Additionally, movie theaters in small settlements are closed. All these lead to “social exclusion” (Kalemci & Özen, 2011: 53) and “theaterlessnes” (Kalemci & Özen, 2011: 54).

Although only the screening stage is noticeable to the audience before screening there are production and distribution stages. The film production stage is composed of scenario writing, finding sponsorships from television channels, funds from the Turkish Ministry of Culture or from Eurimages, site and player selection, shooting, assemblage, and editing stages. The distribution stage starts when the rights of the film are handed over to the distributor organization and end when the film is distributed to the movie theaters. To understand the changes in the organization of the industry value chain and changes in the number of movie theaters; all stages of production, distribution, and screening, must be examined by years. Kalemci and Özen (2011) focusing on the effects of globalization on the change of the quality and diffusion of movie theaters, examined the film production, distribution, and screening stages under two different periods as before and after the entrance of U.S.A. film organizations. According to Kalemci and Özen (2011), this first period is called “network organization”, between the years 1950 and 1989. The second period starts with the entry of foreign direct investments in 1989 and ends in 2006 and it is named the “hierarchical network organization” period. Following Kalemci and Özen’s (2011) study, the industry chain is studied before and after the entrance of U.S.A. film organizations to the Turkish film industry in this study. The Turkish film industry was not also free of any international influence before the change of the 1989 foreign direct investment law, but after this law, differences in the organization of production were obvious.

#### **4.1.1. The Turkish Film Industry until the end of 1989**

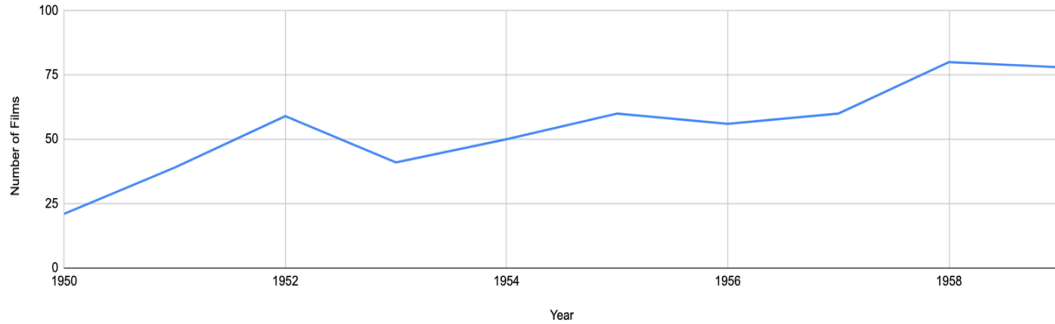
##### **4.1.1.1. Film Production Organizations, Films, and Audiences**

To start from the very beginning, there were only two Turkish film production organizations, Kemal Film and İpek Film, in the Turkish film industry until the end of the 1930's. Other than these two production organizations, Muhsin Ertuğrul was the only name of a producer during this time. Following that, in the years between 1940-1948, 50 films were produced by 14 film production organizations (Scognamillo, 2010: 112-114). This period is known as the transition phase of the Turkish film industry.

In the second half of the 1940s, there was an increase in the number of film production organizations. These production organizations were mostly located at Yeşilçam Street, Beyoğlu. Therefore, 'Turkish commercial cinema' was labeled as 'Yeşilçam' (Genç & Zeis, 2005). Beginning from the 1950s until the 1980s film production organizations were growing in number, rather than just distribution or movie screening.

Since the number of movie theaters increased, the number of cinema audiences increased as well during the 1950's. It can be seen from Figure 4.1 that the number of Turkish film production organizations has increased from 20 in 1950 to almost 80 in 1959. Since the number of audiences increased, new film production organizations were founded, which can compete with the formerly established big family-owned importer organizations like Kemal Film and İpek Film (Işığın, 1998).

**Figure 4.1 The Number of the Turkish Film Production Organizations Between 1950-1960**



Source: Scognamillo, Giovanni (2001), “Türk Sineması’nın Ekonomik Tarihine Giriş”, *Yeni Sinema*, Sayı 9, s.100-101.

It might be said that the Turkish film industry had taken the appearance of an industry between the years 1949 and 1959 with the introduction of other production companies, directors, and new films. The entertainment tax in 1948 applied to both Turkish films (25 percent) and foreign films (70 percent) signifies that film had become a commercial commodity as well as it being an art piece (Scognamillo, 2010: 86). It is also true that there were no big studios or the technical equipment which would have made it an industry for the Turkish film industry before the 1950s. Therefore, the industry was still dependent on foreign film industries during the 1950's. Differing from being dependent, there was a rapid growth in the number of audiences. As can be seen from below Table 4.1, the number of audience has increased 32 percent for Türkiye, but it was 112 percent for Istanbul between the years 1950 and 1960 (Kongar, 1999).

**Table 4.1 The Number of Screened Films in Türkiye and the Number of Audiences in Istanbul During 1950-1959**

Year	Number of Local Films	Number of Foreign Films	Number of Movie Theaters in Istanbul	Total Number of Audience (For Istanbul)
1950	23	229	92	11.822.000
1951	31	201	93	12.268.000
1952	50	240	109	14.315.000
1953	52	308	111	15.372.000
1954	51	323	120	20.615.000
1955	57	324	135	21.350.000
1956	49	317	121	23.500.000
1957	63	424	138	25.648.000
1958	95	253	164	28.123.600
1959	95	246	170	25.161.000

Source: BOZİS, 1969:4.

The decrease in the number of audiences between the years 1958 and 1959 is because of the exchange rate adjustments. These adjustments resulted in a decrease in the number of imported films. Although the number of audiences decreased for a while, in the long run, production in the Turkish film industry was positively affected (Erkılıç,2003).

Color film entered the Turkish film industry during the 1960's. As can be seen from Table 4.2, the number of produced films increased during the 1960's and 1970's (Scognamillo, 2010).

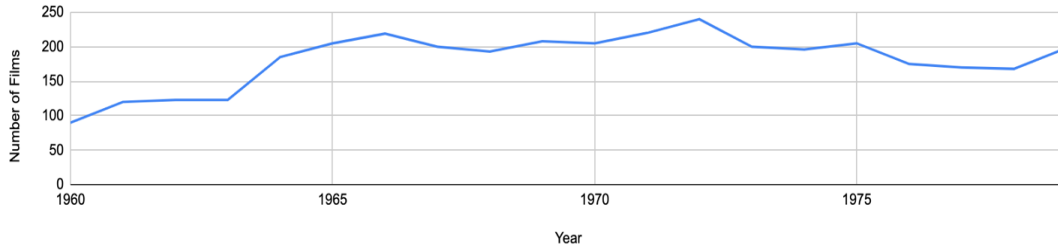
**Table 4.2 Number of Black and White and Color Turkish Films Between 1960-1980**

Year	Black and White Films	Color Films	Total Number of Films
1960	68	-	68
1961	116	-	116
1962	127	-	127
1963	124	1	125
1964	177	1	178
1965	212	2	214
1966	238	-	238
1967	199	7	206
1968	153	24	177
1969	173	56	229
1970	147	78	225
1971	142	138	266
1972	30	268	298
1973	6	202	208
1974	-	188	188
1975	-	225	225
1976	-	164	164
1977	-	124	124
1978	-	128	128
1979	-	195	195
1980	-	68	68

Source: Scognamillo, 2010: 160.

During the history of Turkish cinema, the 1960s were the “Golden Era” according to many researchers (Erkılıç, 2003; Evren, 2005). The increase in film production is noticeable. As can be seen in below Figure 4.2, there were 80 films during the 1960s, but it was around 300 during the 1970s. In addition to this increase in film production, the number of movie theaters also increased (Erkılıç, 2003).

**Figure 4.2 The Number of the Turkish Films Produced Between 1960-1979**



Source: Scognamillo, Giovanni (2001), “Türk Sineması’nın Ekonomik Tarihine Giriş”, *Yeni Sinema*, Sayı 9, s.100-101.

The worldwide effects of the protests of 1968 were also felt in Turkish film production. In addition to this, issues such as regional business administration, star system, censorship, lack of financing and foreign dependency continued (Makal, 1991). Moreover, during the 1970’s and 1980’s opposition in terms of produced film content was taking place. On one side, there were young filmmakers producing political films. On the other hand, since the family audience has already been lost, cheap sex films were being produced.

Furthermore, the television entered the houses. As a result of this, the demand for movie theaters has decreased dramatically. The opening of private channels during the 1990’s captured the audiences derived from movie theaters. The main audiences for movie theaters were women and children (Scognamillo, 2010). Television being way more economical and allowing households to watch more than one movie in one day were just two of many reasons why television was preferred over movie theaters during the 1970’s and 1980’s. In addition to this, ticket prices always tend to go up because of the inflationary environment. These increased-priced tickets created better visual and audial expectations from movie theaters (Scognamilla, 2010). On the other hand, television channels, besides decreasing the demand for movie theaters, provided to the movie industry a new financial source (Dorsay, 1996).

The entrance of videotapes to houses affected the number of audiences at movie theaters negatively. On the other hand, the films produced for video tapes kept up the industry in the second half of the 1980's. Those videotapes were sent to Germany for expatriates' consumption. Therefore, Germany was not an external market for the time, but more like an extension of the internal market (Scognamillo, 2010: 170).

January 24 Resolutions in 1980, deepened the crisis of the 1970's. The Resolutions of the 1980's coup d'état transformed the whole Turkish economic structure and industries as well as the Turkish film industry. Many movie theaters were shut down. There was an incredible decrease in the number of audiences. In addition to all these, only 68 films were produced (Scognamillo, 2010). The arabesque genre took over sex films during this period. Political films were mostly censored during the first half of the 1980's. The number of movie theaters was 3000 in 1969. However, in 1987, this number was only about 400 (Evren, 1997).

The number of audiences decreased during the 1980s because of several reasons. Although after the 12 September 1980 coup d'état, the clash among different parts of the society was eliminated (Kalemci & Özen, 2011), there was not a remarkable return of audiences to movie theaters. As a result of liberal policies, the real income of low-income and middle-income social segments has gradually decreased (Boratav, 2015). In addition to this, television broadcasting and video movies became quite widespread.

#### **4.1.1.2. Industry Value Chain**

As the number of movie theaters increased in Anatolia, a small number of movie copies were shown at Anatolian movie theaters, after being shown at metropolitan movie theaters. The aim was to show a few movie copies at as many different movie theaters as possible. Money earned from this system goes to regional distributors, officers of "percentage". This system is called "percentage application". Since this period is under

the monopoly of a few family businesses, it can be called a” monopolistic vertically integrated organization” period.

According to Kalemci and Özen (2011), the percentage officers before the 1950s were dependent on big film producers/importers located in Istanbul. However, after the 1950s, the dominance of big film producer organizations was diminished as the number of small producers and film productions increased with a new distribution mechanism. This mechanism is called the “regional business administration system”. The aim was to overcome issues of financing by reducing costs and reaching the audience directly. To achieve this, regional business administration officials traveled to cities that have movie theaters. These officials made deals on the profits from movie revenues in return for the movies to be shown in the theaters. Erkılıç (2003:93) explains that there are six regions in Türkiye. First of these is Adana regional business administration. Others are İstanbul, İzmir, Ankara, Samsun and Zonguldak. These regions encompass other cities as well. In this system, regional administrators report to the producers located in Istanbul about what kinds of films are popular. These regional administrators also make advance payments to these producers in order for them to produce films (Erkılıç, 2003). “Star system” was also utilized as a marketing strategy during the 1950's. Cahide Sonku, a female star, and Ayhan Işık, a male star, were the first representatives of this strategy (Scognamillo, 2010).

The main difference between this system from the previous one is that regional administrators are not dependent on the producers. On the contrary, these regional administrators are the financiers who fund the capital needed to produce the films. These regional administrators became the most vital actors of the industry because they were the financiers for film production. It is also said that the regional business administration system played a vital role in the increased number of Turkish film productions and increased audiences by letting the film producers know what kind of movies are favored in their region (Erkılıç, 2003: 95).

The “regional business administration system” began to lose its influence in the 1970s. The changes in the macro environment like in technology and politics caused

this. The main change in technology was a new mass communication tool, the television (Erkılıç, 2003). Another change is the turbulent political environment (Genç and Zeis, 2005:82). The political environment, such as fights in the streets lead to a major decrease in the number of audiences. Another reason for the poor quality of produced films was that the production capacity was exceeded, so the productions became unqualified. In addition to this, beginning in the second half of the 1970s, an increased number of porn film production also led Turkish audiences away from movie theaters. Last but not least, the Cyprus Crisis in 1974 also dragged the Turkish film industry into a crisis.

The reduced number of audiences resulted in a weakened relationship between the Turkish film producers and regional administrators. Işığın (1998:60) states that this weakened bond led to a decrease in the number of film productions and movie theaters. Producers depending on regional administrators faced difficulties with capital. Even though these small producers found a way to produce their films, they could not find movie theaters to screen them. The reason was that big producers made contracts with regional administrators to show their movies throughout the whole year at the movie theaters.

To sum up this period, the organization style is the regional business administered by a dominant network organization (Kalemci & Özen, 2011). Screening strategy is a movie's maximum number of screenings with a few copies at single-screen movie theaters. In fact, beginning from the mid-1970s, there were issues from both on demand and supply sides to reduce the number of films produced. On the supply side, over-capacity film production decreased the quality of films. In addition to this, oil crises and import substitution led to an increase in the prices of input costs. The issues on the demand side are a politically turbulent environment, becoming widespread television broadcasting and video, and last but not least the decrease in the purchasing power of social segments.

## **4.1.2. The Turkish Film Industry from 1989**

### **4.1.2.1. Film Production Organizations, Films, and Audiences**

As the system began to collapse at the end of the 1970's, major U.S.A. film organizations took over the domination of the system from the end of the 1980's. Following the January 24 Resolutions, Esen (2010) called the "1987 Hollywood coup d'état" in which the American film production companies (Majors) took over the Turkish movie theaters with the 1989 Foreign Investment Law. It allowed and facilitated foreign organizations to invest directly in the Turkish cinema industry. After this law, foreign organizations began to have agents in Türkiye, and they focused mostly on distribution. As it is stated by Erus (2007:10), in the distribution area, the market share of UIP (United International Pictures) and Warner Bros. in Türkiye was 73 percent at years between 1993-1994, 77 percent at years between 1994-1995, and 76 percent at years between 1995-1996. Those foreign companies, with their dominance in distribution, decreased the chance of local films being screened at movie theaters (Scognamilla, 2010).

In addition to this, the decreased number of audiences and the ending videotapes era led film producers to look for alternative funding sources such as television channels, the Ministry of Culture funds, sponsors, and Eurimages support (Yılmazok, 2010:88). Advertising industry also supported film production in Türkiye with sponsorships since the 1990's. However, the state did not support the film industry during the 1990's with neither state credits, financing, or co-production (Scognamillo, 2010).

The decrease in film production proves the Turkish film industry crisis during the 1990's. There were 185 film productions in 1987 and 117 film productions in 1988 in Türkiye (Scognamillo, 2010). However, it dropped drastically to 33 film productions in 1991, 37 film productions in 1995, and even 26 in 1997 as can be observed from below Table 4.3. It is also noticeable that there is a gap between the number of

audiences for local and foreign movies. Audience being the driving force for the film industry, could not support local film productions for many different reasons such as economic or political. Narrowed demand affected production negatively as any other industry shaped by supply and demand balance.

**Table 4.3 Number of Films, Audience, and Movie Theaters During the Ten Years Between 1990-1999 in the Turkish Cinema Industry**

Year	Number of Films				Number of Film Viewers		Movie Theater
	Produced Local	Screened Films		Total	Local	Foreign	
		Local	Foreign				
1990	74	26	168	194	500333	9898511	354
1991	33	15	178	193	584941	9894058	341
1992	39	13	152	165	406265	7862849	312
1993	82	11	148	159	578192	10277286	281
1994	84	15	164	179	511389	9734170	292
1995	37	10	154	164	980444	10575188	301
1996	37	10	161	171	2975623	12126932	300
1997	25	13	182	195	1642710	14482078	344
1998	23	10	162	172	2959257	18045968	358
1999	21	14	141	155	2500182	21401343	516
<b>Total</b>	<b>455</b>	<b>137</b>	<b>1610</b>	<b>1747</b>	<b>13639336</b>	<b>124298383</b>	

Source: SESAM, 2005:6.

Martin Kanzler (2014), in this study, focused on production budgets in Türkiye. Study depends on the information given by representatives of the sector. As seen in Table 4.4 below, according to his study, a ‘Blockbuster’ film would cost up to 12 million Turkish Liras to produce. Print and advertising costs are one-third of the total cost. Mid-level film productions generally cost 2 to 3 million Turkish Liras. The cost for print and advertising is 0,5 to 1 million Turkish Liras. Finally, for low-budget films, it costs around 800.000 Turkish Liras.

**Table 4.4 Production, Print, and Advertising Costs of the Turkish Film Genres in 2014**

Film Type	Production Budget (TL)	Printing and Advertising Costs (TL)	Total (TL)
Blockbuster	5 - 8 millions	2,5 - 4 millions	7,5 - 12 millions
Genre/Mid-range Films	2 - 3 millions	0,5 - 1 millions	2,5 - 4 millions
Low Budget Films	Up to 0,8 Million	0,05 - 0,1 Millions	Up to 0,92 Million
International Co-productions	1,5 - 3 millions	0,07 - 0,15 Millions	1,5 - 3 millions

Source: Kanzler, 2014.

According to Kanzler (2014), 358 different production companies exist for the 687 cinema films made in Türkiye in the years between 1990-2013. 70 percent of these irregularly producing companies produced only one film during their period of operation (Kanzler,2014).

#### **4.1.2.2. Industry Value Chain**

The second period, “the hierarchical network organization” period, is between 1989 and 2006. The Turkish film industry has been greatly affected by the economic conditions. The International Monetary Fund made Türkiye, as a developing country, adopt some structural adjustment policies. Some of these were the withdrawal of the state from the economy, liberalization of foreign trade, and domination of the market.

It is not just Türkiye or not specifically after the 1980’s that the U.S.A. film organizations invest in foreign markets. The U.S.A. film organizations began to diffuse into foreign markets from the very first U.S.A. film organization, the Motion Picture Company, in 1909 (Ulusay, 2004). The U.S. government supported the U.S.A. film organizations via a law passed in 1918. With this law, U.S.A. film organizations were enabled to make international collaborations (King, 2002:60). As a result of this, the U.S.A. film organizations settled their distribution channels in South America,

Australia, the Far East, and Europe. Then these organizations became in a powerful position worldwide (Thompson & Bordwell, 1994).

When the conditions became suitable for U.S.A. film organizations in Türkiye, they began to invest in. This resulted in the domination of U.S.A. films at movie theaters. Because these film organizations make package agreements with movie theaters for their movies to be shown throughout the year etc. As a result of foreign and mostly U.S.A.-made films being screened, the Turkish films' chances of screening was very low. In addition to the low chance of screening, with U.S.A. film organizations' domination, before-dominant actors of the industry, regional distributors who fund the local producers, almost disappeared. Therefore, the number of Turkish films produced was decreasing as well. After distribution, U.S.A. film organizations began to invest in screening in Türkiye (Işığın, 2003). They imported to Türkiye, as they did in other countries, a "multiplex" type of screening, which is very common in the U.S.A. (Acland, 2005). Other movie theater owners also transformed single big movie theaters into split into two or three smaller ones (Işığın, 1998).

With some legal regulations, the state began to support film production organizations. One of the most vital improvements in the cinema field during the 2000's was legal regulations. As stated above law No. 5224 of July 14, 2004, on the Evaluation, Classification and Support of Cinema Films, law No. 5225, Cultural Investments and Encouragement of Initiatives and Article 32 of Law No. 5228, Clause D specifying income tax regulations help the Turkish film industry to develop (Binatlı, 2005:134).

During the mid-1990s, since once-dominant regional distributors dissolved, the Turkish small production organizations benefited from this support from the Ministry of Culture, funds from Eurimages, and sponsorships via television channels. Eurimages has been a support fund of the Council of Europe since 1989. Türkiye became a member of Eurimages in 1990 and began to pay subscription fees (Esen, 2010). UIP, Warner Bros., and Özen Film became the dominant distributor organizations in Türkiye. If a film does not have a contract with either one of these distributors, it most

probably cannot be screened. During the 2000s there was an addition of the Kenda film organization (AFM, BKM, Energy Productions, Plato film) to this oligopolistic structure of distribution organizations (Kalemci & Özen, 2011). As a result of this, the organizational structure of the Turkish film industry transformed into a “hierarchical network organization” from the previous one, “network organization”.

One of the differences in the organization structure of the Turkish film industry from the previous one is that distribution organizations took the place of “regional distributor organizations”. As stated by Erus (2007), those regional distribution organizations were dominant over both film production organizations and movie theaters. Regional distribution organizations used to decide on the films that will be screened, in which order, and for how long those will be screened as well as for how long advertorial campaigns will be shown or not. The dependence was on the production side as the regional distribution organizations were funding film producers in the previous period. The fund of the Ministry of Culture, Eurimages funds, television channels, and other sponsorships were new resources for producers in this new organization type. This dependence shifted to screening during this period. As a result, distribution organizations have the power. Because film production organizations need to screen the films they produce.

Technological and financial advances enabled them to make many copies of the films. Since screening many copies of a film at many different theaters simultaneously is possible, films had more chances to be screened, when compared to previous periods. According to the research of Kalemci and Özen (2011), the dominant type of movie theater is multiplex rather than single-screen movie theaters. This type of film organization of Türkiye resembles the U.S.A. film industry, as multiplex theaters, many copies of the movies screening simultaneously with the dominance of distribution organizations.

At the distribution stage, with the change in the law regulations in 2004, United International Pictures (UIP) began its operations in Türkiye. UIP has the distribution rights of film production organizations such as Universal, Paramount, Warner Bros.,

and Walt Disney. One of every ten films is either distributed by UIP, Warner Bros., Özen Film, or Chantier between 2005 and 2015 (Kanzler, 2014).

The distribution system is different in Türkiye when compared to other European countries. In Europe, distribution companies take some financial risks by paying for print and advertisement. Different from Europe, in Türkiye, these kinds of financial costs are carried by production companies (Kanzler, 2014: 99).

At the screening phase, demand triggered the supply. Especially after 2004, the number of audiences for local films has increased. This increase can also be considered as a result of an increase in the number of movie theaters. In the mid-1990's, the rapid increase of multiplex movie theaters in shopping malls eased the access of audiences to movie theaters. This increased number of audiences paved a way for the Turkish film industry. More specifically, the production, distribution, and screening stages evolved in a great way through the support of audiences.

Although it seems unlikely that there will be any new movie theater chains entering the market, existing chains in the market have grown at some rate. AFM International Film Production Trade and Industry; and MARS Entertainment Group merged under MARS Entertainment Group on 17.11.2011, with the approval of the Competition Authority (Rekabet Kurumu, 2016). The gap between other movie theaters and the chain movie theaters widened after this merger. Chain movie theaters with multiple screens are mostly located in shopping malls. As a result of this, most single-screened movie theaters face difficulties. Many single-screened movie theaters were closed down, but Türkiye is still the seventh country with the most screens in movie theaters in Europe according to the report of Competition Authority (Rekabet Kurumu, 2016).

Domination of U.S.A. film organizations in the Turkish film industry necessitated the focus on the U.S.A. film industry. The change in the organization of the U.S.A. film industry would shed light on the different organization types and its effects on the Turkish film industry. Beginning from the 1950's television broadcasting in the U.S.A. has become widespread. In addition to this, in 1948, the U.S.A. prohibited

production and distribution organizations from owning movie theaters. The reason for this is the so-called “Big Five” (20<sup>th</sup> Century Fox, Paramount Pictures, Metro-Goldwyn-Mayer, RCA, and Warner Bros.) used to control the industry by integrating vertically (Mezias & Mezias, 2000). The U.S.A. film industry switched from vertical integration to a contract-based network structure because of television broadcasting’s diffusion, recognition of the new prohibition verdict, and increase in the number of small, independent production organizations (Robins, 1993). Mezias and Mezias (2000), focusing on the U.S.A. film industry, disclosed that increased concentration by the large, generalist film organizations leads to an increase in the number of small, specialist film organizations. Therefore, nowadays those large film organizations have become smaller, and more specialist film organizations have emerged. Those so-called large film organizations produce and distribute their own films; but at the same time, they buy films and services from other producer and distributor film organizations (Gill and Spiller, 2007; Robins 1993). However, there is another view that Big Eight film studios (20<sup>th</sup> Century Fox, Paramount Pictures, Metro-Goldwyn-Mayer, Universal Studios, Warner Bros., Sony Pictures Entertainment, Walt Disney Company, Dreamworks) own sub, small film organizations. Accordingly, Scott (2002) defends that the Big Eight remains in the middle of this network structure through these small organizations and through their relations. As a result, Kalemci and Özen (2011) state that the U.S.A. film industry organization is not a network organization that is formed by equals; but it is a hierarchical network organization.

#### **4.2. COMPARISON OF THE TURKISH FILM INDUSTRY WITH THE AMERICAN FILM INDUSTRY**

In this section in order to provide an evaluation of the Turkish film industry and its current state a comparison with the American film industry is provided. The American film organizations spread in foreign markets from the very beginning (Ulusay, 2004). The United States government supported this spread of American film organizations

with a law passed in 1918 as mentioned above. As a result of this law, American film organizations were able to make international collaborations. Following that, American organizations set their distribution channels worldwide (Thompson & Bordwell, 1994). Thus it is not just the Turkish film industry that was affected by the American film organizations. However, the American influence was felt heavily after 1989, the opening of the industry to foreign direct investment with the law in the Turkish film industry as discussed above. In addition to distribution, the American film organizations invested in screening as well in Türkiye via “multiplex” type of screenings (Acland, 2005). As it is also stated by Kalemci and Özen (2011) the organization of the industry value chain is transformed from a regional distributors dominated network structure into a hierarchical network structure with the 1989 Foreign Investment Law which enabled the major American film organizations to dominate the Turkish film industry. For all those above-mentioned reasons, it is vital to compare the Turkish film industry with the American film industry.

The Turkish film industry has been initiated and supported by the state from the beginning. On the other hand, the American film industry is established by entrepreneurs. This difference shaped the future solutions for the problems of both industries. For instance, after the 1929 Crisis, the American film industry established relationships with the finance sector as a solution for the recession. Instead, the Turkish film industry is supported by the state’s tax deductions and incentives given to local film screenings. In addition to the differences between both countries’ financial structures and capital accumulation, the perceptions of investors are different about the potential profitability. Thence, the American film industry became an industry that is financed by rational investors with a decisive plan. On the other hand, the Turkish film industry is managed by instant, and empirical decisions.

The Turkish film industry began to become an industry in the 1950's, like many other countries, observed and applied the developments and technology from the American film industry. Ongoing political instability and fluctuating economy prevented the Turkish film industry from flourishing. Therefore, it is important to focus

on both countries' structural differences as well as the state and the private sector's roles, and also similarities and differences between the countries' production, distribution, and screening stages to understand thoroughly. Since the American film industry is powerful and influential on the Turkish film industry, it is important to compare them.

The fundamental difference between the American film industry and the Turkish film industry is the gap between scales. Therefore, it is meaningful to compare these two industries periodically and structurally.

#### **4.2.1. Structural Differences of Industries**

Structural differences between the Turkish and the American film industries primarily shaped these industries. The American film industry is mainly embedded in entrepreneurship and profit maximization motivation where rational investors make investments with a solid strategy. On the other hand, the Turkish film industry gets along with a trial-and-error process.

Considering producers, since studios finance the films, the American producers do not need their own financial resources. Producers give their preferences on production choice, movie's star selection, and subject. Likewise, there was a mechanism called the "regional business administration system" in which businesses as financiers could directly order films (Parlayandemir, 2011).

When the American studio system was over, independent producers had more chances to show their presence. This is an economic preference of independent producers. Whereas, in the Turkish case, as a result of the withdrawal of producers, it was more like a necessity than a preference for independent directors to become producers (Parlayandemir, 2011). On top of that, what is common to both the American and the Turkish film industry is the stance towards independent cinema. Even though production can be independent at the production phase, it is dependent on the industry at the distribution and screening phase in a way.

The studio production model's late introduction to the Turkish film industry made the producer-director concept compulsory. In addition to this, the increase in the number of films produced in both the Turkish and the American industries led to a supply-based and non-natural increase in film screenings during crisis times. Contrary to this, during normal times, a demand-based increase in film screenings is ensured (Parlayandemir, 2011).

One of the differences between the Turkish and the American film industries is that the Turkish film industry began its development with a screening stage at first. On the other hand, the American film industry's development of film production, distribution, and screening stages began concurrently. Unlike the European film industries, two big wars benefitted both the Turkish and the American film industries. Although no Turkish-produced film existed up until then, the First World War forced the Turkish cinema industry to produce its own films from a military-owned center. In addition to this, the American film industry was targeting its domestic market before the First World War. After the war, the new target was external markets with the aim of exporting both the American type of ideology and the production model of Hollywood. Following that, because of the Second World War, many successful European producers, directors, actors, and technical staff migrated to the U.S.A. This contributed a lot to the development of the American film industry. On the other hand, many Turkish artists who are in Europe for education or work, by returning to the country contributed to the improvement of the Turkish film industry (Scognamillo, 2010).

Sources utilized by the Turkish film industry and the American film industry are another important structural difference between the two industries. Beginning in the 1990's, the American film industry moved under the control of big multinational companies which the Japanese one is leading. On the other hand, the Turkish film industry mostly depends on various external sources such as Eurimages. Different from the American film industry, the Turkish film industry is affected by the tendencies of sources in terms of content (Parlayandemir, 2011).

Other than financial sources, specialization, and professional staff make huge differences when comparing the American film industry and the Turkish film industry. The American film industry's global domination is protected, and its progressing strategies are developed by professionals who specialize in marketing (Kara, 2014).

Especially since the 1980's, two major differences between the Turkish film industry and the American film industry are financing power and technology. Particularly, since half of the over 100-billion-dollar global film industry is in North America and the United States of America, being an influential power of technological developments after the 2000's, it became the leader among other film industries (Ormanlı, 2013). Cultural, economic, and technological improvements were triggered by the globalization concept. The United States of America utilized cinema as a propaganda tool and generated great income. On the other hand, the domestic market and the Turkish people living in Europe were the only targets since the Turkish film industry was facing economic and political instability. Although the Turkish film industry was awarded international awards, the lack of production budgets and technological necessities dragged it back from being one of the leading film industries throughout the world.

#### **4.2.2. The Roles of State and Private Sector**

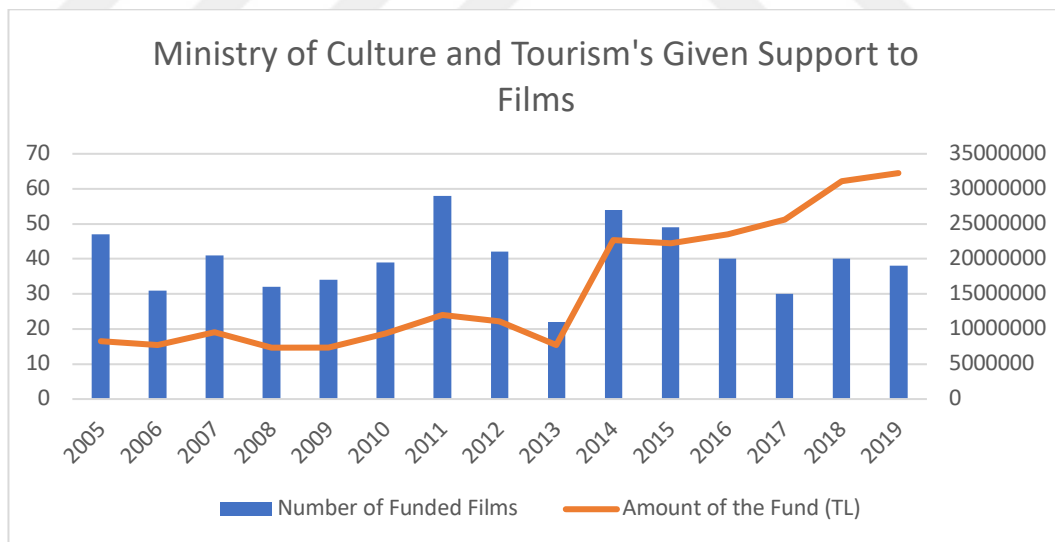
States have positive as well as negative impacts on both the Turkish film industry and the American film industry. Negative impacts on the Turkish film industry can be counted as political developments, coup d'états, and also censorships. On the American film industry side, censorship during the Cold War times refrained it from reaching the world market (Parlayandemir, 2011).

Aside from those negative impacts of states on both industries, there are also positive impacts of states. In the American film industry, some monopoly applications were allowed. Especially for the global success of the American film industry, it is remarkable that the United States Department of State gathered and analyzed

information about rival foreign markets. For the Turkish film industry, the state's support was more at the screening stage via rearrangements of taxes. It was followed by tax reductions at production stages (Parlayandemir, 2011).

Financing a film in Türkiye may come from previous productions' profits, bank credits, sponsorships, revenues from advertisements, and television rights. The state began to support production organizations with law No. 5224 of July 14, 2004, on the Evaluation, Classification and Support of Cinema Films as mentioned before. Since 2005, 613 feature films have been supported with 299.294.646 TL by the General Directorate of Cinema (<https://sinema.ktb.gov.tr/TR-144743/sinema-sektorune-destekler.html>) as seen in Figure 4.3.

**Figure 4.3 Ministry of Culture and Tourism's Given Support to Films**



Source: [www.sinema.ktb.gov.tr](http://www.sinema.ktb.gov.tr)

The film industry is not just a commercial activity but also a cultural one. It is very influential in the promotion and publicity of culture. With this awareness, the Republic Türkiye Ministry of State for Foreign Trade offers to include the cinema and

film sector as the 24th supported sector in terms of export. As a result of this support, the number of tourists, especially from the Middle East, has increased. (Tanrıöver, 2011). The close relationship between the film industry and cultural tourism got significant attention. As a result, the American film industry is supported financially by big media groups with the revenue earned from other sectors. In the case of the Turkish film industry, players in the advertising sector began to support film production from the beginning of 2000 (Erkılıç, 2003).

The Turkish film industry and the American film industry also depart from each other when it comes to organizations, unions, and professional associations in state cinema industry affairs. There are unions and professional associations in both industries; however, their impact areas are different. In the case of the Turkish film industry, rearrangements are done to cover the side of the state and producers. The labor side is usually ignored (Parlayandemir, 2011).

#### **4.2.3. Production, Distribution and Screening**

In order to make an accurate comparison between the production of the two industries, the scales must be evaluated first. The target market is the whole world for the American film industry from the very beginning. On the other hand, the local market and the Turkish citizens living abroad are the target markets for the Turkish film industry. This difference can be seen from the costs spent to produce films for both industries. Films in the American film industry have enormous budgets when compared to the films in the Turkish film industry. While in the American film industry ‘Blockbuster’ films can be produced from the beginning, in the Turkish film industry it is after 2000 that high-cost films were produced when compared to previous periods. Capital accumulation from television soap operas and advertisements made it possible to produce high-cost cinema productions. Nevertheless, when those ‘high-cost’ productions are compared to the ones produced by the American film industry, the Turkish film industry productions are still very low-cost. The highest-budget Turkish

film is “Fetih 1453” with a budget of \$18,200,000 which was screened in 2012. Following the highest budget film with a \$ 14,000,000 budget is “Kurtlar Vadisi Irak” in 2006 (Box Office, 2022). Whereas those high-budget Turkish films only cost less than one-tenth of the average budget of the first fifty films of the American film industry (The Numbers, 2022).

Profit maximization is prioritized by both industries. Previous data and tendencies checked from social media enable us to make strong forecasts about box office successes. In addition to this, investment amounts are determined by production organizations by utilizing the sector analysis.

In terms of distribution, it is more than just delivering copies of films to the regions safely. It is more about planning and forecasting about which film would be more preferred in which region, at which screens, etc. In addition to this, digitalization at the distribution stage enabled distributors to solve logistic problems and fastened the process. In this way, distributors may focus more on promotion and marketing activities (Rekabet Kurumu, 2016).

From the data below Table 4.5, it can be seen that distributor UIP used to have half of the revenue in 2013. However, the next year, its share declined by one-third of the total revenue in 2014. Although it began its operation at the end of 2014, Mars Distribution got a very remarkable share of the total revenue. In a very short time, Mars Distribution became the second one on the list, that gets the most from the yearly revenue in Türkiye (Rekabet Kurumu, 2016).

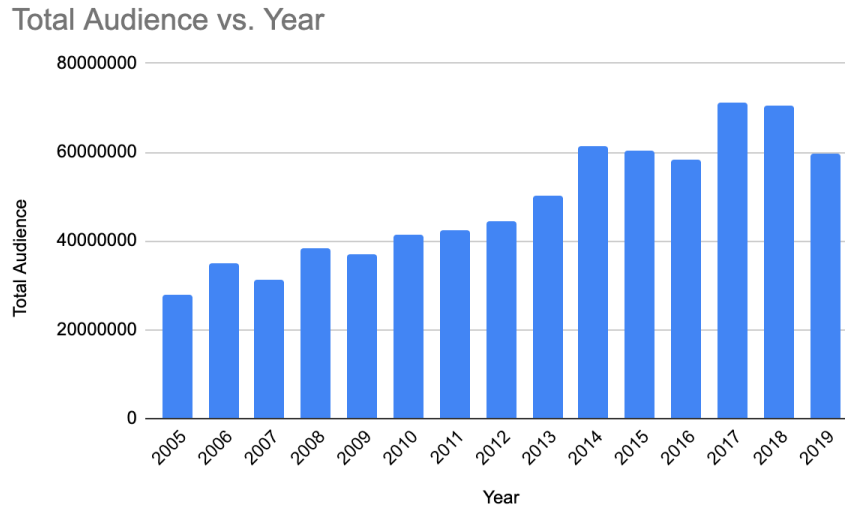
**Table 4.5 Share of Total Revenue of Distributors and Screened Films in Türkiye during 2013-2015**

Distributor	Share of Total Revenue (%)			Share Received from the Number of New Screened Films (%)		
	2013	2014	2015	2013	2014	2015
UIP	46,3	28,1	38,8	15,5	10,6	9,5
Mars Dağıtım	-	6,8	18,6	-	2,8	14,3
Pinema & PinemArt	6,8	7,4	16,4	15,5	14,2	11,9
Warner Bros.	17,1	21,1	12,1	9,0	9,2	8,3
The Moments Ent.	-	6,7	7,5	-	3,1	10,3
Cinefilm	-	1,7	1,8	-	0,8	1,2
Chantier	1,4	4,5	1,6	3,7	7,8	5,6
M3 Film	0,9	1,5	1,4	16,8	24,2	19,4
Bir Film	-	1,5	1,0	-	5,6	7,1
MC Film	-	-	0,4	-	-	4,8
Özen Film	0,3	0,3	0,2	6,5	4,7	5,2
Medyavizyon	1,4	2,1	-	8,7	3,1	-
Tiglon	25,3	17,4	-	21,4	5,6	-
Other	0,5	0,1	0,2	2,9	8,4	2,4
Total	100,0	100,0	100,0	100,0	100,0	100,0

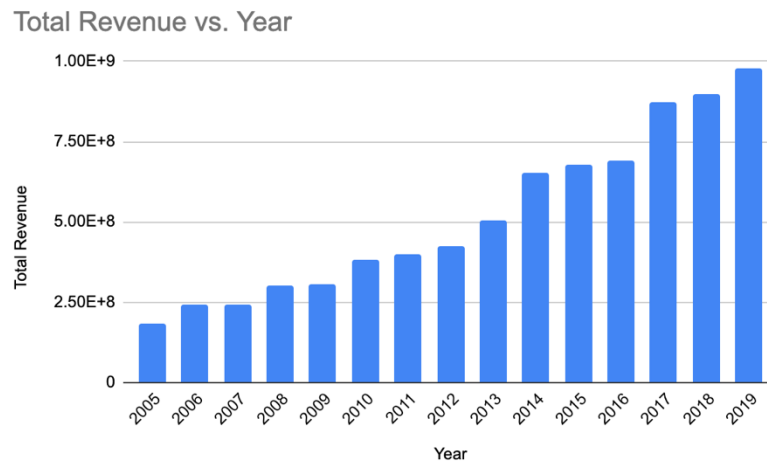
Source: Rekabet Kurumu, 2016.

At the screening stage, parallel to the increased number of audience, the number of films screened is increased continuously. According to the data on Box Office Türkiye's website, the audience has increased to 59.556.020 in 2019 from 27.801.041 in 2005 as can be seen in below Figure 4.4. It is possible to observe the expansion of the industry from the growth of the total revenue. From Figure 4.5, it was 184.286.289 TL in 2005. It has increased to 980.410.599 TL in 2019.

**Figure 4.4 Number of Total Audience for the Films in Türkiye**



**Figure 4.5 Total Revenue of the Films in Türkiye**

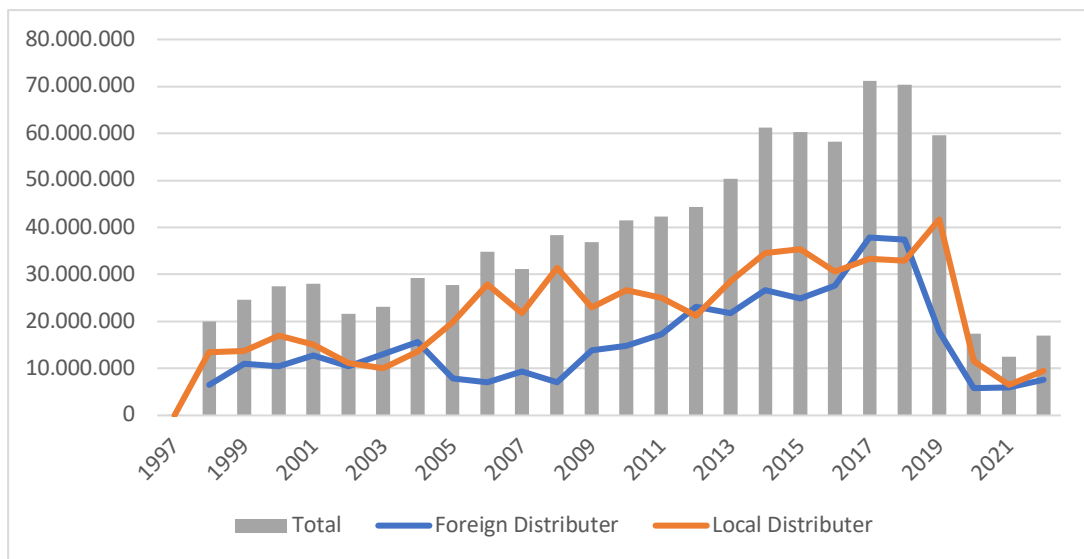


Marketing activities and technological improvements at the distribution and screening stages feed the production stage in a way. For the American film industry

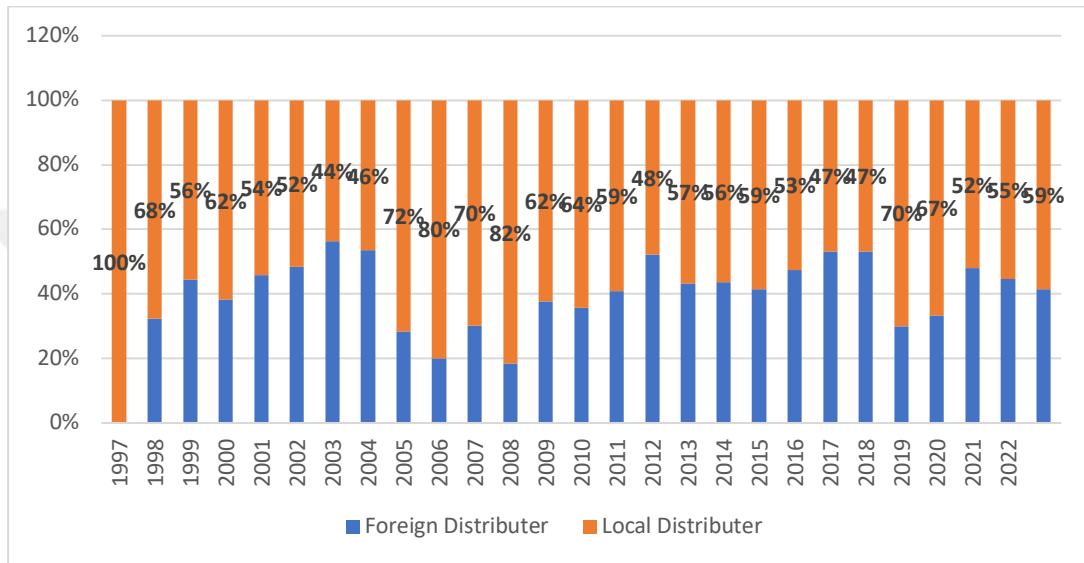
case, technological improvements eased to reach the target audience. In addition to this, with the marketing activities, the aim is to screen the film at the maximum number of movie theaters. The profit earned from this industry value chain returns to the industry value chain itself in the American film industry to make the global cinema profit sustainable (Evren, 2017).

Although there is an increase in the number of films supported, the number of audiences does not increase at the same rate for the Turkish film industry. Moreover, there is a decrease in the rate of the number of screened films to the number of audiences as shown in below Figure 4.6 and Figure 4.7. This brings to mind that supported films cannot find movie theaters to be screened. Correspondingly, the audience is key to the development of the film industry. The financial support which is needed for the film industry to grow is mainly from audience support. State support also comes from the audience. It is because the source of state support is banderole fees and entertainment tax.

**Figure 4.6 Number of Screened Film Audiences According to Distributors**



**Figure 4.7 Rate of Number of Audiences of Local Distributor Films**



After the law no. On June 5, 2003, on Foreign Direct Investments Law passed, there was an increase in the number of film productions which is parallel to the increase in the number of movie theaters in Türkiye. The increase in the number of local productions paved an increase in the audience and revenues.

### **4.3. COMPARISON OF THE TURKISH FILM INDUSTRY WITH THE FRENCH FILM INDUSTRY**

#### **4.3.1. General Structure and Supporting System of the Film Industry**

France is the model for Turkish independent film production as it is for many other European countries. Cinema, in general, culture is very important in France. According to France, the fate of cinema cannot be left to the hands of the market economy. With

the 1940 and 1941 Laws, the French state became the protector and the controller of the sector (Par & Vitrinel, 2012). In 1946, the French state transferred the role of supporting and organizing the French cinema to the Centre National de la Cinématographie (CNC). Another important vantage point is, in 1967, taxes applied to the revenues of cinema tickets. These taxes from ticket revenues are transferred to the French cinema support fund. In the following years, this tax had been enlarged to encompass the television channels. As a result, one-quarter of CNC's revenue is the 13-14% tax deducted from each movie ticket, and the remaining three quarters is the tax collected from television channels (Forest, 2001:276). In order to support and ensure the continuation of creativity in the sector, television channels in France must invest 20 percent of their turnover in cinema or audiovisual productions (Par & Vitrinel, 2012). Distributors and recently, internet providers also contributed to this fund. CNC supports the production and distribution of films, short-film producers, documentaries, and animators as well as movie theaters, festivals, and film schools (Par & Vitrinel, 2012).

There are two types of production support. The first one is “automatic support” which is given to the films according to their screening rates with the condition of investing in cinema again. The second one is “selective support” which is given before the movie is shot. The payback is proportional to the revenue of the film in this type of advance payment (“avances sur recettes”) (Par & Vitrinel, 2012). Automatic support systems exist in many European countries. In addition to this, in Türkiye as well as in other European countries, public support is realized through the form of the selective support system. Different from other European countries, in France, the support is not given just to production but also to distribution and operation as well.

#### **4.3.2. Distribution of Income Sources of the Film Industry**

Primary finance sources of the French film industry are production companies and television channels. In addition to that, as mentioned by Par and Vitrinel (2012), there

exist other entities that provide alternative resources. One of them is SOFICA (Société pour le financement de l'industrie cinématographique et de l'audiovisuel) which comprises the French incorporated companies with the aim of supporting the film industry. Those companies invest the income, collected by individuals, directly to the sector. Individuals joining SOFICA's benefit from discounts on income tax up to 40% with a condition of preserving their contribution for 5 years (Par & Vitrinel, 2012).

In addition to the above, there are specialized banks that offer credits to producers. These credits are vital for producers even if there are not many from these banks. Moreover, Institut du Financement du Cinéma et des Industries Culturelles (IFCIC) was established in 1983 in order to facilitate the credit withdrawal of the cinema industry.

Contrary to the French multi-channeled structure, in Türkiye there is only one support channel. With the law passed in 2004, the General Directorate of Cinema under the Republic Türkiye Ministry of Culture and Tourism provides three types of support which are project, production, and post-production support. The supported production may be exempt from the payback of these supports only if their films are awarded by the specific festivals that are determined by the board. Otherwise, the producer company cannot apply for new support for three years if the payback is not done.

In the Turkish film industry, there is also a presale of films to the television channels. While the amounts are not comparable with the French film industry. Beginning in the 1990's, presales, sponsorships, support from the scenario, and advertisement of films by television channels have started (Par & Vitrinel, 2012). Following that, during the 2000's, the private sector was supporting the film industry in return for tax reductions by the state. In total, when these supports are compared with the French film industry's support, the Turkish film industry's support is very limited. In addition to that, due to the increasing costs, these supports are not enough.

As mentioned by Par and Vitrinel (2012), there is a lack of cinema investment partnerships like SOFICA in France, not enough co-productions with television, no low-interest and long-term loan options specific to cinema, no tradition of sponsorship,

and just limited international support like Eurimage in the Turkish film industry, films with the same scriptwriter, director, and producer, which is “auter”ness is more a necessity rather than a choice. As an ultimate result of this, support from the Republic Türkiye Ministry of Culture and Tourism for the directors who made their first or second films became the only way out. Whether these supports will be refunded or not depends on the awards which supported films win. In addition to that, since it is the first time, most directors cannot calculate the budget in an accurate amount (Par & Vitrinel, 2012). This result discourages most first-time directors. Eventually, they did not produce the second film.

#### **4.3.3. Survival of Support Model in the Turkish Film Industry**

The support from the Republic Türkiye Ministry of Culture and Tourism is criticized for being evaluated by an institution of the state, the uncertainty of the criteria for support, and the payback conditions. For instance, the condition of the paybacks should be done in three years, which puts the production companies in a difficult situation. The industry is full of production companies with just one film as stated by Par and Vitrinel (2012). These companies cannot survive with the debts they are in. Therefore, these production companies die with their debts. If the producer wants to make a new film, then a new company is established as a new entity.

With the conditions stated above, the survival of the Turkish support model for cinema is not possible. The model needs improvements and additions. Since the French model can be taken as an example, the support done by the state should go under an independent entity. As the industry is growing, just the support from this new independent entity would not be enough. Similar to the French model, there need to be special banks and special loans with long-term options and low-interest rates for the cinema industry. In addition to this, “specialization” would contribute to the survival of the model as mentioned by Par and Vitrinel (2012). The director can focus on his

own job, so he does not need to be concerned about raising money or other financial issues.

#### **4.4. SUMMARY**

Since this study focuses on the local specialist film production organizations in the Turkish film industry, it is important to review the Turkish film industry from the beginning. In this chapter, first, the history of the Turkish film industry is studied. The change in the industry value chain, changes in the number of film production organizations, number of audiences and number of films are assessed under two periods. Periodization is done according to Kalemci and Özen's (2011) study. Hence, the entrance of U.S.A. film organizations to the Turkish film industry is taken as the vantage point.

There was a "percentage application" system in the beginning. After that, until the entrance of the U.S.A. film organizations, years between 1950 and 1989, there was the "regional business administration system". However, the effect of the entrance of the U.S.A. film organizations changed it into the "hierarchical network organization". As a result, the U.S.A. film organizations dominated the Turkish film industry first by taking control of the distribution. After that, the screening stage also went under the control of the U.S.A. film organizations. As a result, this domination of the U.S.A. film organizations over the Turkish film industry necessitated the need to concentrate on the U.S.A. film industry.

Therefore, a comparison of the Turkish film industry and the U.S.A. film industry is given. Structural differences that shaped both industries are discussed. For instance, entrepreneurship and profit maximization are the main drivers of the U.S.A. film industry. On the other hand, the Turkish film industry proceeds in a trial-and-error manner. The U.S.A. film industry began concurrently to the stages of development of film production, distribution, and screening. Unlike the U.S.A., the Turkish film industry began with just the screening stage. The roles of the state and private sector

differ as well for both industries. Although the Turkish film industry is initiated by state support, this support is limited to the screening stage via tax rearrangements. On the other hand, the United States Department of State even gathers and analyzes information about competitor foreign markets. Additionally, the scales are very different from each other. The market is the whole world for the American film industry. On the other hand, it was just the local market and the citizens living abroad are the Turkish film industry.

In the last part of the chapter, the French model of film production and the Turkish model are compared. Like many European countries, France is a model for Turkish independent film production. In France, there is a very strong support mechanism for the film production organizations such as funds from an independent body, support of television channels, special banks, and bank credits unique to the film production. In the Turkish film industry case, it is only the funds given by the General Directorate of Cinema under the Republic Türkiye Ministry of Culture and Tourism at the project, production, and post-production stages. Last but not least, the survival of the Turkish film industry is discussed. With the current support model, the survival of the system does not seem to be a long-term model for the Turkish film industry.

## METHODOLOGY

This chapter includes the research methodology of the study. The scope of this study is essentially to understand the survival of local specialist film production organizations in Türkiye. The main research question of this study is whether the concentration of film organizations resulted in the emergence of independent, specialist film production organizations in Türkiye. The following research question is whether these local specialist film production organizations can survive or not? A generalist organization is defined as competing in a variety of domains simultaneously. On the other hand, an organization focusing on only one or a limited few domains is called a specialist organization (Carroll, 1985). Generalist film organizations are taken as vertically integrated, hierarchically structured organizations. Independent film production organization is used as opposed to a hierarchical network structure. Independent film production and distribution can be perceived as opposition to a vertically integrated organizational structure. For the aim of this study, specialist production organizations are defined as “film production organizations/producers which only produce films and do not get involved in either distribution or screening stages. Since the Turkish film industry is under consideration, local specialist film production organizations are focused. First, the software Populus is utilized to analyze the data. Density-Dependent Population Growth simulation is operationalized at the simulation. Starting population size, environmental carrying capacity, and *per capita* intrinsic growth rate are the variables that are used in the simulation. The starting population size is taken as the number of local specialist production organizations in 2005. The second variable growth rate is calculated as the change in the number of local specialist film production organizations for two consecutive years is divided by the number of local specialist film production organizations of the previous year. Then, the average of all these individual growth rates is taken as the growth rate. For the last variable, the number of locations that the movie is screened and the number of weeks it is screened are multiplied to calculate movie screenings. The maximum number of local specialist film

production organizations is in 2018 with 20 percent screening rate of 194 local specialist film production organizations. Additionally, when the screening percentages are checked, the highest percentage among other years with 26 per cent in 2010. Then, it is calculated with an equation as 194 local specialist production organizations exist with a 20 percent of screening. How many local specialist production organizations would exist with a 26 percent screening rate? The answer to this question and therefore the carrying capacity is 252. After that, data is classified and explored to come to a more concrete end. Last, interviews are conducted to ensure the validity of the study.

### **5.1. POPULATION AND SAMPLE SELECTION**

The population is the Turkish film organizations, the sample is composed of all 810 local specialist film production organizations in the Turkish film industry between 2005 and 2019. Within the Turkish film industry, there exists no specialist distribution organization. The number of local specialist film production organizations according to years are as in the below Table 5.1. All those 810 local specialist film production organizations can be found in Appendix 3.

**Table 5.1 Number of Local Specialist Film Production Organizations According to Years**

<b>Year</b>	<b>Number of Local Specialist Film Production Organizations</b>
<b>2005</b>	52
<b>2006</b>	60
<b>2007</b>	72
<b>2008</b>	84
<b>2009</b>	99
<b>2010</b>	96
<b>2011</b>	103
<b>2012</b>	98
<b>2013</b>	116
<b>2014</b>	138
<b>2015</b>	164
<b>2016</b>	154
<b>2017</b>	167
<b>2018</b>	194
<b>2019</b>	162

Since the second research question is whether the local specialist film production organizations can survive or not in the Turkish film industry, a “productivity index” is calculated and applied on those 810 local specialist film production organizations in order to eliminate those that cannot survive. After the application, 46 local specialist film production organizations remained. In addition to that, when the festival presences of those 46 local specialist film production organizations are checked from the list prepared by Yamaç Okur, there remain 12 local specialist film production organizations.

## **5.2. DATA AND DATA COLLECTION PROCEDURES**

Data for this study is collected from two major sources; secondary data which comprises Box Office Türkiye, and web pages of specialized film production organizations. Additionally, interviews were conducted with three knowledgeable professionals about the Turkish film industry.

### **5.2.1. Secondary Data Sources and Collection Methods**

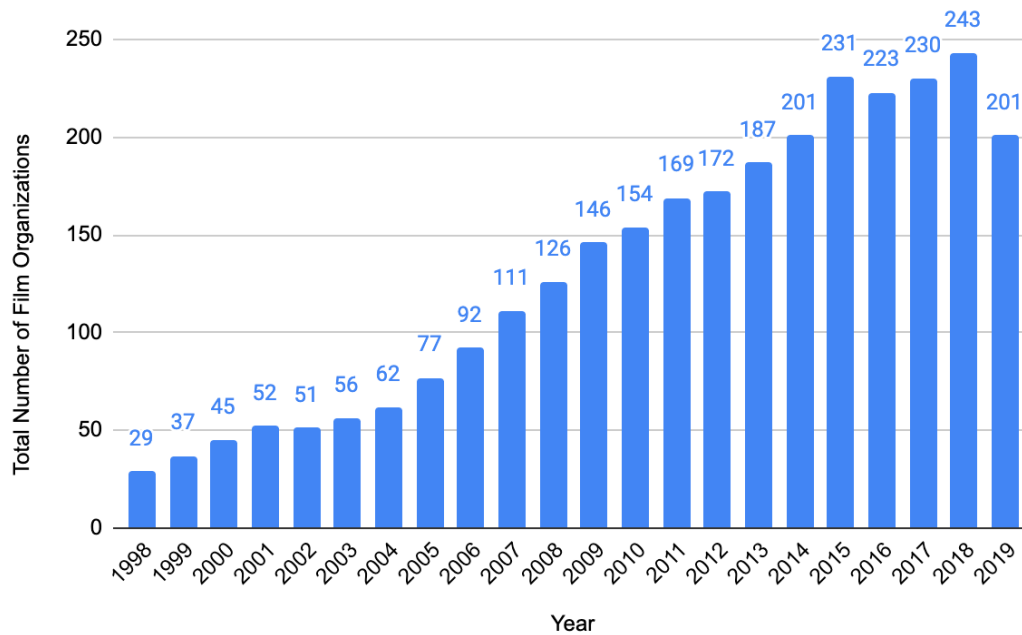
The secondary data is gathered from Box Office Türkiye website ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)). All film organizations, including the generalist and specialist film organizations, are listed for this study by checking one by one from the Box Office Türkiye website. Later, each organization's origin is checked manually from their own websites for all the organizations in the list. Then, these organizations are coded as either foreign or local film organizations depending on their origin stated in their websites. Afterwards, their operation areas are checked. The specialist organizations only involved in the production stage of the film industry value chain are used for this study.

The above-mentioned data covers 15 years between 2005 and 2019 (inclusive). Ultimately, the number of local specialist film production organizations that produced films between 2005 and 2019 (inclusive), is in total 810. A list of these local specialist film production organizations can be found in Appendix 3, under the name "List of 810 Local Specialist Film Production Organizations".

The local specialist film production organizations are assumed to be born in the first year they produce a film. The last time they produced a film is assumed to be their last year alive. When the tenures of these specialist film production organizations are taken into account, the number of organizations according to years is as follows. As can be seen from Figure 11, the number of local specialist film production organizations is increasing year over year. Therefore, it can be said that the increase in

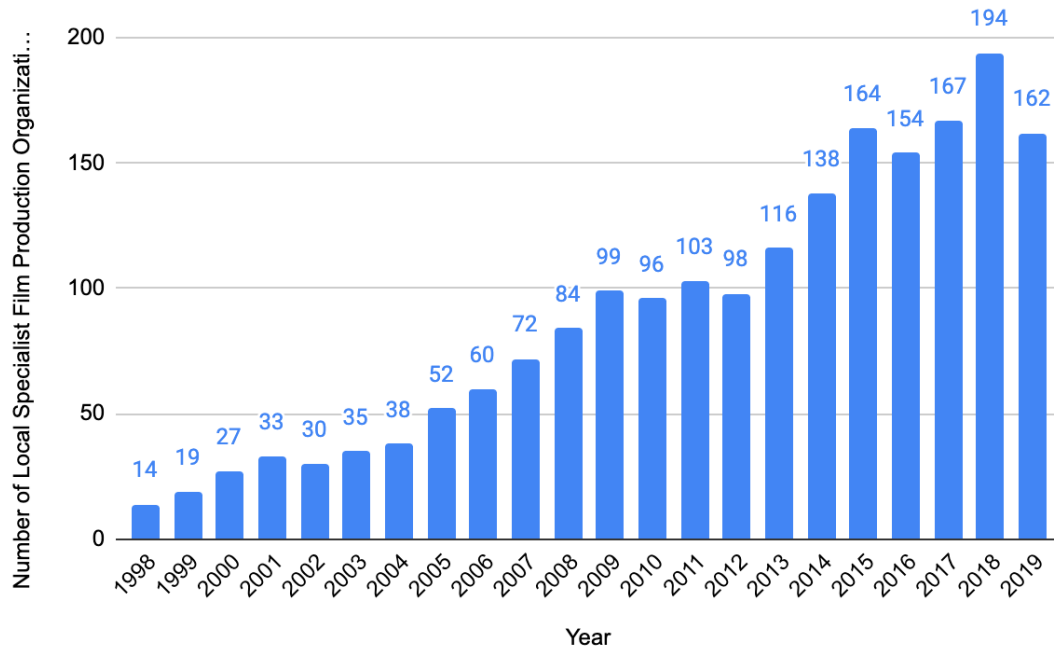
the number of film organizations resulted in the formation of independent, specialist film production organizations in the Turkish film industry. The number of film organizations since 1998 in Türkiye and the increase can be seen in Figure 5.1.

**Figure 5.1 Total Number of Film Organizations in Türkiye**



There are slight decreases only at two years which are 2016 and 2018. At this point, the Turkish film industry data retrieved from the Box Office Türkiye website ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)) is run by the software Populus to check whether the population has reached its carrying capacity or not. After the result of the program, it is seen that the carrying capacity is not reached yet for the Turkish film industry. The number of specialist film production organizations in Türkiye can be seen from Figure 5.2.

**Figure 5.2 Number of Specialist Film Production Organizations According to Years**



Another secondary source utilized is the web pages of specialized film production organizations. After identifying 12 specialist film production organizations a detailed analysis of the data provided on their websites is documented to provide a more in-depth analysis of the factors that contributed to their survival. Detailed documentation of these local specialized film production organizations is given in Appendix 12.

### **5.2.2. Interviews**

For the purposes of data collection, three interviews were conducted in total 26 minutes after in-depth analysis of the 12 specialist film production organizations. These interviews are used to ensure the validity of the study. All interviews were recorded and transcribed verbatim. While identifying the interviewees, purposeful sampling was

utilized. With the purpose that these interviewees would provide the most useful and accurate information for the questions; they were included in this study because they were all involved in the Turkish cinema industry. All three interviewees were educated middle-class professionals. The first interviewee was a 51-year-old woman. She was an academician in the cinema field. The second interviewee was a 40-year-old woman. She was a film producer and also got a degree from the cinema department. The last interviewee was a 72-year-old woman. She was a writer and an academician in the cinema field.

**Table 5.2 List of Interviewees and Interview Details**

		Interviewee Gender	Interviewee Age	Interviewee Profession	Duration (minutes)
Interviewee ATP	Academician	F	51	Academician	11:32
Interviewee	Producer DI	F	40	Producer	12:34
Interviewee	Writer FC	F	72	Writer and Academician	2:18

### 5.3. DATA ANALYSIS

Data analysis of this study is carried out in two phases: analysis of the secondary data which is mainly done by utilizing Populus software and analysis of the interviews conducted.

For this study, Density-Dependent Population Growth simulation is utilized to address whether the carrying capacity is reached or not. This module needs a starting population size which is symbolized as  $N_0$ , environmental carrying capacity, or a maximum sustainable population size which is symbolized as  $K$ , and a *per capita* intrinsic growth rate which is symbolized as  $r$ . Among continuous, lagged continuous, and discrete simulations of the program, this study utilized discrete simulations. Discrete simulation represents this study best, because of the year intervals in which films produced by specialist production organizations are taken as their proof of being alive and births can occur only once.

The Density-Dependent Population Growth simulation is employed for the local specialist film production organizations that lived between 2005 and 2019. This model requires three parameters to run as explained above. The first one is the number of local specialist film production organizations in the initial year of 2005. The number of local specialist film production organizations was 52 in 2005. Therefore, parameter  $N_0$  is 52 for this model.

The second parameter is Growth Rate ( $r$ ). The growth rate is the change in the number of local specialist film production organizations over given years. The growth rate for local specialist film production organizations in Türkiye between 2005 and 2019 is calculated as follows. First of all, the year-over-year growth amount is calculated by utilizing the number of local specialist film production organizations each year. Later, the growth rate is computed by employing this growth amount year over year. More specifically, the change in the number of producers for two consequent years is divided by the previous year's number of producers. When all  $r$  values are calculated, the average of these results which is 9% is taken as the value of  $r$  for this model. Calculated growth amounts and rates year over year are shown in the findings chapter.

The last parameter is Carrying Capacity ( $K$ ). It is defined by Hannan and Freeman (1987) as the limit on the size of an organizational population that can be sustained in society. In light of this definition, the carrying capacity for local specialist

film production organizations in Türkiye between 2005 and 2019 is calculated as follows. The total movie screening and movie screenings of local specialist film production organizations are calculated by multiplying the number of locations where the movie is screened and the number of weeks it is screened. After that, the maximum number of local specialist film production organizations is found. It is in the year 2018 with a 20 percent screening rate of 194 local specialist film production organizations. It would not be right to take this as carrying capacity. Because, when the screening percentages are checked, in 2010 the screening percentage of local specialist film production organizations was 26 percent which is the highest percentage among other years. Then, it is calculated with an equation as 194 local specialist film production organizations exist with a 20 percent screening, then how many local specialist film production organizations would exist with a 26 percent screening rate? The answer to this question is 252. In light of this information, the carrying capacity (K) of the model is calculated as 252.

Discrete simulations are selected since the birth of an organization can happen once and year intervals that organizations produce films are taken as their proof of being alive. After all three parameters are put into the discrete simulation model, the expected shape of the graph would be a logistic growth graph. Density-Dependent Population Growth Model suggests that the number of organizations would increase until the carrying capacity is reached. After that point, because resources are limited in the environment and there exist predators, the number of organizations would begin to decrease.

An index is calculated and called the “productivity index” to classify the local specialist production organizations. It is calculated by the division of the total number of films that a local specialist film production organization produced over 15 years to the lifetime of that organization. Lifetime is calculated by the subtraction of the first year in which a film was produced from the last film was produced. The productivity index shows the average number of films produced by film organizations in a year during a lifetime. If the productivity index is higher than one means that the film

organization produced more than a film every year it lived for. This is not possible unless the organization is a mass film production organization. Therefore, with the help of this index, it was possible to eliminate the mass film production organizations. The organizations with a productivity index of one or less than one are taken.

The following three criteria were the first film must be before 2019, the last film must be after 2005, and the organization must produce at least one film between 2005 and 2019 (inclusive). After the application of these four criteria, 137 local specialist film production organizations remained. Following that, the lifetime mean is checked for those organizations. The lifetime mean is 3,93. As a result of this, with the application of a threshold of 4 years filter, there remain only 46 local specialist film production organizations.

In search of a common criterion, those 46 “survived” local specialist film production organizations are checked whether their films take part in film festivals or not. The list named Turkish Films Major Festival Selections, prepared by Yamaç Okur, which was last updated in September 2023, is utilized for the list of films that take part in festivals. The included festivals in this list are Cannes, Berlinale, Venice, Locarno, San Sebastian, Rotterdam, Sundance, Toronto and Karlovy Vary. As seen in Table 5.3, 12 out of 46 local specialist film production organizations participated in these film festivals. A detailed description of these local specialist film production organizations is given in Appendix 12.

**Table 5.3 List of 12 Local Specialist Film Production Organizations with a Productivity Index of One or Less and Which Produced Film Between 2005-2019 and With Tenure of Four Years or More and With Festival Presence**

Local Specialist Film Production Organization	First Year	Last Year	Total Films	Total Year	Productivity Index	Festival Presentation	Ministry of Culture and Tourism Support
+90 Film Yapım	2012	2019	2	8	0.25	1	1
Asi Film	2008	2019	4	12	0.3333	2	2
Asteros	2015	2019	5	5	1	1	1
At Yapım	2009	2019	4	11	0.3636	1	2
Atlantik	2005	2019	7	15	0.4667	4	3
Ay Yapım	2011	2019	7	9	0.7778	1	0
Kaplan Film	2005	2019	7	15	0.4667	4	5
Kaz Film	2012	2019	1	8	0.125	1	0
Liman Film	2015	2019	2	5	0.4	2	1
Sinefilm	2006	2019	5	14	0.3571	3	2
Terminal	2012	2019	2	8	0.25	1	1
Zeyno Film	2008	2019	6	12	0.5	4	2

Last but not least, when analyzing the interviews, answers enabled the scheme of the content analysis under categories. After all interviews are read, similar recurring statements are grouped under the same themes. Interrelated themes are grouped under the same categories. Information provided by the interviewees, was grouped under five categories. These five categories are;

1. Film companies that produce films of the founder or a single director seem to have more chances of survival.
2. The number and the rate of one-year-lived producers are increasing.
3. The Turkish independent film production organizations are similar to the French independent film production model.
4. The Turkish independent film production model is not sustainable.
5. Digital platforms affected independent film production in Türkiye.

## **FINDINGS**

This chapter includes the findings of the study. Findings will be discussed under three titles, density dependence, liability of newness, and survival.

### **6.1. DENSITY DEPENDENCE**

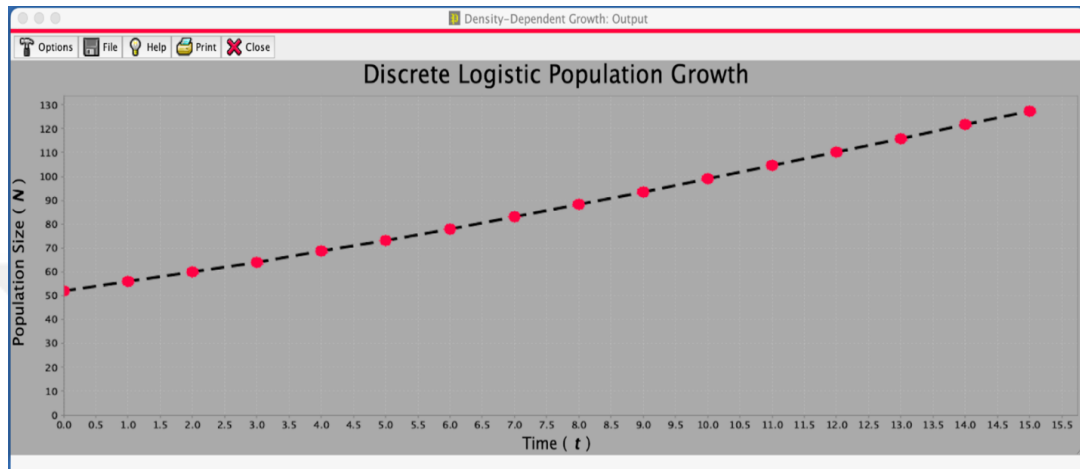
In this study, the aim was to find out whether the concentration of film organizations resulted in the emergence of independent, specialist film production organizations in Türkiye. The second research question was whether these independent, specialist film production organizations survive or not. Since the number of local specialist organizations was increasing, it can be said that as in Density Dependence Theory, the concentration of film organizations resulted in the emergence of specialist film production organizations up until the carrying capacity is reached in the Turkish film industry. This hypothesis was also tested via the Populus software by operationalizing the discrete Density-Dependent Population Growth simulation. Calculated growth amounts and rates year over year are as in Table 6.1.

**Table 6.1 Year Over Year Growth Rate and Rate of Local Specialist Film Production Organizations' Movie Screenings**

Year	Number of Local Specialist Film Production Organizations	Year Over Year Growth Amount	Year Over Year Growth Rate	Total Movie Screenings	Local Specialist Film Production Organizations' Movie Screenings	Rate of Local Specialist Film Production Organizations' Movie Screenings
2005	52	-	-	120532	7077	6%
2006	60	8	15%	274219	23979	9%
2007	72	12	20%	383242	50397	13%
2008	84	12	17%	409031	79500	19%
2009	99	15	18%	452668	105359	23%
2010	96	-3	-3%	522082	134518	26%
2011	103	7	7%	611416	141539	23%
2012	98	-5	-5%	711078	121295	17%
2013	116	18	18%	725709	134407	19%
2014	138	22	19%	776220	113492	15%
2015	164	26	19%	639355	158510	25%
2016	154	-10	-6%	641150	107021	17%
2017	167	13	8%	746332	119690	16%
2018	194	27	16%	976811	196177	20%
2019	162	-32	-16%	920080	150782	16%

When the three parameters, starting population size, carrying capacity, and growth rate, are put in the model, in the case of this study, carrying capacity has not been reached yet during the stated 15 years between 2005 and 2019 in the Turkish film industry. Therefore, the graph is a rising one as seen in Figure 6.1.

**Figure 6.1 Populus Software Output**



The graph would change only if the values of the parameters are changed. For instance, if the carrying capacity were reached at any point of the timeline, after that point the line of the graph would have been a decreasing one, as in a logistic growth graph.

What can be deduced from what has been explained so far is that for the emerging organizations, in the initial phase, the addition of every new organization has a legitimization effect on the existing organizations. Therefore, the number of specialist film production organizations is increasing for the Turkish film industry. Since the carrying capacity is not yet reached as proven by the software, the increase in the number of local specialist film production organizations continues for the Turkish film industry.

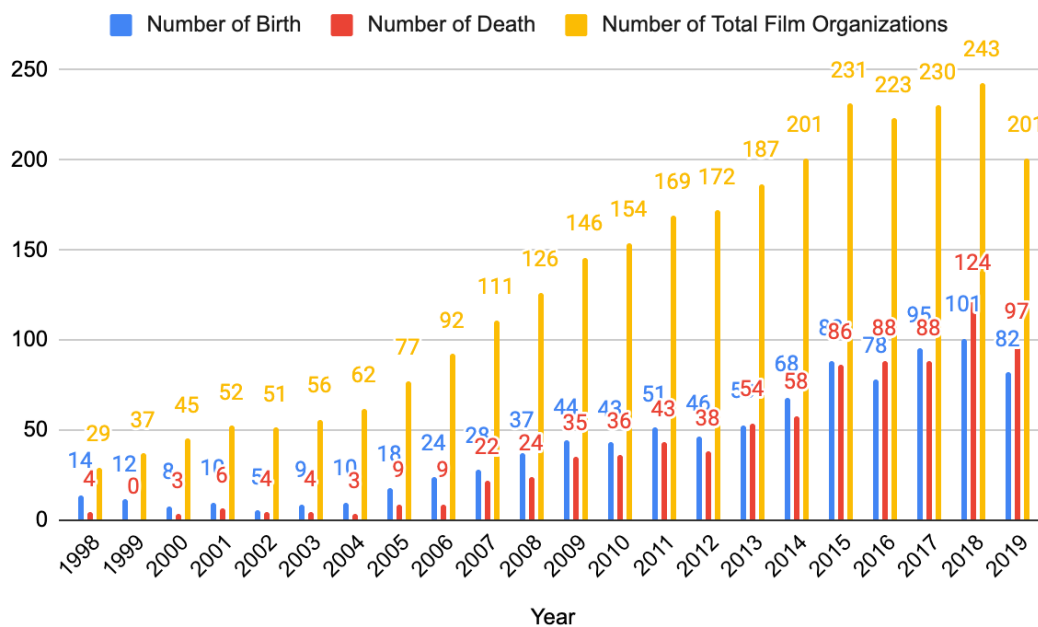
## **6.2. LIABILITY OF NEWNESS**

To take the study one step further, the local specialist film production organizations are focused on more. When it is checked closely, a surprising result has been found. Although the cumulative number of specialist film production organizations is

increasing as in Figure 6.2, there were many one-year-lived specialist film production organizations as well. The increasing number of one-year-lived specialist film production organizations may stem from the fact that they are new to the environment. This mortality rate of new production organizations is called the liability of newness (Stinhcombe, 1965). The competition over limited resources results in high mortality rates for new production organizations. It is not just the number of one-year-lived organizations that is increasing but it is more important that the ratio of one-year-lived local specialist film production organizations to the total local specialist film production organizations that are increasing.

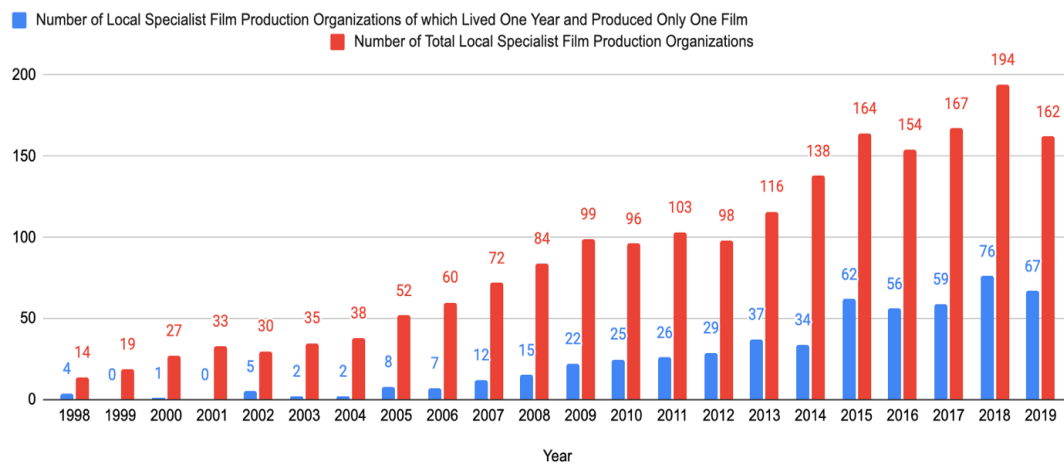
Although carrying capacity is not reached when all those 810 local specialist production organizations are taken as a population, it is worthwhile to zoom in on this population. During this 15-year time period, 535 of these production organizations lived only one year and produced only one film between 2005 and 2019.

**Figure 6.2 The Number of Births, Number of Deaths, and Number of Total Film Organizations**



When the number of one-year-lived production organizations is evaluated, it is seen that their numbers are increasing from year to year, just like the number of one-year-lived local specialist film production organizations as in Figure 6.3.

**Figure 6.3 The Number of Local Specialist Film Production Organizations that Lived One Year and Produced Only One Film and the Total Number of Local Specialist Film Production Organizations**



While the number of specialist film production organizations with one year of lifetime was 8 in 2005, it increased to 67 in 2019. Just the increasing number of organizations might have been misleading, however, the ratio of one-year-lived producers to the total number of producers is also increasing as can be seen in Table 6.2. It was 15.38 percent in 2005 and came to 41.36 percent in 2019.

**Table 6.2 The Number and The Ratio of One Year Lived Local Specialist Film Production Organizations**

Year	Number of Local Specialist Film Production Organizations of which Lived One Year and Produced Only One Film	Number of Total Local Specialist Film Production Organizations	Ratio
2005	8	52	15.38%
2006	7	60	11.67%
2007	12	72	16.67%
2008	15	84	17.86%
2009	22	99	22.22%
2010	25	96	26.04%
2011	26	103	25.24%
2012	29	98	29.59%
2013	37	116	31.90%
2014	34	138	24.64%
2015	62	164	37.80%
2016	56	154	36.36%
2017	59	167	35.33%
2018	76	194	39.18%
2019	67	162	41.36%

When all the interviews are analyzed, the categories of the interviews validate the findings of this study about the liability of newness and survival of the local specialist film production organization. The categories and frequencies can be seen in Table 6.3.

**Table 6.3 Category, Theme, Frequency**

Category	Theme	Frequency
Film companies that produce films by the founder or a single director seem to have more chances of survival	producer-director model	4
	producer with a single director	12
	success	6
The number and the rate of one-year-lived producers are increasing	project-based	6
	cannot afford the second film financially	5
	payback conditions of ministry support	6
The Turkish independent film production organizations are similar to the French independent film production model	The French model	3
	CNC	3
	Ministry of Culture	4
The Turkish independent film production model is not sustainable	no systematic process	2
	the system does not work	1
	no systematic fees collected	3
	involvement of television	3
	independent entity	2
Digital platforms affected independent film production in Türkiye	expansion in the screening phase	5
	financial contribution	6
	prevent disappearing	1
	difficult to obtain data	2
	job opportunity	1
	quality work for platforms	1

As mentioned in Chapter 4, The Turkish Film Industry, most film production organizations cannot even calculate the first film's budget properly, since it is their first time (Par & Vitrinel, 2012). According to the interviews, it is commonly stated that the local specialist film organizations cannot afford to make a second film. This was indicated as such by Writer FC "I think they may have had a hard time making the second movie. Because the box office returns of independent films can be very limited. They may be having trouble in finding resources for the second movie." Academician ATP stated that "...there are also producers who spend their money very quickly and then cannot hold on to the film industry again." It is also stated by Producer DI that these specialist films do not make many box office sale. Again, it is stressed by Academician ATP that "this is a situation that arises due to the instability of the film industry and financial support models, uncertainty, and difficulty in fulfilling the payback conditions of financial support." This brings to mind the heavy payback conditions of the Ministry support. It is stated by the Producer DI that "Therefore, an incredible production company inflation occurs. In fact, when you look at that producer as a person, maybe she is that person. My name is D., I may have made more than one film, but I have to establish different companies like an A film, B film, and C film company. Every time because the law does not allow you to make 1-2 films every year. Therefore, even though I have made many films in that name, as a company, you see that company as being born, established, made one movie, and died.... The fact that the law pushes people to do this. So, you constantly have to establish new companies to make films, sole proprietorship."

In addition, Academician ATP stated, "But in addition to these, we can also see that different production companies with different names can be established by the same people in line with the support received from the Ministry of Culture and in case of concern or fear of not being able to fulfill those supports."

Ultimately as stressed by Writer FC, the film production organizations are project-based most of the time. The increased number and also the increased rate of one year lived film production organizations shows that they were actually aimed to

live just for one film. The financial responsibilities and unfulfilled payback conditions of the Ministry support seem to be the main reason for that. If a director wants to make a second film and also needs support from the Ministry of Culture, since most of the time the Ministry support is the only support they can reach, a new film production company is established by the same person. Rather than applying for support from the old company, a new company with a new name applies to it. As mentioned by Academician ATP “but when we look at the signs and the names underneath, we can see that these production companies were established on a project basis.”

To sum up, the increasing number and rate of one-year-lived local specialized film production organizations in Türkiye, the liability of newness, is the result of three main reasons according to the interviews. The first reason is that it is difficult for these organizations to fulfill the payback conditions of the financial support of the Ministry of Culture. The second reason is that these specialist film production organizations cannot afford to make a second film. Sometimes, these specialist film production organizations could not complete even the first films, because they could not calculate the first film’s budget properly as stated above by Par and Vitrinel (2012). As a third reason, these specialist film production organizations are formed in a project-based manner.

### **6.3. SURVIVAL**

The findings of this study show that the survival rate of specialist film production organizations depends on first, producers working with a single director or producing their own films have a high rate of survival. Second, if not these first two, the survival of the specialist film production organization depends on the founder’s background and experience in the industry.

As a result, when all 810 local specialist film production organizations in Türkiye are taken into account, it can be said that + 90 Film Yapım, Asteros Film, At Yapım, Atlantik Film, Kaplan Film, Kaz Film, Liman Film, Sinefilm, Terminal, and

Zeyno Film are the only 10 specialist film production organizations which can be called “survived”. The remaining two film production organizations, Asi Film and Ay Yapım cannot be considered a specialist for the scope of this study. Because Asi Film produces films with foreign producers and Ay Yapım, cannot separate the television series production from film production. Among those 10 local specialist film production organizations, At Yapım, Kaplan Film, Sinefilm, and Terminal produce only the films of its founder. This person is Atalay Taşdiken for At Yapım, Semih Kaplıanoğlu for Kaplan Film, Pelin Esmem for Sinefilm, and Ali Vatansever for Terminal. The survival of the organization is tied to the founder of the organization. In addition to that, Atlantik Film, Kaz Film, Liman Film, and Zeyno Film production organizations produce the same director’s film. Ömer Atay, being the founder of Atlantik Film, produces films of only director Reha Erdem. Anıl Çelik, the founder of Kaz Film produces films of only director Reis Çelik. In the case of Liman Film, the founder Nadir Öperli produces films by only director Emin Alper. Lastly, Zeynep Atakan the founder of Zeyno Film produces films of only director Nuri Bilge Ceylan. Other than those above, the survival of +90 Film and Asteros Film depends on the founders’ backgrounds and experience in the industry. For + 90 Film, Serkan Cakarer’s experience and his network, for Asteros Film, Kanat Dođramacı’s experience and his network enabled the survival of these production organizations. In a podcast (Yetersiz Bakiye, 4 Sept 2020) of Serkan Cakarer with Yamaç Okur, Cakarer states that even if a film got state support, it is still needed to work with professionals who are friends, as in collaborative work. Therefore, the network is vital and important for this specialist film production organization’s survival.

As it is mentioned in the interviews, when a producer works with a single director, working with the same person for a long time eliminates many obstacles and stages, if they had worked with a new person at each time. Academician ATP mentioned that a director can focus on his own job and create an artistic work in that sense. She continues her statement “Better quality, longer-term products can be produced. That is why we can combine Nuri Bilge Ceylan's success with this. He had

worked with Zeynep Özbatur for many years, and now he works with his wife. However, after all, these are the names he knows very well, and in the long run, they really make the works of Nuri Bilge Ceylan very valuable both in the international and national arenas, that is, in terms of the art of cinema. It makes it visible and known.” Producer DI also agrees that producers working with a single director are more successful. According to her, this producer-director model emerged with the start of systematic funds by the Ministry of Culture in Türkiye. It is also stated that “... either that relationship with a single director that goes like a marriage or the director being his own producer, is much more feasible at the end of the day.”

Aside from the survival of individual organizations, the survival of the independent film production model needs to be discussed. According to the interviews as stated by Academician ATP and Producer DI, the Turkish independent film production model imitates the French model. Nevertheless, there are major differences between the two models which led the French model to survive for many years. In the case of Türkiye, there is a support mechanism as in the French model called Centre National du Cinema et de L’image Animée (CNC). The difference is in France this agency is independent, but in the case of Türkiye, it is under the Republic Türkiye Ministry of Culture. Additionally, there is no other support mechanism in Türkiye. As discussed in the “The Turkish Film Industry” chapter, in France, television channels must invest 20 percent of their revenue to CNC. Other than television channel support, there are specialized banks that give loans to the cinema industry. In Türkiye, with the absence of these kinds of support, the system does not seem to survive. As Academician ATP said, “That is why the model in Türkiye, which I would call unique, is trying to find its own way. It is trying to develop a way out for itself.” There is a need for systematic fees as financial resources flow to the cinema industry. It is stated by the Academician ATP “It is difficult to say that there is such a systematic process for Türkiye. No matter how much it emulated the French model and tried to take it as an example. Today we see that the system does not work. The support model is only the money received from the Ministry of Culture. Apart from that, unfortunately, there are

no systematic fees as financial resources, that is, fees collected from banks or local governments or television channels as in France. None of these directly flow into the sector in a systematic way.”

It is also stressed by the Producer DI that just a small amount of money transferred from private television channels to the cinema industry could make huge differences in the funding system. She stated “Also, in the model in France, television is much more included. Arte and other television channels are much more involved in the production process. Unfortunately, TRT has been doing this for a while in Türkiye. TRT also issued support funds etc., even like “12 Punto”. However I do not think it is involved enough, that is the involvement of different private channels in that process. Because television is a great industry. It is the same in Türkiye. There is a great amount of money. Transferring this to independent cinema more could strengthen the funding system.”

Last but not least, in the interviews, digital platforms such as Netflix, Amazon Prime Video, etc. are asked whether these affect independent film production in Türkiye. The answers to this question were important because there is not much data about digital platforms. Even these platforms are digital in nature and can have and store all the data about film screenings such as how many people watched, how many times a film was reached etc. They do not release any data about these. It is not only not accessible online to regular people, but also, they are not sharing any data with even directors or producers of the films. However, it is believed that there is a contribution in the screening phase for the films. As Academician ATP stated “Of course, there was an expansion in the screening phase. After all, being able to sell the film, which could not be released, at least financially, to digital platforms. Even if it was released, it is of course a contribution, even if only partially, even if it is a small amount. In fact, it prevents the film from disappearing. In the long run, it also enables you to watch movies for longer periods of time. Nevertheless, how big of an expansion this is of course a question mark.”

It is also agreed by the Producer DI that in terms of visibility, there has been an expansion. However, in terms of filmmaking, it did not affect as much as it is thought it would have. She continued “Directors and producers, who used to focus on advertising etc., in order to generate income, because as we said in the independent industry, there is not much economic income, they started to turn to more platforms. This has been a very advantageous thing for the platform, because Emin Alper and Onur Saylak etc. shots work to the platforms, and higher quality work occurs. It became a job opportunity for independent cinema workers. In those respects, I think it is very important. I mean, there would be a DOP, a soundman, and so on, they found employment opportunities there. The production team working on the set, many people... Therefore, there was an income.”

In sum, when the local specialist film production organizations are focused on more, it is seen that their survival is tied mostly to the founder of the organization. It is sometimes the founder and director alignment and other times the founder is the director. If not these two, it is the founder’s experience and network that leads to the survival of the local specialist film production organizations. In addition to that, in order for the Turkish independent film production model to survive, the funds from the Republic Türkiye Ministry of Culture need to be independent from the Ministry as it is at the French model. In addition to that television channels should be more incorporated in the financial support. Special bank credits to the Turkish film industry, inclusion of local governments, and as a whole continuous financial support flowing to the industry should be guaranteed.

## **DISCUSSION**

In this study, the Turkish specialist film production organizations are focused on. The aim was to see if these local specialist film production organizations survive or not. If they survived, then the common properties of these surviving ones are checked. The Turkish film industry being the focus of the study, the increase in the number of films, audience and box-office revenues got attention since the beginning of 2000's. Domination of oligopoly of large, generalist organizations might explain this expansion. However, small, specialist organizations are worth focusing on through the lens of Population Ecology Theory (Carroll, 1985). Focusing on only generalist organizations would result in an incomplete analysis of any industry. Therefore, similar to what Carroll (1985) did with the American local newspaper organizations, both generalist and specialist organizations should be taken into account. It is worthwhile to check specialist organizations within a population because change does not come immediately. It emerges over time and mostly comes through small, new organizations. In order to study local specialist film production organizations, the beginning of the time period is taken as 2005, the first year that the General Directorate of Cinema began to provide and institutionalize public funds to independent film producers. The end of the study is 2019, when the COVID-19 Pandemic has emerged as a worldwide rupture in our lives.

### **7.1. DENSITY DEPENDENCE**

This study is built on the pillars of Population Ecology Theory and previous studies of Population Ecology. Therefore, organizations are studied in groups which are called "populations of organizations" (Hannan & Freeman, 1977). Populations of organizations are the unit of analysis of the study, they are dependent on the same set of resources. According to this theory, there are two types of organizations. The first one is generalist organizations which depend on the vast majority of the resources that

are located in the center of the environment. The second one is specialist organizations depending on the peripheral resources within an environment (Swaminathan, 1998). As Carrol and Swaminathan (2000) stated for the brewery industry legitimation and competition processes are shaped by identities. Focusing on brewery firms in the U.S.A. scholars studied the dynamics behind the rise and proliferation of microbreweries. Their first hypothesis is that when that the concentration of the market increases, the founding rates of specialist organizations will increase. This hypothesis is confirmed in their study, and it is applicable to the local specialist film production organizations in Türkiye as well. However, the hypothesis of Carroll and Swaminathan's study showed that the mortality rates of specialist organizations will differ for the Turkish film industry. At this point, the local specialist film production organizations in Türkiye divert. Because, in the Turkish film industry, the number and the rate of one year lived local specialist film production organizations have been on the rise since the beginning of this study's time period, 2005. In the case of mortality rates, rather than Carrol and Swaminathan's (2000) study, the Turkish specialist film production organizations are more like in Carroll and Hannan's (1989) study. Carroll and Hannan (1989) showed in their study that high density at the founding stage leads new entrants to a liability of resource scarcity. It is the same with the Turkish specialist film production organizations. Since most of the time they cannot find financial resources for a second film, local specialist film production organizations tend to die after just producing one film as stated by the interviewees. They are not even able to pay back the first film's support to the Republic Türkiye Ministry of Culture. The same mortality is studied by Carroll (1985) about the liability of scarcity which is similar to the five populations of the American labor unions (1936-1985), Argentinian newspapers (1800-1900), Irish newspapers (1800-1970), San Francisco region newspaper publishers (1840-1975), and the American brewers (1633-1988).

According to the Density Dependence Theory (Hannan, 1986) when the number of organizations within an environment increases, which is density, then the formation of new organizations also increases up to the carrying capacity of that

population. This period is called legitimation which is the addition of an organization that has a legitimizing effect on other new entrants. When the carrying capacity is reached, the addition of any organization acts as a competitor. As a result of this, founding any organization has a negative impact on the founding rates. As founding rates decrease, the mortality rates increase (Hannan & Freeman, 1987). Martin Rauf (2000) studied the carrying capacity of healthcare organizations in the U.S.A. by focusing on the emergence of new organizational forms at the organizational community level. Rauf (2000) emphasized that in a highly institutionalized environment, the emergence of a new form may take a very long time. Since it is a highly regulated and institutionalized sector, when the carrying capacity is reached, discourse can act as a cultural carrying capacity. Differing from Rauf's study (2000), the Turkish film industry is not as regulated as the healthcare industry. According to the data gathered from the Box Office Türkiye website ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)), the carrying capacity is not reached until the end of this study's time period which is the end of 2019.

In the Turkish film industry context, the increase in both the number of films produced and the number of film production and distribution organizations has had a legitimizing effect on the founding of local specialist film production organizations since 2005 as mentioned. As the number of local specialist production organizations was 52 in 2005, it has increased to 162 in 2019. Similar to the study of Mezias and Mezias (2000) the number of film production and distribution organizations in the United States between 1912 and 1929 had increased. As a result of this, the founding rates of specialist film production and distribution organizations had increased in the U.S.A. It has also been explained from a historical perspective by Kalemci and Özen (2011) that through the entrance of U.S.A. film organizations into the Turkish film industry with the Foreign Investment Law, the industry changed into a U.S.A. film organizations dominated hierarchical network structure.

Although this domination of generalist film organizations' density resulted in the increased rates of founding of specialist film organizations in the Turkish film

industry, these newly founded specialist organizations face the liability of newness. According to Stinchcombe (1965), new organizations are more likely to fail when they are compared to older and well-established organizations. It is also stated by Freeman, Carroll, and Hannan's (1983) study that the rate of mortality declines as the organizations age. In the case of the Turkish film industry, the ratio of the number of local specialist film production organizations that lived one year to the total number of local specialist film production organizations was 15.38 percent in 2005 and it is 41.36 percent in 2019, according to the data of Box Office Türkiye website ([www.boxofficeturkiye](http://www.boxofficeturkiye)). It can be said that the liability of newness is an increasing threat to the founding of specialist film production organizations in the Turkish film industry. Although the effect of liability of newness is seen, there is still a noteworthy increase in the number of specialist film production numbers. The main concern of the study is the survival of these organizations. In addition to that, as in Freeman et al's study (1983) the increasing mortality rate could be the liability of smallness. In the Turkish film industry case, the sizes of organizations are not measured; but the specialist film production organizations are small when compared to generalist film production organizations.

## **7.2. SURVIVAL OF LOCAL SPECIALIST FILM PRODUCTION ORGANIZATIONS**

In order to define survival, 810 local specialist film production organizations are selected from the data gathered from the Box Office Türkiye website ([www.boxofficeturkiye](http://www.boxofficeturkiye)). Since there were inconsistencies, all of these 810 organizations are checked from either their website or through the web to be able to code them as "local". These 810 organizations also do not get involved in distribution or screening stages; they are specialist film production organizations. Five criteria are set to check their survival. According to these five criteria (1) the first film must be before 2019, (2) the last film must be after 2005, (3) must produce at least one film

between 2005 and 2019 (inclusive), (4) not producing as mass producers, (5) the average lifetime is being four years or above, 46 organizations out of 810 met them.

To take it one step further, the international film festival presence of these production organizations is checked from an online list prepared by Yamaç Okur, who is a producer at a generalist film production organization in Türkiye. 12 out of 46 local specialist film production organizations found a chance to take place in international film festivals through the time period of this study. When these 12 local specialist film production organizations are taken into account, it is seen that survival is tied to the founder of the organization. It is either the founder is the director, or it is just one director producing with a production organization of one producer. Last but not least, in other cases, it is the experience and the network of the founder of the production organization.

## CONCLUSION

Growth in the Turkish film industry during the 2000's triggered this study's research. There was an increase in the number of produced films, the number of audience and also total box-office revenues. It can be thought that this expansion is a result of increased film production of hierarchical film organizations. It can be expected from those generalist, major film organizations to produce films in masses. As a result of this, an expansion in the film industry can be ordinary. However, mostly neglected members of the Turkish film industry, specialist film production organizations are worth focusing on more. Other than five generalist film producers and distributors, which are Özen Film, United International Pictures (UIP), Warner Bros., Kenda, and Mars Cinema Group, the number of specialist film organizations and their number of films is increasing. Not only the number of films but also their visibility and presence at international film festivals are increasing.

This study has examined the local specialist film production organizations in Türkiye through the lens of Organizational Ecology (Carroll, 1985). According to one approach, the density of a population of organizations and the emergence of new organizations are curvilinear (Hannan, 1986). This Density Dependence Approach suggests that in an increased density of a population, the emergence of new organizations increases. This increase continues until the carrying capacity is reached. After that point, the density of the population begins to decrease. In addition to this, Resource Partitioning Theory posits that mature industries are dominated by a few major organizations with generalist strategy. Since the central resources are utilized by generalist organizations, peripheral resources are freed up. Eventually, specialist organizations exploit these freed peripheral resources (Swaminathan, 1998). This results in an increased number of specialist organizations.

The main finding of the study is that the number of local specialist film production organizations is rising after law No. 5224 of July 14, 2004, on the Evaluation, Classification, and Support of Cinema Films. The first concern of this study

is whether these local specialist film production organizations survive or not. In order to work on the production organizations, data on film production organizations such as names of production organizations, films, screening weeks, number of audiences, and number of screened locations are gathered from Box Office Türkiye's website. Five criteria are set to check if these specialist film production organizations fit those criteria. Among 46 local specialist film production organizations that fit these five criteria, it is checked whether they are screened at or awarded by an international film festival. Yamaç Okur's list of films that take part at film festivals is utilized. 12 local specialist film production organizations were checked since among 46 production organizations, these 12 of them had a presence at international film festivals. Two of them, Asi Film and Ay Yapım cannot be labeled as "specialist film production organization". Because Asi Film's productions are co-produced by other foreign production organizations. Additionally, Ay Yapım's film productions cannot be separated from television series.

From the remaining 10 local specialist film production organizations, +90 Film and Asteros Film maintain their survival through the producers' past experiences and networks within the industry. From the eight remaining local specialist film production organizations, there are four organizations, At Yapım, Kaplan Film, Sinefilm, and Terminal which produce only its founder's films. The remaining four local specialist film production organizations, Atlantik Film, Kaz Film, Liman Film, and Zeyno Film, produce films by only a single director. As a result, the "survival" of local specialist film production organizations rests on the founder. This study contributes by showing that the concentration of film organizations resulted in the emergence of independent, specialist film production organizations in the Turkish film industry. In addition to that, the "survival" of these local specialist film production organizations is checked, and common properties are stated which would lead to survival.

## **8.1. LIMITATIONS OF THE STUDY**

The first limitation of the study is the timeframe. Since the COVID-19 Pandemic occurred at the beginning of 2020, 2019 is taken as the ending of the study. The conclusion would be more comprehensive and inclusive with more data. However, the Pandemic was a fracture in our lives, and so did this study.

A second limitation would be that this study only focused on the films screened at movie theaters. It is known that specialist film production organizations are also producing films for streaming platforms. Being aware of that, it is searched and tried to have access to the data of the films shown on streaming platforms. However, after speaking with professionals from the industry, it is said that this data is not released deliberately for now.

## **8.2. IMPLICATIONS AND SUGGESTIONS FOR FURTHER STUDIES**

This study showed how specialist film production organizations survive in the Turkish film industry by focusing on the data of films shown at movie theaters. Further studies can focus on streaming platforms and access more accurate information. For instance, the demographic information of the audience can be easily obtained from streaming platforms. It would also be accessible to who watched what. It would be accessible if the movie is even stopped or not or watched how many times and when.

At the end of this current study, it is seen that the survival of a specialist film production organization depends on its founder. In addition to that, it is also seen that one name under an organization can also be affiliated with another production organization. For instance, Zeynep Atakan, founder of Zeyno Film, is also an instructor at one of the workshops of Asi Film. Although it has expanded, the Turkish film industry is still relatively small. Every producer, writer, director, or player knows who takes part in the industry. Therefore, for further studies, one suggestion would be to study the Turkish film industry in terms of networks. The links, relationships, and flow

of information would give information about how relations are and their effects on the survival of organizations.



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## **APPENDICES**

### **APPENDIX 1: Information about Yamaç Okur**

Yamaç Okur is currently a producer at Ay Yapım, which is a generalist production organization in Türkiye. During 2003 and 2013, he was very active at Boğaziçi University Mithat Alam Film Center. He was one of the founders of Altyazı Cinema Magazine. Between 2013 and 2015 he was a member of the Support Committee for Feature Films at the Ministry of Culture. He was one of the founders of Bulut Film in 2007. His list is very inclusive in terms of festivals such as Cannes, Berlinale, Venice, Locarno, San Sebastian, Rotterdam, Sundance, Toronto and Karlovy Vary. It is also very inclusive in terms of the time period, starting from the 1960's and lastly updated in September 2023.

## APPENDIX 2: Population Ecology Literature Review Summary

Study	Populations	Findings
Freeman, Carroll, and Hannan (1983) "The Liability of Newness: Age Dependence in Organizational Death Rates." <i>American Sociological Review</i> . October, 48, pp.692-710.	Newspaper publishers: 7 cities in the United States, 1800-1975; semiconductor manufacturers: United States, 1957-1979; national unions: United States, 1860-1980.	"Liability of newness: the hazard of organizational mortality declines with age"
Freeman and Hannan (1983) " <i>Niche Width and Dynamics of Organizational Populations.</i> " <i>American Journal of Sociology</i> .88:6, pp.1116-145.	Restaurants: 18 California cities, 1977-1979.	"Relative mortality hazards of specialists and generalists (as measured by the breadth of offerings, hours of operation, and so on) depend upon environmental uncertainty and the pattern of variation."
McPherson (1983) "An Ecology of Affiliation." <i>American Sociological Review</i> . 48:4, pp.519-35.	Voluntary associations (civic, fraternal sports and others): Omaha, 1977.	"Sizes of associations depend on the overlaps in membership in socio-demographic space (age, education, occupation)."
Carroll (1985) "Concentration and Specialization: Dynamics of Niche Width in Populations of Organizations." <i>American Journal of Sociology</i> . May, 90, pp.1262-283.	Newspaper publishers: 7 cities in the United States, 1800-1975.	"Resource partitioning: The mortality rate of specialists declines with the concentration of the market. Specialist organizations respond differently to concentrated markets from generalists: as the death rates of

		generalists go up, those of specialists go down.”
Hannan and Freeman (1987) "The Ecology of Organizational Founding: American Labor Unions, 1836-1985." <i>American Journal of Sociology</i> . 92:4, pp. 910-43. Hannan and Freeman (1988) "The Ecology of Organizational Mortality: American Labor Unions, 1836-1985." <i>American Journal of Sociology</i> . 94:1, pp. 25-52.	Labor unions: United States, 1836-1981.	“Density dependence: the founding rate increases with the number of unions (density) initially and then declines with further growth in density; mirror image mortality.”
Carroll and Hannan (1989) "Density Delay in the Evolution of Organizational Populations: A Model and Five Empirical Tests." <i>Administrative Science Quarterly</i> . September, 34, pp. 11-30.	Brewers: United States, 1633-1988; newspaper publishers: Argentina, 1800-1900, Ireland, 1800-1970, San Francisco, 1840-1975; labor unions: United States, 1836-1985.	“Density delay: an organization's hazard of mortality is increased at all ages if it is founded in a period of high organizational density.”
Amburgey, Kelly, and Barnett (1993) "Resetting the Clock: The Dynamics of Organizational Change and Failure." <i>Administrative Science Quarterly</i> . 38, pp. 51-73.	Newspapers: Finland, 1771-1963.	“Major organizational change elevates the hazard of mortality.”

<p>Baron, West, and Hannan (1994) "A Time to Grow and a Time to Die: Growth and Mortality of Credit Unions in New York, 1914-1990." <i>American Journal of Sociology</i>. 100:2, pp.381-421.</p>	<p>Credit unions: New York City, 1914-1990.</p>	<p>“Liabilities of obsolescence and senescence: the hazard of mortality rises with age (net of size); growth rates decline with age and size.”</p>
<p>Hannan, Carroll, Dundon, and Torres (1995) "Organizational Evolution in a Multinational Context: Entries of Automobile Manufacturers in Belgium, Britain, France, Germany, and Italy." <i>American Sociological Review</i>. 60:4, pp.509-28.</p>	<p>Automobile producers: Belgium, Britain, France, Germany, and Italy, 1885-1981.</p>	<p>“Multilevel model of density dependence: growth in the density of automobile producers in Europe decreased the hazard of mortality, but growth in density within a country increased the hazard of mortality of firms in that country.”</p>
<p>Sorensen and Stuart (2000) "Aging, Obsolescence, and Organizational Innovation." <i>Administrative Science Quarterly</i>. March, 45, pp.81-112.</p>	<p>Biotechnology companies: United States, 1988; semiconductor manufacturers: worldwide, 1986-1992.</p>	<p>“Age and innovation: older organizations gain more patents than young ones but tend disproportionately to base their innovations on their own prior innovations.”</p>

<p>Carroll and Swaminathan (2000) "Why the Microbrewery Movement? Organizational Dynamics of Resource Partitioning in the U.S. Brewing Industry." <i>American Journal of Sociology</i>. 106: 3, pp. 715-62.</p>	<p>Brewers: United States, 1938-1997.</p>	<p>"Identities shape processes of legitimation and competition among segments of the brewing industry."</p>
<p>Ruef (2000) " The Emergence of Organizational Forms: A Community Ecology Approach." <i>American Journal of Sociology</i>. 106:3, pp.658-714.</p>	<p>Health care sector: 48 organizational forms (e.g., abortion clinic, birthing center, blood bank, HMO, hospice), United States, 1965-1994.</p>	<p>"The probability of emergence of a new form in a region of identity space increases with the density of organizational forms overall and decreases with the density of forms in the local region of the space."</p>
<p>Dobrev, Kim, and Hannan (2001) "Dynamics of Niche Width and Resource Partitioning." <i>American Journal of Sociology</i>. 106:5, pp. 1299-337.</p>	<p>Automobile manufacturers: Britain, France, and Germany, 1885-1981.</p>	<p>"Crowding in technology space increases the hazard of mortality and the likelihood that a firm changes its niche; change in the niche increases the hazard of mortality."</p>
<p>Barnett, W.P., and Carroll, G. R. (1987) Competition and Mutualism among Early Telephone Companies. <i>Administrative Science Quarterly</i>, 32, pp. 400-421.</p>	<p>Telephone Companies: United States, 1900-1917.</p>	<p>"Neighboring companies are found to have both types of interdependencies, competition, and mutualism, although their exact nature depends on organizational form.</p>

		Companies in separate geographical locations are found to be competitive with each other, regardless of organizational form. The two prevalent organizational forms in the industry at this time each apparently flourished in distinct niches and were symbiotically related.”
Baum, J.A.C., and Mezas, S.J. (1992) Localized Competition and Organizational Failure in the Manhattan Hotel Industry, 1898-1990. <i>Administrative Science Quarterly</i> . 37:4, pp.580.	Hotels: United States, 1898-1990.	“Hotels located in densely populated regions of the distributions of organizational size, geographic location, and price experienced significantly higher failure rates.”
Lomi, A. (1995) The Population Ecology of Organizational Founding: Location. <i>Administrative Science Quarterly</i> . 40:1, pp.111.	Banks: Italy, 1964-1988.	“Organizational populations are internally differentiated and vital rates vary systematically across heterogeneous segments of the population. The Evolution of cooperative banks in Italy is enhanced by bringing the role of spatial factors back into the study of organizational dynamics. Ecological factors related to

		location will be crucial for the survival of these specialist banks because large-scale institutional change is rapidly eroding the historical, legal, and cultural boundaries around populations of banking organizations in Europe.”
Baum, J.A.C., and Haverman, H.A. (1997) Love Thy Neighbor? Differentiation and Agglomeration in the Manhattan Hotel Industry, 1898-1990. <i>Administrative Science Quarterly</i> . 42:2, pp.304.	Hotels: United States, 1898-1990.	“Hoteliers locate new hotels sufficiently close to established hotels that are similar on one product dimension (price) to benefit from agglomeration economies, but different on another product dimension (size), to avoid localized competition and create complementary differences.”
Mezias, J.M., and Mezias, S.J. (2000), Resource Partitioning, the Founding of Specialist Firms, and Innovation: The American Feature Film Industry, 1912-1929. <i>Organization Science</i> , 11:3, pp. 306-322.	Film producers and distributors: United States, 1912-1929.	“The greater intensity of competition among generalists led to an increased rate of founding of specialists, and that innovate film genres were more likely to come from specialists.”

<p>Swaminathan, A. (2001), Resource Partitioning and the Evolution of Specialist Organizations: The Role of Location and Identity in the US Wine Industry. <i>Academy of Management Journal</i>, Vol.44, No.6, pp.1169-1185.</p>	<p>Wineries: United States, 1940-1990.</p>	<p>“Strong effect of location-based resource partitioning on increasing the founding rate and decreasing the mortality rate of specialist organizations- farm wineries- in the American wine industry. Additionally, characteristics of specialists and generalist organizational forms play an important role in the evolution of specialist organizational forms. Smallness and their reputation for high quality tied to vineyard ownership.”</p>
<p>Boone, C., Witteloostuijn, A. V., and Carroll, G.R. (2002), Resource Distributions and Market Partitioning: Dutch Daily Newspapers, 1968 to 1994. <i>American Sociological Review</i>, 2002:67, 3, pp.408.</p>	<p>Daily newspapers: Netherlands, 1968-1994.</p>	<p>“Concentration among generalist (national) newspapers occurs more fully in province-level markets where the readership base consists of relatively homogenous sets of individuals in terms of age, religion, politics, and education. At the same time, these concentrated markets prove to be fertile</p>

		areas for the operation of specialist papers, at least when resources are not fully homogenized.”
Chan, A.P.C., and Li, Q. (2010) Density Dependence in the Chinese Construction Industry: Focus on Mortality of Jiangsu Province (1989-2007). <i>Engineering, Construction and Architectural Management</i> . 17:6, pp.563-580.	Construction companies: China, 1989-2007.	“The construction industry level evolution plays an important role on the exit rate of construction companies; however, this effect does not conform with density dependence as expected, and it interacts with organizational age. Besides, age and size of organizational level, and macro environment also acts on mortality.”
Reis, S., Negro, G., Sorenson, O., Perretti, F., and Lomi, A. (2012) Resource Partitioning Revisited: Evidence from Italian Television Broadcasting. <i>Industrial and Corporate Change</i> . 22:2, pp. 459-487.	Television Broadcasters: Italy, 1992-2003.	“Exit rates of local and multi-local stations (peripheral and near-center producers) declined when national broadcasters (center producers) overlapped more heavily in their programming and therefore competed more intensely. Also, entry and exit of near-center producers are more sensitive to differences in competition among the center producers.”

<p>Li, J, and Lui, W. (2013),  Selecting a Target  Segment: Market  Structure and New  Venture Entry Strategies.  <i>Management Decision</i>,  51:7, pp.1402-1421.</p>	<p>Banks: United States, 1979-  1988.</p>	<p>“New banks were  found to enter more  often in specialist  market niches when  the market was highly  concentrated, but less  often when there were  non-bank financial  institutions active in  the market. The  frequency of new  specialist entries  displayed an inverted  U-shaped pattern as  the number of  established specialist  banks in the market  increased.”</p>
<p>Quan, J. (2013).  <i>Multidimensional Niches  and Independent Film  Production Companies in  Hollywood</i>. Ph.D.  Dissertation, University  of Texas at Dallas,  Dallas.</p>	<p>Independent and major film  studios: United States, 1997-  2008.</p>	<p>“In the distribution  niche dimension, the  niche locations of  both independent  films and major  studio films generate  a positive influence  on the films'  performance. Also,  the likelihood of an  independent  production company's  change in its  distribution niche  location depends on  (1) its repeated ties  with distributors in  that niche location;  (2) the value of the  resources of the  independent's labor  niche location; and  (3) the value of the</p>

		resources of the independent's distribution niche location.”
Kim, T-Y. (2000). <i>Niche Dynamics and Market Segregation: The British Film Industry, 1895-1960</i> . Ph.D. Dissertation, Stanford University, California.	Film production companies: Britain, 1895-1960.	“A broad niche width increases an organization's survival chances in low-density landscapes and a high niche overlaps lower organization's exit rates. Firstly, the film-production company's position through network ties with distributors plays an important role in affecting its exit rates. Secondly, organizational changes are the outcome of both internal structures and external environments. Small organizations are more active and risk-taking than large organizations. Lastly, organizations change due to competition. However, the change does not guarantee the continued Success of an organization.”

<p>Zuckerman, E.W., and Kim, T-Y. (2003) The Critical Trade-off: Identity Assignment and Box-office success in the Feature Film Industry. <i>Industrial and Corporate Change</i>. 12:1, pp.27-67.</p>	<p>Feature films: United States, 1997.</p>	<p>“To succeed in breaking out, an independent film must become regarded as belonging to the multiplex, rather than art house.”</p>
<p>R. Arzu Kalemci &amp; Şükrü Özen (2011) "Türk Sinemacılık Sektöründe Kurumsal Değişim (1950-2006): Küreselleşmenin 'Sosyal Dışlama' Etkisi." <i>Amme İdaresi Dergisi</i>. 44:1, pp. 51-88.</p>	<p>Film organizations: Türkiye, 1950-2006.</p>	<p>“As a result of opening up the industry to foreign direct investment in 1989, the organization of the industry value chain evolved from a network structure dominated by regional distributors to a hierarchical network structure dominated by the big US film companies. Another finding is that the multiplex type of film theaters particularly located in big cities emerges as a supplementary form to the theaters with single screens that have been widespread in the previous period. This leads to an increase in the number of cities without theaters. The study emphasizes that the social exclusion manifested by increasing ‘theaterlessness’ is inherent within the</p>

		multiplex type of film theater diffused through globalization.”
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### APPENDIX 3: List of 810 Local Specialist Film Production Organizations

Local Specialist Film Production Organization	First Year	Last Year	Total Films	Total Year	Productivity Index
+90 Film Yapım	2012	2019	2	8	0.25
1 Mart Film	2016	2016	1	1	1
1 Sanat Yapım	2014	2014	2	1	2
1001 Film	2010	2011	2	2	1
11 K Film	2016	2018	3	3	1
11K Film Yapım	2019	2019	1	1	1
16 Yapım Medya	2017	2018	2	2	1
24 Kare	2008	2013	2	6	0.3333
24 Kare Film	2012	2012	1	1	1
25 Film	2014	2018	3	5	0.6
2506	2019	2019	4	1	4
2D Medya	2018	2018	1	1	1
3 27 Film Yapım	2018	2018	1	1	1
34 Film Production	2017	2019	1	3	0.3333
5. Boyut	2009	2009	1	1	1
7. Sanat	2007	2013	3	7	0.4286
A. İlker Berke Yapım	2015	2015	1	1	1
A.E. Film	2007	2009	8	3	2.6667
AA Film	2011	2011	1	1	1
Abat Yapım	2016	2016	1	1	1
Abus Film	2017	2017	1	1	1
AC Film	2010	2019	6	10	0.6
AC23 Film	2017	2017	1	1	1
Acaristan Film	2016	2016	1	1	1
ACM Film Yapım	2016	2016	1	1	1
ACR Production	2010	2010	1	1	1
Acun Film	2013	2013	1	1	1

Adal	2014	2014	1	1	1
Adam Film	2011	2013	2	3	0.6667
Adar Medya Film	2012	2012	1	1	1
Adg Film	2014	2014	1	1	1
Afitaş	2013	2013	1	1	1
AFS	2005	2014	7	10	0.7
Agros Yapım	2016	2016	1	1	1
Ağustos Film	2011	2017	2	7	0.2857
Ahtapot Film	2017	2017	1	1	1
Akademi Prodüksiyon	2006	2013	2	8	0.25
Akare Film	2010	2010	1	1	1
Akasya Film	2017	2017	1	1	1
Akdeniz Sanat Filmcilik	2014	2014	1	1	1
Akman Fİlm	2010	2010	1	1	1
Aksoy Film	2007	2015	12	9	1.3333
Aktüel	2013	2013	1	1	1
Alaaddin Film	2015	2015	1	1	1
Altın Yapım	2015	2015	1	1	1
Altın Yaprak Film	2016	2016	1	1	1
Altıoklar Film	2005	2007	3	3	1
Altüstü Film	2013	2013	1	1	1
Amenis	2007	2007	1	1	1
Amirler Film	2017	2019	1	3	0.3333
Anagraf Film	2018	2018	1	1	1
Anatolian Productions	2015	2015	1	1	1
Andaç Film	2018	2018	1	1	1
Angel Film Yapım	2018	2018	1	1	1
Angle Production	2016	2016	1	1	1
Anibera	2014	2019	2	6	0.3333
Animaj	2014	2014	1	1	1
Anka Film	2007	2018	6	12	0.5

ANS	2005	2015	11	11	1
ANSE	2010	2010	1	1	1
Ararat Film	2011	2011	1	1	1
Aras Yapım	2018	2018	1	1	1
Arca Medya	2013	2013	1	1	1
Ares Media	2011	2011	1	1	1
Arı Kovanı	2017	2017	1	1	1
Arım Film	2010	2010	1	1	1
Arkadaş Yapım	2012	2012	1	1	1
Art İstanbul	2017	2019	1	3	0.3333
Arti Film	2010	2011	4	2	2
Artist Film Yapım	2014	2018	5	5	1
Artistik Yapım	2017	2017	1	1	1
Artlemma Yapım	2018	2018	1	1	1
Arzu Film	2005	2010	4	6	0.6667
Arzum Film	2015	2016	2	2	1
As Yapım	2017	2017	1	1	1
Asi Film	2008	2019	4	12	0.3333
Asis Yapım	2009	2009	1	1	1
Aslanyürek Film	2011	2014	2	4	0.5
Asteros	2015	2019	5	5	1
ASY Film	2017	2017	1	1	1
Asya Film	2005	2011	2	7	0.2857
Aşına Sanat	2018	2018	1	1	1
At Yapım	2009	2019	4	11	0.3636
Atadeniz Film	2005	2016	1	12	0.0833
Atay Yapım	2019	2019	1	1	1
Ateş Film	2016	2016	1	1	1
Atlanta Film	2016	2016	1	1	1
Atlantik Medya	2005	2019	7	15	0.4667
ATM Film	2008	2008	1	1	1

Atmosfer Film	2014	2014	1	1	1
ATSP	2009	2009	1	1	1
Avangard Film	2014	2014	1	1	1
Avantgarde Yapım	2018	2018	1	1	1
Avcı Film Yapım	2018	2018	1	1	1
Avrasya Medya	2018	2018	1	1	1
Ay Yapım	2011	2019	7	9	0.7778
Aydın Film	2009	2015	2	7	0.2857
Ayhan Ulam Yapım	2017	2017	1	1	1
B Film	2011	2011	1	1	1
B Film Ekibi	2018	2018	1	1	1
Bağımsız Film Yapım	2016	2016	1	1	1
Baki Films	2013	2015	2	3	0.6667
Balkon Filmcilik	2013	2019	1	7	0.1429
Bam Film	2015	2015	1	1	1
Bamworks By Mine Vargı	2010	2010	1	1	1
Bapir Film	2018	2018	2	1	2
Baraka Limited	2008	2008	1	1	1
Barakuda Film	2010	2016	5	7	0.7143
Barikat Film	2015	2015	1	1	1
Barkod Yapım	2010	2010	1	1	1
Barut Film	2009	2009	1	1	1
Batı İstanbul Vakfı	2019	2019	1	1	1
Batı Yapım	2010	2015	4	6	0.6667
Batı Yatırım Yapım	2017	2017	1	1	1
Beatrice Film	2019	2019	1	1	1
Bel Studio	2015	2015	1	1	1
Ber Ay Film	2011	2011	1	1	1
Best Brothers Production	2018	2018	1	1	1
Beşir Derneği	2018	2018	1	1	1

Beyaz Film Yapım	2011	2011	1	1	1
Bezar Film	2010	2010	1	1	1
Bilge Film	2015	2015	1	1	1
Bilge Kılavuz Eğitim	2018	2018	1	1	1
Bizim Reklamcılık Yapım	2017	2017	1	1	1
BKM	2005	2019	57	15	3.8
BKM Film	2011	2017	6	7	0.8571
BKM İthal	2005	2018	3	14	0.2143
Blind Pictures	2014	2014	1	1	1
Bluff Films	2018	2018	1	1	1
BMS Film	2019	2019	5	1	5
Bor Medya Yapım	2017	2017	1	1	1
Bor Yapım	2016	2016	1	1	1
Bosphorus	2015	2015	1	1	1
Boyoz Yapım	2014	2019	2	6	0.3333
Boyut Film	2007	2019	11	13	0.8462
BRK'S Production	2015	2018	4	4	1
BSK Yapım	2012	2019	2	8	0.25
BSM	2016	2018	2	3	0.6667
BTS3D Stüdyoları	2012	2012	1	1	1
Bubi Film	2013	2013	1	1	1
Buhar Film	2018	2018	1	1	1
Bulut Film	2008	2014	7	7	1
Bulut Film Ajans	2009	2009	1	1	1
Burak Film Yapım	2014	2018	3	5	0.6
Butterfly Medya Prodüksiyon A.Ş.	2019	2019	1	1	1
Büyük Galileo	2019	2019	1	1	1
BY Yapım	2019	2019	1	1	1
BYFY Productions	2015	2019	4	5	0.8
C Yapım ve Film	2009	2009	1	1	1

C.F.A. Film	2017	2017	1	1	1
Cadavre Films	2016	2016	1	1	1
Calion Film	2015	2016	5	2	2.5
CAM Film	2012	2015	2	4	0.5
Camerart Film	2005	2005	1	1	1
Can Medya	2019	2019	1	1	1
Carat Film	2017	2018	2	2	1
Case Film	2018	2018	1	1	1
Cevher Filmcilik	2018	2018	1	1	1
CFA Yapım	2019	2019	1	1	1
Cine Park	2014	2014	1	1	1
Cinemed Yapım	2014	2018	2	5	0.4
Cinemia Yapım	2019	2019	1	1	1
Cinemedya	2005	2007	4	3	1.3333
Cinemoon Film	2019	2019	1	1	1
Cinevizyon	2005	2005	1	1	1
CMYLMZ Fikirsanat	2008	2019	10	12	0.8333
CNM Film	2013	2014	2	2	1
CNS Prodüksiyon	2019	2019	2	1	2
Co Production	2005	2006	1	2	0.5
Codex Medya	2012	2015	10	4	2.5
Coloni Film	2005	2005	1	1	1
Comedia Film	2014	2014	1	1	1
Concept Plato	2014	2014	1	1	1
Conka Film	2017	2017	1	1	1
Content Turkey	2017	2017	1	1	1
Cordoba	2017	2017	1	1	1
Çağlar Arts	2012	2018	3	7	0.4286
Çamaşırhane Film	2013	2019	7	7	1
Çan Film	2008	2008	1	1	1
Çınar Film	2019	2019	1	1	1

Çiçek Film	2009	2019	2	11	0.1818
Çimen Yapım	2011	2011	1	1	1
d.f.g.s.	2006	2008	2	3	0.6667
Dada Film	2006	2013	6	8	0.75
Dada Vision	2017	2019	4	3	1.3333
Dali Yapım	2016	2016	1	1	1
Dama Medya	2015	2015	1	1	1
DCC Film	2015	2015	1	1	1
DD Yapım	2016	2016	1	1	1
DE Yapımcılık	2007	2015	2	9	0.2222
Defne Film	2009	2012	2	4	0.5
DeliCe Film	2013	2013	1	1	1
Delightfull Animasyon	2019	2019	1	1	1
Delivizyon	2016	2016	1	1	1
Delta Film	2007	2008	2	2	1
Demir Yapım	2018	2018	1	1	1
Demo Film	2009	2009	1	1	1
Demtaş Film	2011	2011	1	1	1
Deniz Film	2005	2016	4	12	0.3333
DEPOfilm	2016	2016	1	1	1
Deren Medya	2007	2007	2	1	2
Detay Film	2010	2010	1	1	1
Dev Yapım	2012	2012	1	1	1
DFGS	2015	2019	10	5	2
DFI Production	2011	2011	1	1	1
DGB Medya	2012	2012	1	1	1
Digiflame	2018	2018	1	1	1
Digitürk	2015	2015	1	1	1
Dijital Sanatlar	2008	2019	1	12	0.0833
Dijital Yapım Evi	2016	2019	9	4	2.25
Dikmen Yapım	2016	2016	1	1	1

Dino Film	2016	2016	1	1	1
DMC	2019	2019	1	1	1
DNZ Film	2011	2017	7	7	1
Doğa Yapım	2014	2014	2	1	2
Dokuz Film	2016	2016	1	1	1
Donkişot Film	2015	2015	2	1	2
Drama Film Prodüksiyon	2016	2016	1	1	1
Dramaİstanbul	2011	2011	1	1	1
Dras Film Pictures	2019	2019	1	1	1
DSS Yapım	2017	2017	1	1	1
Durak Film	2017	2019	2	3	0.6667
Düet Film	2009	2010	2	2	1
Dünya Yayımcılık	2011	2011	1	1	1
Düş Gezinleri Film Yapım	2018	2018	1	1	1
Düşyeri	2013	2017	2	5	0.4
EBT Yapım	2015	2015	1	1	1
ECN Film	2018	2018	1	1	1
Edessa Films	2005	2005	1	1	1
EDGE	2016	2016	1	1	1
Efektif Sanat	2017	2019	4	3	1.3333
Eflatun	2006	2006	1	1	1
Eflatun Film	2007	2011	4	5	0.8
Ego Grup Medya	2017	2017	1	1	1
Eğrikapı Prodüksiyon	2018	2018	1	1	1
EHY Film	2017	2017	1	1	1
Eilith Media	2019	2019	1	1	1
Ekip Film	2005	2011	4	7	0.5714
Ekol Yapım	2019	2019	1	1	1
El Yapımı Film	2009	2009	1	1	1
Ela Film	2018	2019	4	2	2

Elif Sanat Yapımları	2017	2017	1	1	1
Elita Film	2008	2009	2	2	1
Elizi Film	2009	2009	1	1	1
Ella	2009	2009	1	1	1
Elmas Medya	2016	2016	1	1	1
Eludis Yapım	2018	2018	1	1	1
Empati Yapım	2018	2018	1	1	1
Emr Medya	2019	2019	1	1	1
EN Film	2012	2012	1	1	1
Endemol	2016	2016	2	1	2
Energy Media	2006	2008	5	3	1.6667
Enis Özkan Film	2019	2019	3	1	3
ERA Kreatif Film	2014	2014	1	1	1
Erdi Yapım	2019	2019	1	1	1
Eren Medya	2018	2019	2	2	1
Erik Sanat	2016	2016	1	1	1
Erk Medya Film	2017	2017	1	1	1
Erkul Medya	2011	2011	1	1	1
Erler Film	2005	2014	2	10	0.2
Ervizyon	2015	2015	1	1	1
ES Yapım	2015	2015	1	1	1
Esek Film	2007	2007	1	1	1
Esen Entertainment	2016	2016	2	1	2
Esra Alkan Film	2011	2011	1	1	1
Evcil Film	2009	2015	3	7	0.4286
EVR Film	2015	2015	1	1	1
Evrensel Medya	2011	2014	2	4	0.5
Ey Prodüksiyon	2007	2007	1	1	1
Eyes Yapım	2018	2019	2	2	1
FA Film	2016	2016	1	1	1
Fabrika Yapım	2017	2018	2	2	1

Fanatik	2014	2019	14	6	2.3333
Fanus-u Hayal Film	2019	2019	1	1	1
Fark Film	2016	2016	1	1	1
Fer Film	2014	2014	1	1	1
Fergün Yapım	2005	2009	1	5	0.2
Feza Film	2011	2019	2	9	0.2222
FF Yapım	2016	2016	1	1	1
FG Medya Prodüksiyon	2015	2015	1	1	1
Fida Film	2005	2014	146	10	14.6
Fifth Generation	2012	2012	1	1	1
Fikirtepe Film	2009	2018	3	10	0.3
Fikri Görsel Sanatlar	2011	2019	1	9	0.1111
Fikrigün Film	2018	2018	1	1	1
Film 12	2015	2015	1	1	1
Film Bahçesi	2010	2016	5	7	0.7143
Film Deney	2018	2018	1	1	1
Film F	2005	2010	1	6	0.1667
Film Fabrik	2010	2015	4	6	0.6667
Film Fabrikası	2014	2019	3	6	0.5
Film İcabı	2017	2017	1	1	1
Film Maker Prodüksiyon	2018	2018	1	1	1
Film Stop	2016	2016	1	1	1
Filmabüfe Film	2013	2013	1	1	1
Filmacass	2005	2014	3	10	0.3
Filmakar	2007	2007	1	1	1
Filmaltı	2010	2010	1	1	1
Filmci	2010	2010	1	1	1
Filmeks	2018	2018	1	1	1
Filmhane	2016	2016	1	1	1
Filmik Prodüksiyon	2011	2011	1	1	1

Filmİstanbul	2017	2017	1	1	1
Filmod Yapım	2017	2019	1	3	0.3333
Filmoda	2013	2013	1	1	1
Filmografi	2010	2010	1	1	1
Filmotto	2017	2017	1	1	1
Filmpark	2009	2009	1	1	1
Filmstar	2015	2015	1	1	1
Filmzade	2019	2019	1	1	1
Firuz Film	2012	2012	1	1	1
Five Sisters Company	2017	2017	1	1	1
Fix Yapım	2016	2016	1	1	1
Fiyaka Film	2019	2019	1	1	1
FK Film	2014	2014	1	1	1
FNR Film	2017	2017	1	1	1
Fono Film	2005	2013	4	9	0.4444
FSM İletişim	2018	2018	1	1	1
Gala Ajans	2009	2016	2	8	0.25
Gala Medya	2016	2016	1	1	1
Galata Film	2011	2017	6	7	0.8571
Galibarda Fikir Sanat	2017	2017	1	1	1
gdy Film	2008	2008	1	1	1
Genç Popülist Medya	2018	2018	1	1	1
Get Yapım	2018	2018	1	1	1
Getto Film	2011	2015	2	5	0.4
Gezici Film	2011	2018	2	8	0.25
Gitassi Ajans	2017	2017	1	1	1
Giyotin Film	2012	2018	3	7	0.4286
Gizem Ajans	2019	2019	1	1	1
GK Yapım	2014	2014	1	1	1
Glamour Yapım	2015	2015	1	1	1
GMT Yapım	2018	2018	1	1	1

Gökkuşığı Film	2015	2019	2	5	0.4
Göksu Film	2016	2016	1	1	1
Gözyaşı Film	2011	2011	1	1	1
Green Pictures	2017	2017	1	1	1
Griffin Pictures	2019	2019	1	1	1
GSA Film	2016	2017	4	2	2
Gülen Adam Film	2012	2014	2	3	0.6667
Güler Film	2017	2017	1	1	1
Güleryüz Film	2009	2015	2	7	0.2857
Gümüş Film	2016	2016	1	1	1
Günizi	2007	2007	1	1	1
Gürbüz Prodüksiyon	2018	2018	3	1	3
Gürsoy Yapım	2018	2018	1	1	1
Güverte Film	2017	2019	4	3	1.3333
Güzel İşler	2015	2015	1	1	1
Hacı Yılmaz Film Yapım	2010	2010	1	1	1
Hamsi Medya	2013	2016	2	4	0.5
Han Yapım	2015	2018	2	4	0.5
Hançer Yapım	2016	2016	1	1	1
Hangar Film	2016	2016	1	1	1
Hann Yapım	2018	2019	8	2	4
Harakiri Film	2018	2018	1	1	1
Havva Ünal Production	2010	2010	1	1	1
Hay Film	2019	2019	1	1	1
Hayal Evi	2006	2006	1	1	1
Hayal Sanat	2015	2019	3	5	0.6
Hayalet Film	2009	2010	3	2	1.5
Hayalim Film	2008	2008	1	1	1
Hermes Film	2006	2009	4	4	1
Hezer Film	2018	2019	2	2	1

Hiç Film	2016	2016	1	1	1
HM Productions	2018	2019	1	2	0.5
HMK	2017	2017	1	1	1
Hokus Fokus	2009	2013	2	5	0.4
HS İstanbul Production	2009	2009	1	1	1
Hub Project	2018	2018	1	1	1
Hülya Avşar 10 Film	2018	2018	1	1	1
Hüzzam Film	2019	2019	1	1	1
HY Film	2011	2011	1	1	1
Imagine Film	2008	2016	3	9	0.3333
Insert Film	2018	2018	1	1	1
Insignia	2014	2018	6	5	1.2
Inter Aktif	2019	2019	1	1	1
Intermedia	2005	2012	1	8	0.125
Irmak Film	2008	2008	1	1	1
ISF Film Prodüksiyon	2018	2019	2	2	1
Işık Film	2015	2015	1	1	1
İde Yapım	2019	2019	1	1	1
İdil K.M.	2012	2012	1	1	1
İFP Film	2015	2017	2	3	0.6667
İFR	2005	2007	2	3	0.6667
İgamedya Yayıncılık	2016	2019	3	4	0.75
İGF	2012	2012	1	1	1
İki Film	2009	2013	2	5	0.4
İkinci Yeni Film Yapım	2016	2017	2	2	1
İklim Film	2014	2014	2	1	2
İKSV	2013	2015	2	3	0.6667
İLE Prodüksiyon	2012	2012	1	1	1
İlkon Film	2019	2019	1	1	1
İlter Yapım	2013	2013	1	1	1
İmaj	2009	2018	4	10	0.4

İnfiniti Medya	2018	2019	1	2	0.5
İnfo Medya	2015	2015	1	1	1
İrfan Film	2005	2011	6	7	0.8571
İrisanka Film Yapım	2019	2019	1	1	1
İron Yapım	2015	2015	1	1	1
İsmail Güneş Film	2017	2017	1	1	1
İstanbul Dijital	2018	2018	1	1	1
İstanbul Güneşi	2007	2007	1	1	1
İstanbul Kültür A.Ş.	2018	2018	1	1	1
İstanbul Media	2017	2018	2	2	1
İstos Film	2017	2019	2	3	0.6667
İşler Prodüksiyon	2013	2013	1	1	1
İyi Seyirler Film	2009	2016	4	8	0.5
İz Prodüksiyon	2012	2012	1	1	1
J Plan	2006	2015	8	10	0.8
Jek Film	2008	2008	1	1	1
Jineps Yapım	2019	2019	1	1	1
JOY PR	2015	2018	2	4	0.5
Jua Film	2015	2015	1	1	1
Juli Sanat	2018	2019	2	2	1
K2 Film Yapım	2016	2016	1	1	1
Kadraaj Film	2015	2015	1	1	1
Kafkasör Film	2017	2017	1	1	1
Kala Film	2015	2015	1	1	1
Kalavara Film	2017	2019	1	3	0.3333
Kalem Film	2017	2019	1	3	0.3333
Kamara Film	2016	2016	1	1	1
Kamera Film	2010	2010	1	1	1
Kandur Film	2011	2011	1	1	1
Kaplan Film	2005	2019	7	15	0.4667
Kar Film	2016	2019	1	4	0.25

Kara Film	2005	2016	4	12	0.3333
Kara Kedi Film	2016	2016	1	1	1
Karaçelik Film Yapım	2018	2018	1	1	1
Karakılıç Film	2013	2013	1	1	1
Karapaça Film	2019	2019	1	1	1
Kardeş Sanatlar	2010	2019	2	10	0.2
Kare Film Acis Productions	2013	2013	1	1	1
Kare Kare Film	2016	2016	1	1	1
Karga Seven Pictures	2015	2015	1	1	1
Karıncalar Film	2011	2011	1	1	1
Karlakum Film	2014	2014	1	1	1
Kars Film	2015	2015	1	1	1
Kat Prodüksiyon	2008	2010	2	3	0.6667
Katapult Film	2016	2016	1	1	1
Katarsis Film	2014	2014	1	1	1
Kaz Film	2012	2019	1	8	0.125
Kedi Prodüksiyon Film	2013	2013	1	1	1
Kelebek Film Yapım	2013	2013	1	1	1
Kemik Yapım	2011	2018	2	8	0.25
Keşfedilmemiş Çocuklar Film Yapım	2019	2019	1	1	1
Khan Medya	2017	2017	1	1	1
Kırca Yapım	2010	2010	1	1	1
Kırlangıç Film	2017	2017	1	1	1
Kırmızı Beyaz Film	2017	2017	2	1	2
Kibrit Film	2012	2012	1	1	1
Kinema Film	2013	2013	1	1	1
Kiproko Film	2009	2009	1	1	1
Klaket Medya	2018	2018	1	1	1
Ko'medya	2008	2008	1	1	1
Kokosuku Film	2015	2015	1	1	1

Koliba Film	2009	2011	2	3	0.6667
Konsej Film	2005	2014	2	10	0.2
Koz Film	2017	2018	2	2	1
Krek Film	2007	2007	1	1	1
KTO Karatay Üniversitesi	2018	2018	1	1	1
Kule Film	2013	2013	1	1	1
Kurmaca	2011	2016	36	6	6
Kutlubay Film	2014	2014	1	1	1
Kutu Film	2011	2013	2	3	0.6667
Kuyu Yapım	2017	2019	1	3	0.3333
Kuzey Film	2008	2019	7	12	0.5833
Kuzey Yapım	2008	2008	1	1	1
Kuzgun Film	2015	2015	1	1	1
Kült Film	2013	2016	5	4	1.25
Kültür ve Turizm Bk.	2015	2015	1	1	1
Küsen Film Yapım	2019	2019	1	1	1
Lacivert Film	2014	2014	1	1	1
Ladybirds Yapım	2012	2012	1	1	1
Lal Sanat Atölyesi	2017	2017	1	1	1
Lanistar Medya	2019	2019	1	1	1
Layen Film	2017	2019	3	3	1
Levent Özdemir Reklam	2016	2016	1	1	1
Liman Film	2015	2019	2	5	0.4
Limon Film	2005	2019	16	15	1.0667
Limonata Reklamcılık	2019	2019	1	1	1
Logos Film	2010	2012	3	3	1
Lore Plus Film Yapım	2019	2019	1	1	1
Lucky Red Films	2017	2018	3	2	1.5
Lup Film	2009	2009	1	1	1
Lüks Mns	2019	2019	1	1	1

LVT Film	2015	2015	1	1	1
M Prodüksiyon	2015	2015	1	1	1
M.G. Production	2011	2011	1	1	1
M.S.F. Film	2019	2019	1	1	1
Mac Ajans	2019	2019	1	1	1
Mad Motion Production	2017	2017	1	1	1
Madox Medya	2019	2019	1	1	1
Mag Film	2007	2007	1	1	1
Mahzens Film	2015	2015	1	1	1
Mai Film	2017	2017	1	1	1
Majestik Filmcilik	2010	2017	8	8	1
Majör Prodüksiyon	2017	2017	1	1	1
Makas Film	2013	2013	1	1	1
Makinist Film	2018	2019	3	2	1.5
Mantar Film	2011	2011	1	1	1
Mantis Film	2015	2015	1	1	1
Maraton	2005	2016	7	12	0.5833
Marka Film	2019	2019	1	1	1
Marla Yapım	2017	2017	1	1	1
Maskeli Film	2013	2013	1	1	1
Matla	2010	2010	1	1	1
Mavi Film	2005	2016	4	12	0.3333
Maxony	2012	2012	1	1	1
Maya Film	2011	2011	1	1	1
Maya Medya	2017	2017	1	1	1
Med Yapım	2005	2019	6	15	0.4
Medser	2007	2007	1	1	1
Medya Mühendisi	2011	2012	2	2	1
Medya Skala	2008	2008	1	1	1
Medya Ton İletişim	2013	2013	1	1	1
Mekanik Medya	2016	2016	1	1	1

Meltaş Film Yapım	2018	2018	1	1	1
Menassa Film	2015	2015	1	1	1
Mesai Film	2017	2017	1	1	1
Metafor	2009	2011	2	3	0.6667
Metis Film	2010	2010	1	1	1
Metraj Film	2016	2016	1	1	1
Metro Film	2005	2006	4	2	2
Metronom Yapım	2016	2019	3	4	0.75
Metropol Film	2015	2015	1	1	1
Mevv Film	2017	2017	1	1	1
MG Beyond	2014	2014	2	1	2
MG Film Prodüksiyon	2015	2015	1	1	1
Mia Yapım	2007	2011	4	5	0.8
Mine Film	2005	2005	1	1	1
Minerva Film	2015	2015	1	1	1
Mint Prodüksiyon	2008	2019	8	12	0.6667
Mintaş Film	2014	2018	2	5	0.4
Minus Green	2014	2017	3	4	0.75
Miraz Yapım	2014	2014	1	1	1
Mitos Film	2014	2014	1	1	1
Mitra Filmcilik	2018	2018	1	1	1
MNS Film	2015	2015	1	1	1
MO Film	2016	2018	2	3	0.6667
Mor Film	2015	2015	2	1	2
Mor Koyun	2018	2018	2	1	2
Mor Prodüksiyon	2014	2014	1	1	1
Mor Yapım	2017	2017	1	1	1
Most Production	2008	2015	6	8	0.75
Mostra Film	2013	2013	1	1	1
Mot Reklam	2019	2019	1	1	1
Motion Content Group	2019	2019	1	1	1

Motiva Film	2013	2016	2	4	0.5
MT Film Prodüksiyon	2018	2018	1	1	1
MTA Film	2016	2018	2	3	0.6667
Mucizeler Evi Yapım	2017	2017	1	1	1
Muhtelif Yapımlar	2014	2014	1	1	1
Muhteşem Film	2007	2019	15	13	1.1538
Narsist	2009	2009	1	1	1
Nays	2019	2019	2	1	2
Neher Prodüksiyon	2018	2019	1	2	0.5
Nehir Yapım	2019	2019	1	1	1
Neo	2010	2010	1	1	1
NETD	2019	2019	1	1	1
Netvizyon	2017	2017	1	1	1
Neyir Film	2013	2013	1	1	1
Nezih Ünen Production	2010	2010	1	1	1
NKB Yapım	2019	2019	1	1	1
Nöbetçi Yapım	2008	2017	3	10	0.3
NTC Medya	2016	2019	2	4	0.5
NTV	2008	2008	1	1	1
NuLook	2014	2019	12	6	2
Off Film	2019	2019	1	1	1
Okyanus Film	2019	2019	1	1	1
Olgun Arun	2006	2006	1	1	1
Onaltıdokuz Film	2012	2012	1	1	1
Openvizor	2017	2017	1	1	1
Orka Yapım	2016	2016	2	1	2
Orkinos	2010	2010	1	1	1
Oyunbozan	2010	2010	1	1	1
Ozan Medya	2018	2018	1	1	1
Öğden Film	2018	2018	1	1	1
ÖmerCAN Prodüksiyon	2014	2014	1	1	1

Öncesi ve Sonrası Film	2018	2018	1	1	1
Örümcek Yapım	2012	2012	1	1	1
ÖTV Yapım	2019	2019	1	1	1
Öykü Yapım	2009	2009	1	1	1
Özbey Film	2018	2018	1	1	1
Özgür Yapım	2012	2016	2	5	0.4
Özlem Akovalıgil Film	2010	2010	1	1	1
Özminimalist Film	2014	2019	1	6	0.1667
Pak Film	2018	2018	1	1	1
Pana Film	2006	2017	5	12	0.4167
Panaromik Film	2015	2015	1	1	1
Panocard	2013	2013	1	1	1
Paprika	2013	2013	1	1	1
Papyon Film	2019	2019	1	1	1
Parantez Yapım	2015	2015	1	1	1
Parrot Film	2018	2018	1	1	1
Pasha Project	2016	2016	1	1	1
Pati Film	2014	2014	1	1	1
Pera Film	2006	2006	1	1	1
Peri Film	2016	2016	1	1	1
Peri-san Film	2009	2009	1	1	1
Persona Film	2014	2014	1	1	1
Pervasız Yapım	2015	2019	1	5	0.2
PHS Film	2008	2008	1	1	1
Pi Film	2005	2009	8	5	1.6
Piar DNA	2019	2019	1	1	1
Plan Prodüksiyon	2008	2015	2	8	0.25
Plato Film	2005	2012	8	8	1
Plot Film	2014	2014	1	1	1
Portakal Animation	2016	2016	1	1	1
Portvizyon	2018	2018	1	1	1

Post Office	2019	2019	1	1	1
Posta Film	2008	2008	1	1	1
PPR Prodüksiyon	2009	2009	1	1	1
Pratik Film	2019	2019	1	1	1
Prequel Production	2012	2012	1	1	1
Proceks	2005	2005	1	1	1
Prodüksiyon Ltd.	2016	2016	1	1	1
Proje	2006	2006	1	1	1
Proje-CT	2013	2013	1	1	1
Prolog Film	2015	2015	1	1	1
Protim V.P	2013	2013	1	1	1
PToT Films	2014	2014	1	1	1
Pusula Film	2018	2018	1	1	1
Queen Film	2019	2019	2	1	2
Ran Film	2012	2012	1	1	1
Rasathane Film	2019	2019	1	1	1
Re Prodüksiyon	2011	2012	5	2	2.5
Rec Star Film	2016	2017	2	2	1
Reis Film	2014	2014	1	1	1
Rementad	2018	2018	1	1	1
Remle Film	2014	2014	1	1	1
Renkler Sanat	2008	2011	2	4	0.5
Replik	2005	2005	1	1	1
Ret Film	2015	2015	1	1	1
RETROPRO	2014	2018	6	5	1.2
RH Politik	2005	2008	1	4	0.25
Rina Film	2010	2010	1	1	1
RNK Film	2017	2019	1	3	0.3333
Rok Film	2015	2015	1	1	1
Rotanet	2017	2017	1	1	1
Rönesans Film	2013	2013	1	1	1

Rue De Pera Films	2018	2019	3	2	1.5
Rüzgar Film	2016	2016	1	1	1
Saatleri Ayarlama Ens.	2015	2015	1	1	1
Sağlam Film	2018	2019	3	2	1.5
Sahici Film	2015	2015	1	1	1
Salar Film	2017	2017	1	1	1
Salname	2013	2013	1	1	1
Salyangoz Film	2014	2018	2	5	0.4
Sami Dünder Film	2014	2016	4	3	1.3333
San Medya	2017	2017	1	1	1
Sanayi-i Nefise Yapım	2009	2009	1	1	1
Saner Film	2015	2015	1	1	1
Saran	2005	2009	3	5	0.6
Sargona Film	2018	2019	1	2	0.5
Sarmaşık Sanatlar	2005	2019	4	15	0.2667
Sasin	2011	2011	1	1	1
Saygın Film	2009	2017	4	9	0.4444
Sea Film	2017	2017	1	1	1
Seçkin Film	2016	2016	1	1	1
Sefya Film	2017	2019	1	3	0.3333
Sekans Prodüksiyon	2007	2007	1	1	1
Sener Yapım	2019	2019	1	1	1
Sepya Filmcilik	2015	2015	1	1	1
Ser Film	2011	2014	2	4	0.5
Serbest Film	2017	2017	1	1	1
Serpil Altın Film	2016	2017	2	2	1
Serüven Film	2017	2017	1	1	1
Setra Filmcilik	2013	2013	1	1	1
Shark Film	2012	2012	1	1	1
Si Ya Yapım	2018	2018	1	1	1
Sihirli Film	2013	2013	1	1	1

Sihirli Perde	2018	2018	1	1	1
Simurg Film	2012	2012	1	1	1
Sinefilm	2006	2019	5	14	0.3571
SineGraf	2005	2013	3	9	0.3333
Sinehane	2018	2019	3	2	1.5
SineLama	2017	2018	2	2	1
SineLine Film	2016	2016	1	1	1
Sinema Ajans	2006	2007	2	2	1
Sinemedya	2015	2018	2	4	0.5
Sinetik	2014	2014	1	1	1
Sineva Film	2017	2017	1	1	1
Sinevizyon	2005	2007	1	3	0.3333
Siyah Beyaz Movies	2012	2019	36	8	4.5
Siyah Perde	2014	2014	1	1	1
SiyahTürk Yapım	2012	2012	1	1	1
Siyap Yapım Film	2018	2018	1	1	1
Siz Yapım	2015	2015	1	1	1
Solis Film	2018	2018	1	1	1
Sonbay Sanat	2016	2016	1	1	1
Sonfilm	2009	2009	1	1	1
Spark Fim Collective	2015	2015	1	1	1
Stare Films	2018	2018	1	1	1
Statü	2013	2018	2	6	0.3333
Stok Film	2008	2008	1	1	1
Streç Film	2018	2018	1	1	1
Su Film	2011	2019	2	9	0.2222
Suare Film	2019	2019	1	1	1
SugarWorkz	2006	2019	13	14	0.9286
Sun Yapım	2019	2019	1	1	1
Surela Film	2013	2013	1	1	1
Süper Dokuz	2018	2018	1	1	1

Süreç Film	2014	2016	2	3	0.6667
Şaman Film	2012	2012	1	1	1
Şan Film	2009	2009	3	1	3
Şatıroğlu Sanat Okulu	2017	2017	1	1	1
Şeddadi Yapım	2019	2019	1	1	1
Şiyara Film	2017	2017	1	1	1
Şua Film	2010	2018	2	9	0.2222
TAFF	2013	2019	37	7	5.2857
Tam Multimedia	2012	2012	1	1	1
Taş Film	2015	2017	3	3	1
TDM Prodüksiyon	2016	2016	1	1	1
Tekhne Yapı	2015	2015	1	1	1
Tele Yapım	2015	2015	1	1	1
Temelkuran Film	2008	2009	2	2	1
Terminal	2012	2019	2	8	0.25
Terra Film	2016	2016	1	1	1
TFP	2017	2017	1	1	1
TFT Yapım	2010	2018	7	9	0.7778
THC Yapım	2019	2019	1	1	1
The Best Films	2018	2018	1	1	1
Tılsım Design	2008	2011	4	4	1
Tim's	2006	2013	5	8	0.625
Tiyatrofil	2009	2009	1	1	1
TMC Film	2005	2019	65	15	4.3333
TN Yapım	2018	2019	3	2	1.5
Topaloğlu Film	2016	2016	1	1	1
Toprak Film	2018	2018	1	1	1
TR 40 33 Productions	2017	2019	2	3	0.6667
Trend Film	2018	2018	1	1	1
Trio Pictures A.Ş.	2018	2019	2	2	1
TRT	2005	2019	4	15	0.2667

Truva Film	2006	2006	1	1	1
TRY Yapım	2018	2018	1	1	1
TT Film	2013	2013	1	1	1
Tuana Yapım	2018	2018	1	1	1
Turan Film	2018	2018	1	1	1
Turano Film	2019	2019	1	1	1
Turbude Film	2015	2015	1	1	1
Turkmax	2007	2008	2	2	1
Turkuvaz Medya	2018	2018	1	1	1
Tutya Film	2012	2012	1	1	1
Tünel Film	2016	2016	1	1	1
Two Yapım	2019	2019	2	1	2
U10 Film	2014	2014	1	1	1
UFP	2005	2017	3	13	0.2308
Uğur Film	2005	2019	1	15	0.0667
Uğur Filmcilik	2014	2015	3	2	1.5
Uğurlu Medya	2018	2018	1	1	1
Us Film	2019	2019	1	1	1
USTA Film	2009	2009	1	1	1
Usta Yapım	2011	2011	1	1	1
Ustaoğlu Film	2005	2016	4	12	0.3333
Uzak Yakın Film	2012	2014	2	3	0.6667
Uzman Film	2008	2008	1	1	1
Üçgen Yapımevi	2011	2018	6	8	0.75
Vadi Film	2015	2015	1	1	1
Varyant Prodüksiyon	2015	2015	1	1	1
Varyete Film	2019	2019	1	1	1
Vega Ajans	2019	2019	1	1	1
Vera Production	2018	2018	1	1	1
Verba Film	2017	2017	1	1	1
Vessa Yapım	2018	2019	1	2	0.5

Vidd Film	2016	2019	3	4	0.75
Videotek	2007	2007	1	1	1
Vişne Prodüksiyon	2015	2019	39	5	7.8
VTR	2014	2018	3	5	0.6
White Light Film	2019	2019	1	1	1
Yağmur Yapım	2013	2013	1	1	1
Yaka Film	2006	2006	1	1	1
Yakaza Film	2015	2015	1	1	1
Yakut Sezer Filmcilik	2019	2019	1	1	1
Yalan Dünya	2007	2007	1	1	1
Yalınayak Film	2012	2012	1	1	1
Yapım 13	2008	2010	2	3	0.6667
Yapımhane	2012	2012	1	1	1
Yav He He Film	2015	2015	1	1	1
Yaya Yapım	2015	2015	1	1	1
Yayla Medya	2015	2015	1	1	1
Yazıhane	2018	2018	1	1	1
Yazz Film Yapım	2014	2019	3	6	0.5
Yeditepe Film	2016	2019	3	4	0.75
Yef Media Art	2017	2017	1	1	1
Yeni Film	2015	2018	12	4	3
Yeni Film (2010)	2010	2010	1	1	1
Yeni Güven	2011	2011	1	1	1
Yeni Sinemacılar	2005	2018	6	14	0.4286
Yeni Yapım	2005	2007	1	3	0.3333
Yeniden Film	2008	2017	2	10	0.2
Yenilmez Sanat Merkezi	2016	2016	1	1	1
Yeşilçam Filmcilik	2005	2005	1	1	1
Yol Film	2011	2011	1	1	1
Yol Yapım	2013	2013	1	1	1
Zaim Brothers Film	2018	2018	1	1	1

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Zayka Yapım	2013	2016	4	4	1
Zela Film	2015	2015	1	1	1
Zenos Film	2014	2014	1	1	1
Zero Film	2007	2008	2	2	1
Zerr Film	2018	2018	1	1	1
Zeryen Film	2011	2011	1	1	1
Zeta Yapım	2019	2019	1	1	1
Zeugma Yapım	2018	2018	1	1	1
Zeyno Film	2008	2019	6	12	0.5
Zincidi Film	2013	2013	1	1	1
Zoe Film	2014	2014	1	1	1
Zoom Out Yapım	2013	2013	1	1	1
ZS Film	2012	2012	1	1	1
Zuma Film	2013	2013	1	1	1
Zuzi Film	2010	2014	3	5	0.6

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**APPENDIX 4: List of 137 Local Specialist Film Production Organizations with Productivity Index of One or Less and Which Produce Film Between 2005-2019**

Local Specialist Film Production Organization	First Year	Last Year	Total Films	Total Year	Productivity Index
+90 Film Yapım	2012	2019	2	8	0.25
11K Film Yapım	2019	2019	1	1	1
34 Film Production	2017	2019	1	3	0.3333
AC Film	2010	2019	6	10	0.6
Amirler Film	2017	2019	1	3	0.3333
Anibera	2014	2019	2	6	0.3333
Art İstanbul	2017	2019	1	3	0.3333
Asi Film	2008	2019	4	12	0.3333
Asteros	2015	2019	5	5	1
At Yapım	2009	2019	4	11	0.3636
Atay Yapım	2019	2019	1	1	1
Atlantik	2005	2019	7	15	0.4667
Ay Yapım	2011	2019	7	9	0.7778
Balkon Filmcilik	2013	2019	1	7	0.1429
Batı İstanbul Vakfı	2019	2019	1	1	1
Beatrice Film	2019	2019	1	1	1
Boyoz Yapım	2014	2019	2	6	0.3333
Boyut Film	2007	2019	11	13	0.8462
BSK Yapım	2012	2019	2	8	0.25
Butterfly Medya Prodüksiyon A.Ş.	2019	2019	1	1	1
Büyük Galileo	2019	2019	1	1	1
BY Yapım	2019	2019	1	1	1

BYFY Productions	2015	2019	4	5	0.8
Can Medya	2019	2019	1	1	1
CFA Yapım	2019	2019	1	1	1
Cinemia Yapım	2019	2019	1	1	1
Cinemoon Film	2019	2019	1	1	1
CMYLMZ Fikirsanat	2008	2019	10	12	0.8333
Çamaşırhane Film	2013	2019	7	7	1
Çınar Film	2019	2019	1	1	1
Çiçek Film	2009	2019	2	11	0.1818
Delightfull Animasyon	2019	2019	1	1	1
Dijital Sanatlar	2008	2019	1	12	0.0833
DMC	2019	2019	1	1	1
Dras Film Pictures	2019	2019	1	1	1
Durak Film	2017	2019	2	3	0.6667
Eilith Media	2019	2019	1	1	1
Ekol Yapım	2019	2019	1	1	1
Emr Medya	2019	2019	1	1	1
Erdi Yapım	2019	2019	1	1	1
Eren Medya	2018	2019	2	2	1
Eyes Yapım	2018	2019	2	2	1
Fanus-u Hayal Film	2019	2019	1	1	1
Feza Film	2011	2019	2	9	0.2222
Fikri Görsel Sanatlar	2011	2019	1	9	0.1111
Film Fabrikası	2014	2019	3	6	0.5
Filmod Yapım	2017	2019	1	3	0.3333
Filmzade	2019	2019	1	1	1
Fiyaka Film	2019	2019	1	1	1
Gizem Ajans	2019	2019	1	1	1

Gökkuşığı Film	2015	2019	2	5	0.4
Griffin Pictures	2019	2019	1	1	1
Hay Film	2019	2019	1	1	1
Hayal Sanat	2015	2019	3	5	0.6
Hezer Film	2018	2019	2	2	1
HM Productions	2018	2019	1	2	0.5
Hüzzam Film	2019	2019	1	1	1
Inter Aktif	2019	2019	1	1	1
ISF Film Prodüksiyon	2018	2019	2	2	1
İde Yapım	2019	2019	1	1	1
İgamedya Yayıncılık	2016	2019	3	4	0.75
İlkon Film	2019	2019	1	1	1
İnfiniti Medya	2018	2019	1	2	0.5
İrisanka Film Yapım	2019	2019	1	1	1
İstos Film	2017	2019	2	3	0.6667
Jineps Yapım	2019	2019	1	1	1
Juli Sanat	2018	2019	2	2	1
Kalavara Film	2017	2019	1	3	0.3333
Kalem Film	2017	2019	1	3	0.3333
Kaplan Film	2005	2019	7	15	0.4667
Kar Film	2016	2019	1	4	0.25
Karapaça Film	2019	2019	1	1	1
Kardeş Sanatlar	2010	2019	2	10	0.2
Kaz Film	2012	2019	1	8	0.125
Keşfedilmemiş Çocuklar Film Yapım	2019	2019	1	1	1
Kuyu Yapım	2017	2019	1	3	0.3333
Kuzey Film	2008	2019	7	12	0.5833

Küsen Film Yapım	2019	2019	1	1	1
Lanistar Medya	2019	2019	1	1	1
Layen Film	2017	2019	3	3	1
Liman Film	2015	2019	2	5	0.4
Limonata Reklamcılık	2019	2019	1	1	1
Lore Plus Film Yapım	2019	2019	1	1	1
Lüks Mns	2019	2019	1	1	1
M.S.F. Film	2019	2019	1	1	1
Mac Ajans	2019	2019	1	1	1
Madox Medya	2019	2019	1	1	1
Marka Film	2019	2019	1	1	1
Med Yapım	2005	2019	6	15	0.4
Metronom Yapım	2016	2019	3	4	0.75
Mint Prodüksiyon	2008	2019	8	12	0.6667
Mot Reklam	2019	2019	1	1	1
Motion Content Group	2019	2019	1	1	1
Neher Prodüksiyon	2018	2019	1	2	0.5
Nehir Yapım	2019	2019	1	1	1
NETD	2019	2019	1	1	1
NKB Yapım	2019	2019	1	1	1
NTC Medya	2016	2019	2	4	0.5
Off Film	2019	2019	1	1	1
Okyanus Film	2019	2019	1	1	1
ÖTV Yapım	2019	2019	1	1	1
Özminimalist Film	2014	2019	1	6	0.1667
Papyon Film	2019	2019	1	1	1
Pervasız Yapım	2015	2019	1	5	0.2

Piar DNA	2019	2019	1	1	1
Post Office	2019	2019	1	1	1
Pratik Film	2019	2019	1	1	1
Rasathane Film	2019	2019	1	1	1
RNK Film	2017	2019	1	3	0.3333
Sargona Film	2018	2019	1	2	0.5
Sarmaşık Sanatlar	2005	2019	4	15	0.2667
Sefya Film	2017	2019	1	3	0.3333
Sener Yapım	2019	2019	1	1	1
Sinefilm	2006	2019	5	14	0.3571
Su Film	2011	2019	2	9	0.2222
Suare Film	2019	2019	1	1	1
SugarWorkz	2006	2019	13	14	0.9286
Sun Yapım	2019	2019	1	1	1
Şeddadi Yapım	2019	2019	1	1	1
Terminal	2012	2019	2	8	0.25
THC Yapım	2019	2019	1	1	1
TR 40 33 Productions	2017	2019	2	3	0.6667
Trio Pictures A.Ş.	2018	2019	2	2	1
TRT	2005	2019	4	15	0.2667
Turano Film	2019	2019	1	1	1
Uğur Film	2005	2019	1	15	0.0667
Us Film	2019	2019	1	1	1
Varyete Film	2019	2019	1	1	1
Vega Ajans	2019	2019	1	1	1
Vessa Yapım	2018	2019	1	2	0.5
Vidd Film	2016	2019	3	4	0.75
White Light Film	2019	2019	1	1	1
Yakut Sezer Filmcilik	2019	2019	1	1	1

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Yazz Film Yapım	2014	2019	3	6	0.5
Yeditepe Film	2016	2019	3	4	0.75
Zeta Yapım	2019	2019	1	1	1
Zeyno Film	2008	2019	6	12	0.5

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**APPENDIX 5: List of 46 Local Specialist Film Production Organizations with Productivity Index of One or Less and Which Produce Film Between 2005-2019 and with Tenure of Four Years or More**

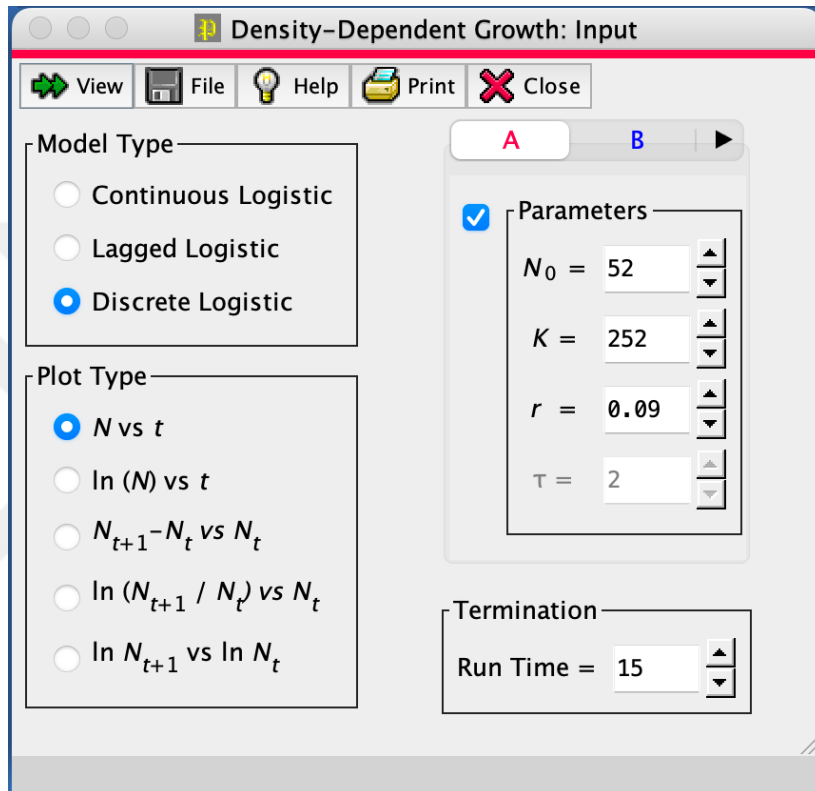
Local Specialist Film Production Organization	First Year	Last Year	Total Films	Total Year	Productivity Index	Festival Presentation	Ministry of Culture and Tourism Support
+90 Film Yapım	2012	2019	2	8	0.25	1	1
AC Film	2010	2019	6	10	0.6	0	0
Anibera	2014	2019	2	6	0.3333	0	0
Asi Film	2008	2019	4	12	0.3333	2	2
Asteros	2015	2019	5	5	1	1	1
At Yapım	2009	2019	4	11	0.3636	1	2
Atlantik	2005	2019	7	15	0.4667	4	3
Ay Yapım	2011	2019	7	9	0.7778	1	0
Balkon Filmcilik	2013	2019	1	7	0.1429	0	2
Boyoz Yapım	2014	2019	2	6	0.3333	0	1
Boyut Film	2007	2019	11	13	0.8462	0	1
BSK Yapım	2012	2019	2	8	0.25	0	1
BYFY Productions	2015	2019	4	5	0.8	0	0
CMYLMZ Fikirsanat	2008	2019	10	12	0.8333	0	0
Çamaşırhane Film	2013	2019	7	7	1	0	0
Çiçek Film	2009	2019	2	11	0.1818	0	0
Dijital Sanatlar	2008	2019	1	12	0.0833	0	1
Feza Film	2011	2019	2	9	0.2222	0	0
Fikri Görsel Sanatlar	2011	2019	1	9	0.1111	0	0
Film Fabrikası	2014	2019	3	6	0.5	0	0
Gökkuşluğu Film	2015	2019	2	5	0.4	0	0

Hayal Sanat	2015	2019	3	5	0.6	0	0
İgamedya Yayıncılık	2016	2019	3	4	0.75	0	0
Kaplan Film	2005	2019	7	15	0.4667	4	5
Kar Film	2016	2019	1	4	0.25	0	0
Kardeş Sanatlar	2010	2019	2	10	0.2	0	1
Kaz Film	2012	2019	1	8	0.125	1	0
Kuzey Film	2008	2019	7	12	0.5833	0	3
Liman Film	2015	2019	2	5	0.4	2	1
Med Yapım	2005	2019	6	15	0.4	0	0
Metronom Yapım	2016	2019	3	4	0.75	0	0
Mint Prodüksiyon	2008	2019	8	12	0.6667	0	0
NTC Medya	2016	2019	2	4	0.5	0	0
Özminimalist Film	2014	2019	1	6	0.1667	0	1
Pervasız Yapım	2015	2019	1	5	0.2	0	0
Sarmaşık Sanatlar	2005	2019	4	15	0.2667	0	2
Sinefilm	2006	2019	5	14	0.3571	3	2
Su Film	2011	2019	2	9	0.2222	0	0
SugarWorkz	2006	2019	13	14	0.9286	0	0
Terminal	2012	2019	2	8	0.25	1	1
TRT	2005	2019	4	15	0.2667	1	0
Uğur Film	2005	2019	1	15	0.0667	0	1
Vidd Film	2016	2019	3	4	0.75	0	0
Yazz Film Yapım	2014	2019	3	6	0.5	0	0
Yeditepe Film	2016	2019	3	4	0.75	0	1
Zeyno Film	2008	2019	6	12	0.5	4	2

## **APPENDIX 6: Populus Software Information**

Populus is a software originally produced to be used in population biology and evolutionary ecology by D.N. Alstad from the University of Minnesota. It consists of various simulation models. After choosing a simulation model, users can change parameters from input windows. Depending on the simulation model, graphical outputs are drawn. Their detailed computational algorithms can be found in its help document. This software is a non-commercial project that can be downloaded and used for non-profit instructional purposes by faculty and students.

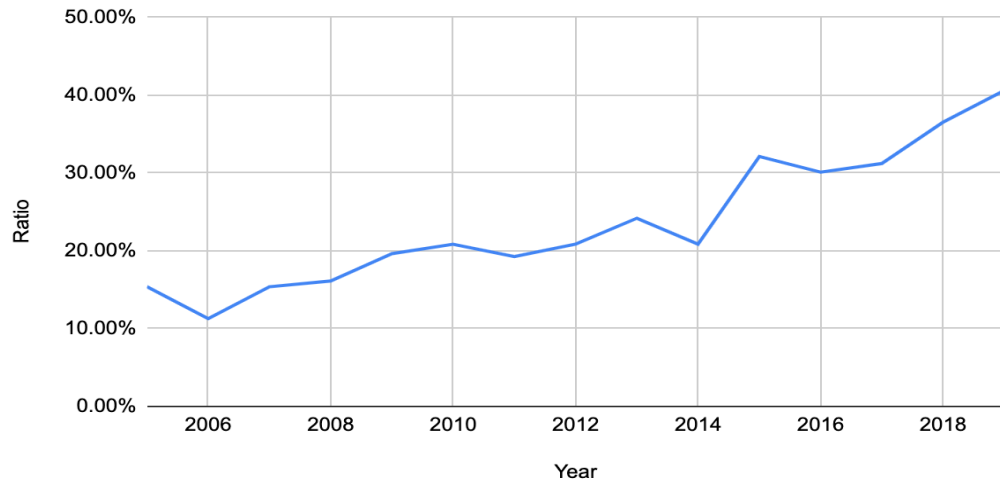
## APPENDIX 7. Parameters for the Density-Dependent Population Growth Simulation



Source: Populus Software

## APPENDIX 8: Ratio of One Year Lived Producers to The Total Producers

Ratio vs. Year



## **APPENDIX 9: Payback Conditions of the Republic Türkiye Ministry of Culture Supports**

Law No. 5224 of July 14, 2004, on the Evaluation, Classification, and Supporting of Cinema Films

Article 20 - (Amended: OG-24/12/2013-28861)

Provided on a refundable basis;

- a) Direct production and post-production support when the film is released or deemed to be released,
- b) The payment made to the credit institution for indirect construction and post-construction supports has ended,

After deducting the expenses incurred for this production from the total revenue obtained from the production as of the end of the calendar year following the year, the remaining net amount will be repaid in proportion to the support made to the total project expenses and in an amount not to exceed this support. If the production is not screened or its date cannot be determined, it is deemed to have been screened at the latest by the end of the calendar year following the year in which the support was made.

Those who receive reimbursable production support must submit the certified public accountant's report on the supported project within thirty days at the latest, as of the end of the calendar year following the year in which the film was released or deemed to have been released; Those who benefit from post-production support are obliged to submit the expenditure documents related to the project and other requested information and documents to the General Directorate. After the delivery of the information and documents in question, the refund amount is calculated by the Ministry.

If the amount of support given exceeds 50% of the total expenses incurred for film production, the amount corresponding to the excess will be refunded by the support recipient together with legal interest.

If the film cannot generate sufficient income to cover its production expenses, the refundable support will be deemed non-refundable by the Ministry if the sworn financial advisor report is reviewed upon the application of the film producer and the request is deemed appropriate.

If the repayment amount calculated as a result of the examination of the certified public accountant report is less than the support amount, the remaining part will be deemed non-refundable only after the relevant determined amount is paid.

The repayment interest rate to be applied to direct or indirect reimbursable construction and post-construction support is determined by the Ministry, provided that it is not more than the current legal interest rate applied by the State to be applied from the date the repayment begins. For indirect support, the relevant institution providing the loan cannot claim any rights from the Ministry.

**APPENDIX 10: Table of Number of Total Revenue of the Films in Türkiye**

Year	Total Revenue in TL
2005	184286289
2006	243265546
2007	242328682
2008	301505965
2009	307972644
2010	383369798
2011	398294141
2012	425630509
2013	504346815
2014	652906744
2015	678557843
2016	691704847
2017	870773229
2018	896780492
2019	980410599

**APPENDIX 11: Table of Number of Total Audience for the Films in Türkiye**

Year	Total Audience
2005	27801041
2006	34866233
2007	31151309
2008	38414342
2009	36904345
2010	41534146
2011	42294040
2012	44339549
2013	50295757
2014	61245258
2015	60228409
2016	58287772
2017	71188594
2018	70409779
2019	59556020

## **APPENDIX 12: Description of 12 Survived Local Specialized Film Production Organization**

The first production organization is called + 90 Film Yapım (<http://www.plus90film.com/>). The company was founded by Serkan Cakarer in 2007. The organization provides directors and writers the environment they need, so they can just focus on their jobs and show their skills in their work. The motivation of the organization is also discovering new talents and supporting them. The first film of the organization is Kırık Midyeler (2011). The second film called Görülmüştür was produced in 2019 and screened at Karlovy Vary Film Festival in the same year.

Asi Film is the second film production organization (<https://www.asifilmatoIye.com/>). This production organization has a collective structure which is composed of independent film producers. Various local and international directors joined the organization throughout the years. Hüseyin Karabay co-founded the organization with Gizem Erman Soysaldı. Karabay in 2006 directed and produced his own film, Gitmek. This film was screened in almost 30 different countries and gathered 18 international awards. Some projects of Asi Film are even co-productions with Germany, France, the United Kingdom, and Greece. The latest film of Asi Film, Unutma Beni İstanbul, is a product of seven directors. Projects of organizations are done collectively as in the last example. The organization also organizes workshops and training sessions, under the name of Asi Film Workshops, for players, directors, and also producers. All these parties find a chance to meet and also learn from each other at the workshops. Gizem Erman Soysaldı is in charge of the design of the content of those workshops, as well as their coordination. Zeynep Atakan, who is the founder of Zeyno Film, is also an instructor at one of the workshops. Since Asi Film's productions are co-produced with other countries, it cannot be taken as just a specialist film production organization.

The third organization, Asteros Film was originally founded by Kanat Dođramacı in 2004 (<http://www.asterosfilm.com/en>). This organization used to produce commercial films and digital videos before it started producing cinema films

and content for digital platforms. It can be said that as a film production organization, it was founded in 2014. Its first film was in 2015. Asteros Film produced 5 films until 2019, with a productivity index of 1. These films are *Git Başımdan* (2015), *Alamet-i Kıyamet* (2016), *Biz Size Döneriz* (2017), *Damat Takımı* (2017), lastly *Küçük Şeyler* (2019). The first film, *Git Başımdan*, is written and directed by Şahin Altuğ. Second film, *Alamet-i Kıyamet*, the third film, *Biz Size Döneriz* and also the fourth film, *Damat Takımı* were written and directed by Doğa Can Anafarta. The last film produced within the time period of this study is *Küçük Şeyler*, which was directed by Kıvanç Sezer. It was screened at the Karlovy Vary Film Festival in 2019. Asteros Film's founder, Kanat Doğramacı has been producing commercial films and digital videos since 2004, before producing films for cinema. His personal experience with producing would have eased his film production journey.

Forth, *At Yapım* was founded by Atalay Taşdiken in 2008 (<http://atyapim.com/demo/>). The first film, *Mommo, Kız Kardeşim* (2009), was screened at the Berlinale Film Festival in 2009. Including this film of the production organization, all films, *Meryem* (2013), *Aşk Ağlatır* (2013), and *Arama Motoru* (2016) are directed by Atalay Taşdiken. *At Yapım* produces films by Atalay Taşdiken, who is also the founder.

*Atlantik Film*, being the fifth organization, was founded by Ömer Atay (<http://www.atlantikfilm.com/>). All the films that *Atlantik Film* productions are written and directed by Reha Erdem. Among the organization's seven film productions since 2005, four of them took part in international film festivals. *Hayat Var* (2008) was screened at and awarded by the Berlinale Film Festival in 2009. This film was also screened at the Toronto Film Festival in 2010. Another film *Kosmos* (2009) was screened at the Berlinale Film Festival in 2010. *Jin* (2012) is another film produced by *Atlantik Film*, Ömer Atay, which screened at the Berlinale Film Festival in 2013. Lastly, the fifth movie called *Koca Dünya* (2016), was screened at the Venice Film Festival and also won the Special Jury Prize in the same year. There is another film by Reha Erdem, *Şarkı Söyleyen Kadınlar* (2013). It is also produced by Ömer Atay but

this time Atay individually produced the film, not by Atlantik Film. This film was screened at the Toronto Film Festival in 2013.

The sixth production organization is Ay Yapım (<https://ayyapim.com/>). It was established in 2005. The organization mainly produces television series. It produced 44 television series and 5 films until 2019. It exports television series. In addition to that, the Turkish Exporters' Association awarded the organization five times for exporting these television series to the global market. The production organization can be called a mass producer in television series. Since there is no separation between television series production and film production, it cannot be called a specialist film production organization as the ones this study focuses on.

The seventh production organization, Kaplan Film is founded by Semih Kaptanoğlu (<http://www.kaplanfilm.com/tr/>). All the films produced by this production organization are written and directed by Semih Kaplanoğlu. During the timeframe of this study, Kaplan Film produced 7 films in total. The first film is called Angel's Fall (2005). It was screened at the Berlinale Film Festival in 2005 and the Rotterdam Film Festival in 2006 and 2009. The first film of "Yusuf Trilogy", Egg (2007) is screened at and also awarded by the Cannes Film Festival in 2007. Milk (2008) being the second film of the trilogy, was screened at Venice Film Festival in 2008 and at Rotterdam Film Festival in 2009. Honey (2010) is the last film for "Yusuf Trilogy". This film was both screened at and awarded by the Berlinale Film Festival in 2010. The next films are Djeca (2012) and Grain (2017). Commitment Ashı (2019) is the first film of another trilogy, called "Commitment Trilogy", by Semih Kaplanoğlu produced by Kaplan Film. Kaplan Film is similar to At Yapım, producing films of its founder. Selim Kaplanoğlu being the founder of Kaplan Film, produces his own films. His experience as well as his network within the industry, eased his production company's survival.

The next local specialist film production organization is Kaz Film (<https://www.beyazperde.com/sirketler/sirket-27947/aktivite-15003/>). It was founded by Anıl Çelik in 2010. Within the time frame of this study, there is only one film produced by the production organization. This film is Lal Gece (2012). The director of

the film is Reis Çelik. Lal Gece was screened at the Berlinale Film Festival in 2012. It is also awarded by the festival in the same year. There are two more productions of this organization. Both of them are Reis Çelik's work. One of them is a documentary. The other one is outside of this study's time frame. However, it is also screened at festivals and awarded. The eighth surviving film production organization is Kaz Film. The founder Anıl Çelik produces only films by one director, Reis Çelik.

The ninth organization, Liman Film is a specialist film production organization that was founded by Nadir Öperli in 2014 (<https://www.limanfilm.com/>). There are two films produced by the organization between 2005 and 2019. These films are Abluka (2015) and Kız Kardeşler (2019). Both films are written and directed by Emin Alper. The first film, Abluka was screened in 2015 at both Toronto Film Festival and at Venice Film Festival. It was also awarded by the Venice Film Festival in 2015. The second film, Kız Kardeşler screened at Berlinale Film Festival in 2019. The ninth organization Liman Film is similar to the previous one, the founder of the organization, Nadir Öperli, produces films of only one writer and director, Emin Alper.

Sinefilm, being the tenth organization, was founded by Pelin Esmer in 2005 (<https://pelinesmer.com/>). Pelin Esmer is also the director of all the films produced by the Sinefilm production organization. Esmer has been producing independent films since 2001. The film called 10 to 11 was awarded by many international film festivals. In addition to this, it is also screened by many international festivals including the San Sebastian Film Festival. It was screened at Turkish, French, and German movie theaters. Another film, Watchtower (2012) is screened in many countries and also in five different states in the United States of America, as a part of the Caravanserai Program. Première of the film were at the Toronto and Rotterdam Film Festivals. The film called Something Useful (2017) was screened at movie theaters in Türkiye and the Netherlands and was also awarded at both Türkiye and international film festivals. In 2018, Esmer was invited to Berlin for the DAAD Artists-in-Residence Program. As a result of this stay, Esmer produced the documentary film Queen Lear. This film has also screened and awarded by many international film festivals. Lastly, in 2019 Esmer

was invited to the residence of artists in Cassis-France and is still working on her new film. Aside from international screenings and awards, Esmer's film got support from the Ministry of Culture and Tourism. Sinefilm is similar to At Yapım and Kaplan Film, produces films by only one writer and director, Pelin Esmer, who is also the founder of the organization.

The eleventh production organization is Terminal (<https://terminal.com.tr/>). It was founded in 2008. In addition to producing films, the organization also supplies a line of production services for audio-visual necessities. It also provides education and training programs for both individuals and organizations. In addition to that, project development and consultancy services are offered by the organization. The organization's team is currently composed of three people. They are Selin Vatansever, and Oya Özden, who are producers, and Ali Vatansever, who is a director. Ali Vatansever also takes charge of the educational side of the organization. There are two films produced by Terminal. Both of them are directed by Ali Vatansever. The first film *El Yazısı* was produced in 2012 and screened by various international film festivals. The second film called *Saf* was produced in 2018. *Saf* was screened at the Toronto Film Festival in 2018.

Last but not least, Zeyno Film was founded by Zeynep Atakan in 2007 (<https://zeynofilm.com/>). Zeyno Film produced four Nuri Bilge Ceylan films which are *Three Monkeys* (2008), *Once Upon a Time in Anatolia* (2011), *Winter Sleep* (2014), and *The Wild Pear Tree* (2018). All of those four films are shown at major film festivals. *The Wild Pear Tree* is only shown at the Cannes Film Festival. The other three, *Three Monkeys*, *Once Upon a Time in Anatolia*, and *Winter Sleep*, are shown at both the Cannes Film Festival and the Toronto Film Festival. In addition to those films produced by Zeyno Film as a production organization, Zeynep Atakan and Nuri Bilge Ceylan individually produced *Climates* in 2006 as co-producers of the film with two other production organizations, which are İmaj Film from Türkiye and Pyramide Films from France. Other than these Nuri Bilge Ceylan films, a documentary directed by Can Dündar was also produced by Zeyno Film in 2012. The survival of Zeyno Film comes

from Zeynep Atakan's background and experience in the industry. Likewise, Nuri Bilge Ceylan is a recognizable and well-known director in the sector. It is not expected that those two people, working together for many years and being aware of the film industry environment, would have been affected by the liability of newness. On the reverse, this local specialist film production organization can be titled as one of the most "survived" local film production organizations of all.

Atakan has independent productions and co-productions other than films of her production company. It is out of the time period of this study, but Atakan co-produced with Martin Hagermann and Martin Wiebel in 1999 *Lola and Billidkid*. This film was also shown at the Berlinale Film Festival. This is important because Zeynep Atakan has experience in film production. Because she is not new in the sector, this could have prevented her production organization falling into the liability of newness. She was awarded the European Film Academy's Best European Co-Producer Award in 2010, and the Uçan Süpürge Bilge Olgaç Achievement Award in 2014 (<https://zeynofilm.com/zeynep-atakan/>). In addition to these, she has invested in the cinema sector by launching the Yapımlab Workshops (2010), starting the Antalya Film Forum (2014), and organizing the Türkiye section of the Youth Audience Award which is a European Film Academy project as stated in Zeyno Film's website ([www.zeynofilm.com](http://www.zeynofilm.com)). Being a member of various film organizations such as the Academy of Motion Picture Arts and Science (AMPAS), the European Film Academy and the Asia Pacific Screen Academy provides visibility to her in the sector as well as the ability to have some control over the environment.

On the other hand, Nuri Bilge Ceylan has also experience as a producer in the sector. Ceylan directed and produced the film *The Town* in 1997 with NBC Films, which is a production organization in Türkiye. *The Town* was shown at the Berlinale Film Festival in 1998, the Toronto Film Festival in 2003, and at the Rotterdam Film Festival in 2009. After that, in 1999 Ceylan directed and produced the film *Cloud of May* again with NBC Films. This film was also shown in festivals, the Berlinale Film Festival in 2000 and the Toronto Film Festival in 2003. Lastly, he directed and

produced with NBC Films in 2003 the film *Distant*. This film was shown at the Cannes Film Festival in 2003 and at the Toronto Film Festival both in 2003 and 2010.

Aside from Zeynep Atakan and Nuri Bilge Ceylan's individual past experiences and successes in the sector, their engagement in film production as a specialist film production organization, Zeyno Film brought them sustainability in the production. Their professional relationship and their individual contributions to the result paved the way for their survival in production. The strong relationship between the director Nuri Bilge Ceylan and the producer Zeynep Atakan comes from well-defined and properly shared roles. In Zeynep Atakan's podcast interview with Nilay Örnek (*Nasıl Olunur*, Episode 2, 1 Jan 2021), Atakan explains that the definitions and boundaries of their division of labor are very clear. She even stresses that this division of labor is written down and both parties sign that agreement. Even who is going to talk about which topics in case of a premiere, interview, etc. are agreed upon, specified beforehand, and signed as an agreement by both parties. These definite and exact boundaries keep their professional relationship away from any conflict. Zeynep Atakan calls this management of well-defined expectations "professionalism". In the case of Zeyno Film's survival, individual backgrounds in the sector, and harmony with each other via definite boundaries are found.

## APPENDIX 13: Interview Questions

The names of the participants will be kept confidential, and their names will not be mentioned in the study. Participants can withdraw from the study or request the deletion of their answers at any time. Interview recordings will be backed up and stored as files both on the hard disk and online.

Verbal approval will be obtained from the participants for the recordings of the interviews.

### Interview Questions

1. In the Turkish independent film production niche, film companies that produce films of the founder or a single director seem to have more chances of survival.
  - a. In your opinion what can be the major driver of this high rate of survival?
  - b. The founder or the director seems to be the only resource of the company. Do you agree with this? Why? Why not?
2. As indicated by the data provided by Box Office Türkiye's website ([www.boxofficeturkiye.com](http://www.boxofficeturkiye.com)), although the number of local independent film production companies is increasing, the number and the rate of one-year-lived producers are increasing as well. Is it because these companies cannot afford to produce a second film, or these production organizations are project-based?
3. Is there an independent film production model in the world that Turkish independent film production organizations are similar to? If so, in which aspects these models are similar? In which aspects do they differ? In addition to these, do you think this model is sustainable or not?
4. In what ways the digital platforms such as Netflix, Amazon Prime Video etc. affect independent film production in Türkiye?

**APPENDIX 14: Result of Evaluation by the Ethics Committee**

**ETHICS BOARD APPROVAL**

Ethics Board Approval is available in the printed version of this dissertation.

