International Journal of Communication 10(2016), 3615–3631 1932–8036/20160005

IJoC Shift or Stasis

Vacillation in Turkey's Popular Global TV Exports: Toward a More Complex Understanding of Distribution

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Audience demand for Turkey's TV series has increased their strength in the regional market and beyond. By mid-2014 more than 70 Turkish TV dramas reached audiences in 75 countries. Some experts have characterized this as *neo-Ottoman cool*, referring to Turkey's growing "soft power" role in successfully combining Islam with democracy. However, survey data from 16 Arab countries, previous audience studies, and our in-depth interviews with Istanbul-based producers and distributors refute this. Neo-Ottoman cool does not register the full dynamics of contingent relations between economy, politics, ideology, and media flows. Our research underscores the region's glocal flexibility and the market articulations overarching Turkey's soft power ambitions, how the drama genre attracts women cross-culturally, and the limits of notions of cultural proximity.

Keywords: media business, Middle East, series, soft power, television, Turkey

The international appeal of Turkish TV series has expanded almost exponentially. Until a decade ago, Turkish TV series were mainly produced in formats targeting national audiences, but recently they have proven to be a formidable player in global television content production and distribution. In 2014, Turkey ascended to the second highest ranking of television drama production worldwide, after the United States, with export revenue of US$200 million (Dickens, 2014). Turkey was the most recent "guest of honor" at the world's largest TV content marketing fair (MIPCOM), held in October 2015 in Cannes. The head of Istanbul's Chamber of Commerce announced at the fair that in 2015, global exports of Turkish TV series were expected to bring in revenue of US$350 million. These series combined are estimated to have reached 400 million viewers worldwide in 2014, across the Middle East, North Africa, Eastern Europe, and Central Asia, with new markets opening up in Scandinavia and Latin America (Özdemir, 2015).

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Date submitted: 2015–10–01

The first series sold abroad was to Kazakhstan and Azerbaijan ("Türk Dizilerinin Yurtdışı rekoru," 2011), but the first major buyers were the three satellite channels in the Arabic-speaking world (MBC, Dubai TV, and Abu Dhabi TV), which acquired the right to air the series en masse in 20 countries across the Middle East and North Africa (MENA) region. In this article, we offer Turkish perspectives on the growth of its media exports. The Arab world is used as a case study, given its large import of these Turkish series in the region. This article aims to account for the continuing contradictory growth of the Turkish series market by discussing (a) the limits of the soft power concept to explain the dynamics of contextual and contingent relations between economy, politics, and culture and ideology; (b) the glocal flexibility and articulatory power of the global television market, which cannot be explained by any single-factor explanation; and (c) the problems of using concepts such as cultural proximity to explain foreign audience demand for Turkish serials.

Turkish television dramas have been considered to be a "fever" hitting Arab screens (Delaimi, 2010). Since the first screening of the series *Iklil al Ward* in 2007 (Çemberimde Gül Oya), and then *Sanawat al Dayaa* (Ihlamurlar Altında) and *Nour* (Gümüş) by MBC (Middle East Broadcasting Centre) in 2008, many more have been distributed throughout the MENA region. Dubbing the shows into Syrian Arabic not only enabled audiences across Arabic-speaking countries to understand them but also provided a sense of continuity, given the earlier regional popularity of Syrian TV dramas (Matthews, 2011). Turkish TV series were not seen as new, but rather as more professionally organized instruments for "capturing the hearts and minds" of Arab audiences, and they also seemed to aid the growth of Turkey's tourism from Arabic-speaking countries (Bilbassy-Charters, 2010; Kendall, 2011).

Public surveys conducted in the region[1] since 2009 indicated Turkey's popularity and positive image, as well as its perceived roles as a "mediator for conflicts" in the region, a "political and economic power," and a "role model." Despite a noticeable decline in Syrian and Iranian public opinion in 2011, the surveys show Turkey continued to sustain a positive image generally in the region (TESEV, 2012a).

However, the social and political upheavals of the so-called Arab Spring in 2011, followed by the rise of a Muslim Brotherhood–supported Egyptian government in 2012, resonated negatively in Middle Eastern perceptions of Turkey. For instance, an "apparent decline in sympathy towards Turkey in [the] MENA region" was reported in the 2012 survey (TESEV, 2012b, p. 5). When Egypt's Morsi government was, in turn, overthrown in a military coup in 2013, Turkey's Prime Minister Recep Tayyip Erdoğan continued to support Morsi despite the opposition of other Arab countries. By the end of 2014, many Egyptian writers and politicians had called for a boycott of Turkish products in response to what they described as "'unjustified' attacks on Egypt" by (now) president Erdoğan ("Egyptians Call for Boycott," 2014). These calls immediately affected TV export figures in the region. Experts reported that sales were

[1] From 2009 onward, the Turkish Economic and Social StudiesFoundation/Türkiye Ekonomik ve Sosyal Etüdler Vakfı (TESEV) conducted public opinion surveys on perceptions of Turkey in the MENA region and Iran. These surveys cannot be expected to offer a complete and accurate view of the public opinion, but they offer a broad view of perceptions on some issues.

"cut [as if by] a knife" at the end of 2013, with MBC slowing down its acquisitions and Abu Dhabi and Dubai TV even halting the airing of licensed titles.[2]

The distributors and channels in Turkey took compensatory measures and opened up to new markets in other regions like Latin America, transforming Turkey from a regional to a global actor in the TV series market. Furthermore, continuing audience interest in Arabic-speaking countries prompted regional and global players in the drama sector to introduce new ways of doing business with Turkey.

Previous research on Turkish TV dramas explained the growth of market demand on a regional (later transnational) scale by notions of "cultural proximity" (TESEV, 2010) and Turkey's growing soft power, especially in the Middle East (Al Jaber, 2010; Cerami, 2013, p. 140). In this context, we problematize excessive academic and popular references made to the cultural proximity as well as soft power concepts. In the related literature, the term *cultural proximity* is used widely to explain mainly the Arab customers' interest in the dramas through either celebrating or criticizing the so-called effects of serials as a part of Turkey's "(il)legitimate" soft power.

Following Straubhaar (2010), we consider cultural proximity as a factor in explaining the Arab audience's interest, due to historical ties with the region's countries. However, we criticize its uses for ignoring class, age, gender, and personal history–related differences of the audience and the effects of multiple cross-cutting proximities (LaPastina & Straubhaar, 2005). Besides, we maintain that celebrating the consumption of Turkish TV dramas with an emphasis on cultural similarities does not sufficiently take into consideration the Arab audience's active choice in their preferences and their negotiations with hegemonic meaning (Hall, 1980).[3] The celebrations of cultural proximity were sometimes conducted with an accompanying "colonial tone," as defined by the Ottoman past and neo-Ottoman claims over the region (Kaptan, 2013).

The term *neo-Ottoman cool* was used by media researchers Marwan Kraidy and Omar Al-Ghazzi (2013a) to explain the popularity of Turkish popular culture in the Arab world, which seemed implausible given historical tensions and postempire disconnects. Much of the Arab world lived under Ottoman Turkish rule for over 400 years, but it was neglected in modern Turkish foreign affairs until Erdoğan's AKP came to power in 2002. From the authors' perspective, the popularity of Turkish TV series in the Arab world would indicate that cultural proximity runs deeper than mere face value. These authors proposed *neo-Ottoman*

[2] The boycott could also be reflecting the reaction of the Arab TV industry to the success of the Turkish series.

[3] For research that compares the Turkish drama audiences of Greece and various Arab countries, see Yörük and Vatikiotis (2013). For the "negotiated readings" of the audience, see Yanardagoglu and Karam (2013). By following feminist literature on soap operas (Brunsdon, 1995; Geraghty, 1991), the appeal of Turkish series, especially to Arab female audiences, are evidenced in its promises of more romance, a better lifestyle, and a relative freedom and gender equality. These are characteristics of so-called the macro-genre that makes Turkish dramas attractive to women in Greece, the Balkans, and recently, in Latin America, the "motherland" of soap operas.

cool as a trope to refer to the Turkish version of modernity, combining Islam, secularism, and capitalism, which also appeals to many Arabs.[4]

In their subsequent study, they found that mass culture products were seen as contributing to the neo-Ottoman cool image, with Turkish TV drama as the "main symbol" of Turkey's soft power in the region (Kraidy & Al-Ghazzi, 2013b). *Soft power* is a term coined by Harvard professor Joseph Nye (1990) to address cultural dimensions of today's global power relations (Meyer, 2007). It interrelates culture, political values, and foreign policy, claiming that mass culture serves to attract an international populace and to inculcate shared values and norms (Nye, 2004, pp. 6–7). It counterbalances "hard power." However, the concept has been criticized from a Marxist perspective for being grounded in neoliberal theory (Joseph, 2008; Meyer, 2007).[5]

Kraidy and Al-Ghazzi explain the recent positive image of Turkey in the MENA region as resulting from the "multiple strategies of using popular culture, rhetoric, and economic branding techniques in a soft power push" (2013b, pp. 2342–2343), but they do so without making a reference to Gramsci's term *hegemony*.[6]

In this article, following a poststructuralist and neo-Gramscian approach, we use the term *hegemony* to refer to consent construction through the material spheres of culture and ideology, politics, and economy, which work in(ter)dependently from and with each other by causing contingent articulations. Thus, as Laclau and Mouffe (2001) argued, we find structural undecidability to be a very condition of hegemony.

Within this neo-Gramscian framework, we approach Turkish TV exports as an accompanying instrument of Turkey's claimed regional cultural and ideological hegemony, which operates with its own contextual causes and results. Since we conceptualize hegemony as a "give and take form of power" (Laughey, 2007, p. 64), we note mutual influences of cultural proximity between Turkish and Arab cultures that have very deep roots.

The economic and cultural transactions in the TV series market shows sustainability and adaptability despite declining political will and popularity. The drama sector seems to have created an economic push of its own, counteracting the region's negative political responses to the Turkish government's hegemonic assertions. Therefore, within this neo-Gramscian frame, we argue that despite some limited negative impacts on the drama sector, the decline of Turkey's Neo-Ottoman political project does not seem to have affected the economic and cultural attraction of Turkey among MENA consumers.

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[4] Kraidy and Al-Ghazzi do not offer a precise definition for the concept.

[5] In Marxist-critical international relations (IR) language, *soft power* is used to refer to a nonmaterial part of hegemony that works though ideology, as opposed to the material and coercive part of it (see Cox & Sinclair, 1996; Joseph, 2008).

[6] For instance, Yörük and Vatikiotis (2013) framed their analysis within his theory of hegemony and highlighted differences between soft power and hegemony when discussing Turkey's regional, global, and cultural power.

In the case examined, "cultural flows" are intertwined with Turkey's neoliberal values, patterns of economic consumption, and a hybrid (modern-traditional) outlook on daily life, which supersede the micro-politics (neo-Ottomanism) of the AKP government.

Such economic and cultural attraction and flows may not always be audience admiration and consumption driven, but they may be contingent on a number of factors such as national and global television market dynamics as well as entrepreneurial initiatives, which we also account for in the following sections. In order to do so, we first consider the political changes since 2011 and then consider simultaneous changes in Turkish television's production and distribution sectors.

We especially focus on events in 2011 and beyond because, first, 2011 marks the 10th anniversary of Turkey's TV dramas being marketed abroad; second, it ushered in the AKP's third term; and finally, the Arab Spring upsurge that swept across a number of Arab countries from 2011 onward prompted a shift in Turkey's foreign affairs stance—desiring "zero problems with the neighbors"—toward more complicated and antagonistic relations (Turkish Ministry of Foreign Affairs, n.d.).

We construct our arguments by analyzing primary and secondary sources in the Turkish drama market. The primary data include face-to-face and online interviews conducted with TV professionals in production and distribution companies in Istanbul, where the sector is based. The majority of secondary data were retrieved from annual TESEV surveys on the political and economic perceptions of Turkey throughout the Middle East.

First, we discuss the changes in the drama sector that raised Turkey to the level of a regional, transnational, and then global actor in just a decade. Second, we outline recent shifts in Turkey's foreign affairs in the MENA region, with a particular focus on reverberations in the media sector. In the third and last part, we elaborate our argument by criticizing or rephrasing the theoretical frames that have been proposed to explain glocal tendencies of the Turkish TV serial market and offer an analysis of the intricate dance between politics, economy, and culture in Turkey.

Turkish Drama's Arab Spring:
From Local and National Production to the Regional Level

Television production in Turkey has its origins in the long tradition of melodrama production in the so-called Turkish "Yeşilçam (Green Pines Street) cinema system" of the 1960s and 1970s, which copied popular Hollywood melodramas in low-budget productions (Simpson, 2006). Since the 1980s, television drama has been popular in Turkey, especially after 1993, when private TV channels proliferated. The national audience persistently favors TV series over other content genres. Over 2014–2015, some 40 different series were broadcast across five major TV stations on weekdays (Deloitte, 2014).

However, this sector is highly fragmented and competitive. Too many production companies vie for a limited number of broadcast hours. At the beginning of a broadcast season, between 50 and 70 titles begin transmission, but only around 20 continue due to poor ratings of the remainder. Over the 2008–

2010 seasons, the production cost per episode was estimated at US$41,500–$125,000, with average advertising revenues at US$125,000 per episode (ISMMMO, 2008, 2010).

The growing appetite for programmed content galvanized a stronger professionalism in the mid-2000s. Production companies felt the need to produce higher quality output and have a more transnational outlook (Yanardağoğlu & Karam, 2013). In 2004, the exports of TV series were valued at as little as US$10,000, but in 2007, the annual income from soap opera exports was measured at US$1 million (DISBOOK, 2013). As indicated in Figure 1, export revenues then leapt from US$10 million in 2009 to US$150 million in 2013 (Deloitte, 2014). TV series were marketed to foreign markets at US$15,000–$150,000 per episode, depending on the recency of their TV season and their popularity (Özedincik, 2013). In 2014, their export revenue was calculated at US$180 million, with more than half of exports directed to the MENA region (Gök, 2015).

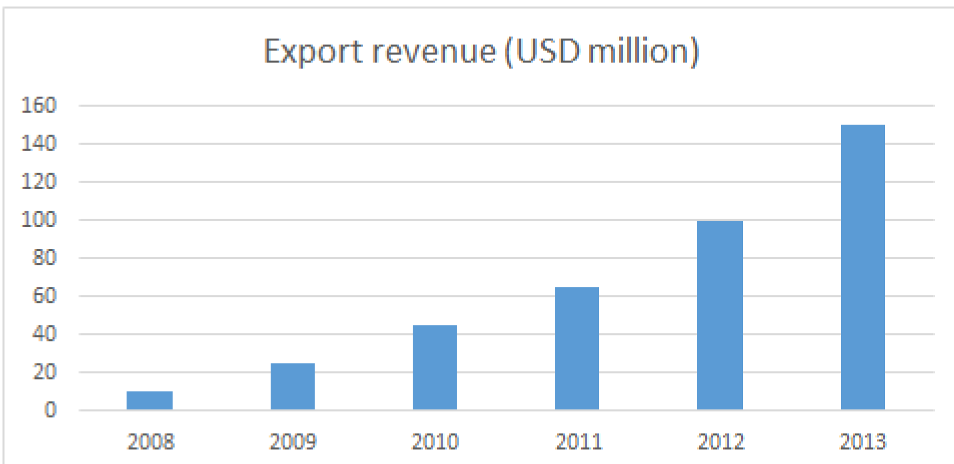

Figure 1. Turkish TV series' export revenue (Deloitte, 2014).

The international appeal of Turkish TV series has, in a short time, expanded almost exponentially. Turkish dramas focus on family and community relationships, longing for lost neighborhoods, and relations between the rich and the underclass through stories of "revenge, unrequited love, betrayal, [and] city versus country" (Simpson, 2006, p. 6). In addition to technical advances in "shooting the series like a film," the format success was perceived by some to connect to the ambivalences of Turkish modernity and their cultural proximity in the eyes of Arab audiences. Also, familiarity with established narratives of the melodrama as a "macro genre" added to its popularity (Martín, 1993). As one sales expert explained:

> the ambivalence of Turkey was interesting for [an Arab audience]. Are we [Turks] modern, are we Arab? They do not know. Istanbul is a beautiful place with young, attractive men and women. Then our stories were interesting for them. When the audience watched Gümüş [*Noor*], they see the Cinderella story, a village girl falling in

> love with an Istanbul boy, and her self-development. But in the Middle East it was seen with different eyes, it was a story of a woman's struggle in a place she does not belong. *Gümüş* was a milestone for the Middle East. (personal interview, July 19, 2015)

Four major factors were identified to explain the success of TV series in the Arab world, as the previous interview also reiterated. These are the technical quality of the TV series, the influence of shifts in foreign policy, the notion of cultural proximity, and perceptions of modernity (Yanardağoğlu & Karam, 2013).

Importing Turkish TV series into the MENA region via satellite channels began entirely serendipitously, after an executive of MBC (a Saudi-owned media firm) watched these series in his hotel room during a visit to Turkey and began buying up the dramas that led to the "craze" (Mathhews, 2011). Although they were not produced for an Arab audience or in order to promote an official cultural policy (Yanardağoğlu & Karam, 2013), Turkish TV serials have played some role in foreign relations by facilitating dialogue between ministers and ambassadors through conversational exchange of anecdotes regarding these series.

Turkish dramas in the MENA region peaked as early as 2008, when the *Noor* series finale attracted an unprecedented 85 million viewers over the age of 15 years, 50 million of whom were women. *Sanawat al Dayaa* attracted 67 million viewers, 39 million of them female. The *Noor* series even managed to command a spot in the top 10 global programs in the Eurodata annual study "One Television Year in the World" by Médiametrie (quoted in Buccianti, 2010). By 2011, of the 70 different Turkish TV series broadcast to audiences in 40 different countries, the 21 countries of the Arab League accounted for more than half of the series sold ("Türk Dizilerinin Yurtdışı rekoru," 2011, January 15).

The AKP government exploited the popularity the TV series enjoyed in MENA and pragmatically seized the opportunity to locate the TV series within an official discourse concerning "Turkey's growing international appeal," part of its soft power as a catalyst in their "zero problems with the neighbors" foreign policy.[7]

Around 2011, trade and political relations with Arab neighbors showed a positive upward curve, and the AKP and Erdoğan as a politician enjoyed growing popularity in the MENA region.[8] This also coincided with the rise in TV series with high ratings and revenue.[9] Nonetheless, the target for TV producers and scriptwriters continues to be the "national audience." Hence, the constant priority given to the national market by the TV production sector should temper any claims that the Turkish government

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[7] For instance, in December 2014 during a visit to a production set, Deputy Prime Minister Yalçın Akdoğan asserted that "These TV series are important for Turkey's soft power and regional influence" ("Akdoğan'dan dizi yorumu," 2014, para. 3).

[8] Erdoğan was "greeted like a rock star" on his first tour of the MENA region during the Arab Spring in 2011 (Abuzeid, 2011, l. 1).

[9] Before 2011 there were two primetime series per evening on Turkey's major TV channels (personal interview with TV sales representative, July 19, 2015, Istanbul).

has taken deliberate actions to use TV series to consolidate its soft power in the MENA region (Anas, 2012; Cerami, 2013; Kraidy & Al-Ghazzi, 2013a).

For the production companies, including TV channels with their own in-house production divisions, the priority was, and has been, to secure good ratings, audience share, and advertising revenue nationally before a series can ever be marketed abroad. As one sales expert explained, due to the high cost of production, the priority needs to remain "90% [in] the local market." The "luxury of producing series 'A' for a local audience and 'B' for the foreign audience," the expert explained, does not exist. (personal interview, January 30, 2015).

End of the "Arab Spring" for Turkey: Decline in Turkey's Regional Political Ranking

Turkey's changing foreign policy toward the Arab world has been one of the factors affecting the popularity of its TV series in the region. Commercial and bilateral relations between Turkey and its Arab neighbors only began to strengthen after the 1990s (Kirişçi, 2000). This improvement in Turkish-Arab relations, initiated when the AKP came to power in 2002, represented a shift from the "disinterest" of Western-oriented policies of former governments, which had been shaped around the so-called Kemalist doctrine of "peace at home, peace in the world," to the Islamic-Conservative AKP's pragmatic interests.

The short-term positive outcome of this policy could be observed in the improving bilateral cultural and economic relations. For instance, the recognition of TV experts both in the MENA region and Turkey of the value of TV series for their markets gave countenance to increasing economic trade and export-promotion of Turkish series already in commercial circulation since 2007. Also, in 2010 a Turkish TV channel in Arabic was launched. The public surveys conducted by TESEV between 2009 and 2013, first in 7 Arab countries (Egypt, Jordan, Palestine, Lebanon, Saudi Arabia, Syria, and Iraq) and later in 16, indicate that the Arab people indeed "recognized" the changing policies of Turkey as it had taken a "more active role" (Altunışık, 2010, p. 5) in the region. As Figure 2, adapted from TESEV reports (2009–2013), suggests, TV viewing practices are not necessarily convergent with survey participants' political opinions about Turkey. The following figures indicate that the Arabs' belief that Turkey was playing a bigger role in MENA declined in those years. However, the graph also indicates an upward trend in popularity of Turkey's TV series, despite this decline in perceived soft power.

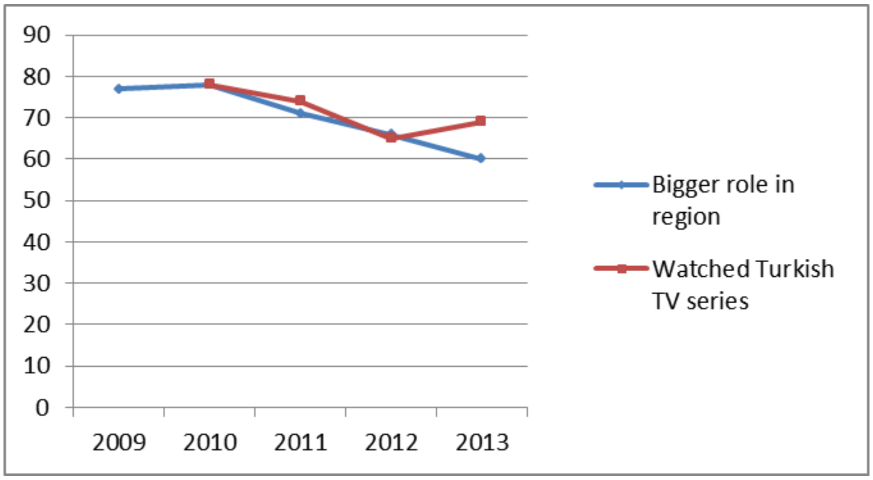

Figure 2. Comparative time series: Arab perceptions of Turkey versus series viewership (TESEV, DISCOP).

The surveys were not repeated in 2014, but a perceived and sustained audience interest in Turkish drama was observed at the 2014 international television industry fair *DISCOP West Asia* in Istanbul (DISCOP).

The Impact of the Decline: Globalization of the Turkish Drama Sector with Asymmetrical Interdependence

Trying to trace the rise and decline of Turkish television export figures over the last several years is like putting a puzzle together. The figures here are gathered from different sources because there is no single institution keeping export statistics. Many distribution and production companies rely on their own company records and do not wish to share them openly. One expert expected revenue from series exports in 2015 to reach around US$200 million. However, all interviewees clearly described a "nose dive" in MENA sales since the end of 2014. They attributed this abrupt change to three intertwined factors. The first and most obvious factor was the deteriorating relations between Turkey and its Arab neighbors. One sales professional remarked:

> The last package of series sold to the Middle East was in December 2013. Arabs like the Syrian dialect in dubbing. Because of the problems there [in Syria, the Syrians] *could not work*. . . . The Middle Eastern [media] companies told us they did not want [to purchase] Turkish series due to the politics in their countries. We started focusing on other countries. (personal interview, January 30, 2015)

Another sales director similarly said the "sales were cut like a knife" around the end of 2013. He elaborated:

> Our series showed the country one would desire to live in. These [MENA media] companies took a great risk not to air products they licensed for 3–4 years. This is something that would be very much against the management of a channel. Only those close to their governments could do it. We used to talk with the directors of acquisitions of those channels and explain that the creative spirit behind the Turkish TV series was not same as the Turkish government's. But we could not convince them, despite their personal positive attitude towards the Turkish series. (personal interview, June 24, 2015)

The sales director of another distributor said they were "worried about the embargo and crisis in MENA" because sales in this region are conducted "single handedly for 20 countries" covered by MBC, Abu Dhabi TV and Dubai Media—and their embargo would mean losing the whole Arab-speaking market. This is why the opening of the South American market in 2014 has been termed a "life-raft" by industry experts.

Since late 2011, geographically and culturally distant markets in East Asia, Africa, South America, and the Balkans have been opening up for Turkish series. In 2013, for instance, Ukraine, Pakistan, Russia, and China all started importing Turkish dramas. However, the most recent development was indeed in March 2014, when Chile opened up the South American TV market by screening five Turkish titles. The distribution company Global Agency estimated that Chile and Argentina will soon be followed by Uruguay, Colombia, Perú, México, Ecuador, and Brazil, home markets of the *telenovela* format (personal interview with sales professional, May 11, 2015).

However, the international sales director of a major TV channel believes that the recent changes in the Turkish television sector cannot be explained only by the changing political situation. There are also other factors, such as the 2012 switch to a new ratings system in Turkey (which came into effect in May), and increased concerns about the "exportability" of the TV series (especially to Arab countries), due to the new constitution of the panel used in measuring Turkey's television ratings. Prior to 2012, the education level of the "head of household" determined how social and economic status was categorized. In the new ratings system, as experts explain, mass public income level, rather than education, is now one of the primary determinants (Eyüboğlu, 2012). As one expert noted, "[Arab audiences] love watching a fairytale-like life in a modern Muslim country. If now the panel is dominated by a conservative [less educated mass, translator's emphasis] audience, their preferences will impinge on the series to be produced" (Gülşan, 2012).

The sales experts and distributors similarly confirm that in the new system, "the new Turkish ratings panel audiences are not conducive to encouraging production of series that are also likeable abroad." In the new panel, experts observe, the audience seems to prefer "romantic comedy, entertaining and light stuff," so the channels are less inclined to offer demanding dramas to the audience. This new set of preferences, according to the professionals interviewed, has had two consequences. First, the volume of production dropped compared to the period prior to 2011, when five major channels of the day each broadcast two titles on their primetime slots. That was the period when 70 new series were produced, helping to build a good catalogue of exportable dramas ready to sell. This abundance of available titles has been gradually declining. Second, low ratings make it harder for producers to "meet production costs," which simultaneously inflates the price asked per episode from foreign buyers.

Third, TV production in Turkey attracted new players to the national market, including global giant Endemol, which can compensate for the difficulties experienced by local producers. Endemol entered the Turkish sector in 2008 with game shows and is considered by experts to be becoming "stronger as a producer" in Turkey. In 2014, Endemol began producing a Turkish series, *Paramparça* (Broken), and preferred to make "celebrity agreements" with famous and popular names in order to "tie them to their company," akin to the big studio system in the United States. The Turkish production system had previously operated by "finding the right script and then looking for the actors." In the emerging system, celebrities now make casting agreements with a production company and "start looking for a script later," experts claimed. (personal interview, May 11, 2015).

This is considered to be the most significant change in the sector since the end of 2011. According to a sales expert from a major distributor company, "Endemol can do what Turkish local companies cannot risk." In its capacity to "sell expensive production at a cheaper rate, it can also bear the risk of producing a title only for export," he explained. "Endemol can help the sector, but right now producers do not know what to do," the expert elaborated, "because the series are considered unsuccessful as a result of only looking at their [domestic} ratings." (personal interview, May 11, 2015).

Endemol's presence in the Turkish TV series market as a producer is signaling further articulation of the local market in alignment with the "global format industry," as suggested by Chalaby (2011). An Arab production company (part of the MBC-affiliated production company O3) also entered the market in 2014 to produce a Turkish TV drama (*Kaderimin Yazıldığı Gün* [My fate]) for the national Star television channel.

This Arab production company's move can be understood first as a positive impetus of the popularity of Turkish TV series in the region. As Buccianti suggests:

> the rise of soap operas *à la turque* has resulted in a re-evaluation of the Arab entertainment industry, a sudden and difficult awakening for a field that was long dominated by the state. The Arab media space is witnessing major changes with the daily birth of new satellite channels. (2010, p. 8)

The entrance of Arab production companies into the Turkish sector can also been seen as an attempt to effectively bypass the embargo of Arab states, especially in Egypt, on Turkish series. Pressure from their audience, estimated to be around 220 million loyal Arab viewers (a majority of them women), forced Arab channels to come back to the Turkish distributors seeking new products, albeit offering a much lower price per episode.

Another sales expert claimed that the "Middle East has learnt [how to produce a Turkish series] so well. They have become more selective; they only want to buy the titles of popular actors that they love." This expert also claimed:

> The weight in the Middle Eastern market shifted to Latin America two years ago, and I am talking for all distributors and producers here. 60% of our revenues came from MENA, and the remaining 40% came from the other 60–70 countries. This is not the case any longer. Right now there is a decrease in Middle East and the Balkan exports, and a rise in Latin American ones. (personal interview, June 24, 2015)

These latest developments provide supporting evidence for the argument at the beginning of this article that the economy and the influence of cultural hegemony provide contingent articulations.

While Turkey's claimed hegemony in the Middle East was working smoothly through an overlapping cultural and ideological, political, and economic conjuncture until 2011, by the end of 2013 export cuts due to political boycotts had forced the sector to adapt. However, the Arab world's continued economic attraction to Turkey (and the demand of its television audience) resulted in the professionalization of the Turkish drama sector, improvements in its labor conditions, the start of a "star" system, and Turkey's expansion to overseas markets where audience interest cannot be explained by cultural proximity. Moreover, the entrance of new players like Endemol and Arabic companies into the Turkish market, while fueling competition, caused compensating effects on sector revenues. This demonstrates how global flows are "multi-directional" (Robertson, 1992), and also illustrates Straubhaar's (2010, p. 259) "asymmetrical interdependence," a concept designed to capture scenarios of multiply directed cultural flows within a framework of one nation's cultural dominance (but not complete domination).

Conclusion

In this article, we examined possible reasons for the continuing international appeal and growth of Turkish television drama by taking the MENA region as a case study. First, we considered the factors that raised Turkey to the level of regional, transnational, and global actor in the last decade, and then we considered the reverberations of the shifts in Turkey's foreign affairs in the MENA region on the media sector. In order to do so, we used primary and secondary sources data regarding the Turkish drama market. The primary data include face-to-face and online interviews conducted with TV professionals in production and distribution companies in Istanbul, where the sector is based. The majority of secondary data were retrieved from annual TESEV surveys on the political and economic perceptions of Turkey throughout the Middle East as well as previous research conducted in this field.

In analyzing the theoretical frames that have been proposed to explain glocal tendencies of the Turkish TV serial market and political, economic, and cultural factors, we criticized the extensive use of concepts of soft power and cultural proximity in previous academic explanations. In our approach, we claim that the success of Turkish serials in the region is not the direct outcome of exercise of soft power, although they were employed as instruments of public diplomacy for a while. Instead, we believe it has to do with glocal economic dynamics, specific characteristics of the Turkish drama sector, the genre itself, and audiences' negotiated readings.

Turkey continues to be seen as one of the strongest economies in the region, with its economic potential appreciated by neighboring countries (TESEV, 2012b, 2013). One of the side effects of its TV drama sector is a boost, not only in tourism,[10] but in the textile, fashion, home decoration, and construction sectors as well. Consequently, the sector still enjoys the benefits of its continuing charm for Arab customers by drawing global and regional players into the market. To explain Turkey's ambitious relations with the Arab countries in the region, we prefer to use the term *hegemony* (rather than soft power) in its neo-Gramscian meaning, one that does not prioritize the spheres of culture/ideology, politics and economy, since in this case each clearly works in(ter)dependently from/with the other in the construction of consent, with undecidable outcomes.

Following the "golden period" of 2002–2011 ("golden" in terms of foreign, economic, political, and cultural relations with MENA countries), Turkey's positive political image in the region is now significantly declining and making neo-Ottomanism "not so cool." This also affects the export of Turkish dramas, which enjoyed its peak during the same period. However, as the surveys and interviews referenced in the article prove, the audience appeal of these series in the Arab world continues, which opens up the Turkish media market to new articulations that bypass the negative effects of its declining regional political image. Despite a decline in the political will, cultural and economic transactions seem to be self-sustaining, which is transforming not only the Turkish television drama sector, but the Arab one too. Thus, we hope new research in this field will look more closely at the intricate dynamics within the global television market, which is superseding politics and challenging the established notions of cultural proximity.

However, in analyzing the flexibility of the Turkish TV market in adapting to new political and economic conditions, we submit that even though the AKP government's micro-politics toward the MENA region have collapsed, its macro-politics, which represents a pragmatic amalgamation of a peculiar interpretation of an Islamic worldview with neoliberal economics, has been largely deemed successful according to public opinion in the Arab world. This remains true despite issues regarding the AKP government's risky attempts to experiment with Turkey's established political system.

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[10] According to the Ministry of Culture and Tourism, the most significant increases in the number of visitor are from Gulf countries, including a 34% increase in Saudis, 75% in Kuwaitis, 51% Emiratis, and 1,379% more Omanis (quoted in Buccianti, 2010).

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