CHAPTER 1

WILL IT TRAVEL? THE LOCAL VS. GLOBAL TUG-OF-WAR FOR TELENOVELA AND TURKISH DIZI PRODUCERS

Carolina ACOSTA-ALZURU¹

¹Prof., University of Georgia, Grady College of Journalism and Mass Communication, Department of Advertising/
Public Relations, Athens, USA

e-mail: cacosta@uga.edu

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ABSTRACT

Dramatic serialized television content currently enjoys a dominant position in the television and OTT global market. Simultaneously, production and consumption are changing due to digital technologies. In this environment, long-established telenovela production powerhouses—Mexico, Brazil, Colombia and U.S. Telemundo—face new opportunities and threats that complicate some of the differences between their local and global audiences. In addition, new non-Latino-American players, such as Turkey, have been displacing telenovela producers in several markets, including on their own turf. Turkish dramas—dizis—have made a global footprint. Annual revenue from overseas sales of Turkish TV shows exceeded the \$300 million mark in 2017, giving Turkey a 25% share of the international market for television fiction. Turkey and the major telenovela producers mentioned above are undergoing political and economic changes that impact their television sectors, the stories they tell, and their production conditions. As production decision makers for both telenovelas and dizis factor in both their national audiences and contexts and the global market trends, the perennial tension between prioritizing the domestic or the international market has become even more critical. Underpinned by how they rank local ratings versus global sales, these tensions influence the writing, casting and production processes. In this chapter, I examine the tensions between local and global markets for the telenovelas produced for Telemundo and Univision—which are inextricably linked to Mexico’s telenovela production and consumption—and for Turkish dizis, and how these impact their production.

Keywords: Telenovelas, dizis, Turkish dramas, production, distribution

INTRODUCTION

Dramatic serialized television content currently enjoys a dominant position in the television and OTT global market (Roxborough, 2018). Simultaneously, production, and consumption are changing due to digital technologies (Farveen, 2019; Laporte, 2016). In this environment, long-established *telenovela* production powerhouses—Mexico, Brazil, Colombia and U.S. Telemundo¹—face new opportunities and threats that complicate some of the differences between their local and global audiences. In addition, new non-Latino-American players, such as Turkey, have been displacing *telenovela* producers in several markets, including on their own turf (Bowen-Tombari, 2018). Turkish dramas—*dizis*—have made a global footprint. Annual revenue from overseas sales of Turkish TV shows surpassed \$350 million in October 2016 (Vivarelli, 2017), and continued to exceed the \$300 million mark in 2017, giving Turkey a 25% share of the international market for television fiction (“Turkish TV series, productions showcased at Cannes series festival,” 2018).

Turkey and the major *telenovela* producers mentioned above are undergoing political and economic changes that impact their television sectors, the stories they tell, and their production conditions. In addition, changes at the helm of key broadcasting, production and distribution companies also have consequences on the sector as a whole (“Patricio Wills Joins Televisa to Replace Rosy Ocampo,” 2018; Ravindran, 2018; Tan, 2019).

As production decision makers for *telenovelas* and *dizis* factor in both their national audiences and contexts and the global market trends, the perennial tension between whether to prioritize the domestic or the international market has become even more critical. Underpinned by how they rank local ratings versus global sales, these tensions influence the writing, casting and production processes.

In this chapter, I examine the tensions between local and global markets for the *telenovelas* produced for Telemundo and Univision—which are inextricably linked to Mexico’s *telenovela* production and consumption—and for Turkish *dizis*, and how these impact their production.²

***Telenovelas* and “Turkish *Telenovelas*”**

Telenovelas and *dizis* are serialized genres marked by the paradox of being simultaneously successful and disdained. Both are melodramatic in their essence and dramatic structure;

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- 1 Telemundo’s main competitor, Univision, is not included in this list because it does not produce the *telenovelas* it broadcasts.
 - 2 Due to this chapter’s length restrictions, Brazil and Colombia—also strong *telenovela* producers—are not included.

hence, emotions are underscored and accentuated as they become the main ingredient in the spectacle that these shows provide, which almost always include a strong love story. *Telenovelas* and *dizis* own the primetime of the countries that produce them, and have colonized important slots in the programming grids of many nations around the world (Vassallo de Lopes & Orozco Gómez, 2017; Vivarelli, 2017).

Their stories can be original, or they can be adapted from, or straightforward remakes of, other *telenovelas* and *dizis*, films or books. *Telenovelas* and *dizis* are regulated, first by the regulatory bodies of their countries of origin, and later by similar institutions in the countries that buy and broadcast them. These regulations determine what the audience will and will not watch in these shows.

Telenovelas are, generally, less restricted regarding political content—both overt and understated—while *dizis* are devoid of overt political content. In the *dizi* sector there is a much stronger and clear sense that they have to play within the general political climate created by the ruling party, AKP.³ It is also worth noting that Turkey’s Radio and Television Supreme Council—RTÜK—has strict rules that prohibit steamy love scenes and the showing of a lot of skin. These rules are not nearly as stringent in *telenovela* producing countries. Hence, the absence of these kinds of scenes is one of the first distinctions that the audience notices between *dizis* and *telenovelas*.

But there are other important differences. The most conspicuous one is the contrast between their broadcast schedules: *telenovelas* air daily, while *dizis* are broadcast weekly. Therefore, *telenovela* episodes are written, produced and edited for one-hour slots (including commercials). Their net duration is 40-45 minutes. *Dizi* episodes are much longer: 140-165 minutes (without commercials, which means that their actual air time is three hours or more). This length has consequences for *dizi*’s storytelling since the show must grab the audience’s attention for a long time and keep it hooked for one whole week until the next installment. As the CEO of an important Turkish production company explained, the plot might take the audience through several genres:

In some Turkish content you don’t have a genre. Since it’s over two hours long, you may start with a romantic comedy, then in the middle of it, it’s a drama, then it’s a love story, then sometimes it ends like a thriller (Çatay, 2016).

3 An illustrative example is that almost all networks broadcast regularly a *dizi* set in the military whose plots are in line with the government’s discourse. Also, the official network TRT broadcasts historical *dizis* that “reflect the political elite’s populist-nationalism and are in line with the AKP’s (Justice and Development Party) political discourse” (Çevik, 2019).

The story's pace is also different from that of *telenovelas*:

Because *dizis* are shot in natural settings and because dialogues are performed almost in real time, *dizis* are "naturally slow". The musical, textual and visual diversity is richer than the soap and the telenovela, which also have a slow narrative flow (Öztürkmen, 2018, p. 7).

For *telenovela* watchers, *dizis* may seem slow at first. At the same time, *telenovela* audiences end up with the feeling that "a lot happened." For Öztürkmen (2018) the number of locations presented in these shows is a factor that influences this perception:

Structurally speaking, *dizis* offer easily comprehensible narratives in their naturally communicated slowness in a wide variety of settings. The large range of locations raises curiosity as each place becomes a puzzle for the local audience, and for the foreign viewers, an eye on places where they do not have the opportunity to travel (p. 7).

I believe that another reason for this perception is that the level of drama of Turkish *dizis* is noticeably higher than that of *telenovelas* (Panjeta, 2014). The intense dramatic crescendos are accentuated with the use of slow motion and of the music score, which is often composed for each specific *dizi*.⁴ Since the audience's engagement with the story must stay strong for a whole week until the next installment, the end of each episode has to be particularly compelling (and followed by carefully edited advances of the next one that are broadcast throughout the week). As a genre, *dizis* are much closer to Greek tragedy than *telenovelas*. Hence, the happy ending is not guaranteed in *dizis*, as it used to be in *telenovelas*.⁵ This is another way in which the dramatic intensity of *dizis* surpasses that of *telenovelas* because the level of uncertainty ingrained in the stories is higher.

While most *telenovelas* are still broadcast continuously from beginning to end,⁶ the *dizi* sector works on a season basis. *Dizis* are broadcast from mid-September to the end of May. In June, July and August broadcasters show "summer *dizis*", which are lighter and more on the romantic comedy side,⁷ and reruns.

4 See for example in iTunes, the music of Toygar Işıklı (Işıklı, 2019).

5 The happy ending is still prevalent in telenovelas. But as telenovelas evolve and adapt to their audience's increased exposure to other genres, we are seeing more variations of the traditional happy ending.

6 This is also changing, particularly for shorter, more expensive shows, that are labeled as "series" by Univision and "super series" by Telemundo. These products may have seasons, but their broadcast schedule is not fixed by a season system, like it happens in Turkey.

7 Successful summer dizis are often tested on the regular season. Many of them fail, but sometimes there is one that survives. The most recent example is *Erkenci Kuş* (Early Bird), which was broadcast on Tuesdays during the summer of 2018, moved to Saturdays during the regular season and returned to Tuesdays in the summer 2019, after a two-week break.

Given the business and production models of the most important *telenovela* producers these days, the number of episodes of a *telenovela* is pre-determined. *Dizis*, by contrast, must first survive in the extremely competitive Turkish market. Hence, the total number of episodes is, usually, not known *a priori*.

Finally, regarding production values, those of *dizis* are generally higher than those of *telenovelas*. This is not only evident on the screen but also in the everyday production routine, which can be quite brutal in Turkey (Konuslu, 2012).⁸

In Latin America (the birthplace of *telenovelas*), Spain and other *telenovela* consuming countries, *dizis* are often called “Turkish *telenovelas*,” which is also the term of choice of entertainment media outlets (Degorgue Alegre, 2019; “‘Fatmagül’, la novela que rompió récords, regresa a Nova,” 2019). Even the version in Spanish of the official Turkish outlet TRT, uses the term (“Las 10 telenovelas turcas más vistas del mundo,” 2018). But Panjeta argues that these are different genres:

Determining factor that separates the Turkish series out of telenovelas is the vitality of their stories and the manner of technical realization. Characters are not set or preset, but evolving, just as in the works of classical literature. [...] Specifically, in the Turkish series, compared to soap operas or telenovelas, there is an organic compound of everyday life and tragedy elements (Panjeta, 2014, pp. 161-162).

I agree that there are key differences between the two genres, but I disagree with the implication that *telenovela* stories are less vital and lack “an organic compound of everyday life and tragedy.” It is too broad of a generalization of a genre whose plots range from traditional “Cinderella” stories to social and political critique (Acosta-Alzuru, 2011, 2013, 2017; La Pastina, 2004; La Pastina & Joyce, 2014; Porto, 2005). It would also be a mistake to assume that all *dizis* are similar. *Dizis* do hold the advantage regarding production values, but, *telenovela* producers are trying to close the gap.

To be sure, *dizis* and *telenovelas* are not the same, but they are closely related. They are successful serialized melodramatic genres trying to redefine themselves so as to maintain their success and, simultaneously, shake off the stigmas they carry.

8 I have observed production in Caracas, Miami and Istanbul. The level of detail in production is much higher in Turkey (more camera shots per scene, more complex locations, etc.). The Turkish work longer days and more days per week.

Theory: The Cultural and Political Economic Imperatives of Media Flow

Theories of cultural imperialism that involve one-way flow of communication from the West to the rest (and from North to South), and their ensuing hegemony (Mattelart, 1979; Schiller, 1976) have been challenged for quite some time. Ang (1985), and Katz and Liebes (1987) underscored the importance of being aware of the audience's interpretative differences. Later Straubhaar (1991) suggested that audiences prefer content that is produced in their own local or national context. This cultural proximity theory has been further developed. For instance, it states that if a specific genre of television content was not produced in a particular country, viewers will choose shows from similar and/or close cultures, countries and languages (Straubhaar, 2007). Additionally, La Pastina and Straubhaar (2005) refined the concept by presenting cultural proximity as a complex interaction between texts and audiences whose members' identities are not unidimensional:

We argue that audience preferences are indeed formed within the overall trend toward cultural proximity within both national and cultural-linguistic boundaries. However, as Iwabuchi (2002) points out, cultural proximity cannot be seen as an essential quality of culture or audience orientation, but rather a shifting phenomenon in dialectical relation to other cultural forces (La Pastina & Straubhaar, 2005, p. 272).

These authors underscore the importance of ethnicity, gender, religion, diasporic background and genre. The latter is particularly important as we try to understand the global appeal of melodramatic genres, like *telenovelas* and *dizis* because:

Melodrama builds on underlying oral structures, formulas and archetypes that can be shared by cultures. The underlying structure of melodrama has offshoots in almost all parts of the world, so melodrama can reach past cultural differences. Many, if not most, cultures seem to have experienced some form of serial storytelling rather like melodrama even before television became available to them (La Pastina & Straubhaar, 2005, p. 275).

Notwithstanding the contribution of cultural proximity, some scholars have argued that the theory is insufficient to explain media flows and that political economy imperatives must be included in the analysis equation. For example, in her examination of the global success of Colombian *telenovela* “*Yo soy Betty, la fea*,” Jade Miller (2010) underscores the “cross-ownership structure of and multinational flows that mark the *telenovela* industry” and argues that “*telenovelas* can best be understood as localizable, yet universally appealing cultural products traversing global networks of capitalist cultural concerns” (p. 198). For her part, Bilge Yesil (2015) argues that the transnational flow of Turkish *dizis* “is a by-product of those

political economic factors in the mid-late 2000s that increased the drama output in Turkey and created a favourable environment for its distribution” (p. 46). She points to the mid-late 2000s when, due to financial issues, the Turkish film and theatre talent migrated to television and their know-how and expertise was utilized by commercial broadcasters. At that time, the advertising market expanded and the demand for television content by broadcasters increased sharply. Many new production companies were created and some film production companies also entered the television sector. At the same time, the government saw (and sees) these dramas as potential soft power vehicles; therefore, it gives producers and distributors financial assistance to attend trade shows, and has awards for actors and producers who are deemed to play a role in promoting Turkey.

Studying the consumption of *dizis* by Iranians who reside in Vienna, Deniz Özalpman (2017) confirms Yesil’s emphasis on political economic factors over cultural proximity and adds that the latter does not take into consideration “the series of opportunities arising from regional conjuncture as the war in Syria and political turmoil in Egypt and Lebanon; countries who were traditionally producing TV dramas in the Arab/Muslim world before the Turkish drama expansion and/or the economic crisis in Greece” (p. 27).

Looking at the flow of *dizis* from the *telenovela* side, some distributors argued that as *telenovela* producers placed an emphasis on *narconovelas*,⁹ Turkish *dizis* fulfilled the audience’s craving for more traditional love stories (Santana, 2018; Villanueva, 2018). This is an oversimplification of the *dizi* phenomenon that assumes that all *dizis* are like *telenovelas rosa*.¹⁰

Some of the previous scholarly rationales also developed as counter arguments to the consideration of globalization as the theoretical umbrella that explains the characteristics of the products that flow. Focusing on the transnationalization of the *telenovela* industry, Daniel Mato (2005) tried to articulate both cultural and economic analysis as he argued that both the “homogenizing” and “deterritorialized” features assumed to be hallmarks of globalization were not actually present in the *telenovela* sector. Mato focused on the rise of Miami as the point of reference, and important location of choice, for the transnationalization of the *telenovela* industry (2002).

9 Narconovelas’ plots are set within the drug trade (and sometimes also immigration) larger context. Mafia-like behavior and violence are part and parcel of them.

10 The first two *dizis* that were widely successful in Latin America were Binbir Gece (One thousand and one nights) and Fatmagül’ün suçu ne? (What’s Fatmagül’s fault?). Because these are slower *dizis* with strong, uphill star-crossed love stories, there was the general sense that *dizis* were like traditional *telenovelas rosa*.

For his part, Juan Piñón (2014) underscored a later development—the emergence of a *telenovela* production axis comprised by Miami, Mexico and Bogotá— and put forward the term “reglobalization:”

Reglobalization is a process through which Latinidad is re-crafted for regional/global consumption through notions of traveling narratives, multinational settings, multicultural castings, and transnational co-production agreements in which local entities produce a hybrid version of the region that includes a commodified production of a hemispheric Latinidad for global consumption (p. 655).

Piñón’s assertion of the existence of a Latinidad constructed for regional and global consumption points to the area of representation—in the cultural studies sense, of creation of meaning through language—and, in particular, to representations that are easily consumed beyond their local origin.

This notion has a counterpart in the *dizi* camp. Marwan M. Kraidy and Omar Al-Ghazzi (2013) set out to answer the question of why Turkish dramas were so popular with Arab audiences, when Arab cultural production was undergoing an “unprecedented period of vibrancy” (p. 17) They concluded that some *dizis* “conjure up an accessible modernity” while others “enact a counter-hegemonic narrative that puts Middle Easterners in the role of heroes” (p. 18). Kraidy and Al Ghazzi call this “Neo-Ottoman Cool,” which is “grounded in a Turkish modernity that has been attractive to Arabs” (p. 26), one that is “selectively both Western and Islamic” (p. 26).

Neo-Ottoman cool, of course, does not explain the popularity of *dizis* in non-Arab countries. Other factors already mentioned in cultural proximity theories and political economy imperatives play a role. But for Latin Americans, in particular, Turkish *dizis* bring together many of the codes of a genre they already know well, the similarity of people’s phenotypes and of some key cultural cues—like the presence of strong mothers in a patriarchal society—with the exoticism of new landscapes and varying cultural mores, all wrapped in high production values. This is a different “Neo-Ottoman cool,” one that has proven to be highly attractive to Latin Americans.

Both Latinidad and Neo-Ottoman Cool point to representations that are appealing to non-domestic audiences. These representations are the end results of writing and production decisions. How are these impacted by the inevitable differences and ensuing tensions between the domestic and global markets for *telenovelas* and *dizis*?

AIM AND METHODOLOGY

There is an undeniable economic element driving television production. But production “cannot be reduced to a question of ‘economics’ alone” because production processes are “assemblages of meaningful practices” (du Gay, 1997, p. 7). In other words, media industries produce content and, in doing so, they constitute communities with their own ways of seeing, and their own processes, rituals and routines (Mayer, 2013). These production cultures warrant examination (Caldwell, 2008). This paper delves in the area in which the production cultures of *telenovelas* and *dizis* intersect with their output and global distribution.

The study is based on in-depth, semi-structured interviews and observations in Miami and Istanbul during several time periods since October 2015. The observations were conducted on production sets in both cities. The study also includes interviews and observations at two of the world’s largest television content trade shows: MIPCOM Cannes 2018 and NATPE Miami 2019. Throughout the years included in this study, interviews were conducted with *telenovela* and *dizi* producers, distributors, writers, directors and actors. When necessary, interviews in Istanbul were conducted with the help of an interpreter.

FINDINGS

From Idea to Screen: Production and Business Models

In the *telenovela* world projects usually start with a writer submitting a story idea that goes through a multistep approval process. In that process the writer eventually submits “the bible,” which consists of an extended synopsis, characters’ profiles, the “route map” (what will happen and when throughout the story) and the first three episodes. Once the story receives the final approval, the *telenovela* goes into the pre-production and production stages (Farías, 2018). Increasingly, we also see cases in which writers are assigned a specific task: an adaptation of an older *telenovela*, book or film, or the next season of a successful show. Once the decision has been made and the writer selected, then the process is the one briefly described above (Santana, 2018; Wills, 2018).

In the last ten years, the business and production models of *telenovelas* have changed in important ways. For the most part, gone are the days in which *telenovelas* were produced almost at the same time as they appeared on the air, and when writers and producers considered the audience’s reactions as they worked on the story. Today, production is at least 40 episodes ahead from air time. Often the whole *telenovela* has been produced before it goes on the

air. This means that when the show is broadcast, there are no possible changes, no steering of the wheel, no wiggle room. If the *telenovela* fails, (and if there is a substitute *telenovela* available), the broadcaster can only “demote” the product by moving it to a less important time slot in the programming grid. As a Telemundo executive told me, “we broadcast the first episode with a prayer that all goes well” (Farías, 2018). Because of this, the writing process is heavily checked throughout. Episodes are reviewed by teams designed for this task, and writers receive continuous feedback. This is an attempt to immunize the show from failure, given the inflexibility that the distance between shooting and broadcast time brings to the product. Paradoxically, it is that same distance which makes this checking process possible, a process which in the previous production model had been significantly less thorough.

Also gone are the days in which the ratio of studio to locations in *telenovelas* was about 70-30%. Today *telenovelas* strive to shoot almost everything on location. This, of course, has raised their budgets significantly, which, in turn, has required not only new financial schemes to fund the necessary investment, but also a revised business model. The project’s capital structure is now defined in advance; therefore, the budget is also set in advance (Santana, 2018; Wills, 2018). This means that the number of episodes is also decided ahead of time; hence, that number is now independent of the show’s performance. The *telenovela*’s time slot is often predetermined too, which influences both writing and production.¹¹

This new business model for *telenovelas*, in which many decisions are made in advance, is more efficient in financial terms and also makes possible a more efficient production process. Nonetheless, actors, directors, production and technical crews still work long days.

Miami, Mexico and Bogotá still configure an important production axis (Piñón, 2014), with Miami and Mexico being the two main decision loci. This is due to the demographics of Latinos in the United States: more than 60% are of Mexican origin (López, Bialik, & Radford, 2018; Lopez, Gonzalez-Barrera, & Cuddington, 2013). For Telemundo and Univision, catering to Hispanics of Mexican origin is crucial to winning the ratings war. This is the main reason behind the longstanding, albeit not always smooth, close relationship between Mexico’s Televisa and Univision. It is also a key factor in the decision making process at Telemundo (Farías, 2018; Santana, 2018) and the guidelines its writers must follow (Párraga, 2016; Stopello, 2016; Zelkowicz, 2016). *Telenovelas* may be written by non-Mexican writers, but the language is then thoroughly Mexicanized (Padrón, 2018; Párraga, 2016; Stopello,

11 For example: “The 10 p.m. *telenovela* needs a lot of incidental music and a faster pace to keep the audience awake and hooked” (Stopello, 2016).

2016; Zelkowicz, 2016).¹² Non-Mexican actors are expected to speak with a “neutral accent,” which is really a milder form of a Mexican accent (Ibarra, 2016; Manzo, 2016; Valdés, 2016).

Focusing now on Turkey, both the production and business models for *dizis* are significantly different than those of *telenovelas* because in Turkey there are more competing broadcasters and production companies than in any of the *telenovela* producing countries. In any given night, seven commercial networks (atv, Fox, Kanal D, Kanal 7, Kanal 8, Show, Star) and the government’s TRT1 may broadcast *dizis* on prime time.¹³ At 8 p.m., most channels broadcast a 30-45-minute summary/reminder of the last episode (remember that *dizis* are broadcast weekly), followed by the *dizi*’s new installment. The episode is broadcast in large chunks of time—some are 45 minutes long—followed by a significant number of commercials, before going back to the episode. The broadcast ends around midnight.

The large majority of these *dizis* are not produced in-house by the broadcaster, but by a production company that has struck a deal with the broadcaster. The characteristics of these deals (investment scheme, revenue distribution) vary depending on several factors. A key one of these is the individual negotiation power of the production company and the broadcaster, which depends on the previous successes of each party and how prior projects in common worked out for them. Typically, the producer proposes the project to the broadcaster (plot and possible cast) and the negotiation begins. The broadcaster invests in the project, but the financial risk is heavier on the producer. Because of this, and because the Turkish local market is so competitive that a *dizi* that does not achieve good ratings in its first 4-6 episodes is cancelled, the strongest producers make the broadcaster sign agreements for a minimum number of episodes to protect themselves from heavy losses.¹⁴ But not all producers have the power to establish this condition. Regarding revenues, usually producers receive money depending on the *dizi*’s rating points and shares. As for international sales, the typical deal is that the broadcaster and producer split these earnings equally.

Istanbul is the decision center of the *dizi* sector and its main production center. As already mentioned, the starting point of a *dizi* occurs in the production company, and it can vary from receiving a writer’s idea to making decisions in brainstorming sessions:

Sometimes my two writers just give me an idea, a paragraph. And if I like it, we start working on the script for about 18 months before we start producing (Alp, 2017).

12 Not only the dialogues are Mexicanized, writers’ indications to actors, producers and directors are also rewritten using the vocabulary used in Mexico.

13 The number of *dizis* on a given night is between four and eight.

14 This number also varies, but is usually between 8 and 13 episodes.

I said that I wanted to make a revenge story and she said, “you mean like a Count of Montecristo?” and from that came *Ezel* (Çatay, 2016).

The production process is, at the most, only two installments ahead of the episode being broadcast. In most cases, production finishes shooting and editing an episode only 48-72 hours before it airs. This means that writing is only three or four episodes ahead; hence, audience-induced script modifications are common. This short distance between production and broadcast is one of the factors that makes the *dizi* production process so grueling. The high production values of these shows also add a layer of complexity. Almost all scenes are shot on location, which means that the weather is a factor. Unlike Miami, Istanbul is a city with four clearly defined seasons in which light changes dramatically, even in the same day. Istanbul is also a huge, complex metropolis of 20 million that sits on two continents. It boasts an incredible array of neighborhoods that provide an impressive diversity of possible sets, but it is also a city permanently hobbled by its traffic. “It isn’t easy. Imagine moving like 20 trucks through this city” (Çatay, 2016). Some *dizis* are shot in other Turkish cities and towns. These bring visual and plot variety, but require transportation and housing for the cast and crew away from Istanbul.

Production days are very long. Directors and main actors report working 16 hours a day, with the hardships that this amount of work bring to their private lives. For example, a director told me:

I work roughly 16 hours a day. I have a daughter who lives abroad and who I really didn’t see grow up because of my work. I keep a blanket and a set of spare clothes in my car because sometimes I can’t go home. (İşbilen, 2017).

Technical workers may labor almost non-stop for 18-20 hours a day, six days a week, in precarious conditions in which they may be exposed to the rigors of the weather for many hours and in which accidents may happen (Konuslu, 2012).¹⁵ There have been bouts of uproar regarding labor conditions in the Turkish television sector (AFP, 2015). Producers are aware that the situation must be improved, but the length of each episode and the closeness to air time work against changing the way things are done.

Right now, I produce every week 165 minutes for each of two series. It’s like producing four movies every week. And I have to try to do it in five days (Alp, 2017).

15 Accidents are, unfortunately, common. For example, in April, 2019 a technical worker lost his life after he fell from a ladder on the set of *Atiye*, produced by OG Media for Netflix (“Netflix’in yeni dizisi *Atiye*’nin setinde kaza! 1 çalışan hayatını kaybetti,” 2019).

So, producers place the final responsibility on the directors:

We have a rule that says no more than 12 hours. But, it's sometimes the call of the director. If he or she wants to finish that scene, they continue. If they're working on the first episodes or if it's a wedding scene, they push the limits sometimes (Çatay, 2016).

But directors know that within the current time and quality expectations, it is very difficult to reduce the number of hours on the set:

It's 150-165 minutes of material per week, so that's why we work long hours. Now there are new regulations, 12 hours maximum, so I'm trying to reduce daily timing. But because it's 150-165 minutes, there's not much I can do. We have to work a lot (Sara, 2016).

The Domestic Market

The domestic markets of the big *telenovela* producers consist of two main competitors: Brazil (Rede Globo and Record TV), Mexico (Televisa and TV Azteca), Colombia (Caracol, RCN) and in the United States Spanish language television (Univision and Telemundo). Some markets are pretty static. In Brazil and Mexico, for example, the competition has rarely been even, with Rede Globo and Televisa dominating the audience metrics for decades. In the US, Univision led for years, but in 2011, Telemundo started getting closer and closer with the *narconovela* *La Reina del Sur* at 10 p.m. Since then, spearheaded by the success of many of their “super series” in the 10 p.m. slot, the battle between the two broadcasters for the primetime has been more interesting and its outcome less predictable (Smith & Garsd, 2016).

Telenovelas tend to establish themselves in a head-to head, winning or losing position against their competitor and stay there most of the time until the competitor changes. At that point, the game begins again and the positions may change. A *telenovela*, then, may win or lose every night, and so will its broadcaster. Battles are defined by the time slot (See Table 1).

It is important to mention the concept of “key demographic” or “desired demographic,” which is the advertisers’ most coveted demographic group. Its definition varies according to genre, broadcaster and time of day, but it broadly draws a group that has spending power. For *telenovelas* broadcast in the United States, the key demographic is adults 18-49 years old. In contrast, Mexico’s advertisers and broadcasters pay attention to total figures over any specific demographic group. In the United States, it is rare to see a *telenovela* win in the key demographic and lose in total ratings.

Things are very different in Turkey—the local market of *dizis*. Since *dizis* air weekly, every night is a different race. (See Table 2).

Because there are many production companies, there are always new shows waiting in line for an available slot. Hence, broadcasters pull from the air rather quickly any *dizi* that does not garner the numbers they expect. For example, in the 2018-2019 season, commercial networks premiered 24 new *dizis* on primetime. Twelve of them were cancelled, and three ended on their first season due to severe erosion of their ratings.

Audience measurements in Turkey have a troubled history of corruption (Temel, 2016). People who work in the television sector repeatedly warn me that the ratings system has been intervened by the government for populist purposes. Still, ratings and shares are the currency of the commercial television system and these constitute the most important factor that determines the life expectancy of a *dizi*. Ratings impact the decision-making process of broadcasters and producers alike.

The equivalent to the “desired demographic” in Turkey is the AB group, the higher income stratum. It is not uncommon for a *dizi* to perform well in total audience measurements and not so well in the AB demographic. The inverse is also true.

When speaking of audience measurements in Turkey, it is important to pinpoint the year 2012, when the definition of the rating demographic groups changed. It now privileges income over education, which was not the case before. More importantly, the relative weight that each group had in the calculation of total ratings and shares changed. The weight of the lower socioeconomic level DE tripled. (See Table 3).

As we will see in the next sections, these changes had important implications not only for the domestic market of *dizis*, but also for their international sales.

International Sales

There is a recurrent question I ask of all who I interview for my research about *telenovelas* and *dizis*:

Please rank the following three factors in order of importance for a successful *telenovela/dizi*: cast, story, production values.

There is consensus among the participants of my studies that the story is the most important element. So, what stories sell better in the international market?

For *telenovela* producer Patricio Wills,¹⁶ the love story is essential: “we’ve failed when we’ve tried to reinvent the drama without a love story” (Wills, 2018). For writer and former Telemundo Senior Vice President for Scripted Development, Perla Fariás (2014, 2018), if the characters are well constructed, and there is an emphasis on their actions and not on their cultural context, the *telenovela* will travel well. Marcello Coltro, Senior Vice President for Content & Creative for NBC Universal, argues that people “are looking for evasion, so realistic plots have a narrower audience” (2016), and *telenovela* writer Valentina Párraga states that “tears are universal, but humor is local” (2016); hence, an emphasis on drama is necessary for a *telenovela* to sell well abroad.

Narconovelas are an interesting case. For some years now, producers, writers and distributors have been telling me that the end of the *narconovela* period is here. But the fact is that *narconovelas* are still being produced and many are still very successful. Telemundo’s most recent huge hit, for example, is the second season of *La Reina del Sur*, even though it has been eight years since its first season (Clancy, 2019).

In Turkey, distributors agree that the *dizis* that travel better are “hardcore dramas, with love, tears and revenge” (Filizketin, 2017), and a moral or ethical issue at the core of the plot (Özkübat, 2017; Turna, 2017). And even though there are some notable exceptions to this tenet,¹⁷ Turkish distributors believe that stories that are “too local” with “lots of ladies with headscarves” and heavily immersed in “tribe” culture and other cultural mores of the more traditional towns and cities in the interior of Turkey, do not sell well on the international market (Arat, 2018; Filizketin, 2018; Özkübat, 2017; Turna, 2017; Ziyatlar, 2018).

Importantly, both *telenovela* and dizi *distributors* must go through a negotiation process with producers to be given the shows they will represent on the international market. For *telenovela* distributors, the process is more or less centralized, since most broadcasters also produce and distribute. But Turkish content, as we have seen, is the output of a highly competitive and complex sector. Only atv and Kanal D distribute most (not all) their content (Akar, 2017; Turna, 2017). Other *dizis* are sold by companies specialized in distribution. Not surprisingly, the distribution sector is also competitive and complex. Content Acquisition Heads for these distributors have to choose products early in the game, sometimes even before

16 A few days after our conversation, Wills was named President of Televisa Studios. He is the first non-Mexican to hold that position.

17 Sila—a dizi produced in 2006—is the most notable exception, and is mentioned as such by most people I have talked to in the dizi sector.

the first episode has been broadcast. It is a difficult guessing game, followed by a negotiation with the producer (and sometimes also with the broadcaster) that can be quite involved.

Telenovelas, once the “world’s most watched television genre” (McAnany & La Pastina, 1994), have lost a lot of ground on the international market. More research is needed to determine why this has happened. The genre seems to have evolved too slowly to keep up with audiences around the world whose media consumption habits are changing due to digital media technologies that expose them to content from around the world. Newcomer countries to serialized melodrama production have also challenged *telenovelas*. Korean and Indian dramas have travelled some, but it is Turkish *dizis* which have posed the biggest challenge to the *telenovela* world, colonizing programming grids in many regions of the world, and planting themselves on Latin American television screens.

At first, some *telenovela* decision makers underestimated the challenge. In our conversations they would mention the short-lived fad of Korean drama in Latin America as a predictor of what would happen to *dizis*. They severely undercalculated the production output and the strength of the Turkish television sector. Today, *telenovela* executives no longer underestimate the Turkish phenomenon, but they are generally disinformed about the *dizi* sector’s business and production model, and how the Turkish domestic market works. The same happens in the *dizi* sector in which most people are not well versed on the *telenovela* industry.

Dizis started spreading first in some Arab countries and in the Middle East. This was followed by their spread in the Balkans and Asia, and now in Latin America. Distributors point out that there are areas of the world that they have not been able to penetrate. For instance, Western Europe. In addition, distributors keep monitoring the markets for signs of declining interest in *dizis* and keep pushing their products. Persistence is a lesson they have learned well:

For six years we went to NATPE in Miami and L.A. Screenings and we didn’t do a single deal. And, then, we did. And Latin America became our next booming market. Now we are attending trade shows in Africa knowing that, at the end of the day, it will pay off (Okan, 2018).

Latin American sales, then, became a life saver for *dizis* when other markets started slowing down or when international politics interfered, as was the case recently when the Dubai-based MBC Group—which was instrumental in the spread of Turkish *dizis* in the Arab region—stopped broadcasting Turkish content due to the political differences between Saudi Arabia and the Turkish government (“MBC stops all Turkish TV drama,” 2018). Turkish distributors are now reaping the benefits of the Latin American markets while they look ahead to Africa and take advantage of the boost the genre received when *Kara Sevda* won the

International Emmy for Best Telenovela in 2017, beating melodramas produced in Canada and in the country that has dominated this award: Brazil (“Turkish drama ‘Kara Sevda’ wins ‘Best Telenovela’ at International Emmy Awards,” 2017). Their strategy continues to be to place one product at a very low price and use its success as a spearhead to sell more content. The most recent example of this is Spain, where *Fatmagül’ün suçu ne?* started what now has all the characteristics of a boom (“Las telenovelas turcas que llegarán a España,” 2019).

Interestingly, *Fatmagül’ün suçu ne?* and other older *dizis* are, generally speaking, selling more easily than many of the products that succeeded them on the Turkish screens (Pérez, 2019; Turna, 2017). When asked about the cause of this, distributors point to the 2012 changes in the Turkish ratings system. They argue that the newly placed emphasis on the DE socioeconomic level exacerbated the differences between local and global consumers for *dizis* (Filizketin, 2017; Özkübat, 2017; Turna, 2017; Ziyatlar, 2016).

Tensions between the Domestic and Global Markets

When examining these tensions, my starting point was to understand the relative weight that international sales have in the business and production models of both *telenovelas* and *dizis*. I also tried to understand the issue from the opposite perspective: how do their business and production models impinge on their respective domestic-global markets equations.

In the *telenovela* sector, an aspect that has changed dramatically is the importance given to the product’s international sales. The conventional wisdom used to be that it was risky to put the business of exporting ahead of the domestic market (Mato, 2005). Hence, international sales were long considered to be “the ‘gravy’ to the ‘main course’ of domestic earnings” (Miller, 2010, p. 201). This is not the case anymore. As production values and budgets go up, the need to partially finance the projects with global sales is now unavoidable:

Our business model is *sui generis* because our content production is very tied to the international market. We know we need new stories, daring stories, but also elevated production levels. We wouldn’t be able to produce what we produce without global sales (Santana, 2016).

Hence, *telenovela* producers consider international sales at every step of a project’s development. Given that the broadcast of a *telenovela* is now distanced from writing and production, writers and producers try to calibrate local and global markets throughout their work. It is not an easy nor a straightforward task, but the performance in the domestic market of the *telenovela* does not determine the shape—story, cast, locations and number of episodes—of the product that goes on sale on the international market.

The Turkish case is more complicated. Turkish *dizi* producers insist that they have in mind first and foremost the Turkish audience when they make production decisions:

No one, including this company, took those *dizis* to be successful in other countries. We did everything for the Turkish audience. We still do everything for the Turkish audience. Yes, we know about international sales and we care about them, they are profit. But, you have to create content for the Turkish audience because if it isn't successful here, it's going to be cancelled in 3-4 episodes and then, you don't have anything to sell anywhere (Çatay, 2016).

When I produce, I think about Turkey. If the Turks buy your content, other people will buy it also. I have to be successful first in my country, then I'll be successful in other countries (Alp, 2017).

Distributors acknowledge that for international sales it is essential for a *dizi* to have a minimum number of hours:

Producers first think of the Turkish audience because they need money from the broadcaster. And the broadcaster gives the money according to the ratings. To produce more than 13 episodes, you need good ratings. If you have less, the *dizi* is way too short to be sold abroad. Our international clients never buy less than 26 episodes (Turkish length) that are edited and segmented into approximately 85 one-hour episodes. But, in order to give them this number of episodes, you need continuity here in Turkey, and for continuity you need ratings. So, everything is affecting everything. But, first, you need ratings in Turkey (Filizketin, 2017).

However, distributors also state that things are rapidly changing and international sales *are* in the mind of producers, even if they do not admit it. Producers often consult with distributors about story and cast decisions with an eye on the international market:

The broadcast in Turkey cannot cover the cost of the series. This wasn't the case five years ago. Back then, none of the producers were thinking of the sales in the international market. And they were making their plans based on the payments received from the broadcasters. But now, all the broadcasters are constantly thinking of the international sales, and producers too. At the beginning of a project, they're asking us our opinions about the cast, for instance, whether it would work in the international market or not (Okan, 2016).

But, ratings and international sales do not always go hand in hand, and there are important examples of this both in the *telenovela* and *dizi* sector. For instance, in terms of local ratings, the most successful "super series" franchise for Telemundo is *El Señor de los Cielos*, written by Luis Zelkowicz. *El Señor* has aired for six seasons, always beating Univision by a large margin. Interestingly, it is not its author's best seller internationally. *Una Maid en Manhattan*, a romantic *telenovela* based on the film *A Maid in Manhattan*, which never won the ratings war in its time slot, has sold in many more markets than *El Señor* (Farías, 2018; Zelkowicz, 2016).

In Turkey, *Kara Para Aşk*, did not garner the ratings that both the broadcaster and producer were expecting. The *dizi* had a short, 13-episode, first season with decent ratings ranging from 5 to 7 points. However, in the second season the ratings dropped dramatically to two points. However, international sales had already started and the *dizi* was selling well. Hence, even with these audience numbers, production and broadcast in Turkey continued for the full second season. In the end, there were 54 episodes (Turkish length) to sell and, while the final episode's rating in Turkey was a meager 2.75 points, in 2016 *Kara Para Aşk* became the *dizi* which was sold to most countries ever (Okan, 2016).

The appearance and increasing prevalence of OTT platforms like Netflix and Hulu has also changed the equation of the relative importance between the domestic and global markets. For all purposes, placing the product on these platforms is considered an international sale. For some decision makers those platforms *are* now the international market: "Every time I'm considering a project, I ask myself 'would this work on Netflix?'" (Wills, 2018). So even though almost all *telenovelas* are designed for open television, VOD platforms are in the mind of decision makers (Farías, 2018; Santana, 2018).

The same happens to Turkish producers. At the time of this writing, in addition to Netflix, there are two digital platforms in Turkey: BluTV and PuhuTV. Generally speaking, these platforms offer the *dizis* that are on the air and some older ones on an on-demand basis. But, some production companies have created *dizis* specifically for these platforms. These stories are not subjected to the strict content regulations of RTÜK; therefore, the stories are darker and the love scenes have some steam.¹⁸ But these two platforms have not performed as expected financially, and the Turkish government has threatened to regulate their content also (Solaker, 2018). Therefore, Turkish producers are aiming to place their products on Netflix. More importantly, they want to produce *for* Netflix (Vivarelli, 2019b).

On December 2018, the first original Turkish series made for Netflix premiered. *Hakan: Muhafız (The Protector)*, produced by O3 Medya for Netflix, had a successful first season. The second season is already out and a third one has been commissioned. At least three other original Turkish series for Netflix are in production: *Ottoman Rising* (Weatherbee, 2018), *Atiye* (Vivarelli, 2019a) and *Aşk 101* (Tan, 2019).

The casts of all of these are headed by actors who are well known abroad because of their work in *dizis*. These (and a few other) Turkish actors are quite famous in *dizi* buying countries, where their fans are organized in clubs and are very active on social media. Distributors advise

18 Fi, Çi (2017-2018), Dip (2018) and Şahsiyet (2018) are three examples.

producers to include these actors in their productions as a way of boosting their chances in the competitive international arena (Filizketin, 2018; Okan, 2019; Özkübat, 2017). Turkish actors are aware of this. However, only a handful of them—the most famous ones—receive a percentage of the international sales of the *dizis* they have worked in. “I don’t get a single lira from that” was the sentence I heard from most of the Turkish actors I talked to.

Regarding the role that actors play in international sales, a paradox is brewing. While “big names” are still recommended to increase the chances of international sales, those names no longer guarantee ratings on the Turkish market as they used to.¹⁹ Still, as was the case with *Kara Para Aşk*, if the producer and broadcaster trust that the *dizi* will sell well internationally, they might agree to continue the series for a number of episodes that will allow them to offer it abroad. A recent case that illustrates this is *Çarpışma*, a show with an impressive cast headed by one of the most famous Turkish actors—Kıvanç Tatlıtuğ, and a first episode ambitiously produced and directed, that included a terrorist attack in a stadium and a four-car collision. From the beginning, *Çarpışma*’s ratings were unimpressive and they continued to drop, even in the AB demographics. Nonetheless, 24 episodes were produced and broadcasted while it was pushed in the international market (“MADD’s ‘Crash’ Lands In Hungary,” 2019; Vanoli, 2019). In other words, *Çarpışma* ended up being produced for the international market. This may be a sign that a shift is brewing in the international sales-domestic market equation in Turkey.

DISCUSSION AND CONCLUSION

What works in my market? What travels well? Can the answers to these two queries be reconciled? These are the main questions on the minds of *telenovela* and *dizi* producers. As they try to answer them, they grapple with shifting definitions of the local. Univision is an interesting case because the *telenovelas* it broadcasts are made, first for the Mexican audience, and then for the US Spanish language audience. The *telenovela*’s checking process is done by Televisa with Mexico’s audience in mind. This used to work well, given the demographics of Latinos in the US. But that is not always the case. Hence, the assumption that a Mexican is a Mexican, even when leaving abroad, does not hold anymore for Univision and Televisa. Still, for these products the success in Mexico is paramount, often more important than their performance in Univision. In other words, Univision’s domestic market is, for all effects, an international sale for Mexico.

19 Recent examples include: Mehmed (2018), starring Kenan İmirzalıoğlu, which was cancelled after only six episodes and Vurgun (2019), with Erkan Petekkaya, which was also cancelled on the sixth episode.

Its competitor—Telemundo—does produce with the US Hispanic audience in mind first, but conceptualizes it almost as a country within the US, and that country is similar to Mexico. At the same time, Mexico is the most important international market for Telemundo, the one that it “can’t afford to lose” (Santana, 2018). Hence, the borders between Mexico and the US Spanish language audience are blurred for the two major *telenovela* broadcasters in the US and for their producers too. This means that as the makeup of the Latino population in the US changes and becomes more diverse regarding country of origin (Flores, 2017), the production decision process for Telemundo and those who produce for Univision will become increasingly complex, and co-productions that involve countries other than Mexico will be more and more frequent.

For the *dizi* sector, the local and the global are clearly delimited. The factor in common between them is the universal appetite for melodramatic serialized content. However, the current business and production models for *dizis* make international sales too dependent on the show’s domestic performance. This could be the main reason behind “Turkey’s successful sales of *dizis* in countries that are like Turkey, but not in countries that are different from Turkey, like those in Western Europe, for instance” (Turna, 2017).

The current business and production models for *dizis* could change if the Turkish economy continues its recent decline (“What can stop Turkey’s economy from unravelling?,” 2019). We are already seeing signs of this; for example, the above-mentioned case of *Çarpışma*. But we will see more. Due to Turkey’s deteriorating economy, advertising expenditures have dropped. This means that broadcasters have less money to invest in content. Therefore, producers are looking for new investment sources for their products. Some are associating with distributors, as is the case of the revival of *Behzat Ç* for Turkish platform BluTV, in which distributor InterMedya both co-produces and distributes worldwide (Franks, 2019). Other producers are associating with each other and creating their own distribution firms (“Medyapim and Ay Yapim Present New Turkish Distributor Madd Entertainment,” 2018). Some are establishing agreements, particularly with Latin American players. So far, these deals take the form of co-production using a Turkish script in a Latin American country (“Ay Yapim announced two coproductions in Latin America: with VIS and Mega,” 2019). But, according to the interviews I conducted in January 2019 at NATPE-Miami, there could also be agreements in which the story takes place in both Turkey and Latin America with Turkish and Latin American actors shooting scenes in Turkey and Latin American countries. Language is a factor, of course, since most Turkish actors do not speak Spanish and Latin American actors do not speak Turkish. In any case, these agreements not only help the *dizi* sector circumvent the local economic

conditions, but also point to Latin American producers' acknowledgment of the success of Turkish products, and to both *telenovela* and *dizi* producers' determination to take advantage of the common codes between the two genres and the shared meanings between Turkish and Latin American cultures. From a theoretical perspective, these agreements underscore that both the political economy of television and cultural proximity are factors in the way melodramas are engineered so they can travel.

Telenovelas and *dizis* evolve in mutual competition. Their producers are not simply glancing at each other anymore. Some are talking to each other as they produce under local conditions for increasingly sophisticated non-local audiences, trying to guess what the future will be for all television content. So maybe the question is not "will it travel?", but "who will it travel with?"

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Tables and Figures

Table 1. Domestic Market USA Spanish language television primetime (Week of February 12, 2018)

A	B	C	D	E	F
8:00 PM	Monday	Tuesday	Wednesday	Thursday	Friday
1	Rico y Lázaro	Rico y Lázaro	Rico y Lázaro	Rico y Lázaro	Rico y Lázaro
2	José José	José José	José José	José José	José José
9:00 PM	Monday	Tuesday	Wednesday	Thursday	Friday
1	Papá a toda madre	Papá a toda madre	Papá a toda madre	Papá a toda madre	Papá a toda madre
2	Al otro lado del muro	Al otro lado del muro	Al otro lado del muro	Al otro lado del muro	Al otro lado del muro
10:00 PM	Monday	Tuesday	Wednesday	Thursday	Friday
1	Enemigo Intimo	Enemigo Intimo	Enemigo Intimo	Enemigo Intimo	Enemigo Intimo
2	Por amar sin ley	Por amar sin ley	Por amar sin ley	Por amar sin ley	Por amar sin ley
Legend:	Telemundo				
	Univision				

Table 2. Domestic Market Turkey (Week of December 10, 2018)

Ratings	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	Çukur	Kadın	Diriliş Ertuğrul	Bir Zamanlar Çukurova	Arka Sokaklar	İkizler Memo-Can	Savasci
2	Söz	Eşkıya Dünyaya Hükümdar Olmaz	Sen Anlat Karadeniz	Avlu	Gülperi	Erkenci Kuş ep.	
3	Yasak Elma		Yaparsın Aşkın	Bizim Hikaye	Kızım		Elimi Bırakma
4			Cocuklar Duymasın	Çarpışma	Payitaht "Abdülhamid"		Bir Litre Gözyaşı
5		Ufak Tefek Cinayetler			Şahin Tepesi	Kalk Gidelim	Ağlama Anne
6		Mehmetçik Kutlu Zafer	Jet Sosyete	Muhteşem İkili	İstanbul Gelin	Yaparsın Aşkın	
7	Ege'nin hamsisi			3 Te 3 Tarih			
Legend:	Star TV						
	Kanal D						
	ATV						
	Show TV						
	Fox TV						
	TRT1						
	Kanal 8						

Note: Slots in which the broadcaster did not air a dizi are shown without content. Kanal 7 is not included in the table.

Table 3. Changes in Turkey’s Rating System		
Demographic Level	Relative Weight in Total (before 2012)	Relative Weight in Total (since 2012)
AB	21%	11%
C1C2	67%	53%
DE	12%	36%