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Eskişehir Investment Support Office**

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Bursa Eskişehir Bilecik Development Agency (BEBKA)

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EXECUTIVE SUMMARY

The animation industry, which accounts for 25% of the worldwide audio and visual industry, has become an indispensable actor of TV, cinema, internet, commercial application, digital platform and social media. With the development of game and software technologies, the field of animation has also grown and the industry has grown in an astonishing way. Animation is used in a wide range of fields such as architecture, medicine, defense industry, high technology sectors, media and entertainment. In particular, the US and Japan are industrialized in the field of animated films, while the European and East Asian countries have made several breakthroughs in the sector in recent years.

It is estimated that the world animation industry market volume which was 122 billion dollars in 2010, has reached 300 billion dollars in 2017. Countries have begun to develop various mechanisms to stimulate investments with legal regulations in order to ensure the development of the sector which has high market volume and profitability.

It is possible to say that a sectoral ecosystem has been formed in the last decade regarding the animation sector in Turkey. A rise is observed in the Turkish anima-

tion sector due to the size of the global market volume, the establishment of the Turkish Radio and Television (TRT) Children's channel, the making of feature films, and the inclusion of the sector statement in the top strategy documents and documents.

Turkey has approximately a hundred direct and indirect operating enterprises in the animation industry. Many of these enterprises are small and medium sized enterprises and serve the advertising industry as well. 90% of the enterprises are operating in Istanbul. Istanbul is followed by Ankara, Eskişehir and other cities. Most of the animation productions broadcasted in national and international channels in our country are foreign productions. Almost all of the national channels, except for the TRT children's channel, are importing animation productions. According to the report titled "Focus on Animation" published by the European Commission in 2015, approximately 96% of animated feature films and 80% of cartoons in Turkey are made up of foreign productions. In Turkey, 94% of the children in the 0-14 age group are watching cartoons. It is also revealed that animation in this light of development is a clear sector of development.

1. Introduction

The animation industry has become one of the fastest growing sectors in the world thanks to the developments in science and technology. The animation industry has made great economic contributions to the US, Canada, Europe and some Far Eastern countries. The industry also began to develop rapidly in Turkey.

In the last 10 years in Turkey, studies and investments for the animation industry has contributed significantly to the development of the sector. Turkey has an advantageous position in matters such as qualified workforce, experience, knowledge, cost and technological superiority. As a result of taking the policies and measures that will enable the Turkish animation sector to

reach an important level in the global market, the infrastructure and human resources of the sector have developed.

Eskişehir, one of the most developed provinces in Turkey, has an important potential with its human resources and infrastructure in the animation industry. For this reason, in order to further develop the sector in Eskişehir, various projects are being carried out in order to strengthen the sector infrastructure and increase its national and international recognition. Bursa Eskişehir Bilecik Development Agency (BEBKA), which is the executive of these projects, aims to make Eskişehir the animation base of our country.



SECTION 2

ANIMATION INDUSTRY IN TURKEY

2. Animation Industry in Turkey

The animation industry, one of the world's fastest growing industries in the world, continues its growth trend also in Turkey. When Turkey's investment climate is analyzed in terms of the animation industry, there occur some important issues which are listed below.

- The presence of public and private educational institutions serving in the field of animation
- The presence of qualified workforce
- Lower labor costs compared to Europe and America
- Closeness to European and Asian markets
- High number of animation audience
- The existence of sectoral incentives
- University-industry collaboration culture
- Widespread animation awareness and culture
- Young population
- Richness of animation history and culture

2.1. Historical Development of Animation Industry in Turkey

The history of animation industry in Turkey is based on the beginning of the 1900s. Until 1908, there was no activity of broadcasting any movies or display in our country. By 1908, cinema halls were set up in our country in accordance with the mass demonstration and also films and images were started to be displayed. In the 1930s, cinema was established in several important regions of Turkey. In addition, cartoons from foreign companies, especially Walt Disney, have been shown in our country. During this period, the car-

toonists and illustrators has closely followed cartoons and various attempts have been made in the field of animation for the first time in Turkey.¹

The first cartoon released in Turkey (Kadikoy Opera Cinema) was "The Skeleton Dance" (1932) made by Walt Disney.²



The Skeleton Dance (1929)³

¹ Selçuk Hünerli, *Canlandırma Sineması Üzerine*, İstanbul: Es Publications, 2005

² Erdem Göktepe, *Geçmişten Günümüze Hareketli Görüntü ve Türkiye'de Animasyonun Gelişimi*, Master's Thesis, İstanbul

³ http://www.imdb.com/media/rm4094933760/tt0020414?ref_=ttmi_mi_all_sf_1#, Date of access: 18.02.2016



Cemal Nadir Güler (1902-1947)⁴

Cemal Nadir Güler is one of the first cartoonist artists who are interested in animation in our country. Güler has carried out various studies in order to be able to create the cartoon project named "Uncle Bey Beach" in animation format, but he could not implement the animation project due to material and technical impossibilities.

In 1947-1949, the first successful animation experiments were realized as a result of the lessons given by Vedat Ar at the State Fine Arts Academy. During this period, Vedat Ar and fifteen students realized Turkey's first animated film with the study called "Zeybek Oyunu" three minutes.⁵

Made by Turgut Demirbağ in 1951, 'Once Upon A Time' project became Turkey's first feature-length and colorful animated film.

Founded in 1959 by Süheyl Gürbaskan, Istanbul Advertising Agency, Filmar, an animation studio founded by Vedat Ar in the 1950s, added mobility to the sector in this period. Vedat Ar founded Filmar and produced two-three-minute short animated films. During the same period, Istanbul Advertising Agency has made



"Zeybek Oyunu" Workshop Studies⁶

various cartoon works by employing cartoon artists with the increasing interest in terms of animation. These films, which are prepared within the agency and which can be evaluated as short and simple, have received considerable public interest.⁷

During these years, animators taking education outside Turkey have transferred know-how to Turkey. It was observed that the artists who provided the transfer of knowledge and experience were leading the establishment of animation production studios and feeding the industry. Among the most important animation artists of this period are Ferruh Dogan, Oguz Aral, Tonguç Yaşar and Orhan Büyükdoğan.⁸

⁴ https://tr.wikipedia.org/wiki/Cemal_Nadir_G%C3%BCler, Date of access: 17.02.2016

⁵ Arif Şerif Onaran, Türk Sineması Part 1, Ankara: Kitle Publications, 1999

⁶ <http://www.animasyongastesi.com/turkiyede-animasyonun-dunu-ve-bugunu/>, Date of access: 19.02.2016

⁷ Erdem Göktepe, a.g.e.

⁸ <http://www.animasyongastesi.com/turkiyede-animasyonun-dunu-ve-bugunu/>, Date of access: 19.02.2016

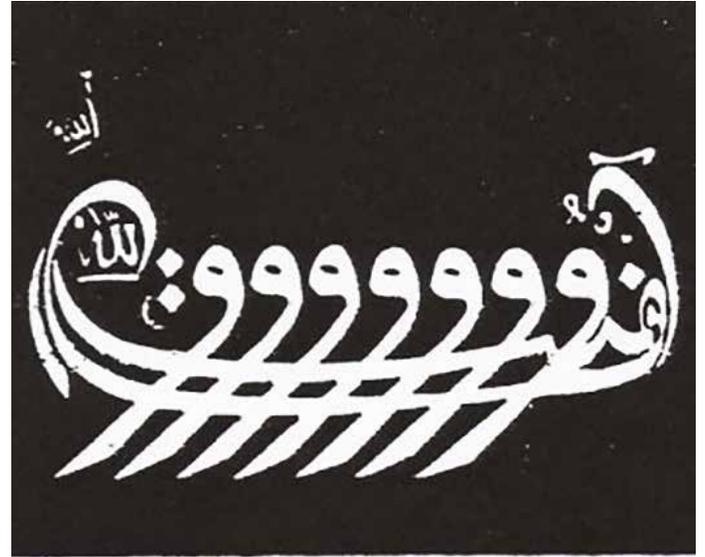


Tonguç Yaşar⁹

1960s have been a period in which the establishment of many advertising agencies in Turkey. Some of these agencies are: Kare Ajans, Karikatür Ajans, Radar Reklam, Stüdyo Çizgi, Canlı Karikatür, Ajans Bulu, Sinevizyon, Pasin & Benice Animasyon ve Artnet. The main goal of these studios, which are active in the advertising sector, has been to produce successful animation films by earning a certain amount of revenue in the field of advertising.¹⁰ The introduction of television in this period was one of the most important developments affecting the animation industry.

In the 1970's, when award-winning competitions were organized, animated films were also seen in addition to commercials. This period has been a period when

animated films have become more popular and encouraging new works. Among the noteworthy works of this period is "Evliya Çelebi" in the form of two films of 7 minutes each formed by Yalcin Cetin on the Studio Çizgi. Tonguç Yaşar's animated film named "Amentü Gemisi Nasıl Yürüdü?" is another work that came to the forefront in this period. It was the first Turkish cartoon to be shown in the festival held in the Annecy city of France, passing through the preselection among the nine hundred films, which won the prize in Antalya 2nd Golden Orange Festival.¹¹



Amentü Gemisi Nasıl Yürüdü?¹²

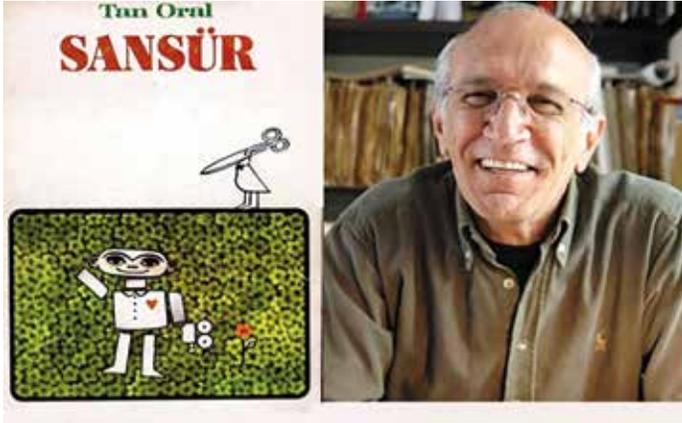
In the period of 70's, cartoonist Tan Oral's "Cansur" animated film, which he made using collage method, won TRT Culture and Art Science Short Film Competition championship award and Akşehir Nasrettin Hoca Animation Film Contest big award.

⁹ <http://www.canlandiranlar.com/saygi/>, Date of access: 01.08.2016

¹⁰ Selçuk Hünerli, a.g.e.

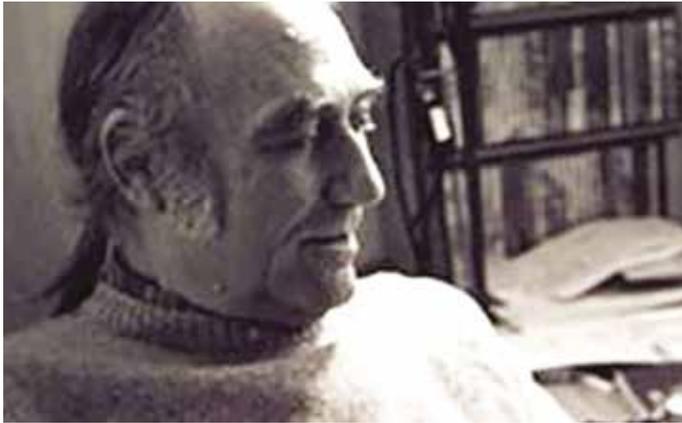
¹¹ Türker, H. İ., "Canlandırmanın Tarihçesi Ve Türk Canlandırma Sanatı". İnönü University Art & Design Magazine, 1. (2), 2011

¹² http://www.kameraarkasi.org/yonetmenler/canlandirmalar/1980_onesi/amentugemisinasilyurudu.html, Date of access: 24.02.2016



Tan Oral¹³

Other important animation works of this period are; Emre Senan-Gergeadam (1975), Emre Senan-Canlandırma Tabanca (1976), Emre Senan-Kısasa Kısas (1977), Emre Senan-Hayatında Eğri Çizgiyi İlk Keşfeden Adam (1977), Cemil Erez-65 KV (1974), Ateş Benice-Düğüm Nasıl Çözülür? (1976), Ateş Benice-Hoca Bir Gün, Ateş Benice-Stereo (1980).¹⁴



Ateş Benice¹⁵

Towards the end of the 1970s, animated films have been made for both movie theaters and television programs. Animation studios have continued to make animated films in terms of agreements with TRT. Dede Korkut Stories were prepared by Pasin Derviş in Pasin-Benice Studios in 1988. These stories are converted to a fifty-minute animated film 'Boğaç Khan' which is considered to be Turkey's first feature-length animated film.

The 1980s were quite positive for Turkish animation. In these years, Turkish animation artists have participated in many festivals abroad with animated films and won various awards. In 1980, Ateş Benice's "Stereo" film was shown at the Zagreb Film Festival¹⁶; Bahattin Alkaç's "Tombişin Story" has received positive reviews in a contest he has participated in Germany and Ali Murat Erkorkmaz's "Quick Case" work was the one of the first 350 films at the Annecy Film Festival in 1983.

Towards the end of the '80s, it is seen that the first studies were made in computer in our country with 3D animated content. The Yapı Kredi logo animation, which Kerem Kurdoğlu made for the Yapı Kredi advertising film in 1989, is one of the first examples of the 3D animation work.¹⁷

In the 1990s, technological developments made remarkable progress in the cartoon industry. The cartoon, named "Papirüs" and made by Umut Sanat Animated Film Studios, is one of the most important cartoons emerging with technological developments. In addition, Papirus, made in partnership with the French production company Gouman, was made entirely in the computer environment and received the "Best Line of the Year" award in France.

¹³ <http://www.sinefest.com/sansur-altin-portakalda.html>, Date of access: 01.08.2016

¹⁴ Türün, C. "Türkiye'de Canlandırma Sineması Bugünü ve Geleceği," 1989

¹⁵ <http://www.kameraarkasi.org/yonetmenler/atesbenice.html>, Date of access: 29.03.2016

¹⁶ Atan, U., "Çizgi Filmin Türkiye'deki Tarihi Gelişimi". Animasyonun Kültür Aktarımındaki Yeri, Unpublished Master's Thesis. Konya: Social Science Institute of Selçuk University, 1995.

¹⁷ Erdem Göktepe, a.g.e.

The first animation class and the first animation department in Turkey, was opened in Anadolu University in 1984 and 1990.

The establishment of the Association of Cartoonists in 1993 was considered one of the most important developments in terms of representation of the animation industry. In this period, the Ministry of Culture and Tourism has encouraged the members of the Association of Cartoonists to make projects by increasing the support given to animation.¹⁸ However, the association has not been very active in this period. It is also seen that Turkish animation artists have worked in international animation studios during this period. While Tahsin Özgür worked as an animator in projects named Tarzan, Hercules and Asterix at Walt Disney; Şahin Ersöz had worked on projects named Herkül and Balto as storyboard artists at Walt Disney.

The most important developments in the sector have started to appear in the 2000s. In the early 2000s in Turkey, it is observed that animation studios producing 3D animation have established. In the 90's, advertisement films and cartoons began to be produced by these studios for TV channels. After the year of 2009, there was a tremendous increase in the number of feature animated films.

The most important development that contributes to animation industry in Turkey, is the establishment of TRT Kid channel in 2008. As of 2008, the most important recipient of the animation industry in Turkey is TRT Kid channel. Thanks to TRT Kid channel, there has been a significant increase in the number of animation studios operating in the animation sector. Today, an-

imation studios producing animated series in Turkey, achieve income the most from TRT Kid channel.

The animation department of the universities and vocational high schools have been opened in various regions of Turkey since 2006. These departments have made important contributions to the sector in terms of human resources.

2.2. Corporate Structure

There are several pioneering institutions in the animation field in Turkey. These institutions are operating in public sector and private sector. Except for animation studios and TV channels in Turkey, policy makers and major institutions are as follows:

- Ministry of Culture and Tourism General Directorate of Cinema
- Radio and Television Supreme Council
- TRT
- Animation Associations
- BEBKA
- Universities

2.2.1. Ministry of Culture and Tourism, General Directorate of Cinema

Leading institution of the animation industry in Turkey is General Directorate of Cinema which is an unit of Culture and Tourism Ministry.

The mission of General Directorate of Cinema: "Providing extensive viewership by conveying national cinema works to the audience, developing policies to raise public awareness about art, supporting the projects serving this purpose, encouraging the creation of qualified artworks, conveying our cultural inheritance

¹⁸ Çiğdem UÇARCAN, 1970 Sonrasında Türk Çizgi Film Sektörünün Gelişmesi ve Sorunlar, Graphic Department of Social Science Institute of Dumlupınar University, Kütahya, 2010

to the next generations and reinforcing the place and the role of Turkish cinema.”

The vision of General Directorate of Cinema:

“Putting the Turkish cinema industry in a position of worldwide acknowledgement and elevating our country to a degree as one of the major film production locations.”

2.2.2. Radio and Television Supreme Council (RTÜK)

Radio and Television Supreme Council (RTÜK) in Turkey is an independent administrative authority that controls editing and making radio and television broadcasts. RTÜK has a very critical position in the animation sector, where television broadcasting is very important in terms of demand.

Law No. 6112 on Establishment and Broadcasting Services of Radio and Television, dated 15.02.2011, is a law related to the animation industry.

According to this law, if TV channels in Turkey broadcast cartoon programs, at least 20% of these films must be produced in Turkish and reflect Turkish culture.

2.2.3. Turkish Radio Television Corporation (TRT)

It was established in 1964 to carry out radio and television broadcasts on behalf of the state. Turkey’s first and only domestic children’s channel, TRT began broadcasting to children in 2008. The largest buyer of domestic-made cartoon series in Turkey is TRT. Most of the animation studios which produce domes-

tic-made cartoon series sell their productions to TRT Kid channel.

2.2.4. Universities

There are many universities with animation department in Turkey. Among these universities, the most rooted university is Eskişehir Anadolu University. Eskişehir Anadolu University Animation Department was founded in 1990.

All universities with animation department in Turkey can be examined in Table 1.

There are also a lot of vocational schools with anima-

Table 1. Universities with Animation Department in Turkey

Univesity	City
Anadolu University	Eskişehir
Bahçeşehir University	İstanbul
Dumlupınar University	Kütahya
Maltepe University	İstanbul
Marmara University	İstanbul
Yaşar University	İzmir
İstanbul Aydın University	İstanbul
Başkent University	Ankara
İstanbul Kültür University	İstanbul
Eastern Mediterranean University	Gazimağusa

tion department in Turkey. These vocational colleges can be examined in Table 2.

Table 2. Vocational Schools with Animation Department

University	City
Adnan Menderes University - Söke MYO Computer Aided Design and Animation	Aydın
Bozok University - MYO Computer Aided Design and Animation	Yozgat
Mustafa Kemal University - Kırıkkhan MYO Computer Aided Design and Animation	Hatay
Plato MYO	İstanbul
Amasya University - Tasarım MYO Computer Aided Design and Animation	Amasya
Sütçü İmam University - Teknik Bilimler MYO Computer Aided Design and Animation	Kahramanmaraş
İstanbul Gelişim University - MYO Computer Aided Design and Animation	İstanbul
Ahi Evran University - Mucur MYO Computer Aided Design and Animation	Kırşehir
Çukurova University - Karaisalı MYO Computer Aided Design and Animation	Adana

Source:https://dokuman.osym.gov.tr/pdfdokuman/2017/OSYS/YER/Table-3_12082017.pdf

2.2.5. Bursa Eskişehir Bilecik Development Agency (BEBKA)

Bursa Eskişehir Bilecik Development Agency is one of Turkey's 26 development agencies. BEBKA is responsible for Bursa, Eskişehir and Bilecik provinces of Turkey. BEBKA supporting developing and potential sectors in TR41 Region, tries to increase Turk animations' national and international recognition and also to make Eskişehir become Turkey's animation center.

The 1st Anatolian Animation Festival held in 2015, the 2nd Anatolian Animation and Digital Operate Festival held in 2016 and the 3rd Anatolian Animation and Digital Works Festival held in 2017 have been the most remarkable events of BEBKA in terms of bringing together industrial players. In addition, Animation film competitions were organized and winners were awarded.



BEBKA is planning to organize Eskişehir International Animation and Digital Works Festival and Animation Film Competition in 2019.



BEBKA provided financial support of approximately 1 Million TL to the Animation R & D Center Project established within the Animation Department of Eskişehir Anadolu University. In 2016-2017, BEBKA has opened a stand in the International Animation Film Festival in Annecy, France, which is considered the world's most important animation festival. In the festival, "Anatolia Animation / Turkey-Eskişehir" concept and introduction of the Turkish animation sector were introduced.



The main objectives of all these activities of BEBKA in the animation sector are to improve the basic facilities in the animation industry in our country and human resources; to ensure the sector to boost entrepreneurial culture and competitiveness; to take a share from the global animation market by contributing to the goal of becoming the animation base in Turkey.

2.2.6. Animation Associations

There are several associations related to animation industry in Turkey. The most prominent of these associations in recent years are the Animators Association and the Anfiyap Association. The Animators Association was established in 2011. This association is one of the most important representatives of animation sector in Turkey. There are award-winning directors from national and international festivals as well as those who are dedicated to the animation industry in the Animators Association. ASIFA Turkey was founded in 2012 under this associations. Animators Association's members are also members of ASIFA Turkey. Various events and festivals are also organized by the association in certain periods. Directors who want to attend to the Talent Camp Program can send their projects to the camps every year.

Recently, there has been an increase in the number of animation-oriented associations in Turkey.

2.3. Animation Studios

There are more than 100 animation studios in Turkey. Most of these studios are in Istanbul. Istanbul is followed by Ankara, Eskişehir and other cities.

Animation studios in Turkey produce animation for cartoon series, feature film, promotion, advertisement,

entertainment, music clips, game, architectural animation, education, simulation etc. You can examine some animation studios in Table 3.

Table 3. Animation Studios in Turkey

Animation Studios	City
4 Yüz Production	İstanbul
ABT İstanbul	İstanbul
Adisebaba	İstanbul
Maara Animasyon	İstanbul
Cartoon Animasyon ve Multimedya Stüdyoları	İstanbul
Animasyon Cumhuriyeti	İstanbul
Anima İstanbul	İstanbul
Animax	Ankara
Sinefekt	İstanbul
Düşyeri	İstanbul/Eskişehir
Düşlerevi	İstanbul/Eskişehir
Grafı2000	İstanbul
Cordoba	İstanbul

Animation Studios	City
Atom	Ankara
Resimli Film Animasyon Stüdyosu	Eskiőehir
Animanya	Ankara
Animatürk	İstanbul
ISF Studios	Ankara
Düőlerevi Çizgi Film Stüdyosu	İstanbul
Haylaz Prodüksiyon	İstanbul
Pasin Animasyon	İstanbul
Lighthouse	İstanbul
Siyah Martı	İstanbul/ Eskiőehir
Zor Zanaat Prodüksiyon	İstanbul
Yoyo Film	İstanbul/ Eskiőehir
IPD Istanbul Post Production Department	İstanbul
Zahiri Animasyon	Eskiőehir
Hayali Animasyon	Ankara

Animation Studios	City
Koff Animasyon	İstanbul
35 MM Stüdyo	İstanbul
Arzum Film Animasyon	İstanbul
Flamingo	Eskiőehir
Anibera	İstanbul
Portakal Animasyon	İstanbul
Kraken	İstanbul

Almost all animation studios in Turkey are small and medium-sized businesses.

2.4. Animation Production in Turkey

Animation production in Turkey is carried out in many areas. Generally, studios produce for cartoon and advertisement. Since 2009, there has also been a significant increase in the number of feature animated films. Animated TV series and feature animated films in Turkey are shown in Table 4 and Table 5.

In Turkey, animated TV series are generally produced for TRT Kid Channel. Thanks to establishment of TRT Kid Channel in 2008, there has been a huge increase in number of cartoon TV series production. In addition to TRT Kid channel, some TV series such as the Fırıldak Family and King Őakir are broadcast on different platforms and channels.

Table 4. Cartoon TV Series Production in Turkey

Nane ile Limon	Keloğlan Masalları
Canım Kardeşim	Cille
Sizinkiler:Çatlak Yumurtalar	Küçük Hazarfen
Keloğlan	Rafadan Tayfa
Pepe	Kuzucuk
Dede Korkut Hikayeleri	Elif'in Düşleri
Çınar	İbi
Çılgın Orman	Köstebegiller
Maysa ve Bulut	Bizim Ninniler
İstanbul Muhafızları	Niloya
Ege ile Gaga	Gizemler Diyarına Yolculuk
Emiray	Ozi
Aslan	64 Kare Ülkesi
Fırıldak Ailesi	Kral Şakir
Limon ile Zeytin	RGG Ayas

Breaking point for feature animated film production in Turkey was in 2009. Since 2009, there has been a significant increase in the number of feature animated film.

Table 5. Animated Feature Film Production in Turkey

Year	Animated Feature Film
1951	Evvel Zaman İçinde
1963	Cicican
1988	Dede Korkut / Boğaç Han
2009	Zeytinin Hayali
2009	Suluboya
2013	RGG Ayas
2014	İksir: Dedemin Sırrı
2014	Uzay Kuvvetleri 2911
2014	Evliya Çelebi ve Ölümsüzlük Suyu
2014	Rimolar ve Zimolar: Kasabada Barış
2015	Köstebegiller: Perili Orman
2015	Pırdino Sürpriz Yumurta
2016	Köstebegiller 2: Gölge'nin Tılsımı
2016	Kötü Kedi Şerafettin

Year	Animated Feature Film
2016	Canım Kardeşim Benim
2017	Doru
2017	Pepee: Birlik Zamanı
2017	Fırıldak Ailesi
2018	Sagu ve Pagu

When considering the development of software technology and computer animation, it will be a mistake to reduce animation only to feature films and animated series.

Mass Media	Cinema, Television, Advertising, Multi Media
Fine Arts	Design, Architecture
Scientific Studies	Archeology, Chemistry, Engineering, Medicine, Astronomy
Education	Organization Education, Public Spots, Simulation
Other Fields	Entertainment (Computer Games), Music, Organization, Presentation, Computer, Internet, Virtual Reality Applications

The main fields of animation are as follows:

Animation is usually produced for the mass media in Turkey. In last decade, it has begun to be produced for other fields.

2.5.TV Channels and Rating

More than 500 Turkish channels are being viewed as free via Turksat 4A and Turksat 3A. The most important TV platforms are:

- Digitürk
- D-Smart
- Teledünya
- Tivibu
- Filbox

There are approximately 20 public channels and the rest are private television channels.

There are 17 kid channels in Turkey. 6 of these are in domestic channel status and 11 belong to foreign organizations. TRT Kid is the only kid channel that broadcasts publicly. Other local kid channels broadcasting in Turkey are:

- Smart Kid
- MinikaGo
- MinikaKid
- Kidz TV
- Planet Kid

It can be said that the number of domestic thematic channels are limited for the children between ages 3-14, ages between 0-3 and the children above the age of 14 . There is not any free thematic channels in Turkey.¹⁹

¹⁹ Yasemin Bakı, Tematik Çocuk Kanallarında Yayınlanan Çizgi Filmlere İlişkin Bir Değerlendirme, 2nd International Kid and Youth Literature Symposium, 2015, s.373.

2.5.1. TRT Kid Channel

TRT Kid is the largest buyer of locally made animated television series in Turkey. Most of the animation studios which produce domestic production line series sell their productions to TRT Kid Channel.

It can be said that the number of domestic animation productions in our country increases, the problem of trust belonging to the industry is overcome, job opportunities for animators occur, and interest in animation education increases with the establishment of TRT Kid Channel.

TRT Kid Channel is generated animation projects to animation studios operating in Turkey and contents of all projects are being assessed in line of local and cultural elements and pedagogical principles.

2.5.2. Disney Channel Turkey

Disney Channel Turkey has started to test broadcasts in 2011 and to broadcast in 2012. On Disney Channel where foreign productions are usually broadcasted, a Turkish comedy-adventure serial "Limon ve Zeytin" has started to be broadcasted in 2014. The production based on the serial named "Sizinkiler" tells the adventures of Limon ve Zeytin.

2.5.3. Planet Kid

Planet Kid Channel, which started its official broadcasting life in 2011, has been continuing its broadcasts via TURKSAT, Digiturk, D-Smart, TeleDünya and Tivibu platforms.

2.5.4. MinikaKid and MinikaGo

MinikaKid, which was established in 2012 and broad-

casts to the area between the ages of 3 and 7, has started its broadcasting life as a result of Minika's separation into MinikaGo and MinikaKid. MinikaGo was established in 2011 and has been broadcasting to 7-14 age range. All programs broadcasted on channels in Azerbaijan, TRNC and Turkey are composed of foreign-made broadcasts.

2.5.5. Cartoon Network Turkey

Cartoon Network began its broadcasts in 2008. Broadcast area of the channel consist of TRNC, Azerbaijan and Turkey and almost all of the broadcasts are imported. Kral Şakir, which is a local production of Grafi2000, has been broadcasting on the channel recently.

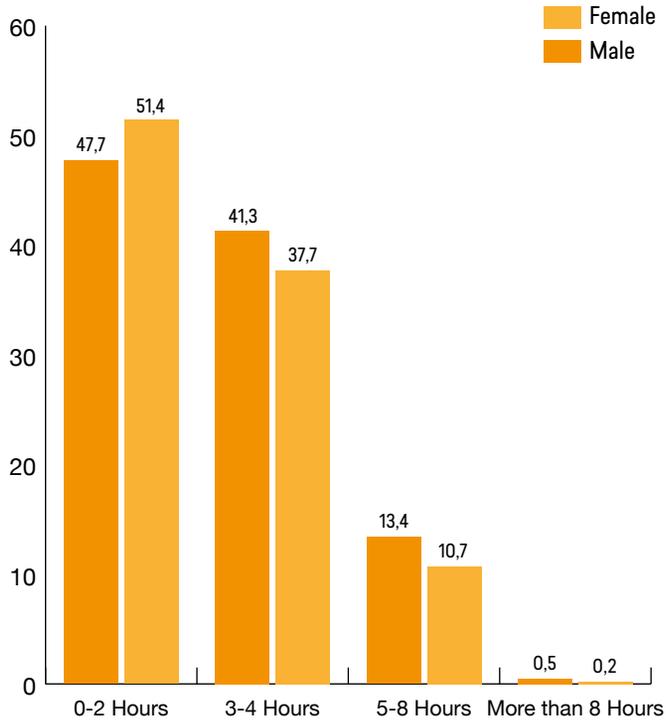
2.6 Intended Audience

Animation production in Turkey is generally considered to watch by the children in a certain age group. It was observed that not only children are interested in animated films, but also adults give close attention to animation products.

According to Turkish Statistical Institute 2017 data, Turkey's population is 80.8 million. 54.9 million of the adult population in 15-64 age range in Turkey and 27.7 million of this figure is men, while women constitute 27.2 million. The population aged 65 and over is also determined as 6.9 million. The population between the ages of 14 and 19 is about 19 million. Basis for the audience of animation works constitute the 0-14 age group children. Especially animation series broadcasted on television are often followed by children in this age group. Considering the types of programs children watch on television in Turkey, it is seen that cartoons are more being watched.

According to TSI data of 2013, television watching times and the three most frequently watched programs of children in 6-10 and 11-15 age groups are given below:

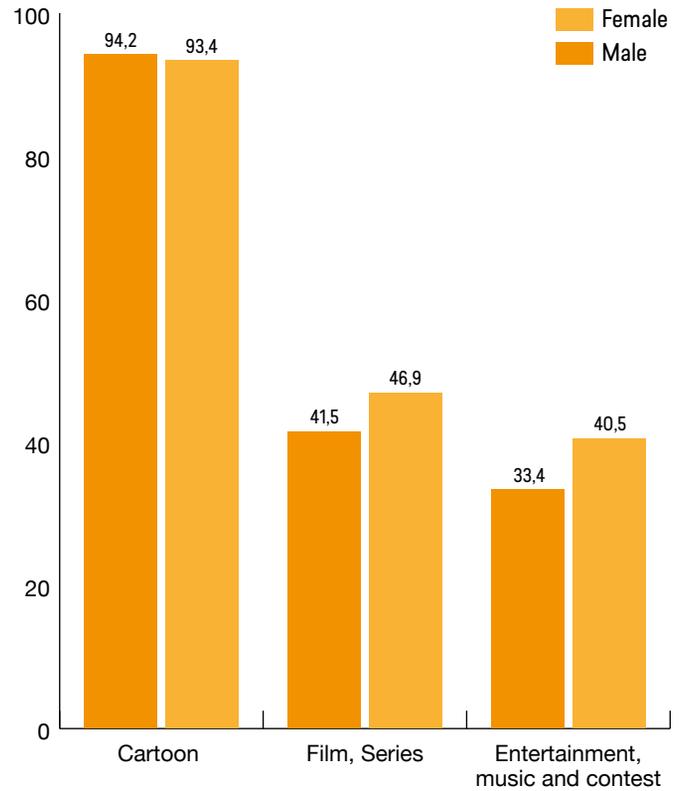
Table 6. Television Watching Times of Children in 6-10 and 11-15 Age Groups



Source: Turkish Statistical Institute (2013)

It is understood that 47.7% of the boys in the 6-10 age group and 51.4% of the girls are watching television between 0-2 hours. 3-4 hours of TV watching rate of boys is 41.3% while the rate of girls is 37.7%. As a result, it is understood that most of the children in the 6-10 age group did not watch TV more than 4 hours.

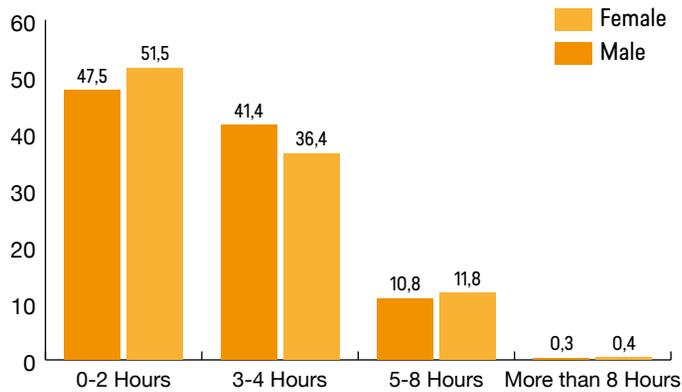
Table 7. Program Types of 6-10 Age Group Children Watching on TV



Source: Turkish Statistical Institute (2013)

It is seen that approximately 95% of children in 6-10 age group watch cartoons. It is also understood that 41.5% of boys and 46.9% of girls in this age group watch film and serial programs. The proportion of boys watching entertainment, music and contest programs is 33.4% while this rate is 40.5% for girls. As a result, it will not be wrong to say that almost all the children watch cartoons within the range of 6-10 years.

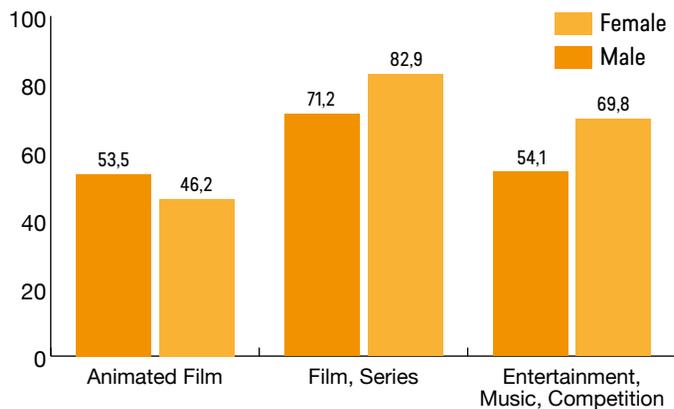
Table 8. Television Watching Times of Children in 11-15 Age Groups



Source: Turkish Statistical Institute (2013)

It is seen that children in the 11-15 age group are watching television in the same time period with the children in the 6-10 age group. As a result, it is understood that children in this age range usually watch television for up to four hours.

Table 9. Program Types of 11-15 Age Group Children Watching on TV



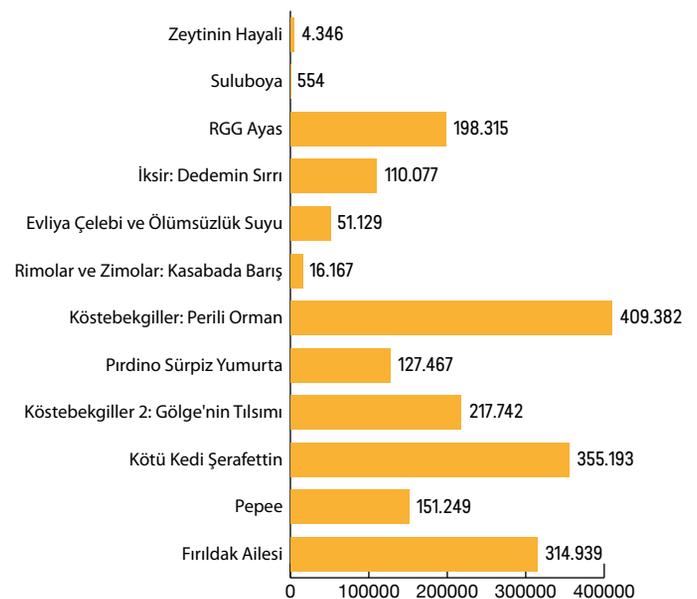
Source: Turkish Statistical Institute (2013)

It is observed that the children in 11-15 age group have a change in the proportion of the types of programs they watch on television. According to this, while 95% of children in the age range of 6-10 years are watching cartoons; this rate has fallen to 50% for the children between the ages of 11-15.

While 71.2% of boys aged 11-15 years are watching film and serial programs, this rate is 82.9% for girls. It is understood that entertainment, music and contest programs are watched by children in this age range compared with cartoons.

Many local feature-length animated film was released in Turkey. Feature-length animated films are more watched when compared with foreign serial products.

Table 10. Watching Times of Local Animated Films²⁰



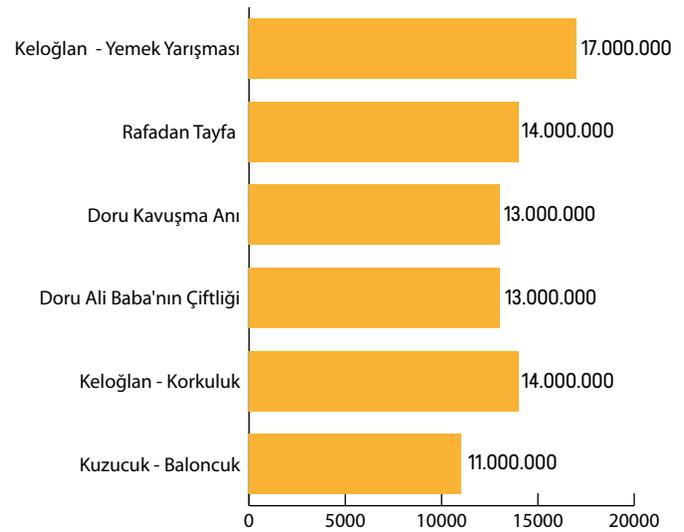
²⁰ <http://boxofficeturkiye.com/> 24.04.2018

Table 11. Some of Foreign Produced Animated Films Shown in Turkey and Number of Viewers - 2017²¹

Order	Film	Number of Viewers
1	Moana	1.337.112
2	Çılgın Hırsız 3	999.234
3	Şirinler: Kayıp Köy	840.130
4	Arabalar 3	829.942
5	Patron Bebek	601.418
6	Maşa ile Koca Ayı	463.355
7	Fırıldak Ailesi	314.939
8	Kaptan Düşükdon: Destansı İlk Film	201.724
9	My Little Pony Filmi	164.506
10	Buzlar Kraliçesi 3: Ateş ve Buz	163.900

In 2017, 42 animated films were shown in Turkey. Youtube is one of the most popular media areas in recent years as a video hosting site. Youtube, where many videos are located, also includes animation productions. Throughout Youtube, children and adults from all over the world can watch animation series, music clips and short and feature films.

Table 12. Youtube TRT Kid Channel²²



2.7. Labour Force

Total labor force in the animation sector in Turkey is about 1500-2000 people. It is seen that those who have not educated in this area are employed as well as those who graduated from animation department in the sector. The main areas of people employed in the animation industry in Turkey are as follows:

- Character Designer,
- Storyboard Artist,
- Konsept Designer,
- 3D Modelling Artist,
- Rigging Artist,
- 3D-2D Animator,
- Animation Director,
- Texture and Light Artist,
- Scenarist,
- Visual Effects Artist,
- Sound Designer and Editing.

²¹ <http://www.animasyongastesi.com/2017-yili-turkiye-gise-degerlendirmesi/> , 08.05.2018

²² <https://www.youtube.com/user/TRTCOCUKKANALI/videos?flow=grid&sort=p&view=0> : 30.04.2018

Average annual earnings of a graphic designer working in Turkey is estimated to be \$ 18,377.²³

According to interview results with the studios, about \$ 650 to \$ 1000 earned income can be expressed by a mid-experienced animator in Turkey. In Turkey, the minimum wage data for 2018 are shown in Table 13.

Table 13. Minimum Wage in Turkey 2018

(01.01.2018-31.12.2018)	
Gross Wage	338,25 \$
Insurance Fee Worker Share	47,3 \$
Unemployment Insurance Fee Worker Share	3,4 \$
Income Tax Base	287,5 \$
Income Tax	43 \$
Stamp Tax	2,6 \$
Disc.	96,4 \$
Minimum Living Discount	25 \$
Net Wage	267,1 \$

Dollar exchange rate is taken as the base 6 TL.

Minimum wage in Turkey is about \$ 267.

2.8. Co-Production and Foreign Trade

By the end of 2017, global animation industry market volume is about \$ 300 billion. Turkey's share from this rate is quite limited. Turkey's animation industry market volume estimated is about \$ 100 million for 2017.

Although Turkey has imported many cartoon and feature animated films as many years, Turkey has been in a position to export domestic cartoon and feature animated films to other countries nowadays. In 2018, it is observed that animation studios from Turkey make international co-production agreements with foreign animation studios.

Many countries have turned its route to Turkey due to cheap labor and qualified personnel in animation industry.

2.9 Government Supports

There are several government supports for animation industry in Turkey.

2.9.1. Ministry of Culture and Tourism General Directorate of Cinema

The General Directorate of Cinema of the Ministry of Culture and Tourism supports short and feature animated films. Animation studios can receive funding from the General Directorate of Cinema for film projects.

2.9.2. Ministry of Industry and Technology

The Ministry of Industry and Technology offers a variety of incentives to animation studios if they set up

²³ <http://www.payscale.com/>, 04.10.2018.

a design center in their area. Particularly income tax withholding, SSI premium support and income / corporation tax exemption significantly reduce the cost of film production.

2.9.3. Turkey Employment Organization and Social Security

In order to reduce labor costs, animation studios can benefit from funds of these public organization. These organizations provide a variety of employment and social security incentives.

2.9.4. Technology Development Zone

Animation studios located in Technology Development Regions can benefit from incentives such as income or corporate tax exemption, labor force incentives, income tax discount and VAT exemption. VAT exemption applies to software products. Eskişehir Technology Development Zone Management Company (ATAP A.Ş.) applies a 25% rent discount to publicly supported projects.

2.9.5. Small and Medium Industry Development Organization (KOSGEB)

Animation studios carrying out projects in the field of R & D and innovation can receive approximately \$ 250,000 from KOSGEB.

2.9.6. The Scientific And Technological Research Council Of Turkey (TÜBİTAK)

Thanks to TÜBİTAK BİGG program, TÜBİTAK is able to transfer approximately \$ 40,000 to new entrepreneurs who want to establish an animation studio in Turkey. It can also provide funding for R & D and innovation projects.

2.9.7. Ministry of Trade

Animation studios in Turkey can benefit from various funds for promotions in abroad. These funds are given for expences of branding, promotion, foreign trade, consultancy etc.

SECTION 3

ANIMATION SECTOR IN ESKİŐEHİR

3. Animation Sector in Eskişehir

Eskişehir is the one of the most developed cities of Turkey. Eskişehir has significant situation and potential in animation industry. Eskişehir Anadolu University is the main element that reveals this potential. The main reasons for this are summarized below:

- **Anadolu University Animation Department, the most established university in the field of animation in our country, is located in Eskişehir:** The university has about 30 years of experience with its strong academic staff. More than 300 animators graduated from Anadolu University.
- **Low labour and production costs:** The animation sector is a labor-intensive industry. Compared to many European and North American countries, labor costs are very low in our country and in Eskişehir. An animator in America and Canada earns \$ 50,000 a year; this income is less than \$ 20,000 in our country and in Eskişehir.
- **Establishment of Animation Research and Development Center which is also supported by BEBKA in Anadolu University:** Animation studios and students can also benefit from the center established in 2015.
- **Human resources:** There is sufficient and qualified human resources in animation field in Eskişehir.
- **Animation studios:** In Eskişehir there are animation studios where popular productions of our country are produced.

- **High living standards and socio-cultural structure:** Eskişehir is one of the most developed cities with ideal population, human capital structure, culture and art and all kinds of infrastructure facilities in Turkey.
- **Location and proximity to the bazaar:** Eskişehir; where animation usage areas are concentrated, are located in the center of important illusions such as Istanbul, Ankara, Izmir, Bursa, Antalya and Konya.
- **Corporate Infrastructure:** Animation sector in Eskişehir has many shareholders such as Eskişehir Osmaniye University, ARINKOM Technology Transfer Office, ETTOM Technology Transfer Office, Eskişehir Technology Development Zone, Eskişehir Chamber of Commerce.

3.1. General Information About Eskişehir

Eskişehir is considered as one of the most modern cities in Turkey. The fact that Eskişehir is located in a region between Istanbul, Bursa and Ankara is particularly striking in terms of location. Eskişehir has a total of 14 districts, two of which are central districts.



Located between Istanbul and Ankara, Eskisehir has a convenient location in terms of transportation. Thanks to the high-speed train (YHT), it is possible to reach Istanbul and Ankara in just a few hours from Eskişehir.

Eskişehir, which is one of the most advanced metropolitan cities and livable cities in Turkey, is in the front rank of culture and arts, education, health, transportation and social life opportunities when compared with others.

3.2. Animation Sector in Eskişehir

Eskisehir is considered as one of the most important cities in animation field in Turkey. Animation sector has a high developmental potential in Eskişehir with its companies and animation studios.

3.2.1. Institutional Structure

There are various institutions in Eskişehir that carry out studies related to animation sector. These institutions are as follows:

Eskişehir Anadolu University
Eskişehir Osmangazi University
Bursa Eskişehir Bilecik Development Agency
Anadolu Technology Research Park (ATAP)

These institutions have different work areas for the animation industry. Eskisehir Anadolu University and Eskisehir Osmangazi University are educational institutions that produce information in the field of animation and provide sectoral workforce. Bursa Eskişehir Bilecik Development Agency (BEBKA) carries out promotional activities for the sector and also provides consultancy services to investors at the same time. The Anadolu Technology Research Park hosts animation studios makes it possible for studios benefit from tax and SGK exemptions.

3.2.1.1. Eskisehir Anadolu University

Anadolu University, founded in 1958 in Eskişehir, has 14 faculties, 7 institutes, 1 state conservatory, 36 research centers, 3 colleges and 4 vocational colleges.

Table 14. Eskişehir Anadolu Univesity: The Number of Units

Units	Faculty	Institute	State Conservatory	Research Center	College	Vocational College
Number	14	7	1	36	3	4

Table 15. Eskişehir Anadolu University: The Number of Students

	Faculty	Open Education
The Number of Students	29.086	996.794

Eskişehir Anadolu University's first animation class was opened in Graphic Design Department in 1984. In 1990, Animation Department was established in the Faculty of Fine Arts. As of today, Assoc. Prof. Fethi Kaba is the header of Eskişehir Anadolu University Animation Department.

The main aim of the department is to be able to search in various branches of advertising, cinema, television, multimedia, education and to be equipped with both conceptual and technical skills rather than specialized in a single subject.

In 1990, lessons were built on traditional animation, but after 1992, lessons for computer animation were also integrated into the curriculum. As of today, there are courses on cinema language, film, video and animation techniques. Traditional cartoon techniques and 3D computer animation courses are given as the basis. There are also cinema courses and other elective courses in the department. These lessons are planned in a format that can complement the development of the students in the field of animation.

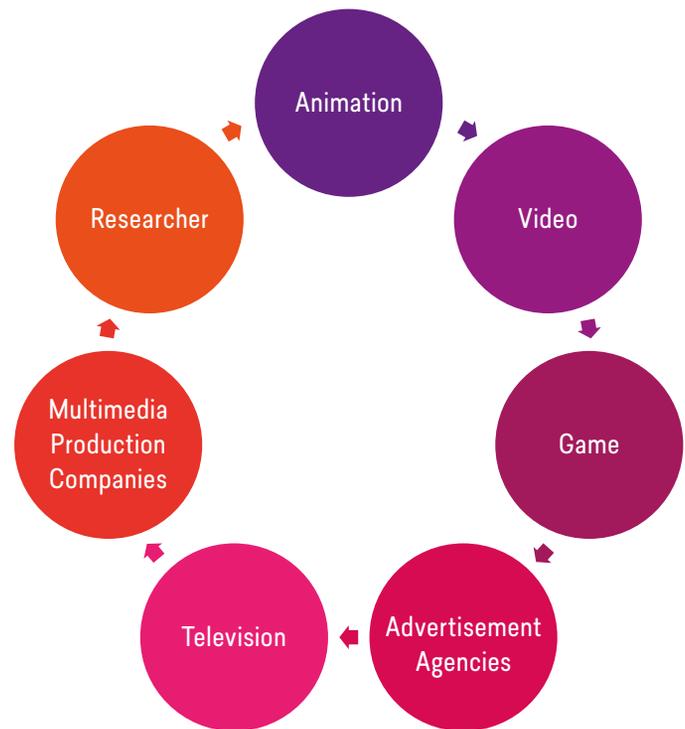
Table 16. Eskişehir Anadolu University Animation Department - The Number of Students

Number of Graduate	Number of Student
329	179

Source: Eskişehir Anadolu University

329 people graduated from Eskişehir Anatolian University Animation Department. The number of students is currently 179. There is also an MA in Animation at the university.

Animation graduates can be employed in the fields listed in Table 17.

Table 17. The Fields which Animation Graduates Employed

It is observed that Eskisehir Anadolu University graduates have worked in leading animation studios in the world and those graduates have been placed in many successful business and projects. Kaan Kayımoğlu is one of these graduates. Kayimoglu has been working in San Francisco for Zynga and Activision. He has also worked as an animator in games of major animation films such as Finding Nemo and Tangled.



Kaan Kayımoğlu²⁴

Onur Senturk is a successful animator on the international scene. His main studies are Film generation of “The Girl with The Dragon Tatro”, Amnecy International Pens film, Asics advertisement film, Algida advertisement films etc. Candaş Şişman and Deniz Kader work in fields of exhibition arrangements and video works. Project named “Haydarpaşa-Yekpare Projection Mapping” is one of their important works. Kubilay Kocaoğlu, who continues his studies in England, produced animations for Avengers, Gravity, Wrath of the Titans, Guardians of the Galaxy and Sherlock Holmes

films. Yıldırım Çınar and Mahmud Asrar work on comic strips of Superman Avengers, Iron Man etc. Ahmet Tabak served as chief animator in the movie “Bad Cat Şerafettin”. He is also working in many commercials. Turgut Akaçık continues to work as an advertising director after long time playing the animations of the character of Arçelik Çelik. Akaçık’s “Don’t Go” short film work has been a tremendous success, winning two awards at the Annecy Animation Film Festival.

Apart from Animation Department of Eskişehir Anadolu University, another institution that can contribute to the animation industry in Eskişehir is the R & D and Innovation Coordination Unit Technology Transfer Office. ARINKOM TTO office, its short name, continues its activities in Eskişehir Anadolu University since January 2014.

The main objective of ARINKOM TTO; “To accelerate research, technology development, innovation and technology-based entrepreneurship activities in Eskişehir and to ensure that Anadolu University’s technology transfer and commercialization potential of information is best utilized for the benefit of the region, country and world.”

Its main services can be listed as follows:

- Project Information and Support Services
- University-Sector Business Association Services
- Support Services for Intellectual Rights Processes
- Technology Assessment Services
- Teknogirisim and Access to Capital Support and Information Services
- Project Based Internship (PBI) Services
- Legal Consultancy and Contract Management Services

²⁴ <http://www.galeridiani.com/galeri/detay/kaan-kayimoglu-my-people-resim-sergisi/3>, 02.08.2016

It is possible that animation studios located in Eskişehir can benefit from these services.

Animation Research and Development Center was established within Anadolu University by BEBKA's 2014 Cooperation and Development Financial Support Program.

There are Motion Capture system, Green Screen Studios, Wacom Cintiq laboratory, Render Farm and 3D Printer systems in this center.

Because of the lengthy and costly process of animating characters with a natural look with traditional animation methods, the motion capture system can reduce the time and cost problem the least.

The movement data can be transferred to the computer environment using real actors with 2 drawing workshops, 1 computer workshop, 1 cintiq drawing tablet workshop and editing room, 1 green screen and motion capture studio, 7 camera facial movements in the center and 12 other camera motion capture systems.

Afterwards, these data can be created in computer environment and applied to virtual actors, so that virtual character animation can be performed. Because of the lengthy and costly process of animating characters with a natural look with traditional animation methods, the motion capture system can reduce the time and cost problem the least.

The establishment of the Animation R & D Center and the integration of the technological infrastructure with the courses have opened the way for the students to meet new technologies in the field of animation. In addition, animation studio in Turkey is possible to benefit from these centers. It is foreseen that the center will contribute to the opening of new employment areas in the region, as well as strengthening education and technological infrastructure in the field of animation.

3.2.1.2. Eskişehir Osmangazi University

The establishment of Eskişehir Osmangazi University dates back to 1970 and has a total of 29,822 students. There are 10 faculties, 5 institutes, 26 research centers, 1 college and 4 vocational colleges in the university.

Table 18. Eskişehir Eskişehir Osmangazi University Number of Units

Eskişehir Osmangazi University Number of Units					
Units	Faculty	Institute	Research Center	College	Vocational School
Number	10	5	26	1	4

Source: ÖSYM, YÖK, Anadolu Üniversitesi, Eskişehir Osmangazi University

Eskişehir Art and Design Faculty, one of the faculties located at Osmangazi University, was established in 2009. The main parts of the faculty are as follows:

- Visual arts
- Visual communication design
- Industrial Product Design
- Fashion and Textile Design

The vision of the faculty is to educate artists and designers who can compete nationally and internationally. In line with this vision, their duties are determined as follows:

- To provide theoretical and practical education in art and design subjects,
- To use traditional and modern tools and equipments in teaching,
- To develop intuition, understanding and presentation techniques,
- Creating opportunities and opportunities for artists and designers to emerge their abilities
- Emphasize that art and design are for all living things.

Another institution that interests in animation industry is Eskişehir Osmangazi University Technology Transfer Office Application and Research Center which is located in Eskişehir Osmangazi University. The center, its short name ETTOM, started its activities in February 2015. ETTOM's main objectives are to contribute to economic and social development by making use of national and international financial support programs, collective dissemination of produced information and transformation into commercial product, management of intellectual and industrial property rights and encouraging academic entrepreneurship by following universal approaches.²⁵

ETTOM can serve the following issues:

- Promotion and Awareness
- Training and consultancy
- Project management
- Access to Financial Resources
- Problem solving
- Intellectual Property Rights
- Licensing
- Commercialization
- Entrepreneurship
- Cooperation and Coordination

Animation studios taking place in animation sector in Eskişehir are likely to benefit from ETTOM services.

3.2.1.3. Bursa Eskişehir Bilecik Development Agency (BEBKA)

BEBKA is a public institution supporting to sectors that have the potential in TR41 Region. Animation industry is one of these sectors in Eskişehir. BEBKA tries to increase its national and international recognition and to contribute to the goal of becoming Turkey's animation center. BEBKA has carried out many activities related to animation for four years. The 1st Anatolian Animation Festival was held in 2015, the 2nd Anatolian Animation and Digital Works Festival was held in 2016 and the 3rd Anatolian Animation and Digital Works Festival was held in 2017. These events have been the most remarkable in terms of bringing together industrial players in Eskişehir. BEBKA will organize Eskişehir International Animation Film Festival as of 2019.

3.2.1.4. Anadolu Technology Research Park (ATAP)

Anadolu Technology Research Park (ATAP) hosts many

²⁵ <http://ettom.ogu.edu.tr/>, 29.06.2016

animation studios in Eskişehir. Animation studios that carry out their activities in offices allocated by ATAP benefit from tax exemptions and SGK incentives.

3.2.2. Animation Studios

Eskişehir has a very suitable investment environment for animation studios. Especially the animation department which is located in Anadolu University provides many advantages for both studios and students. Animation studios operating in Eskişehir are shown in Table 19.

Table 19. Animation Studios in Eskişehir

Resimli Filim
Düşyeri Çizgi Film ve Canlandırma
Zahiri Animasyon
Flamingo Animasyon
Düşlerevi Eskişehir
Yoyo Film Eskişehir
Siyah Martı Eskişehir

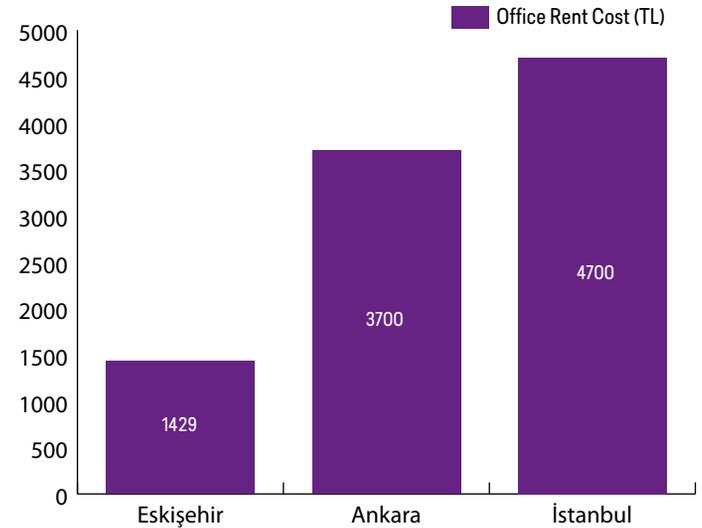
It is known that animation studios located in Eskişehir produce important animated films and these productions provide considerable contributions to the Turkish animation industry.

Animation studios in İstanbul have started to open their branches in Eskişehir due to the availability of cheap labor and appropriate investment environment. About 50 people are employed in animation studios operating in Eskişehir.

3.2.3. Labor and Life Costs

Eskişehir is among the most developed cities of Turkey due to ideal population, human capital, culture, art and infrastructure facilities. In Eskişehir, whose population is close to one million, life and investment costs can be cheaper than relatively developed cities.

Table 20. Office Costs



Life costs are lower in Eskişehir than developed cities such as Istanbul and Ankara. As can be seen from Table 20, the rent expenses for the workplace in Eskişehir are 1/3 of Istanbul.

It can be said that animators employed in the animation sector earn an average of \$ 750 a month. It can be said that the investment costs within the scope of operating expenses are quite suitable in Eskişehir.

CONCLUSION

Looking at the developments experienced in the animation sector in recent years, it is seen that worldwide industry has started to progress through cooperation between countries and co-production agreements

between studios. In this direction, efforts are being made to develop cooperation environment with different countries which have growth strategies in sectoral sense in order to gain more momentum in our country and in Eskişehir.

Our country is in a position of being an open market for development and cooperation with its quality manpower in the animation sector, low production costs, and the position and living standards of Istanbul, Ankara and Eskişehir, where animation studios are mostly located. Developments around the world are followed by our country animation companies, participation to the related fairs is ensured and these works are reinforced with the support of the State.

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