

**“MUSIC INDUSTRY IN TURKEY: AN ASSESSMENT IN THE CONTEXT
OF POLITICAL ECONOMY OF CULTURAL PRODUCTION”**

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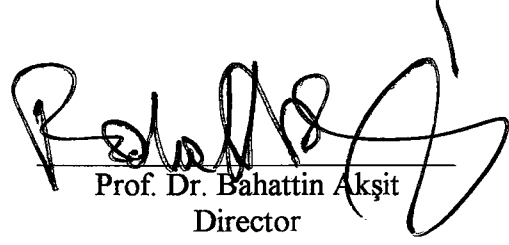
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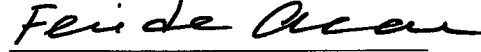
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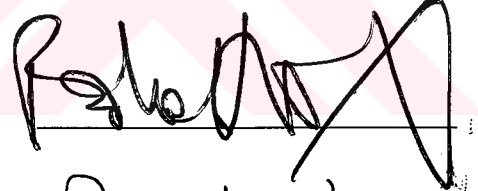

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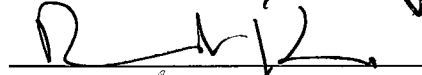

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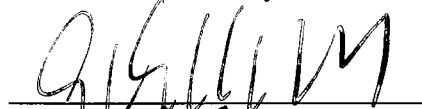
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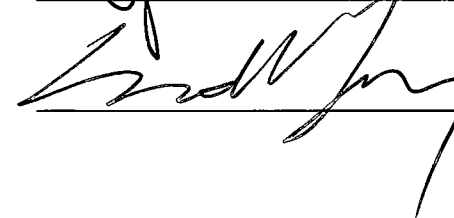
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ABSTRACT

MUSIC INDUSTRY IN TURKEY: AN ASSESSMENT IN THE CONTEXT OF
POLITICAL ECONOMY OF CULTURAL PRODUCTION

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This thesis analyses the development of music industry in Turkey in the context of a critical political economic approach. In addition to the analysis of how music (as a cultural product) is commodified as a consequence of particular historical transformations, the questions concerning the process of capital accumulation in the field of musical commodity production, the process of the specific articulation between the economic and cultural spheres (especially in the process of the internationalisation of capital), and finally how these processes function (and to what extent they are valid for) Ottoman/Turkish practices are the basic foci of this study.

Keywords: Commodification, culture industry, music industry, musica practica, political economy, popular music, recording industry, Turkish music.

ÖZ

TÜRKİYE'DE MÜZİK ENDÜSTRİSİ: KÜLTÜREL ÜRETİMİN EKONOMİ POLİTİĞİ BAĞLAMINDA BİR DEĞERLENDİRME

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Bu tez Türkiye'de müzik endüstrisinin gelişimini eleştirel ekonomi politiğin yöntemsel çerçevesinde incelemektedir. Müziğin kültürel bir ürün olarak nasıl ve hangi süreçler uzantısında metalaştığı ve böylece günümüzde kültürel bir meta üretimi olarak müzik üretimi üzerinden sermaye birikiminin nasıl sağlandığı, bu sürecin (yine sermayenin dolaşımının sağlanması adına ve sermayenin uluslararasılaşması sürecinde) örneğin kültürel alanla ekonomik alan arasında nasıl eklemelenmelere yol açtığı ve özellikle Türkiye'de bu sürecin nasıl işlediği (Türkiye'de kültürel üretimin endüstrileşmesi sürecinde bir örnek olay olarak) bu çalışmanın odağındaki temel sorular olmuştur.

Anahtar Kelimeler: ekonomi politik, kültür endüstrisi, metalaşma, musica practica, müzik endüstrisi, popüler müzik, Türk müziği.

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CHAPTER 1

INTRODUCTION

Most part of what we hear or listen to in our daily lives as music is produced and distributed through a complex industrial process. Though it is quite stunning, we should acknowledge that irrespective of its form, the music that reaches us is a mechanically produced and reproduced industrial "product". As a matter of fact, in this study that concentrates on the music industry, and through situating musical production as an indispensable element of cultural commodity production, an analysis of the development of music industry and the structure of its current organisation is presented.

Currently, the production and distribution of music, like other products of media, is extensively organised and realised as an industry and business by multinational media conglomerates. However, music appears as a more specific and distinct form of industrial organisation, since it is free from several limitations and constraints like geographical availability, time constraints, or consumer income that are common in the production and consumption of other media products. Almost everyone everywhere, and regardless of their

intentions, listen to the music that is produced and distributed by the "culture industries". Currently, the products of the industry are so diversified that almost no musical style is excluded in the repertoire of music producers. Thus, there is always a musical style, which is commercially available for everyone to feel pursued by the music.

As Chaffee (1985) suggests, "popular music is perhaps the most international mode of communication". In this context, music industry has invaluablely contributed to the making of the multinational entertainment corporations. Moreover, in the face of continuous advancements in entertainment and communication technologies, the music industry manages to remain as an integral component of the cultural production within entertainment sector.

However, the study of music as related to media is a relatively new field and it has been neglected in the mainstream literature, which had extensively focused on TV and film studies until last twenty-five or thirty years. Nevertheless, currently, music has become a phenomenon of worldwide significance. As a product of culture industries, music has wide ranging effects on our daily lives utilised through multiple media not only as records, but also as integrated with other forms of mass communication ranging from music videos to any form of TV programs, and films to CD-ROM games, magazines, or books.

As a consequence of the advances in mass communication technologies, the increasing promotion of music through multiple media is also accompanied with the rising interest in popular music within media studies. However, the ongoing tendency in most of the studies on popular music has been to analyse music production as if it is merely a symbolic production and treat music as an independent variable in examining particular practices of cultural (music) consumption.

However, this study aims to analyse music production in the context of a critical political economic approach. This is not to suggest that symbolic character of cultural production is unimportant, but on the contrary, this study questions how symbolic production is integrated to economic categories in contemporary capitalism. In order to understand certain dimensions of a complex relation, the analysis of music production is chosen as a significant case. In this context, it is especially important not to forget that popular music has developed as a commodity, which is produced, distributed, exchanged and consumed within an industrialised production process. As Negus (1992: 1) states, "the quest is for entertainment icons whose sounds and images can be inserted into the media and communication networks which are spanning the globe. As the twentieth century ends, the music business is one integral component of an increasingly global network of inter-connected leisure and entertainment industries".

As a matter of fact, through presenting an analysis of the functioning of music industry, one of the basic objectives of this study is to contribute to a proper understanding of media of modern capitalism in which the communication systems are articulated not only to the routines of everyday life but also to the material production process. These articulations signify the fact that media increasingly occupy a greater space both in individual and in social life. One of the basic reasons behind the expansion of media can be found in the development of forces of production together with the development of means of production, which is particularly shaped by the advances in new information and communication technologies. Thus, it is also possible to evaluate the relation between the development of capitalism and the expansion of media in the context of a determined articulation between the development of media and the increasingly complicating capitalist social formation.

Such a dialectical relationship reveals one of the distinctive features of modern society: the cultural production is extensively realised within the media. This is to say, cultural production (and reproduction) is either directly carried out by media, with media or through media. Consequently, rather than merely transmitting information, the primary function of the media is to produce and spread symbols. In this context, one of the crucial units of analysis appears as the consumption of these symbols through which, as mediations, individuals not only signify their own or others'

life but also develop respective social and political actions. It is true that such an analysis invaluablely contributes to reveal how particular cultural practices are articulated to the political through cultural consumption. However, in order to develop a proper understanding of media of modern capitalism, the unit of analysis should be extended to uncover symbolic production as a commodity production aiming to realise value through exchange in the market. In other words, although it is almost impossible to ignore the symbolic dimension of cultural production and consumption, it is erroneous to suggest that cultural commodity is merely a sign.

The complex and multiple articulations between the political, cultural and economic realms, of course, require to develop a proper understanding of the ways in which the economy is being restructured, as well as the changes in cultural and political realms, which respond to (and often reinforce) the respective restructuring of the economic sphere.

The nature of this restructuring can be traced back in the context of a new phase of transnationalisation essentially initiated by the practice of "Fordist" regime of accumulation leading to a certain "American cultural hegemony" which later went together with the discourse pertinent to "post-industrial society and politics" and which stressed the primacy of consumption leading to the realisation of "pleasures" and thus announcing the "liberating potential" of popular culture.

The new phase of transnationalisation, today, which is often referred as globalisation, signifies a strategy of negating any mode of regulatory control over capital circulation, in which multinational corporations (of which cultural industries constitute a great portion) could easily redefine and restructure the global market through establishing an absolute control over input markets for capital and labour.

In this conjunction, the process of industrialisation of culture can be considered as a specific process of capital valorisation adapting to new fields with specific conditions and which entails specific articulations of culture and economy. This process renders valorisation of capital much more profitable than many other "conventional sectors" of economy. As a matter of fact, Negus (1992) notes that currently the music industry is as important as the steel industry for English economy since the exports of music albums, reported to be nearly 1.6 billion pounds for the year 1992, has exceeded the total amount of exportation of the products of steel industry.

Theoretical Remarks

Here, we should, I believe, recall one of the well-known distinctive characteristics of capitalist mode of production, which is all commodity production is (made) for a capitalist market. Commodity production in the "cultural sector" is not an exception. If this is the case "the materiality of all

production", as suggested by Raymond Williams (1977), can appear as a basis for mediation between the base and the superstructure, for what maintains and predates the existence of a capitalist market is the "direct material production of politics" to establish a respective social and political order. In this sense Williams (1977: 92) argues that "from castles and palaces and churches to prisons and workhouses and schools; from weapons of war to a controlled press: any ruling class, in variable ways though always materially, produces a social and political order ... The complexity of the process is especially remarkable in advanced capitalist societies, where it is wholly beside the point to isolate production and industry from the comparable material production of defence, law and order, welfare, entertainment and public opinion". This point is crucial, for Williams, "to understand the material character of the production of a cultural order". However, following Garnham (1990), it should be added that, rather than merely focusing on the shared materiality of the various social practices, what is important to grasp is their specific and diverse economic articulations in a historical manner, so that what Marx and Engels meant in *The German Ideology* by "control of the means of production" can be recontextualised historically as a continuously shifting relationship, which can be redeployed, as an analytical tool, to elucidate the distinct modalities of cultural production.

Indeed, the analysis of the specific articulations between the economic level and the cultural sphere should be built on

the basis of the relationship between the "material conditions of production" and "ideological forms". This relationship denotes to the distinction suggested by Marx in his *Preface to A Contribution to the Critique of Political Economy* and referred in the later chapters of this study as the distinction between "the mental and the material".

The changes in the economic foundation lead sooner or later to the transformation of whole immense superstructure. In studying such transformations it is always necessary to distinguish between the material transformation of the economic conditions of production, which can be determined with the precision of natural science, and the legal, political, religious, artistic or philosophic -in short ideological forms in which men become conscious of this conflict and fight it out (Marx; 1975: 426).

As is seen Marx, here, suggests two distinct levels of analysis, one of which signifies the unconscious -i.e. the material production which is determined by the forces "beyond our will"- and the other, signifying the conscious -the ideological forms which give birth to the "lived experiences" especially on the basis of capital-labour relationship. In capitalist social formations, this relationship becomes highly mediated and appears, in part, as a cultural form for it is the representation of the material in symbolic forms.

Considering the relation between this distinction and the "materiality of cultural production" may contribute to our attempt of understanding the specific articulations between the economic level and cultural sphere. The real existence of

symbolic forms depends on their specific relation to the material (as suggested by the term "representation"). In other words, "materiality of cultural production" -in the sense that Williams (1977) uses the term- is a process signifying the translation of the immaterial cultural forms, which concedes to the functioning of ideology to regulate the organisation of new needs (and use values), to social forms, through which the former gains material effectiveness. It is only the level of social forms in which the social relationships are organised around the principle of the domination of commodity exchange. Concurrently, all extended social relationships under capitalism is determined and generalised through its basic abstracting and generalising motive: reducing everything to the realm of equivalence of exchange value.

But, it should be noted that as Garnham (1997) argues, ideological forms do not operate at the level of the system of exchange values, thus it should be misleading to reduce ideological forms, which are primarily concerned with difference, distinction and heterogeneity, into the realm of equivalence of exchange values. However, it is the general functioning of culture industries, particularly within the stage of monopoly capitalism in which "the superstructure is industrialised" (Curran; 1977, Garnham; 1990), that contributed to translate ideological forms into "distinct" life experiences; and through obscuring the positions within the capital-labour relationship they recontextualised the relationship of ideological production to total social

experience in a particular way melting the "difference" and "distinction" in the pot of "consumption". Consequently, culture industries can be said to occupy an intermediary space in which, on the one hand, their operations are economically determined within commodity production and on the other hand they perform an ideological function operating within the politics and culture. In this sense, symbolic production is articulated to commodity production and contradictions are transformed into profit motives under the generalised abstraction of "consumption patterns" - a process realising the capitalisation of culture for valorisation of capital within that sphere.

Penetration of capital into cultural production and thus the commodification of cultural production signify a specific process of articulation between use-value and value, in which the use value acquires a direct economic character.

Marx, in his analysis of capitalist commodity production, had suggested that commodities have a double existence, as repositories of "use value" and of "(exchange) value". As is known, exchange value of a commodity is realised only when the commodity is exchanged at the market and its use value is realised at the moment of its consumption. The argument presupposes that "in the commodity, the use value is a given thing with definite characteristics" (Marx; 1990: 980). However, in order for a commodity to be exchanged, its use value should be created before it enters to market -

logically, this is also a precondition for the possibility of realising the use value.

As a matter of fact, commodification is generally defined as a process of transforming use values into exchange values. However, this argument, although valid for all other commodity production, is insufficient to explain the whole process of commodification in cultural production. In this context, in order to develop a comprehensive understanding to analyse the commodification of cultural production as an outcome of a specific process of the articulation between use-value and exchange value, two interrelated frameworks can be suggested: first, the process of creation of the use value of cultural products as a part of the production process of cultural commodities should be distinctively analysed, and second, the problem of human needs should be reconsidered.

Marx, in his analysis on the capitalist commodity production (particularly in the *Results of the Immediate Process of Production* -in volume I of *Capital*) had considered the creation of use values as a part of the labour process.

Looking at the process of production from its real side, i.e. as a process which creates new use values by performing useful labour with existing use values, we find it to be a *real labour process*. [emphasis included] (Marx; 1990: 981).

In this sense, in the labour process, Marx argues, it is possible to find the transformation of things in which use values function as raw materials (or means of labour) to

create a new and different use value -i.e. the product. This can be labelled as a process of creating "second order use values"¹ in which their existence, although depending on the *objective conditions of production* (material means of production), is realised by a distinct moment, "the active capacities for labour, labour power expressing itself purposively", which signifies an opposing sphere -i.e. the *subjective conditions of labour*.

The relation between these two distinct moments, or in other words, the process as a whole, is conceptualised by Marx as the *use value of capital* that functions to create new use values:

The total labour process as such [objective conditions of labour functioning as a means to produce its subjective conditions] with the totality of its objective and subjective interactions appears as the total manifest form of the use value, i.e. the real form of capital in the process of production (Marx; 1990: 981).

This analysis of Marx, focusing on the real labour process, can be extended to include ideological forms, through which the creation of new forms of use values is possible. Accordingly, the process of representation is to be considered as a real process within which consciousness is to be situated within the process of the transformation of the lived experiences represented in these symbolic forms. Concurrent to the production process in which second order use values are created through the transformation of things in which use

values function as raw materials, transformation of the "real experiences", as a particular instance of ideological production, leads to the creation of new "human needs". This latter process cannot simply be collapsed into the economic processes. However, as a precondition of the creation of new use values from new needs, this process appears as a part of material cultural production (in the sense Williams uses the term) since it contributes to the production of a cultural order, which makes the cultural commodity production possible. This can be considered a starting point in focusing on the transformation of cultural production into capitalist commodity production.

Both the process of commodification of cultural production and the form that the cultural commodities take have some notable differences from other conventional sectors of commodity production. The principle diversing aspect that can be identified within the cultural commodity production is the problem of the realisation of value, which entails an examination of the development of commodity form, as a process in cultural production. Here, again, the departure point for such an analysis can be based on the specific use-value/exchange-value relationship embedded within cultural commodities.

Use-value, or the utility of a commodity to its consumer, in general, depends on the ability of that commodity to satisfy particular needs. Marx states that needs are not

limited with the "material wants" and may also spring from "fancy" as well as the "stomach". The specificity of cultural commodities lies in the fact that the utility of these kind of commodities are symbolic. In other words, their use value is merely for satisfying the wants from "fancy". Moreover, in the consumption process, cultural commodities are not exhausted when they are satisfying a want. This depends on the intrinsic nature of the commodity form of cultural goods. To understand the circulation of capital within cultural commodity production, and thus the nature of reproduction of capital (since the commodities are not exhausted in the process of consumption to necessitate re-consuming in this sense), we must define the components, which make up a cultural commodity.

In the common understanding, it is the exchange value, not the use value that enters into the economic processes, since capitalist commodity production is organised around the principle of production of surplus value. If only the realisation of exchange value produces the surplus value, then value form of the commodity depends on the process of creation of exchange value -in other words, on the amount of socially necessary labour time, which has been invested on its production. Consequently, the value form depends on the labour that the commodity contains, not its use value. However, it is the utility of a commodity (its use value) that determines the commodity form. Hence, commodities must also be repositories of use value; otherwise they could not be exchanged at the

market for consumption. But, in its common understanding, this is left outside of the economic processes.

However, to understand the nature of contemporary capitalist commodity production (in particular, the cultural commodity production), I believe, a modification is needed in the common understanding. The success of contemporary capitalism as a system lies in its capacity to transfer huge number of commodities to realise their exchange value in the market. This simply means that what is produced is (to a large extend) consumed, which is, in fact, a precondition to avoid stagnation, as well as demise of capitalism through depression. Consequently, it can be concluded that what determines the continuity of accumulation of the surplus is the continuous modifications that occurs in the patterns of accumulation. As is known, in the present stage of monopoly capitalism, the continuous expansion of commodity production accompanied with the continuous capital accumulation entails an imperative for the creation/production of demand for goods. Production of new needs, as an indispensable part of the process of commodity production, is not only an ideological production but also a process of construction of new symbolic utilities (i.e. production of new use values through which the structural tendency of falling rates of profit seems to be frozen). Moreover, this process also reveals, as stated by Kline and Leiss (1978: 18), "the realm of needing" in contemporary capitalism "has become an integrated function of the field of communication".

Within this framework, it can be argued that the industrialisation of culture in monopoly capitalism primarily signifies that contemporary capitalist production is a process that organises and establishes an absolute control over use values through subjugating them via the exchange value. In other words, it is a process in which the system of abstract exchange value manipulates the system of meanings within which cultural commodities are located.

In the light of these theoretical considerations, in this study it is argued that the ultimate end of cultural production in a capitalist social formation is valorisation of capital. Music production, the subject matter of present thesis, is a part of this process. However, the possibility of commodification of cultural production depends on the existence of a historically constructed specific articulation between the "use value" and "value", in the sense that the extent the use value of cultural products is dominated (manipulated) by the exchange value presents the degree of control over cultural production and consumption by the culture industries.

Bearing these theoretical considerations in mind, it is possible to suggest that intellectual production at the stage of monopoly capitalism is situated in an intermediary space between "base" and "superstructure". Consequently, it is possible to discern two distinct but related moments in this context: Culture as a superstructural level and culture as a

material production. Similarly, production of use values bears this double characteristic, they emerge as a product of a hegemonic struggle, and they are a part of the material production at the same time (i.e. contributing to the formation of a cultural order within which the production of the cultural products as commodities for the capitalist market becomes possible). In this sense, the production and exchange of cultural commodities become dominant forms of cultural relationships. However, this never entails that the content of cultural commodities, or their consumption would necessarily support the dominant ideology. In other words, the exchange of cultural commodities and their consumption does not necessarily secure the functioning of an "ideological effect". Furthermore, at some instances, the use value of a particular commodity to its consumer may be incompatible with the dominant ideology (for instance, purchase of an album of Leonard Cohen, a revolutionary singer²).

Plan of The Study

In the development process of industrialisation of culture the twentieth century has witnessed a tension between "music as expression" and music commodity. The completion of the process of industrialisation meant the termination of this tension on behalf of the latter. The industrialisation of music means a shift from active musical production to passive pop consumption, which is also a process of a general musical deskilling according to Frith, who argues that:

The rise of the multinational leisure corporations means, inevitably, efficient manipulation of a new, global pop taste that reaches into every first, second and Third World household like Coca Cola (and with the same irrelevance to real needs). (Frith; 1992: 50)

This being the general case, the present study on the development of music industry in Turkey is based on the assumption that in advanced capitalist countries, the music industry is constructed on a basis of industrial capital through which the surplus value is extracted in a closed determined articulation with the production, organisation and manipulation of the use value of music. But in the case of Turkey, it is argued that until late twentieth century the music sector is built upon the operations of the commercial capital which is organised and manipulated by the intrinsic use value of music (i.e. not created or manipulated through an industrialised production process but already existent).

Consequently, it can be deduced that, the degree of the control exercised by capital over the demand would display the structure of music production - more precisely, the organisation of production as well as the ownership patterns. Hence, the commodity form of music and the source of value and surplus value is determined in this particular process³. In other words, in this study, it is implied that the transformation of musical production to a cultural commodity would be concurrent to the development patterns of capitalism.

In line with these considerations, this study is organised in two parts. In the first part, the emergence of music as a commodity under (Western) capitalism and its concomitant current organisational form as an industry is analysed. In the second part of the study, Ottoman/Turkish musical tradition and the specific historical conditions that obscured a similar development with Western capitalism is scrutinised and it is completed by a comprehensive inquiry into the current situation of the Turkish music market.

The first part of the study is comprised of two chapters. Following this introduction, Chapter 2 examines the specific historical conditions that gave birth to the emergence of music as a commodity in Western capitalism. A precondition of the production of music for exchange at the market is the alienation of "musical work" as a product of labour. In this context, it is argued that the alienation of musical activity had begun under Western Feudalism, and the profound consequences of this process has been the "appropriation" of music by dominant classes much before the intensification of exchange relations. The importance of this process is that through the alienation of music activity (which challenges "music as expression") and objectification of musical work, the historical conditions that lead to the "material production of culture" has begun to emerge. As a matter of fact, the production of music for the market is a development specific to capitalist social formations and it had appeared in Western Europe only at the eighteenth century parallel to

the establishment of capitalism as a dominant mode of production. Consequently, parallel to the rise of the social and economic order of bourgeoisie, music not only appeared as a hegemonic apparatus of the cultural power of dominant classes but also transposed into a commodity to be exchanged at the market as an outcome of this process.

In Chapter 3, the development of the music industry in the West, which is founded on the historical conditions outlined in Chapter 2, is examined. Moreover, in Chapter 3, not only the current structure of music industry (in the West) and the ownership patterns embedded within the production process of music as commodity is discussed, but also the means, through which tastes are manipulated and new needs are produced, are analysed.

The second part of the study is comprised of three chapters and examines Ottoman/Turkish musical practice together with the formation and development of Turkish music market. In Chapter 4, it is argued that the Ottoman musical practice, which was elevated on the basis of a specific social and cultural organisation, had signified a dealienated structure - i.e. music remained as a "mode of expression" as a reflection of the "collective memory". Moreover, it is also argued that, contrary to Western experience, the dissolution of this structure did not lead to the objectification of music -which appeared in the West as a precondition of the commodification of music production. The consequences of this historical

development marked an obscurity in the development of the production of music for the market.

Chapter 5 is devoted to the analysis of the development of music sector in Turkey. The chapter begins with the description of the economic policies of late Ottoman Empire and early years of Republic to understand how these policies affected the structuring of music market in Turkey. Accordingly, it is argued that the existence of a music sector under the control of particular European and American record companies depended on the "open door policy", which had been carried out until the early years of Republic (1929). During these years, foreign capital investments had been realised in many sectors of the economy, including the music sector. Hence, it is claimed that this structure, rather than fostering the development of an industrial production of music, reinforced the dominance of commercial capital for what characterised the structure had been the extensive transfer of accumulated surplus to foreign capital (rather than further capital investments in the domestic market) in the early years of the market.

In contrast to the absolute domination of foreign capital until 1960s, foreign music has never been a dominant format in Turkish music market. In this sense, major record labels functioning in Turkish music market has never been successful in manipulating music production and has always remained depended on local factors. Due to the reasons outlined in

Chapter 4, together with the consequences of cultural policies of Republic outlined in Chapter 5, it is argued that it has not been possible to extend commodity form in music production (particularly producing new genres of music and accompanying new audiences). Consequently, neither multinational record companies, nor domestic companies could manage to manipulate demand for music to construct particular consumption patterns, which caused a highly instable market structure in Turkish music. More importantly, it is claimed that this structure hindered a development towards industrialisation of music production.

Both Chapter 4 and 5 construct the historical basis for understanding the current structure of Turkish Music Industry. Thus, an analysis of the current structure of Turkish sound-carrier market is presented in Chapter 6. The analysis of the market depended on several sources: First, the data (which was compiled from the record books of the Directory of Copyrights of Ministry of Culture and Tourism by the author of this study) about the album sales on the company basis between 1990-1998; and second, the interviews made with several music producers, music critics, musicians, studio owners, radio directors, chairman and board members of MESAM and MÜYAP and the director of the Directory of Copyrights of Ministry of Culture and Tourism.

Chapter 6 begins with the description of the general characteristics of the market in the context of its size and

value together with the analysis of composition of capital, its change through years and the market position of multinational corporations in relation to domestic manufacturers. Secondly, the organisational structure of major and small record companies is examined; and finally, the production process of popular music is analysed.

Finally, it can be argued that, in contrast to the development of music industry in Western capitalist world, for the reasons outlined in Chapters four and five, industrialisation of Turkish music production exhibited a delayed development and it can be added that the process is still immature although, by 1990s, notable developments in the organisation of music production to manipulate demand for music and to create new audiences are realised.

Notes

¹ Here, the term "second order use value" is suggested to denote to the new use value appeared within the labour process. As Marx states, "in the commodity, the use value is present directly, immediately, whereas in the labour process it becomes manifest as the *product*." (1990: 979). Second order use value is related with the *real labour process*, in which the traces of purposive labour can be revealed. However, this process is completely obliterated in the finished article (the individual commodity) which "has left its mode of origin behind it" and which "contains preserved within itself the process in which particular useful labour was performed and objectified".

² Such instances are generally misinterpreted through suggesting that "the system also offers people particular sources to take a stand against the established constraints" (Fiske 1992: 157). For example, in United States, the analysis of the advance of "Rock culture" -it is suggested that Rock is an oppositional culture, which had sprung from youth-, can be considered as a typical example. Accordingly, the "oppression" is regarded as economic whereas the moment of resistance is situated within the culture as if these realms are completely autonomous. This seems to be a mere tautology, since rather than a mutual determination, a one sided conduction (from cultural to economic) is conceptualised in such analyses. Hence a resistance organised in the cultural realm is thought to supersede the oppression through economic. However, the organisation of production within the realm of culture (or the commodification of culture) and its driving forces signify the fact that organisation of a counter hegemony is almost impossible unless it is accompanied with a material production of particular superstructures. At the same time, this can be interpreted to show the real power of contemporary capitalism in which the logic of capital accumulation pushes the political and ideological level into the economic categories forcing them to function through exchange relations.

³ It should be stated that there is no unique commodity form for cultural products. The disc on which a song is recorded is a commodity form. But at the same time, the audience is also a commodity in the sense that it has an exchange value on the basis of revenues from copyrights. Moreover, various forms of ratings (music lists generated by magazines, music televisions or radios) are also commodities, since audiences are delivered to advertisers on the basis of these ratings, thus they also have an exchange value. However, the existence of various commodity forms, which extends the possibility of realisation of value, depends on the existence of an absolute control over

the demand. For example, the music industry constantly needs new audiences for the continuity of capital accumulation. This entails production of new audiences -i.e. creating new audiences as defined by new genres of music (like heavy metal, punk, funk, hip hop). The need for creating new audiences, which is at the same time analogous to production of new symbolic needs, brings a pressure towards financing. This is performed through advertising finance (promotion). Hence, in the process of creation of false needs advertising sector functions as an integrated sector to culture industries. Moreover, the fact that a value created in a sector can be realised within other sectors entails the existence of a monopolistic structure for maximising profits. In this context both vertical and horizontal integrations in media ownership guarantees a continuous and huge amount of capital accumulation.



CHAPTER 2

MUSICA PRACTICA

The purpose of this chapter is to understand the historical conditions that gave birth to a specific commodity: music.

As Attali (1996: 4) notes "music is more than an object of study"; it is also a way of perceiving and a tool of understanding the world. As Marx asserts, "music is the mirror of reality". Through this mirror, one can easily figure out the institutional and cultural challenges, struggles and mutations. For instance, it was not only a mere coincidence that during the renaissance period, for the first time, the vocal music that highlighted individual voices within the choir (either in choral recitatives or in the emerging operatic arias) emerged. As a matter of fact, it was a music opposing to and erasing the medieval plainchant (in which the voices sang in harmony -in a unisonal way representing the negation of individual). Similarly, the enlightenment ideal of rationality and the notion of harmonious order (which later became a dream of bourgeoisie) can be found not only in the texts of enlightenment thinkers but also in the music of the age. Indeed, it is possible to find several parallelisms

between the "general theory of equilibrium" of classical political economy and the music of eighteenth century. As is known, one of the basic premises of the classical political economy was that the harmonious order -in which the exchange was considered as the locus of order- continuously reproduces equilibrium. Hence, progress was defined as a phase of disequilibrium -but as a differential resonance rather than a dissonance that will inevitably be resolved in a new phase of equilibrium consolidating the harmony. Concurrently, the music of the age was representing the "incarnation" of the harmonious order. The basic characteristics of the eighteenth century music was a "perfect harmony" moving towards an end that brought the healing of all distress. As a matter of fact, such a pattern aimed to generate a desire and a belief to enforce the order.

It should be remarked that such parallelisms always existed at all ages and in all societies. For example, the experience of rock music in the twentieth century, has shown that this music was much more than something to be merely listened to, but denoted to a distinct set of meanings through which not only the world we live in was signified in a particular way, but also particular consumption patterns were constructed to articulate its fans to the economic system.

"Theorising the music" is beyond the borders of this study. But, here, it should be stressed that there is a possibility of "theorising through music", in other words, revealing what

music expresses other than melodies encoded in musical notes. As a matter of fact, it is possible to demonstrate how the music, as an element of praxis is translated into a tool for power in a (class) society. More precisely, it is, thus, possible to reveal the implicit structures of domination in a social formation.

2.1 The Context

As a matter of fact, the musical practice, as an element of praxis -the collective action reflected in music, and music consolidating praxis, or the music constituting the collective memory and living in the labour of all- belongs, in its pure form, to primitive communism.

In the Andaman Islands, everyone composes songs, and children begin to practice themselves in the art of composition when they are still young. A man composes his as he cuts a canoe or a bow or as he with it. He then awaits an opportunity to sing it in public, and for this he has to wait dance ... He sings his song, and if it is successful he repeats it several times and thereafter it becomes a part of repertory (Radcliffe-Brown¹, quoted in Attali; 1996: 30).

Roland Barthes (1985a) had suggested the term *musica practica* denoting the everyday practice of music -i.e. music is considered as *lived experience (erleben)*, and as an indispensable element of culture, it lives, breathes and transmitted to following generations. The process of transmission is also a process of change. Hence, *musica practica* is continuously modified in accordance with the

changing "needs" of generations. The absence of an ideological motivation claiming universality and thus the absence of the mechanisms retaining the ephemerality of music seems basic preconditions for the possibility of *musica practica*².

However, it should be remarked that *musica practica* is a medieval term and currently does not correspond to a reality in the sense that it had been experienced hitherto. In the words of Barthes (1985a);

it is the music you or I can play, alone or among friends, with no audience but its participants ... it is a muscular music; in it the auditive sense has only a degree of sanction: as if the body was listening, not the 'soul'; this music is not played 'by heart'; confronting the keyboard or the music stand, the body proposes, leads, coordinates - the body itself must transcribe what it reads: it fabricates sound and sense: it is the scriptor, not the receiver; the decoder. Initially linked to the leisure class, such music has dwindled into a mundane rite with the advent of bourgeois democracy (the piano, the jeune fille, the salon, the nocturne); subsequently it has vanished altogether (who plays the piano today?). ... Concurrently, a passive, receptive music - one of resonance rather than of presentation- has become *music proper* (of the concert, the festival, the record, the radio): playing no longer exists; musical activity no longer manual

In this study I will refer to *musica practica* (in addition to the original usage of Barthes) as a form of crystallised praxis -an unmediated productive activity. In other words, *musica practica* is a technē which is not mediated through technique (or, in general with other mental structures). It

stays as in direct opposition to alienated (and alienating) mental structures. Within this form, then, *musica practica* is as old as language and appear as an expression of consciousness.

The term *musica practica*, then, implies the function of music in a particular social formation. For instance, in an era where social, political, and economic practices were infused with sacredness, music was a means of expression and explanation -a *musica practica* together with (and articulated to) epic narratives and myths- functioning for the reproduction of the social structure. Thus, for Attali (1996: 24)

Before exchange, we see that music fulfils a very precise function in social organisation, according to a code I shall call sacrificial. Codification of this kind gives music a meaning, an operationality beyond its own syntax, because it inscribes music within the very power that produces society.

It is in this context that "music as expression" (signifying *musica practica*) is an unmediated productive activity (it is a "dealienated" structure in the sense that it is an extension of praxis) and this excludes "music as commodity". In other words, *musica practica* is situated within the totality of collective action of man -negating any appearance of autonomy. One of the basic distinctions between *musica practica* and "alienated" musical production, thus, lies in the fact that the "alienated music" has an appearance of an

autonomous existence -which seems to be a precondition of its (later) becoming an object of exchange (a commodity).

Here, my argument is that, it is through music's acquiring a degree of autonomy (as if a life of its own) that a new path of development towards its becoming a commodity under capitalism became possible. Of course, commodification of music within an industrialised production process is relatively recent and peculiar to capitalism, however, materialisation of musical production -a precondition for commodification-, and its becoming an object did not develop simultaneously with capitalism (it was much earlier than the proliferation of capitalist social relations). This asynchrony can find an explanation in the abstruse term "alienation" - and, alienation of artistic production.

As a matter of fact, the artistic production has a double nature, each of which excluding the other. On the one hand, the artistic production, as an aspect of the mental production inseparably coexists with the material production and is highly dependent on its laws of motion. This leads Marx to consider artistic production as an "ideological alienation"³. That is, the division of labour between the mental production and material production under capitalist relations attributes a mediatory role to the former. In other words, mental production as an "ideological alienation" further blurs man's social existence while reinforcing the "real alienation". In this context, it can be concluded that, artistic production,

appears as a terrain in which cultural power is both expressed and reinforced.

On the other hand, the second aspect of artistic production denotes to a "dealienated" structure. Artistic production, as a crystallised form of praxis, has the capacity to challenge and foster change, since it is a creative and transformative productive activity of man. In this respect, it justified the basis for the existence of *musica practica*. In other words, the existence of *musica practica* depended on the condition of labour embodied in the artistic production which in its turn determined the form of the product and its function within a definite social formation. In the Feudal Europe's musical activities, it is not very difficult to see the persistence of *musica practica* in the rural areas because of the low level of complexity in the division of labour together with not yet separated mental and material production. However, understanding the condition of the urban music and its practice calls for a more a more comprehensive analysis. Such an analysis leads us to assert that in the Feudal Europe, two distinct musical practices, namely *musica practica* and an alienated musical production coexisted.

As the artistic production, and in particular musical production, carried through an objectified musical work develops, the artistic production (musical production) becomes an alienated productive activity. In this context, the conditions that enables *musica practica* as a social praxis,

ceases to exist. In other words, the particular dynamics behind the dissolution of *musica practica* can be found in the intricately constructed relationship between the music and alienation. In this context, the emergence of musical notation (written music) can be suggested as a symptom for the advent of such a relation. Accordingly, music, which hitherto appeared as a mode of expressive action of praxis (*music as action*) had now turned out to be an object (*music as text*). The appearance of *music as text* signifies a process of transformation in which something that occurs as a mode of expression is mutated towards becoming an object, in which music as action is utilised to represent itself (as "music as text" rather than collective action). This can be considered a break in which musical practice as a productive action (identified with praxis) is alienated and turned out to be an alienating productive activity. Thus, music appeared as an autonomous object. In this conjunction, music as text, rather than expressing a praxis, emerged as a concrete product of labour, and stood in contradiction with the labour that created it - i.e. as a unique, autonomous and alienated object negating praxis embodied within music as action.

The causes of this break should not be searched within the (hi)story of the 'internal' development of music. On the contrary, it should be evaluated as an outcome of a transformation of a social formation through the development of social division of labour concurrent to the particular

development of productive forces and new relations of production.

One of the most conspicuous consequences of the emergence of music as text is the distance created between creation/production (composition) and performing, which challenged their hitherto unity under *musica practica*. Moreover, the separate existence of music as text (waiting to be represented but its existence endures irrespective of the representation) gives birth to further divisions such as the distance between performing and spectating. This signifies the emergence of a production-consumption relationship in the field of musical production. It can be argued that, music's extensive institutionalisation to acquire a commodity form subject to an exchange relationship in the market can be explained and comprehended through such a framework. Consequently, musical production, under capitalism is an expression of ideological alienation and its product is objectified as a use value to be realised within (or translated into) exchange value at the market. In this respect, the subject of musical practice becomes the object of consumption -and thus commodified. Hence, in capitalism, there is no room for the *musica practica*, for capitalist relations of production challenges such a practice -through blurring praxis in general.

However, transition in this process did not, of course, take place immediately. Therefore, in the due course of

transformation and transition, a certain coexistence of the *musica practica* and an alienated music can be observed under the European Feudalism.

2.2 Feudalism and the Two Distinct Musical Practices

By the twelfth century, the rising distinction between the religious and the nonreligious was also mirrored in the music as the coexistence of "plainchant" and (secular) popular music of villages and "streets".

It was the jongleur, inseparably a musician as well as an entertainer, an itinerant, who was one of the basic actors circulating the popular music within the society. His services were demanded regardless of social classes: peasants, artisans, emerging bourgeoisie and nobility. In contrast to the structured and notated music of the church, jongleur's music depended on his memory; it was the oral history of culture incarnated in the melodies composed by the jongleur. The songs varied from old peasant songs from all over the Europe to satirical songs about current events -sometimes causing them to be imprisoned by the rulers (Robinson et. al., 1991; Shepherd et. al., 1977). Until the end of thirteenth century, this music was an inseparable activity of practical life, something not listened to or watched but something living and continuously changing through an active participation -as a constituting part of the lived experiences, it was a *musica practica*. Concurrently, until thirteenth century, the music played and sung in the villages, in the courts of the nobbles

or in the marketplace was, to a large extent, undifferentiated (Merwe; 1992).

However, the Church and its musical practice stood in direct opposition to the *musica practica*. Analogous to the "double nature" of artistic production (as was discussed in the previous section) the music of Feudalism used to bear a double nature which can only be perceived under the optics of two distinct and mutually exclusive musical practices. In this regards, the decrees of the church, aiming to regulate the musical activity between the twelfth and the fourteenth centuries should be considered not only as a means to assert its own power in the society, but also as revealing the conflict between these two musical practices. For instance, the Church had decreed that;

at saints' vigils, there shall not, in the churches, be any theatre dances, indecent entertainment, gathering of singers, or worldly songs, such as incite the souls of the listeners to sin' (Council of Avignon, 1209, quoted in Attali; 1996: 22).

The church had also prohibited;

granting assemblies of women, for the purpose of dancing and singing, permission to enter cemeteries or sacred places, regardless of considerations of dress [as well as] nuns from heading processions, either within their own cloister or without, that circle churches and their chapels while singing and dancing, something which we cannot allow even secular women to do; for according to Saint Gregory, it is better, on

Sunday, to toil and dig than to dance (Council of Paris, 1212, quoted in Attali; 1996: 22).

Moreover, it had obliged;

priests to prohibit, under penalty of excommunication, assemblies for dancing and singing from entering churches of the saints, may they be subjected, if they repent, to three years' penance (Council of Bayeaux, beginning of the fourteenth century, quoted in Attali; 1996: 22).

The aim of the church was to establish a control over the society, and the music had become one of its means. Thus, it prohibited the (secular) music of the "streets". As a matter of fact, it can also be claimed that the Church had correctly intuited the subversive power in the *musica practica* and had distanced this music from the Church.

However, although the distinction between these *two musical practices* was at the same time signifying a terrain of struggle in the realm of culture, it did not negate a relation of reversibility - i.e. the circulation of the symbolic forms between the classes. In other words, with the infusion of popular music into the plainchant, the melody was introduced into the Church music. Consequently, as an amalgamation of melodies of popular origins and Gregorian sources, a new form of Church music was constructed⁴ (Hoppin; 1978). Especially, by the thirteenth century, the number of instruments and voice parts were further increased and the polyphony consolidated in the Church music (Lewis and Fortune; 1975). In this process, popular music's contribution to the Church was much more than

an inspiration (of the Church), for the popular melodies were directly articulated to the Church music (Hoppin; 1978). However, since the polyphonic reconstruction of these melodies made them unrecognisable in a polyphonic complexity (Lewis and Fortune; 1975), the Church could easily ignore its music's true origin. In other words, it can be argued that the Church, while excluding the musical practice of the popular music, had appropriated its melodies.

The coexistence of many voice parts, each consisting of a separate melody (which constitute a harmony when sung or played together), defines the basic characteristic of the polyphony in music. Musical notation⁵ (encoding the melody in the musical staves of four or five or more lines, each representing a specific pitch) is a precondition for the creation of polyphony. Since polyphonic music is comprised of many voice parts, each part should be encoded appropriately, and in order for it to be performed, decoding is necessary (in order for performers to sing different parts simultaneously and in a harmonious manner). In other words, it can be said that polyphonic music cannot exist without a proper system of musical notation, and musical notation is a means for exact repetition of a polyphonic composition.

In this context, it can be claimed that through the introduction of musical notation and (later) consolidation of polyphonic complexity, the production of Church music in Medieval Europe had signified a case for "alienation".

Because, through the separation between the labour (that created the music) and the product of labour (the musical work), the latter (musical work) acquired a separate (autonomous) existence -it is objectified. In this respect, musical scores were the representations of the music per se - and through decoding these scores, irrespective of time and/or location, repeating the original music was made possible. Consequently, it can be added that through the introduction of musical notation, the musical production was materialised (in the process of encoding), and the musical work could begin to exist independent from both its composer and its performers.

This also signified a profound change in the activity of performing. Performing -in this context, performing through decoding, as opposed to the musical practice defining musica practica-, was no more a creative artistic production, but on the contrary, it became a technical activity as a mechanical repetition of an objectified musical work. At the same time, performing also turned into an exclusive activity of educated clerics in churches.

Such a development had also been an expression of a deepening separation between two musical practices (Church music and musica practica). As a matter of fact, polyphony had never been connected with the masses (but as will be seen, it would later invade them). The folk songs and dances -the music in the villages- together with the music of jongleurs were simple and monophonic -not to be listened to separately but as

an inseparable activity of certain daily practices (such as in carnivals and in several public festivities). The production, performance and participation in the musical activity used to constitute a unity. Hence, this music, while constituting a *musica practica*, used to depend on and reproduce the 'lived experiences'. It was spontaneous and even the known songs were always open to modification. In this respect, this music was not repeatable, but was subject to reproduction: the melodies existed only through performances and were continuously changing (and being modified) due to the changes in the experiences of its performers. Moreover, as constituting a *musica practica* contrary to the music of the Church, this music was neither a tool for power nor a spectacular exhibition of power. Consequently, it can be concluded that the *musica practica* had constituted an indispensable part of life, in which the music had never existed autonomously. This explains one of the important reasons behind the absence of notation and polyphony in the medieval music outside the Church.

To sum up what has been discussed so far, it can be asserted that the Church music had represented a case for "alienated" musical production, which was integrated to the hierarchical Feudal power structure, and which stood in direct opposition to the *musica practica* of the people. Moreover, it should be stressed that to develop a better understanding of the relation between the musical practices and the class

structure within the Feudal society, one should also discern the relation between the nobility and the music.

As a matter of fact, at the beginning of the twelfth century, as initiated by the abstract texts of troubadours⁶, which were never heard outside the courts (Wathey; 1989), the nobility had started to separate its own music from the *musica practica*. In this respect, in addition to the troubadours, nobility was also hiring jongleurs, who were forming orchestras composed of five or six musicians to serve nobles in the courts. The maturation of the process of separation had lasted for about 200 years, and finally, by the end of thirteenth century, the nobility, like the Church, banished the activities of jongleurs within courts and no more listened to their music (Hoppin; 1978). Rather, they were listening to a music specifically made for them by professional musicians (the hitherto hired jongleurs had now become the servants in the courts). This music was composed of solemn songs, polyphonic entertainment songs (light music), as well as dances conducted by the orchestras (Wathey; 1989). The origin of these melodies were, yet again, from popular and folk tunes of the *musica practica*. However, mutated through the polyphonic complexity, this music, like that of Church's, was again distanced from the people. The people were listening to this kind of music rarely, only at specific occasions, such as while worshipping ceremonies in the cathedrals or in the royal wedding processions. As a matter of fact, the music which hitherto belonged to the people was taken from their hands and

what has been returned was an "alien". For instance, in sixteenth century, a medieval author had described the music he heard in a royal wedding procession as a "heavenly noyse [heavenly sounds] on both sides of the street" (quoted in Hoppin; 1978). The sounds were "heavenly" because they belonged to "another world" -they were mutated and their true origin was no more recognisable-, and thus, these sounds were alien to the people.

The music, which hitherto occurred spontaneously as integrated to daily practices and the musician, once independent and existed as a member of *musica practica*, had now bounded by hierarchical obligations within a given power structure. Thus, the musical activity and the salaried musicians either directly serviced lords or are organised within the guild system of feudal order in the absence of such an engagement. However, in both cases their activity was constrained and controlled by the nobility or by the Church⁷. Consequently, the music made by the musician as a servant was increasingly repressing the music made by jongleur -i.e. the music of the masses which also became repressed like their voices. This was, at the same time, heralding a move from the *two distinct musical practices* to a unity.

However, one had to wait for the total dislocation of the *musica practica* until the rise of capitalism as the dominant social formation. In this process, the rise of the bourgeoisie and initially, its attempts to integrate itself to the

existing (Feudal) order, brought further changes to the musical practices.

One of the initial stages of such changes was the proliferation of the commerce of notated music (sheet music) and the commercial concerts. Both debuted the relationship between music and money. Despite the fact that salaried (professional) musicians had already existed within the feudal order (much before the proliferation of the commerce of music), the attempt of the bourgeoisie to commercialise the music had destructive consequences for the existing order. As a matter of fact, although the bourgeoisie of that age was far from bearing the characteristics of industrial bourgeoisie, there was a basic distinction between nobility and bourgeoisie: the nobility was setting up a relation of domesticity through a mechanism of a politico-legal coercion whereas bourgeoisie was constructing a relation of exchange based on commerce. In this respect, concurrent to the rise of the bourgeoisie the hitherto feudal dependency of musician was dwindling -due to the diminishing financial power of nobility. As a result, the further strengthening of bourgeoisie jeopardised the relation between the court and the musician - which was a feudal relation of domesticity, legitimised by a feudal contract⁸ freed the musician from the shackles of aristocratic control. Although the musician was still integrated to the feudal system, newly emerging economic forces that the musician could depend on -other than courts- emanated a new ground for subversion. The musician was no more

in direct service of the feudal power. Consequently, the music and the musician, gradually distanced from the dwindling feudal power and increasingly formed a political alliance with the bourgeoisie struggling against the existing order. In this conjunction, it can be argued that the newly composed music began to mirror the emerging new codes of power.

With the rise of the bourgeois order, its music began to permeate the masses. In other words, the music of the bourgeoisie, which was characterised by a more complex form of polyphony leading to "perfection" in music through its harmonious and thematic melodic structure inspired by the advances in science and mathematics (Scott; 1989), had not only further challenged *musica practica*, but also invaded masses through leaving no room for the people other than "silently" sitting and "listening to" this harmony. Before, the nobility had isolated its music from the people -the aim was to establish a control over the music. Bourgeoisie's music, on the contrary, proliferated in the society. Thereafter, the music served to reinforce its control over the society -it signified a process of transition from the "control of music" to "control through music".

As a matter of fact, with the advent of bourgeois order, the music which had already been objectified through the notation, was now becoming a subject to consumption. In other words the path towards the translation of its use value into

an exchange value, a process in which its production was determined by the laws of the market, was opening.

For example, Beethoven, the great composer who had also a clear vision as to the functioning of the new order, derived a considerable income from the sales of his works. How, and what publishers demanded with respect to the imperatives of the market can be observed in this letter of Beethoven in 1816, in response to Birchall, a music seller in London:

"... in reply to the other topics of your favour, I have no objection to write variation according to your plan and I hope you will not find £30 too much ... the accompaniment will be a flute or violin or a violoncello; you will decide it when you send me the appropriation of the price" (Nohl; 1867: 211).

As a matter of fact, Beethoven was well aware of how artistic production is commodified in the new order, as well as the contradictions of the system. For example, in 1801, in a satirical letter to the publisher Hoffmeister in Leipzig, he wrote that;

You may perhaps be surprised that I make no difference of price between the sonata, septet and symphony. I do so because I find that a septet or symphony has not so great a sale as a sonata, though a symphony ought unquestionably to be of the most value ... I cannot think that, taken as a whole, you will consider these prices exorbitant; at least, I have endeavored to make them as moderate as possible for you ... Now this troublesome business is concluded - I call it so, heartily wishing that it could be otherwise here below. There ought to be one grand depot of art in

the world, to which the artist might repair with his works, and on presenting them receive what he required, but as it now is, one must be half a tradesman besides -and how is this to be endured (Nohl; 1867: 36).

It can be concluded that one of the immediate results of the integration of music(ian) to the bourgeois order was the institutionalisation of the music as a commodity -its acquiring an exchange value. Since the late eighteenth century, one of the most important symptoms of this development was the emergence of commercial concerts, which was organised by "entrepreneurs". It should be remarked that until this time, the nobility had extensively financed the music, of which production and consumption was isolated merely in churches and in courts. However, with the introduction of commercial concerts, not only the possibility of hearing this music extended, but also, it increasingly turned out to be an entrepreneurial activity. In other words, the emergence and proliferation of the commercial concerts signified a simple fact: people were now paying (and from that date on, have to pay) in order to listen to music. The process of the production and consumption of music was now integrated into a market mechanism.

Commercial concerts had started in London, in 1672 -England was a pioneer parallel to the early development of capitalism. The proliferation of commercial concerts in other parts of Europe followed England by the end of first quarter of the eighteenth century. However, in the early stages of the

development of the concert organisations, aristocracy, which was still holding the political power, had tried to control and constraint the diffusion of this "external" activity. For example, Royal Academy of Music of France, claiming to hold the "monopolistic control" of all musical activity in the name of the king, had prohibited such activities for almost 50 years (Scott; 1989). In the second quarter of the eighteenth century, bourgeoisie had managed to overcome in the struggle; and from that day on commercial organisation of the musical activities were allowed through a conditional permission by the Academy -which was demanding high fees up to 50.000 livres for authorising such commercial public performances (Kaygısız; 1999).

As a matter of fact, such developments sufficiently exhibited the importance of commercial concerts. Attali (1996: 50) notes that the concerts "were organised by entrepreneurs for the bourgeoisie, in whose dreams they were a sign of legitimacy". However, it should be noted that although a broad and ticket buying audience was a new phenomenon for the musical activity of the dwindling Feudal order (and because of this it was considered an activity not only peculiar to bourgeoisie, but also explicitly external to feudal economy), the audience was not constituted solely of bourgeoisie. On the contrary, at the beginnings, the audience from nobility had dominated the "public" concert.

However, although the establishment of bourgeois order was neither immediate nor total; it was evident. Russell (1987: 66), notes that "the period from the end of the Napoleonic Wars until 1848 witnessed ... an 'explosion' in concert life throughout Europe as the middle classes, anxious for social and cultural respectability, began to attend in large numbers". It was not until the mid nineteenth century that the concerts became completely public: "What appears to have happened from about 1845 was an extension of this process as new types of popular concert, which on occasions could reach well into the ranks of the working class while still holding attraction for the upper middle classes, emerged" (Russell; 1987).

As a matter of fact, the commercial concerts, from the very beginning of their emergence (from about the end of seventeenth century), signified a challenge to the monopolistic control of music by aristocracy. For aristocracy, losing this monopoly was, at the same time, losing a position in their struggle against bourgeoisie. What followed (about half a century later) was the introduction of a new spatial regulation for the commercial concert activity: the emergence of concert halls (music halls) as permanent locations of the commercial concerts. This not only signified the defeat of aristocracy against bourgeoisie in its attempt to establish a control over the musical activity, but also expressed the permanency of the newly emerging power structure. But more

importantly, concert halls were heralding the coming of a music industry.

The first concert hall was set up in Germany in 1770 by a group of Leipzig merchants (Attali; 1996: 50). The concert halls, especially in the nineteenth century, were the most important element of the entertainment business that has become almost a sector in the economy, and foreshadowed the coming of the mass entertainment industry in the twentieth century. Russell (1987: 73) notes that, in 1890s, some fourteen million tickets were sold annually only in London. It can be argued that, parallel to the development of capitalism, musical production increasingly gained an economic status and it became an object of mass consumption, and a lucrative business.

As the field of musical production is further integrated to the capitalist economy in the twentieth century, the musical practice which hitherto defined an emancipatory moment, called *musica practica*, had vanished. In other words, currently, although some particular "appearances" can be found within, what Barthes calls, "countercultural forms", *musica practica* is lost in the West. The institutionalisation of bourgeois culture and its (all-inclusive) claims to universality dissolves and nullifies any possibility of a an all encompassing *musica practica*. For Barthes (1985b: 152), what is left is "languages of expression" permitting certain individuals or social groups to "express themselves", or to

"liberate themselves on the level of expression". However, through the total abolishment of *musica practica*, "music as expression" as a crystallised praxis is invaded (and hindered) by the capitalist production process. Thus, under capitalist social relations, the "countercultural forms" are incarcerated. Concurrently, Barthes argues that:

I am trying to ascertain the importance of these movements in a dialectical fashion, to see how they are useful, but also to understand that they do not necessarily represent, despite appearances, the most radical form of subversion. (Barthes; 1985b: 152)

The action of "music as expression" and even translation of this expression into praxis (reconstituting a dealienated musical practice) is always a possibility. However, even hearing this "noise" -as a precondition- is not easy. Under capitalism, this emancipatory moment is continuously being negated by a hegemonic control through the music (i.e. establishing a control over the musical production process since its products serve to establish a control over the society through the music).

Although the intrinsic "double nature" of musical production still, theoretically, keeps the possibility for a "*musica practica*", predominance of alienated musical practice reveals that the institutionalised music production is not an autonomous social activity.

As a matter of fact, industrialisation of musical production (by the end of the nineteenth century) and music's involvement (as an aspect of the materialised cultural production) in the commodity exchange process (as a part of the market) signifies a specific articulation of the economic and cultural realms.

The duality (i.e. subversive and emancipatory when active participation occurs, repressive and dominating in the eventuality of passive consumption) in the activity of artistic production, particularly in the production of music, is suppressed through the "capitalisation of culture" (Miege; 1989). This can also be understood as a process leading to the negation of the oppositional and autonomous cultural practices. Consequently, the music -particularly the popular music- in the twentieth century represents a classical case for alienation. As Frith (1992: 50) states, "something human is taken from us and returned in the form of commodity". In this sense, music is fetishised, "made magical and what we can only reclaim [it] through possession, via a cash transaction in the marketplace" (Frith; 1992). In other words, it can be asserted that alienated musical production under capitalism is a repressive action (dismissing any possibility of subversion), and at the same time proliferation of its product, the commodity music, created in the process of an industrial production leaves no room for an emancipatory moment. This is how the "passive music consumption" predominates the societal life. However, it is important to

underline that, here, the term "passive music consumption" does not denote to the functioning of an "ideological effect". Rather, it is passive in the sense that it has no subversive power -the relation, under capitalism, is, now, an exploitative one.

Notes to Chapter 2

1 A. R. Radcliffe-Brown, The Andaman Islanders, New York: The Free Press, 1964, p. 132

2 It is in this context that the musicologist Joseph Kerman claims the evanescence of music -i.e. "until recently the repertory of Western art music ... did not extend back more than a generation or two at a time" (Kerman; 1985: 337). At a time where hegemonic struggle for power in the realm of culture was not consolidated and thus history was not possessed through universalist claims of a class, this explains the reason behind the claim of a composer in 1477 that there was no music worth listening to that had not been composed in the previous forty years or so (Chanan; 1995: 13). Still, for example about a century later, in 1569, it is reported that Lasso's choir at the court in Munich was singing music no older than 45 years (Chanan; 1995).

³ According to Marx, alienation crystallises the double nature of labour (labour as an extension of man, as well as external to man) and the productive activity becomes "self destructive" through the operations of "second order mediations" (in Marx's terms, "mediation of mediation") such as division of labour, private property and exchange. In other words, within a state of division of labour which is organised around the principles of private property and exchange, the productive activity of men is incarcerated -and it cannot be defined out of these categories. As a matter of fact, a further differentiation in

the division of labour -that is between mental and the material- is a precondition for the validity of this argument. In this sense, the division of labour between the mental, and the material gives rise to a new category: ideological alienation, which aggravates and deepens the alienation situated within material production. Ideological alienation feeds what Marx calls "real alienation" which is associated with material production. In this respect, the structures of thought (the mental) and the production of ideas, of conceptions, and consciousness serve to construct "the language of real life" (Marx; 1965: 37), which are conditioned by a definite development of productive forces. It should be added that, according to Marx (1975: 349), alienation of mental structures (while serving for reinforcing the "real alienation") takes place in the sphere of consciousness, "of man's inner life, but economic [alienation] is that of real life -its supersession therefore, embraces both aspects".

⁴ The emergence of melody in the plainchant (which hitherto was merely a characteristic of secular music) led to a major change in the church music. A new musical form emerged by adding an extra voice part to be sung separately on different pitches (three or four notes apart) moving in parallel motion. This musical style was called *organum* (part music). Organum was the first step towards polyphonic (multipart) music. In twelfth and thirteenth centuries, what is called *free organum* was introduced. In free organum, there was an additional part to be sung different from the chant melody. In this kind of music, which is called polyphony, there was a combination of many different melodies, and the individual parts of the whole musical piece (each melodic structure) was called a *counterpoint*.

⁵ The perfection of the system -the systematic notation of music- began in eleventh century, which was attributed to an Italian Benedictine monk Guido d'Arezzo who had invented the

basics of the system called *Tonica-Do*. He had used the first syllable of each line of a hymn to label the value of musical scores. His aim was to make singing easy through syllables. This system was considered the first systematic attempt to notate the music. The words were;

Ut quent Luois
Re sonare fibiis
Mi ra gestorum
Fa muli tuorum
Solve poluti
Lavii reatum
Soncte Johannes

As can be seen, the first syllable of each line constitute a series, which is very close to the values used today (Do (Ut), Re, Mi, Fa, Sol, La, Si(So)). In seventeenth century, Giovanni Maria Bononcini used (Do) instead of (Ut). And in the same century, for the first time the flat scores began to be used. From that time forward, the music could be notated "perfectly" to represent its original. However, it should be noted that contemporary signs used to notate the music began to be used in nineteenth century.

⁶ This music was developed by the troubadours of southern France and their northern counterparts, *trouvères*, and lasted for about two centuries from 1100s to 1300s. Many of them were of noble birth, and all their music was designed for nobles and performed only in the courts. Troubadours and *trouvères* often wrote both the words and music of their songs, which were generally performed with instrumental accompaniment [for more information, see Wathey (1989), Hoppin (1978)].

⁷ For example, Johan Sebastian Bach, while working as the organist of the Neue Kirche at Arnstadt in 1705, the church granted him leave to visit the north-German city of Lübeck to hear the great organist, Dietrich Buxtehude for four weeks. However, when he returned to Arnstadt three months later (with new musical ideas), he faced with the reproach by the church both for his behaviour and new musical ideas. Moreover, the

consistory of Arnstadt decided to reprimand Bach on his "strange sounds" during the services, and also asked him to explain the unauthorized extension of his leave in Lübeck:

"Nos: Reprove him for having hitherto made many curious variations in the chorale, and mingled many strange tones in it, and for the fact that the Congregation had been confused by it. In the future, if he wish to introduce a tonus peregrinus, he was told to hold it out, and not to turn too quickly to something else, or, as had hitherto been his habit, even play a tonus contrarius." (the quotation is taken from the internet site of The Bach Achieve at University of Leipzig)

8 Johan Sebastian Bach, in August 1703, was appointed as the organist of the Neue Kirche at Arnstadt. His work contract is a typical example: "Whereas our Noble ... Anthon Günther ... has caused you ... to be accepted and appointed as organist in the New Church, now therefore you are ... faithful and obedient to him. His above mentioned Noble Grace, the Count, and especially to show yourself industrious and reliable in the office, vocation and practice of art and science that are assigned to you [...]. As also in other respects, in your daily life to cultivate the fear of God, sobriety, and the love of piece ... , High Authority, and your superiors, as befits an honour-loving servant and organist. For this you shall receive the yearly salary of 50 florins; [...]." (The quote is taken from the internet site of *The Bach Achieve* at University of Leipzig)

CHAPTER 3

ENTERTAINMENT AS AN INDUSTRY: THE DEVELOPMENT OF MUSIC INDUSTRY IN THE WEST AND ITS CURRENT STRUCTURE

The basic argument presented in the previous chapter was that following the dissolution of *musica practica* in the West, commodification of music parallel to the development of capitalism had become possible.

On the basis of the process of commodification of music, this chapter will present an examination of the development of musical production and consumption in the West, during the twentieth century. As a matter of fact, music production and consumption during this time is increasingly organised within the framework of an industrial activity. In this context, the chapter is comprised of three main parts. In the first part, the development of music industry accompanied with a highly concentrated market structure in advanced capitalist countries will be analysed; in the second and third parts, the current structure of the music market and the organisational structure of the record companies operating in these markets, as well as the specificities of record production process will be examined respectively.

3.1 The Development of Music Industry in the West

3.1.1 From Sheet Music To Recorded Music: The Formation Of The Music Industry

It would be a mistake to think of a simultaneous development between industrialisation of musical production and development of a "recording industry", since, much before the invention of gramophone (and thus the formation of a recording sector) mass production of "sheet music" throughout the nineteenth century appeared as the commodity form of music. It was the leading form of musical reproduction based on an industrialised production process. Indeed, the music industry producing the sheet music for the market was organised around the music publishers who were converting the creations of composers and lyricists into commodities.

The accompanying consumption pattern, on the other hand, was structured through a mode of middle-class home entertainment, of which symbol was piano. According to Sanjek (1988: 296), by the last quarter of the nineteenth century, only in America an average of 300,000 pianos and player pianos were sold annually, and this trend had continued until the end of World War I. Piano and sheet music (hardware and software) were two indispensable elements of the music industry of the nineteenth century - like the vinyl records, audiocassettes or compact disks and their players of the twentieth century. In this context, the sales of popular sheet music in the hundreds of thousands of copies were not exceptional (Garafolo; 1997:18). For example, the famous song "After the Ball" by C.

K. Harris (written in 1892) was sold more than five million copies in only a couple of years (Hamm; 1979: 285).

As Garafolo (1997: 17-39) clearly exhibits, "sheet music industry" and "recording industry" had developed as separate industries despite the fact that they intersected at many points with an increasing frequency over the years - in other words they represented separate levels in the development of commodification and industrial production of music in its formative stages. However, currently, both are the branches of a huge music industry although, the production of sheet music seems to be a suppressed field through the extensive deskilling attack of recording and playback technologies¹. As a matter of fact, through the introduction of records and the expansion of recording industry, record companies -rather than music publishing and piano making industries- had become the primary institutions organising the entertainment.

The crucial developments, which led to the development of a recording industry, were Emile Berliner's invention of "gramophone" in 1888 and two years later, Thomas Edison's introduction of "phonograph" in 1890. In fact, the recording industry was founded on the basis of Berliner's invention for it was the only appropriate device for mass production of records (see Chanan; 1995, Frith; 1992, Gelatt; 1965).

Recording sector grew very fast, and by the first decade of twentieth century, an industry had already been established in many countries. More importantly, from the very beginning, the

structure of the music market has been defined through a tendency towards monopoly. Concurrently, in its formative stages two major companies -namely, Victor Talking Machine Company (of American origin) and The Gramophone Company (of British origin)- appeared as multinationals leading the production of records for the world market (Gronow; 1983: 56).

The rapid expansion of record production and consumption continued until 1930s. The record sales exceeding 100 million copies annually in America (as well as in European countries) signified the prosperous development of recording industry from 1910 onwards until the end of 1920s.

As a matter of fact, the early development of the recording sector was characterised by periodic crises - or what can be labelled as a cyclical development analogous to cycles of capitalist development. Accordingly a slump in 1930s and again a boom in 1940s followed the boom in 1920s. However, after 1940, it can be observed that the frequency of the cycles expanded (this is to say, the time elapsed between two slumps increased) in line with the increasing capacity of industry to organise the production as well as the consumption.

It can be easily claimed that, the economic crisis of 1930s (beginning by the Great Depression of 1929) had not only caused a major collapse of the world music industry, but also signified a major change in the consumption patterns of people. Sales of records had dropped from 104 million in 1927 to 6 million in 1930s; and the number of phonograph machines

manufactured had fallen from almost one million (annually) to 40,000 (Frith; 1992: 55).

In addition to the economic crisis, the proliferation of radio receivers had some catastrophic consequences for the music industry -since the radio receivers had extensively begun to substitute records and gramophones parallel to the changing patterns of consumption. Due to the crisis, leisure expenditures of the people were already shrinking. However the decline in the revenues of recording industry was sharper than the general decline of leisure expenditures, for the spread of radio and the arrival of "talking pictures" had further hit the record industry (Frith; 1992: 56, Martin; 1995: 238-240, Bindas; 1992: 139).

In this context, almost all small firms had went bankrupt during the crisis. But more importantly, the strategy adopted against the danger of bankruptcy had caused a major change in the structure of the music market. In other words, mergers and takeovers during the crisis had been the general strategy of major companies - a strategy, which characterised the music market during and after the crisis, and which led to the consolidation of an oligopolistic market structure.

The mergers and the consolidation of an oligopolistic market structure had altered the existing trend that would end up with the dislocation of the whole industry. Accordingly, the major record companies, especially by the post-War period, had succeeded to convert almost all previous "disadvantages"

into "assets" leading to profit maximisation. Firstly, in America, early radio stations' racist attitude to exclude black music (and thus its audiences) had prepared the ground for record companies to expand and benefit from the market for jazz and blues music (Garofolo; 1997). Secondly, by the replacement of record players by radios in peoples' homes, major record companies succeeded to shift the source of profit from the record sales to performing rights and royalties (Frith; 1992: 59). Finally, concurrent to the monopolistic tendencies that structured the music industry, one of the most important developments of the post war period for music industry was the "link" established between radio and film interests, which had later defined the huge and integrated "entertainment" industry (Martin; 1995).

It can be argued that the recording industry, in the post war recovery period, had been re-institutionalised and restructured not only in America but also in European countries. Similarly, for Frith (1987) the British recording industry was formed under the specific conditions and as a consequence of the economic crisis of 1930s. Consequently, the recording industry had attained the sales success of 1920s by the end of World War II (Gronow; 1983) and established its leading position within the whole entertainment sector by mid 1960s (Peterson and Berger; 1975).

3.1.2 From Keynes to Rock: The Making of the Modern Music Industry

Post-war recovery of the music industry has been possible through consolidating a highly concentrated and internationalised music market². In particular, integrated with the cinema industry and radio, the "modern music industry" (which has already been integrated vertically, and operating in an oligopolistic market) of the post-war period can be identified in terms of an excessive "horizontal integration". Moreover, the American influence on international popular music, which had already begun through proliferation of Hollywood films during the war, had been intensified and further contributed to internationalisation of record companies' operation in post war period. Consequently, as Frith (1992: 64) argues, the pop music people heard on radio and on records across Europe was either directly or indirectly American. Thus, American cultural hegemony in the post-war period -as expressed by "Americanisation"- imposed a model not only for the structure of music industry but also for the consumption patterns that feed the industry. This is closely related with the post-war social and economic developments in American society.

Accordingly, in America, the personal income rose 293% between 1940 and 1955, which guaranteed continuation of the increasing consumerist desires. In 1950, there were 1.5 million television sets in households, and within 3 years of time, the number increased by 2000% and reached at a level of

30 million television sets (Buxton; 1983). In 1954, with 6% of world's population, America hold 60% of world's cars, 58% of the telephones and 45% of the radios (Grossberg; 1992: 138).

At the beginning, this prosperity was highly unstable and was excluding large segments of the population like Blacks and working class. Actually, one of the underlying features of the economic boom was to transform (or convert) productive apparatus of society into consumerist ideals, (basically and in the first instance) for financing military expenditures. Under this (artificial) prosperity, the plan was to expand the market for consumer goods to feed consumerist goals, and to sustain growth. Thus, as is known, the strategy was, following Keynes, to challenge middle class propensity to save and expand the base of the consumer market by increasing the access. The ideology behind this strategy was Fordism, which was initiated by Henry Ford's recognition that 'he could accumulate more profits if his workers were also his consumers'. Hence, linking mass production to mass consumption through increasing wages, it was assumed that the rates of profit would increase³.

Consequently, the expanding market necessitated the economic inclusion of the hitherto "excluded classes". This inclusion, also required the further extension of political and civil liberties. It is in this context that excluded classes' integration into "prosperity" became possible. Here, the state was the basic actor. Consequently, the promises of

this seductive prosperity were now open to everyone; and politically, for example, Supreme Court's 1954 anti-discrimination decision was an example that proved this. However, if this was a contract between the state, capital and labour, which seemingly resulted in the increasing prosperity of working class, it was a deceptive contract in the sense that it finally transformed the working class's prosperity into their integration to the system and guaranteed its later disorganisation. It was neither contradictory nor accidental that proclaiming the 'end of ideology' coincided with this inclusion strategy since it was assumed that the alliance between the state, capital and labour marked the existence of their "compatible" interests. Actually, the 'end of ideology' was the ideological expression of "American liberalism"

There was an enormously powerful context of mobility and change, defined by images (in advertising, film, television etc.) ... Such images defined a socially constructed map of the possible and proper trajectory for the individual, the family and even the social group to move up the social ladder. In the 1950s the mobility was defined largely by economic position, by the increasing accumulation of capital (money, investments and property) and was only occasionally and indirectly based on the accumulation of cultural capital. That is, the upwardly mobile fractions of the working and middle classes were not necessarily attempting to become "upper class"; their mobility was not a radical rejection of their own cultural tastes and styles. Rather they created their own styles and aesthetics, building upon the available resources of the expanding consumer culture (Grossberg 1992: 141)⁴.

This kind of mobility was suggested to be possible and available across social differences, and as a result of the inclusion strategy it allowed everyone (even the most socially marginal groups like Blacks and immigrants) to move upwards through preserving "their own cultural values". Economic rationality behind this development was the commodification of culture, and both in theory and in practice, it was quite easy to hide this economic rationality through presenting it as if it was an expression of a tolerance and respect inherent in American liberalism as opposed to "totalitarianism". The "American Dream" is baptised its name. As Grossberg (1992: 142) describes,

While the dominant rhetorics were celebrating difference and change, they were also defining a distinctly 'American' brand of political, moral and cultural conservatism. Economic prosperity was channelled into and invested in individuals' own lives ... People bought houses in the suburbs and cars to take them to work in the city and to play in the various resorts and amusement parks located in the country; and they filled their houses with new consumer goods, including new technologies of mass communication ... The investment in the family, defined as the site of and reason for consumer spending, was seen to be part of a larger commitment necessary if the America was to realise its destiny, its dream of 'peace and prosperity' (for all?)

Actually, realising the "American dream" was signifying the fact that not only America but also the world was entering a new age. This new structure was marked by a redistribution of power and wealth through the internationalisation of capital

together with exporting the ideals of "American Dream" and thus re-contextualising and signifying the individual's daily life and experience.

Such a development brought a "liberal" consensus, which also found its expression in the products of culture industries (in popular music, in television, in films and in literary production). Even the opposition was melted within this "liberal" toleration in the name of recognition of diversity, and its possible manifestations in the form of cultural products (films, music, literary products, etc.) were managed to be appropriated by capitalist culture industries and thus articulated to the system of cultural production through a process of commodification which turned out to be a contribution to further capital accumulation, but more importantly any possibility of its transformation into an organised powerful political challenge was eliminated in this way.

In America, the emergence of Rock as the dominant music genre was a typical example. Its boundaries were drawn through this "liberal" consensus. Although it is possible to find some "socialist", "antiracist" or "antisexist" claims within the rock formation, its integration to the ideology of 'end of ideology' (or "liberal consensus") closed any possibility of a political resistance or ideological struggle. For example, the attempts of "protest" singers like Bob Dylan or Joan Baez has been deliberately cheapened when commercialised under the

slogan "Revolutionaries are in Columbia" -actually, this slogan was the advertising campaign of Columbia Records which had signed various long-term contracts with these "revolutionary" singers. Hence, in the context of the "value" of "toleration" within liberal consensus, being a revolutionary was considered a "colour" among the others rather than a threat -and by this way, it could easily be attributed a commercial value.

As a matter of fact, the mainstream rock was far from being "revolutionary". It had targeted the young audience, and it was not bringing a challenge to the ideology of "American dream" - which was a commitment to mobility and consumerism. Furthermore, through constructing a rock 'n' roll dream of success through the images of rock stars, it opened a new path for realising these ideals.

Consequently, it should be noted that the ideology of "American dream" -i.e. a commitment to mobility and consumerism- had also shaped the post-war structure of music industry, which was organised around two interconnected principles: the "star system" and the "creation of new audiences" (through targeting/shaping the youth culture). It should be stated that, understanding the economics of these two principles, which guided the industry from that date on, is crucially important to understand how and why these principles are linked to the ideology of "American Dream".

A basic law-like generalisation for the production process in recording industry (as well as in almost all cultural industries) is that the costs of reproduction are always much lower compared to costs of producing the original copy of an album. Hence, once the breakeven point is caught, the sale of every extra copy brings astounding profits. For example, based on the assumption that the breakeven point is 100,000 units, it can be argued that selling a total of 200,000 units of one title causes an incomparably higher capital accumulation than selling a total of 200,000 units of two separate titles (even both are realised as cost covering sales). This is the basic economic rationality behind the "star system". Accordingly, the creation of a star means to reserve huge amounts of capital investment on the promotion and marketing (to a degree to guarantee to multiply the sales level of breakeven point). The particular consequence of this strategy is the enormous increase in initial capital investments accompanied with enormous increase in the profits. Consequently, based on the assumption that if in a particular music market the quantity of new albums per year decreases accompanied with an increasing or constant annual retail value, then it can be suggested that the profitability increases. According to BPI (British Phonogram Industry) statistics of 1999, the new album releases per year had decreased more than 55% between 1970-1995, while the total retail value of the market was constantly increasing (IFPI; 1990, IFPI; 2000).

It is obvious that only major companies could implement such a strategy. Hence, it can be deduced that "star system" is profitable only in an oligopolistic market structure, and at the same time it reinforces the oligopoly through excluding small companies from competition. However, within this structure major companies still need small independent companies (*indies*), which would operate as if they were their artist and repertoire (A&R) divisions to promote new "star candidates". It should be remembered that the main target of "star system" is almost always the teenagers. Teenagers constitute a constantly renewing (and thus changing) consumer group with a distinct "life-style" and consumption pattern. Consequently, their altering demands are first tracked and met by small (independent) record companies⁵, since rather than the huge and bureaucratic organisational structure of majors, it is the independent companies that can easily reach to new teenagers through their small and flexible organisational structures⁶. Therefore, it can be concluded that, currently, "indies" and majors are the two indispensable complementary components of the music market, in which indies function as the guarantor of the continuation of majors' monopolistic control over the market. In despite of the conservative attitude of major companies, it is argued that indies are innovative and without them majors could not create new genres and their audience (Gelatt; 1965, Chapple and Garofalo; 1980, Laing; 1985, Frith; 1992). Accordingly, indies act independently in trying the new, and if commercial success

follows then majors begin to invest on the respective genre or artist without any further risk. Then, the relation between majors and indies is, actually, a symbiotic one (Burnett; 1990). In this context, Frith (1981) argues that it is inappropriate to use the term "independent" when referring to these small companies, since they mostly function as talent hunting agents of multinational corporations. Thus, when major record companies directly or indirectly are supporting most of the indie labels, they are actually minimising the probable risks to maximise their profits. In other words, the trend in the world music market is shaped in such a manner that major companies aim at guaranteeing their profits by leaving the average 15-20% of the control of the market to indie labels.

This is an apparent practice aiming the control of the market's operation, and it, in a way, confirms Galbraith's (1967) argument suggesting that the planning and control is increasingly replacing the competitive market structure when it is dominated by larger industrial corporations in contemporary capitalism. As a matter of fact, Galbraith (1967: 24) argues that;

... in addition to deciding what the consumer will want and will pay, the firm must take every feasible step to see what it decides to produce is wanted by the consumer ... it must exercise control over what is sold. It must exercise control over what is supplied. It must replace the market with planning.

It is obvious that this structure reinforces the tendency for concentration in the market. Furthermore, in a highly concentrated market, vertically and horizontally integrated corporations can easily manipulate technological developments to strengthen their position and to guarantee profit maximisation. Hence, by the last quarter of twentieth century, together with the developments in communication technologies, the worldwide proliferation of cultural commodities is marked by an increasing tendency towards consolidating monopoly:

In 1994 more than 90% of the gross sales of recorded music worldwide came from albums, singles, and music videos owned or distributed by one of six multinational corporations: Time Warner, Sony, Philips, Bertelsmann, Thorn-Emi, and Matsushita. Burnett (1996: 2)

3.1.3 Structural Changes in 1980s

As is argued above, the advent of a cyclical development characterises the music industry. As a matter of fact, development of the internationalisation of music market with a faster pace emerged as an outcome of a crisis that hit the music industry in late 1970s. The industry had witnessed a period of growth for more than 20 years that reached at its peak between 1973 and 1978 -the record sales rose from \$4.75 to \$7 billion in the respective years (Burnett; 1993).

However, the decrease in the album sales due to the failure of major companies' creating new genres and audiences marked a new period of slump in the beginning of 1980s. The resolution of the crisis, in late 1980s, marked a structural

change in the music industry. In this period, major record companies, rather than developing new strategies to increase record sales, shifted their investments into new areas -such as copyrights and back catalogues. More importantly, it should be noted that, in this period, the entertainment corporations, through utilising the advantages of horizontal integration, could easily integrate the products of music industry to other entertainment areas (including newly emerging areas such as computer games).

However, among these, television still seems to be the most important medium. Rise of television as the basic medium of entertainment dates back to 1950s. Such a development had necessitated a reorganisation in the industry -i.e. through the rise of television, the reorganisation of radio and music, which led to further fragmentation of the audience and provided the path for the creation of homogenised specialist markets for profit maximisation⁷. In a similar fashion, recently with the spread of cable and satellite TV technologies (including the very recent introduction of interactive-digital television technology), and introduction of computer technologies enabling the use of television screen for video games (for example Sony's Playstation) and for films (for example, VCD and DVD technologies equipped with Dolby Digital stereo surround sound systems) let the entertainment industry to utilise music for accumulating capital in many different ways other than sale of records.

In the re-institutionalisation process of the television, the emergence of music television channels (among the thematic broadcasting channels) is particularly important. The first, and probably the most striking, example is the MTV. As Frith (1990b: 95) points out, MTV emerged in a manner similar to what is called Top 40 radio format. Record companies first used it as a new form of promotion (like radio), supplying free music videos funded by the artist's marketing budgets. Music television, although used initially as a radio-like promotion technique, quickly turned out to be the basic medium for increasing the intensity of consumption. Through visualising the music, it became easier to manipulate and situate the songs within particular systems of signs -thus it became easier to attribute varying use values to songs. By the same token, the emergence of music television also marked the beginning of an irreversible change in the structure of the industry. "Singles", in the music industry, have always been promotional tools for fostering the consumption of "albums" or launching new stars. However, it was the singles market, which was mostly affected by the crisis in the beginning of 1980s. The music television, which is mainly based on singles, changed the situation by modifying the structure of singles market -today it would be more appropriate to talk about "singles as music video" rather than "singles as records". Thus, singles, after the emergence of music televisions, rather than being commodities for exchange at the market, began primarily functioning as a promotional medium to foster

consumption of the products of culture industry, since this made them a sort of commodity which is a source of revenue not only in the sales of records but also in the form of copyrights. This is a particularly important point, since music television is not just a medium for promoting record sales but also a means for further profit maximisation from musical properties. There is strange relation between the music video as a "promotional tool" and music video as a "copyright commodity". It is obvious that music video promote record sales, however, once the promotion is "successful", together with the record, the demand for the music video per se increases. It is just at this point that the music video itself gains an exchange value, that the TV channels have to pay royalty rights to perform such music videos. In other words, the music video, rather than functioning solely as a promotional medium, becomes a source of income for its own within the industry -and recently it is a much more valuable source of revenue than the sales of records it promotes. In most cases, if the music video is "successful" the album is sold for the sake of that particular song it promotes. If the song becomes a "hit", then the copyright income from its continuous play in nightclubs, restaurants, radios, televisions, etc. brings almost an equal revenue with the sale of the records.

Consequently, it can be argued that, the introduction of music video into the TV programs, especially the establishment of music televisions changed the music policy of record

companies. In 1950s by the entrance of television sets into the living rooms, the understanding of "entertainment" was drastically transformed due to the visual power of the television. Similarly, music video channels had visualised the music. Currently, the possibilities and imperatives of visual entertainment increasingly determine not only the music policy of record companies, but also alter the general structure of the market in general. First, it affects the format, length and structure of the music produced. For example, those songs those are "inappropriate" for making music videos are naturally discouraged and virtually eliminated in the industry for they are considered as economically 'irrational' and can led to the reduction of the 'speed of consumption'⁸.

Second, although the advent of music television should be considered an additional opportunity to assure the consumption of the marketed commodities in shorter times, it is also true that video promotion is an additional cost for producing music. Moreover, faced with the higher costs of music video production, record companies, in order to guarantee the coverage of such costs by the sales, had to increase their expenses -i.e. their capital investments on other aspects of promotion such as packaging and publicity (like concert touring and radio promotions). In other words, video promotion is not just a cost factor per se, but became also a factor increasing all other respective costs of musical production. This, in turn, affects the whole organisation of the industry, since such higher costs can only be met by the major

companies. As a result of the increasing costs of launching an album, new entries to the market becomes more and more difficult since minimum amount of necessary capital to be invested increases parallel to the increases in overall costs of production.

It has been calculated that a major company in the United States surrounding a single track, which may be being used to sell an album or to establish a star, is half a million dollars. In Britain the overall costs of even a routine pop promotion are around half a million pounds. The Pet Shop Boys, for example, reckoned to spend about £200000 making their second LP, and budgeted £200000 for the four music videos to accompany the singles that would be taken from it, and another £200000 for all the other promotional costs. (Frith; 1990b: 95).

It is obvious that without such investments, it is almost impossible for an album, among others, to "catch the success". As one of the executives of Virgin Group had explained; "if we don't get a video, we don't get a hit". On the other hand, it is also obvious that the record sales in domestic markets would not be sufficient to cover such high costs. Thus, as Frith concludes, the sales to justify an investment of about £600000 (as in the example of Pet Shop Boys), a minimum of two million copies must be sold. Such a performance can only be obtained in an international market. In sum, introduction of music videos, rising overall costs of production, and thus, the growing importance of having an international audience to meet such high costs of production are the factors limiting

the new entries to the market. Consequently, increasing concentration and monopolistic control are the primary outcomes of the new imperatives of the production process.

Thirdly, with the emergence of music televisions and music video, a new and general category of visual entertainment had emerged. It is composed of many interrelated parts of which music is only one but an indispensable part among others (others being television, film, video or computer games etc). As one of the executives of Island Records suggested;

If you are in the entertainment business on the music side, you really need to be in films as well because I think they are really joining into one business. You need to have access to putting your music into other people's films, and expanding the horizons of your artists into scoring, performing, or having their songs in films. I also feel that one needs to be in the film business in order to understand it and have access to people who are good video makers (quoted in Frith; 1990b: 97).

Film and recording industries increasingly develop in a mutually dependent relationship. Films both promote and are promoted by sound tracks. Many of the songs at the top of the charts are film-linked and similarly films are often promoted by their sound tracks (mostly title songs of the film -like "Titanic"). In almost all of the music retailer shops there is now a popular category labelled "Sound Tracks".

Usually a record and a film cross promote. This entails a modification in the content of both. For instance, recently, in the production of both popular films (mostly in Hollywood) and their soundtracks, in order them to support one another

and thus reach higher ratings, some specific strategies are employed:

... [songs should be] an essential part of the emotional experience [of the movie]. For a soundtrack to be really successful -like Top Gun or The Big Chill- you have to hear what you see. And to make that happen, the director usually has to shoot scenes using either the actual music in the film or something that's very similar. (Holden; 1987)

If we recall, again, Galbraith's assumption suggesting the need for planning to establish an absolute control over the operation of the market; such developments can be considered as the extensions of particular strategies of majors to control the international entertainment market. It should be remembered that, the existence of this structure, in which vast amounts of profit maximisation is possible (through horizontal and vertical integrations), highly depends on sustaining the tendency towards monopolisation.

3.1.4 Music Industry Today: Concentration Forever

A vision of capitalist social relations that operate 'less oppressively' depends, as is well known, on two main capitalist perspectives: Smithean (from which the classical approach is derived), and Keynesian political economy. The former is based on the belief in "laissez faire" capitalism, which naturally functions through the market's cyclical movement of slumps and booms. Accordingly, it is believed that if existing structure of capitalism is left 'untouched', in

its due course of operation, if booms exist slumps would not be only inevitable but also be 'useful'. It is useful in the sense that slumps would contribute first, to the elimination of 'inefficient capital'; second to 'free' the labour market to restore proper operation of the market; third, to a reorganisation of industry; fourth, to the introduction of new technologies, and in this sense, to the re-skilling of the 'workforce'; and finally to raising society's overall wealth. According to this perspective, the market is primary and eternal whereas the function of the state is limited only with the provision of an appropriate legal framework to prevent infringing market's motility. The latter (Keynesianism), on the other hand, although encourages the introduction of new technologies and reorganisation of both industry and 'workforce', consider slumps in the functioning of capitalism as deviations to be corrected. In this sense, market is to be 'created' (rather than seen as motile). The function of the state, then, is to create a market and block possible deviations in its functioning. In sum, according to this perspective, market must be regulated.

However, it should be stated that neither of these perspectives are sufficient to explain the operation of the music market. The premises of classical liberal economy -which is mainly focused on the 'dream of free market'- have never been realised in culture industry of which structure is shaped by high technology. Keynesian premises, on the other hand, are

proven not to relieve the oppressive and exploitative nature of capitalist social relations.

Actually, there has never been a free market in commoditised popular music. Before the apparent domination of multinationals (in mid 1970s) domestic markets were considered more important, and within the national boundaries of advanced capitalist countries a monopolistic structure has always been predominant. For example, up to 1975, the control of 50% of the American market of recorded music was in the hands of two firms -namely, CBS and Warner-. Moreover, only 10% of control was left out of the hands of other majors. As Eisen (1970) states, in 1970 CBS owned at least eleven labels in its Records Division together with seven big nationwide and 237 affiliated radio stations. Moreover, Columbia's Musical Instruments Division owns Fender guitars, basses and amplifiers (Eisen; 1970: 128). This monopolistic structure was extended to dominate the 'world market' by mid 1970s -again leaving no room for the 'realisation' of the 'dream of a free market'. The structure established at the national level was directly elevated into an international level, but only the actors changed. By 1978, the world market leaders were based on Europe (and later Japan) rather than America. For example, in the same year EMI and PolyGram became the leaders of the industry topping 1 billion dollars of revenue whereas CBS group stayed at the third position with revenue of 946 million (Sanjek and Sanjek; 1991: 238). In early 1990s, American music market was dominated by European and Japan based corporations.

This development through the internationalisation and concentration of capital was inevitable, since the domestic markets of advanced capitalist countries were no longer 'large' enough to meet necessities of increasing capital accumulation. In mid 1980s "EMI had 32 subsidiaries in 29 countries and 28 licensees in as many countries, while PolyGram had 48 operations in 30 countries and a total of 182 other companies working for them as licensees in most parts of the world" (Sanjek and Sanjek; 1991: 238). CBS and RCA were drawing almost half of their profits from their international divisions (Garofalo; 1991).

The tendency towards fewer and larger concentration of capital in culture industry became more apparent by 1980. For example, EMI paid more than 23 million dollars to buy Screen Gems/Columbia, and later EMI was purchased by an English company, Thorn-Electrical Industries⁹. After making an agreement with JVC (Japan), Thorn-EMI purchased two more record labels (Liberty Records and United Artist Records). Similarly, Transcom purchased MGM; MCA bought ABC; PolyGram purchased Casablanca; and Bertelsmann (Germany) purchased Arista and more recently, in the early 1990s, MCA bought Geffen but was then bought by Matsushita (Japan) for over \$6 billion¹⁰ (Garofalo; 1991). These take-overs and mergers continued (and still continuing) to secure the monopolistic control of capital over the market. For example in 1990s' take-over battles, Viacom, the owner of MTV, acquired Paramount; PolyGram swallowed both Motown and Sam Goldwyn's

film studios, but did not stop there, it also bought the remaining 51% of Go Discs label. Time-Warner bought Cablevision Industries and then combined with Turner Broadcasting at a cost of \$7.5 billion, and Disney bought the Capital Cities, a media conglomerate, for \$19 billion (Burnett; 1993).

It should be noted that although the market structure of culture industry is more likely to be oligopolistic, the mode of control exerted reflects a monopolistic tendency since major companies, often think either merging or of large scale cooperation¹¹ to secure the continuity of capital accumulation -particularly in times of crisis.

Establishing a monopolistic control over market (from manufacturing to distribution and to consumption) provided majors to increase profits enormously. By 1985, the majors, controlling the 95% of English music market, used the power they hold to increase stock turnover ratio by over 50% to increase their profits by diminishing retailers' credit period from 100 to 60 days¹² (Qualen; 1985: 4). Actually, such a strategy was an indicator of a structural change in the organisation of the industry. Manufacture was losing importance for the majors. For example, EMI had sold its manufacturing plants in Scandinavia in 1983 and lowered the workforce in its other manufacturing plant in Sweden (Garfield; 1986: 17). PolyGram closed its plant at Chadwell Heath-England, and Warner shut its major factory in 1988

(Burnett; 1993: 58). As Burnett (1993) mentions, in 1980-1986 period CBS fired its 300 workers in America together with lowering its international workforce from 17160 to 10110. Similarly, in England, about 2700 of 10700 music industry workers lost their job between 1980-1984 -and more than 80% of them were from manufacturing¹³ (Qualen; 1985: 1). The reason behind this action was the fact that, majors recognised manufacturing was not the motor force of music industry -i.e. manufacturing, although necessary, is not the crucial phase of capital accumulation in musical production- and the lowest rates of profits were extracted in manufacturing. In music industry, the copyright ownership, distribution and retail sales of music is much more profitable¹⁴.

Moreover, in the context of a monopolistic control over the market, the questions of who manufactures and where the units are manufactured loses its importance, since the distribution of music is strictly under the control of these majors. This is why majors pay a particular attention to the distribution process. As a top level executive from EMI states;

What the independents do, often better than us, is produce extremely sound marketable material. I think there is room in the world for both of us. But, as happened over past five years, they won't be able to attain total independence. We'll see creative satellite companies being born, retaining their artistic integrity, but using the larger companies for distribution. I don't think anybody can distribute records from scratch, on a world-wide basis, more efficiently than the large multinationals can. We've been doing it for a

long, long time, and we've built up heavy networks
(quoted in Wallis and Malm; 1984: 92).

It should be remarked that the established control over distribution of music is always necessary for maximising profits that would assure the continuation of the capital accumulation. Thus, the distribution process by the mid 1980 was completely in the hands of multinationals, which enabled them to control not only the production of, but also the consumption of music in several domestic markets.

Moreover, establishing a control over the distribution process is also vital for assuring revenues from copyrights. As was explained previously, in the last decades of twentieth century, the tendency for music industry majors was to shift their investments towards licensing deals. Thus, the issue of copyright became particularly important. Negus (1992: 13) notes that in 1989, the National Music Publishers' Association of America estimated that publishing revenues from "major global markets", which were thought to be the 80% of the total, were in excess of \$3 billion. Similarly, according to English trade magazine 'Music Week' the music-publishing sector accounted for 1/3 of the total known turnover of the world's recording industry (Negus; 1992). An international coordinator in the Los Angeles office of a British owned company reported that;

International sales are like money in your pocket without really having to do much. You can sell, potentially, from two, to five, to ten million

records overseas and it's a heavy source of income. If you consider that you have no promotional overhead, no marketing overhead, you don't even package it. All the marketing and promotion costs are covered by each territory. The only thing you do is supply the tape, and the money you make is on your royalties basically. It's an internal company licensing deal, which is a great source of revenue. Say you make two or three dollars on the licensing, that's 20 to 30 million dollars. It's phenomenal. (quoted in Negus; 1992: 8)

3.2 Music Industry and the Sound Carrier Market

3.2.1 The General Characteristics and Tendencies

About half of the revenues of the European and America music industry derive from the sale of sound recordings¹⁵. In 1999, over 2.5 billion units of recorded music was purchased in Europe, America and Japan; and the retail value was over 33 billion dollars (IFPI; 2000). This amount constituted over 85% of the whole album sales worldwide. An overall picture of album sales worldwide is summarised in Table 3.1.

Table 3.1: Album Sales and Retail Value in 1999 (Worldwide)

	TOTAL UNITS (millions)	RETAIL VALUE (millions \$)	UNIT GROWTH (%)	REAL GROWTH (%)	DOMESTIC REPERTOIRE (%)	INTERNATIONAL REPERTOIRE (%)	CLASSICAL REPERTOIRE (%)	ALBUM SALES PER CAPITA (album)	VALUE PER ALBUM (\$)
WORLD Total	3459,4	33506,5	0,00%	-2,00%	66,20%	29,20%	4,60%	0,6	11,13
US	1084,7 31,36%	14251,4 37,01%	5,00%	6,00%	92,00%	5,00%	3,00%	3,9	13,14
EUROPE	1112,4 32,16%	12376,1 32,15%	0,00%	-2,00%	41,30%	51,50%	7,20%	1,6	11,13
JAPAN	322,6 9,33%	6436,6 16,72%	-11,00%	-7,00%	77,00%	23,00%	0,00%	2,6	19,95

*Source: Compiled from IFPI (2000)

Among the national markets, America accounted for 37,01% of the total world sales of sound recordings in 1999. Japan, UK and Germany followed America with shares of 16.72%, 7.55% and 7.36% respectively. Table 3.2 presents the top 10 national markets according to retail values.

Table 3.2: Top 10 National Markets in 1999 IFPI World Music Sales Ranking

Rank	Country	Value (million \$)
1	US	14251,4
2	Japan	6436,6
3	UK	2908,9
4	Germany	2832,5
5	France	1983,4
6	Canada	883,6
7	Brazil	668,4
8	Australia	656,3
9	Spain	639,5
10	Mexico	626,0

Source: IFPI (2000)

The most important segments of the music industry are the sound carrier market, copyrights, concerts and other occasional performances. The size of a music market is determined by the combination of these elements. Hence, in music markets where copyrights are disregarded, not only the total volume of the market but also the profitability is lower even if the amount of unit sales are relatively high. In such countries, the share of hardware (i.e. the manufacturing costs) is always higher than the share of software (the mechanical royalties paid to artists and musicians as well as promotional expenses) in determining the cost of an album, which causes lower wholesale and retail values. Actually, in

such cases, as explained in previous sections, although profits are realised immediately, the profitability in the sector is much lower because sales exceeding breakeven point does not bring higher rates of profits.

The total retail value of the market is also directly related with the level of piracy. In general, it can be argued that, there is an inverse relationship between them, since, in the markets where a high level of piracy exist, the record companies cannot increase prices in order to compete with illegal album releases. Consequently, higher unit sales do not always lead to profit maximisation.

In determining the costs of production, it can be argued that, both the hardware/software ratio and the level of piracy, rather than the quantity of unit sales, forms the basic criteria to distinguish between music markets. Table 3.3 presents an example to explain the situation¹⁶:

Table 3.3: A Comparison of Advanced and Underdeveloped Music Markets

	GROUP I					GROUP II				
	FRANCE	CANADA	SPAIN	ITALY	AUSTRIA	INDIA	CHINA	INDO NESIA	THAI LAND	RUSSIA
TOTAL UNITS*	133,1	79	63,4	50,5	20	133,7	71,9	59,6	47,8	103,1
RETAIL VALUE*	1983,4	883,6	639,5	607,3	322,9	174,8	94	126,7	125,5	153,1
VALUE PER ALBUM*	14,9	11,2	10,1	12,0	16,1	1,3	1,3	2,1	2,6	1,5
ALBUM PER CAPITA*	2,3	2,6	1,6	0,9	2,4	0,1	0,1	0,3	0,8	0,7
PIRACY**	(Category 1) 2,00%	(Category 1)	(Category 1) 1,00%	(Category 2) 15,00%	(Category 1) 1,00%	(Category 3)	(Category 4)	(Category 3)	(Category 3)	(Category 4) 80,00%

Source: Compiled from IFPI (2000); EMO (1996)

*Total Units and Retail values are in million dollars. Value Per Album is in dollars and Album per capita is in units.

**It is very difficult to measure the level of piracy in music markets. While IFPI gives approximate numbers, EMO, without giving any numbers, categorises level of piracy in 4 groups (category 1 denotes to lowest levels of piracy while Category 4 is the highest)

Accordingly, the first group (France, Canada, Spain, Italy, and Austria) represents the countries where music industry is highly developed and the share of hardware in total costs of production is lower. The second group (India, China, Indonesia, Thailand, and Russia), on the other hand, represents the countries where industrial production of music is not developed and concurrently the share of hardware (over the software in determining the cost of producing an album) is higher. Additionally, in the Group II countries copyrights are not protected and thus ignored - a situation which signifies the existence of higher levels of piracy.

Although the difference between two groups on the basis of the value of the music markets is obvious, it can be observed that a comparison on the basis of unit sales is not meaningful. For example, total unit sales are almost equal between France-India, Canada-China, Spain-Indonesia, and Italy-Thailand. However, in terms of the total retail value of the market, there is a profound difference between Group I and Group II countries. For example, the total retail value of the market in Group I countries is seven times higher than the Group II countries -despite the fact that total unit sales of Group I and Group II countries are virtually same. The situation is much more explicit when the music markets of Austria and Russia is compared. Accordingly, although the total unit sales in Russian music market is five times higher than the Austrian music market, the total retail value of

Austrian market (322,9 million dollars) is almost twice of Russian market (153,1 million dollars).

Consequently, it can be argued that the total unit sales per se is not an appropriate criterion to determine the value of and profitability in music markets. As will be examined in the following section, understanding the value of a music market, as well as the source of profit, depends on considering various criteria together (ranging from the unit sales to dominant album formats and to composition of capital investments in the production process).

3.2.2 The Industry and The Dominant Album Formats

One of the distinguishing characteristics, exhibiting the level of development of music markets can be found in the dominant "album" formats. Accordingly, in countries where musical production is highly industrialised, the vast majority of the recorded music sales are now in the Compact Disc format. For example, in America music market, a total of 1.05 billion albums were sold in 1999, and 933.8 millions (with a share of 86%) of this total was in CD album format. In Japan, the second large market of the world, the share of CD albums are over 97%. It is possible to observe similar shares in all developed music markets of the world. Similarly, if we return to the case presented in Table 3.3, it is observed that the average share of CD album sales of Group I countries is over 85% whereas it is as low as 7.7% in Group II countries. As a matter of fact, audiocassette is the dominant commodity music

medium (with a share of over 90%) in Group II countries, which represent an underdeveloped market structure with relatively higher (but unprofitable) levels of unit sales.

Actually, CD format has been an expression of higher costs of production despite the fact that there is no profound difference between the manufacturing cost of a CD and an audiocassette. However, CD is a response to an artificial need for higher quality, which marks the dominance of a different level within the organisation of production as well as of the industry.

The rise of Compact Disc format in 1980s had altered all the meanings attributed to a music album. CD presented not only a higher quality of sound, but also challenged the music listening patterns through the technological opportunities it offered. Consequently, from studio recording to the packaging process, the content together with the sound quality of an album had profoundly changed with the introduction of the CD technology. For example, CD technology, while persuading consumers to listen hi-fi music with a higher price, had managed to overcome the crisis in early 1980s which had been marked by the excessive "underconsumption" of music. In a report in June 1987 Financial Times, it was argued that the CD had saved the America music industry in two ways: first, it had revived consumer interest in music, and second, it had allowed record companies to push the prices of albums to a

level that provided them to maximise profits (quoted in Frith: 1990b; 103).

Actually, with higher costs of unit production accompanied with higher rates of profitability, the increase of the CD consumption, which reached to a considerable level in 1985 in America, provided major record companies to regain control over the industry. For example, in 1986 the unit sale of 53 million CDs had generated a revenue of 927 millions. Although the amount of CD sales in the respective year was only 40% of total LP sales (realised as 125 million units), the revenue it generated was almost the same with LP sales. Introduction of CD format equally challenged the European music market. Appendix 9 shows the changes in the consumption of three main music media formats in certain music industries through years.

The data presented in Table 3.4 (as well as Appendix 9) shows that CD has become the dominant format in a very short time (about 6 years after its common usage) in advanced music industries. Moreover, within 16 years time (between 1983-1999), LP format is almost disappeared (its consumption decreased more than 95%) and the consumption of audiocassettes decreased more than 60% while CD consumption between these years rose almost as much as 55.000 times (IFPI 1990).

Another impact of the increase of CD consumption has been the revival of the market for music hardware. The peak years of audiocassette consumption (between 1989-1991) in advanced music industries had also marked high penetration of music

hardware ownership (IFPI; 1990). Hence, the new CD format could succeed to create a demand for its hardware. In this context, the increasing demand for Compact Discs accompanied increasing demand for CD player equipped music hardware (since both the saturation and penetration of CD hardware ownership was at very low levels at the end of 1980s) which provided enormous profits for vertically and horizontally integrated multinational entertainment corporations (such as Sony, Philips-Polygram, EMI etc.). The changes in CD hardware penetration in selected countries is presented in Table 3.4.

Table 3.4 Changes in CD Hardware Penetration

	FRANCE		GERMANY		ITALY		JAPAN		SPAIN		UK		US	
	Penetration	Saturation	Penetration	Saturation	Penetration	Saturation	Penetration	Saturation	Penetration	Saturation	Penetration	Saturation	Penetration	Saturation
1989	10%	16%	14%	20%	3%	6%	36%	51%	2%	4%	9%	18%	19%	20%
1990	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
1991	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
1992	51%	37%	55%	44%	16%	12%	117%	55%	24%	18%	49%	39%	59%	39%
1993	67%	47%	71%	55%	20%	14%	135%	70%	30%	23%	61%	47%	79%	46%
1994	84%	55%	88%	64%	25%	17%	149%	72%	38%	29%	74%	54%	101%	53%
1995	92%	57%	104%	68%	31%	23%	164%	80%	46%	34%	90%	62%	123%	59%
1996	103%	61%	119%	71%	37%	30%	178%	85%	54%	38%	103%	63%	149%	65%
1997	113%	65%	132%	72%	42%	36%	188%	90%	62%	42%	122%	65%	173%	69%
1998	124%	68%	144%	75%	47%	42%	199%	93%	70%	47%	138%	68%	195%	73%
1999	133%	71%	147%	77%	53%	45%	190%	95%	78%	58%	155%	71%	195%	79%

*Source: Compiled from IFPI (1990,2000)

As a matter of fact, at the beginning of 1960s a similar effect was tried to be created through the introduction of cassette technology with the advent of silicon chips and integrated circuits. Cassettes were initially designed by Philips for professional purposes (for example, to use in Dictaphones), but later developed and marketed by Japanese companies as an alternative music medium to vinyl disc (Robinson et. al; 1991: 53). By the end of 1960s, cheap

compact cassette recorders had become common in the developed music industries, and was rising in other music markets. Consequently, the end of 1980s marked the widespread consumption of audiocassettes with a percentage of 55% while LPs share was 25% and the newly emerging CD format was 20% (IFPI; 1990). However, it should be mentioned that the pre-recorded cassette consumption of 1980s has never reached the success of CDs of 1990s in music markets of advanced capitalist countries.

It can be argued that, multinational record corporations who control the music industry has never affiliated with the audiocassette format. On the other hand, cassette technology could easily spread into the countries where a less developed music industry exists.

The introduction of cassette technology challenged the pre-existing vinyl record format since cassettes existed as a two way medium which can record as well as play the music. Cassette recorders/players were much cheaper, repairable and thus durable than records and phonographs. More importantly, cassette recorders and players could function with minimum power requirements leading to release of highly portable hardware designs. In this context, cassettes provided the expansion of music market through the mobility it provided (car-audio equipments, walkmans, or small portable radio-cassette players). In terms of manufacturing, mass production of cassettes (either in the form of empty or pre-recorded

formats) was incomparably easier and cheaper than that of vinyl discs.

Consequently, as Manuel (1993) states, cassette technology has been conducive to the decentralisation, diversification and expansion of recording industries. However, it would be misleading to argue that its impact has been uniform throughout the world. For the major record companies, that has been holding the control of production in advanced music markets, introduction of cassette technology presented a heavy compensation for expanding the market. In other words, the cheapness and easiness of producing pre-recorded cassettes challenged their position in the market, since every empty cassette sold was preventing the sale of at least one pre-recorded cassette or LP. This was one of the reasons behind the relatively lower sales of pre-recorded cassette albums (as mentioned above, pre-recorded cassette sales has never exceeded the 55% of total album sales in advanced music industries).

However, the same reasons revived the music consumption in less developed regions. Record companies in these areas could begin to finance the costs of production of an album in the cassette format, since the only requirement for manufacturing audiocassettes were high speed dubbing machines (which were incomparably cheaper than the record pressing plants). More importantly, the cassette technology caused an enormous spread of piracy which offered consumers illegal music albums at very

low prices. In sum, the technology, which has always been a means of political and economic control over production by capital had now produced a possible challenge for its own domination in music industry through the impact of cassette technology. In this context, Manuel (1993: 20), at the beginning of 1990s, had argued that:

Cassette technology, by decentralising and diversifying the control and the products of the music industry has rendered Adorno's pessimistic criticisms less applicable ... The spread of inexpensive micro-media like cassettes at once illustrates the obsolescence of Orwellian pessimism, as well as the necessity of examining recent developments from the perspective of the now-familiar questions relating autonomy, freedom, and control of the means of production.

However, recent developments has shown that there is no room for such an optimism, since the beginning of the dramatic decline of the cassette consumption had been initiated even at the same years and major entertainment corporations had begun to promote the CD technology much before 1990s. For the reasons presented above, dismissal of cassette technology through the ideological claims of "lower sound quality of a lower technology" and regaining the control over production through setting up CD technology as an industrial standard has not been difficult in advanced capitalist countries where consumers were reserving a greater portion of their income to leisure (entertainment) spending -thus they were ready to pay more for a real hi-fi sound quality. In sum, it can be argued

that multinational corporations did not permit the further spread of cassette technology in advanced music markets¹⁷.

CD technology is completely different from audiocassette. Through relatively high costs of its production, together with the new promotional and packaging techniques (such as booklets or books given with the CD and/or combining audio tracks with multimedia content), CD technology provided major record companies to establish tighter forms of control over the demand which had profound effects on the production, distribution and the consumption of popular music. This aided to eliminate the threat, posed by audiocassette technology, to lose their control over production and consumption in advanced music markets.

Meanwhile, the dominance of audiocassette as the basic music medium in less developed music markets has been consolidated. The easiness and lower costs of producing (or copying) audiocassettes led to an autonomous development of musical production, which considerably explains the dominance of domestic repertoire in these countries¹⁸. In other words, the cassette technology provided smaller record companies to break the domination and control of multinational corporations over local music markets.

In such music markets, the lower costs of production accompanied with the lower retail values (due to lower purchasing power and higher rates of piracy) have reduced the profit margins in the musical production business while

proliferating music consumption¹⁹. Hence, despite the relatively high amounts of album sales, for the reasons stated above, not only the development of an industrial capital but also the domination of multinational capital is hindered in the music sector of the less developed countries.

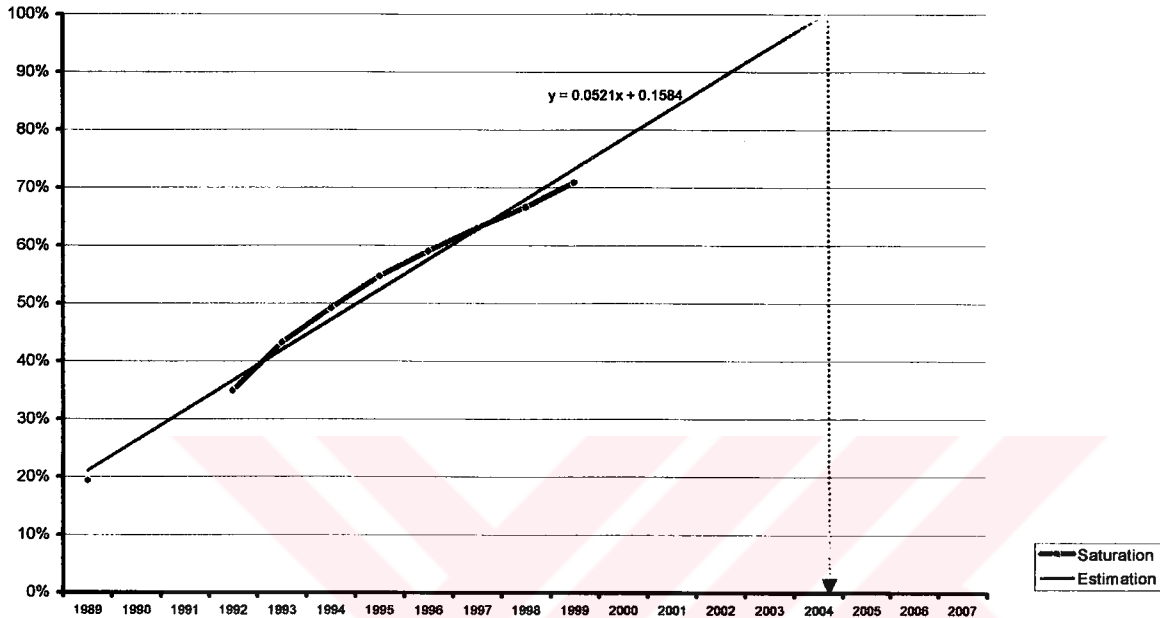
3.2.3 Towards New Commercial Formats

In addition to CD format, there is also a considerable market for music videocassettes and Digital Video Disks (DVD) in advanced music markets. These typically contain a concert recording or a series of music videos of songs. Following America and Japan, UK and Germany are the third and fourth largest national markets for music video. In 1996, the retail value of music videocassette market in UK was about 65.4 million dollars whereas it was 15,2 million dollars in Germany²⁰. According to 1996 EMO (European Music Office) report of 1996, the European Union market for music videos was estimated to be 10 million units with a retail value of 122.5 million dollars.

As can be observed from the Table 3.4, the market for CD hardware ownership is also saturating increasingly. Accordingly, the average ratio of saturation in these markets has increased from 19% to 71% between 1989-1999. If the ongoing trend continues in the following years, it can be argued that the European, American and Japan markets will be fully saturated in the years between 2004-2005 (Figure 3.1). Hence, new technological advances can be expected around the second half of the first decade of twenty-first century to

preserve the continuity of capital accumulation in music industry²¹.

Figure 3.1: Changes in Market Saturation in CD Hardware Ownership and an Estimation for full Saturation



**Source: Calculation is based on IFPI data (IFPI; 1990, 2000)*

In this context, it can be observed that new music album formats are increasingly appearing. For example, in 1996, record companies have started to issue Enhanced CD albums which contain multimedia content (audiovisual material) in addition to audio tracks. Currently, the multimedia content of these E-CDs viewed and listened with a computer's CD-ROM drive while it is possible to listen to the audio tracks in conventional CD players. Additionally, in the recent years, a more flexible album format (MD - Mini Disk) is proliferating in the music markets of America and Japan²².

In addition to CD players, the consumption of the hardware for CD recorders are continuously increasing. In this context, currently major record companies, computer and telecommunications companies are establishing joint ventures to develop a major project entitled MODE (Music on Demand Project) for the direct delivery of digital sound recordings by cable or through internet (Laing; 1996: 17). Accordingly, it is reported that, in the near future consumers will find opportunity to digitally record the music they purchased from MODE (over the internet) directly on a CD.

3.3 Record Companies and The Production of Popular Records

3.3.1 The Structure of Major Record Companies in a Concentrated Market Structure

The most important component of music industry is the recording companies whose primary function is producing, manufacturing and selling records (widely in the form of audiocassettes and CDs). It is possible to classify these organisations according to size and organisational structure. As was mentioned in previous sections, since its beginnings at the end of nineteenth century in United States and in Europe, few major corporations have dominated the music industry. Concurrent to the internationalisation of capitalism these corporations began to continue their control in the world market as "multinational" corporations. For most of this time, the music industry is controlled by five to eight big corporations and since 1970, the concentration ratio of eight

firms did not fall behind 72.5% (Gronow; 1983, Chapple and Garofalo; 1980, Lopes; 1992, Negus; 1992, see Appendix 7 for the changes in the concentration in world music market, and see Appendix 11 for the explanation of how concentration in a market is calculated). Moreover, since 1990, 80 to 85% of record manufacturing in the United States is dominated by six multinational corporations. Namely, these major corporations are Sony Music Entertainment, Thorn-EMI, the Music Corporation of America (MCA), Universal Music Group, the Bertelsmann Music Group (BMG) and Warner Music International²³ (see Burnett; 1990 and 1993, Negus; 1992) The music market in the European countries also face similar concentration ratios. The six largest corporations in European Market are responsible for distributing and marketing about 75% of all albums sold (Laing; 1996: 24). The combined share of these six companies ranges from 66% (Netherlands) to over 80% (Italy, Finland and France). Additionally, there are also hundreds of independent small companies operating in the market with a total market share ranging from 15 to 30%.

Mostly, the major entertainment corporations own more than one major recording company. Each of these music companies appear as autonomous in their decisions and actions, however they are responsible to the administrative board of the entertainment corporation they are tied. The existence of many job-intensive departments characterise the internal structure of these autonomous record companies. Although departments do not operate as a separate company -they are responsible to the

board of directors of the record company-, they function as a semi-autonomous unit in their specific area of interest. These departments can be classified in six groups: Artist and Repertoire (A&R) department, Promotion department, Sales Department, Marketing Department, Manufacturing Department and finally Distribution department.

A&R department is responsible for finding new talents. A&R is one of the most important departments of a record company. It is usually further subdivided into specialised divisions in terms of different genres of music (Hale; 1990, Negus; 1993). A&R department is also responsible to find appropriate producers for the artists, selecting songs through cooperating with the producer and even determining the sequence of the songs in the projects (Stratton; 1982).

Promotion department is responsible for getting the product known by the public. In doing this, not only radio and television broadcasts are planned but also several meetings with the music critics as well as several presentations are arranged by this department. Also, this department is responsible for tracking and sending respective albums' commercial success and chart positions to magazines, radios and television stations (O'Shea 1993). To organise such activities, promotion department is also subdivided into specialised promotion units (Hale; 1990, Negus; 1993). Among these units, particularly the sub-division called "publicity" has a particular significance. This department is responsible

for maintaining a relationship with the media organisations. Promotion department usually cooperates with and supported by the marketing department which is specialised on designing several campaigns and advertisements in the media (Von Schilling; 1989).

Sales department has the responsibility of monitoring a record's progress at the wholesale and retail level (Hale; 1990).

Manufacturing and distribution departments generally appear as separate divisions directly tied to the corporation. Manufacturing department is responsible for the production of audiocassettes, CDs (or whatever the configuration of the medium is). Distribution, as one of the most important chains of vertical integration, appears as a network guaranteeing the profit maximisation not only through the distribution of company's own products but also through distributing the products of smaller companies which do not own their distribution system. Distribution department works in a close relationship with sales department.

Consequently, it can be argued that modern recording industry is comprised of a web of minor and major companies in which "majors increasingly split into semi-autonomous working groups and label divisions, and minor companies connected to these by complex patterns of ownership, investment, licensing, formal and informal and sometimes deliberately obscured relationships" (Negus; 1992: 18). And in this context, Negus

adds that "this has resulted in complex and confusing, continually shifting corporate constellations which are difficult to plot, as deals expire, new relationships are negotiated, new acquisitions made and joint ventures embarked upon".

3.3.2 Producing A Popular Record

Each record is considered as a commercial project to be realised if it has viewed by the record company as having a potential to become profitable. In other words, a company's decision to make records to particular singers or music groups are generally taken irrespective of the artistic value of the music. Thus, once the decision is taken, then the record company signs a contact with the singer or group to make records for which the singer or the group will be paid according to the terms of the contract (usually a particular percentage of all profitable sales). Together with the contract, the company determines a production budget through calculating risks involved in the project. Then, the most appropriate producer according to the style of music is selected, and the company, delegates the major responsibility to the producer. The producer selects a music director for the album and they both cooperate with the A&R department of the company to select songs to be performed. After this stage, the music director of the album can make changes in the compositions or can pass the compositions to professional musical arrangers for their appropriate arrangement according

to the musical style of the singer/group. Then studios, together with the instrument players are selected for the studio recording. Meanwhile, the record company initiates a promotion plan for the record.

When the album is completed, producer selects a "single" among the ten to twelve songs of the album for the promotion. The selection of the first single is one of the most critical decisions of the production process, since mostly the single appears as the motor force of the album sales -i.e. the album is known by this single and moreover it is generally bought for that single. In this respect, before releasing the album, the single is sent to radio stations for airplay. As the single predates the complete album, few weeks after its release, the complete album is distributed to the retail shops and usually at this stage a music video is made for the most promising song of the album (usually the music video is made for the pre-released single).

Generally, the most profitable part of the life cycle of a song lasts no more than three months; hence to keep album sales alive, record companies issue new promotion plans (for example, arranging interviews in the media or making new music videos etc.) in every two or three months until to a stage where promotions become ineffective for increasing the sales. (Hale; 1990).

The process outlined above signifies the essential procedures of producing popular record particularly in

advanced music markets, in which the music industry is dominated by few multinational corporations. However, the process of producing a popular record has some particular differences in less developed markets (like in Turkish music industry). It can be said that the difference is also a reflection of the difference in the degree of "industrialisation" of the musical production.

To understand the specificity of the current structure of Turkish music market, in the following part of the study, the historical development of the commercialisation of musical production (beginning from Ottoman music practice towards an industrial production in Turkey in the second half of twentieth century) will be examined.

Notes to Chapter 3

¹ Currently the capacity of most people to play a musical instrument is restricted with playing audiocassette and CD players; and even most of them hardly know the technical capabilities and complete features of their electronic record players.

² Concentration is a measure of the degree to which few large companies exert control over the production and employment as well other factors relating with the operations within an industry (see Appendix 11 for the explanation of how concentration is measured). As Sánchez-Taberner (1993: 7) explains, concentration in a media market can be defined as an increase in the presence of one or a handful of media companies in any market as a result of various possible processes: acquisitions, mergers, deals with other companies, or even the disappearance of competitors. Concentration, in

short, means that fewer corporations own the media. It is generally accepted that concentration is measured by calculating the share of top four (shown as CR4 indicating concentration ratio for top four) or eight (shown as CR8 indicating concentration ratio for top eight) largest companies in total sales within the respective market. Accordingly, if CR4 is higher than 50% or CR8 is higher than 70%, then this means that the concentration is leading to oligopolistic or monopolistic activities on the market (Burnett;1996: 13) It should be added that, currently, together with concentration, also conglomeration takes place in media markets. This means corporations own many companies that function in diverse areas and media companies are the part of these corporations. This type of concentration of media production is, according to Hamelink (1983), the result of three interlinked economic processes: integration, diversification, and internationalisation. Integration is also defined in two main categories: Vertical integration and horizontal integration. According to Burnett (1996: 14-15), vertical integration refers to situations where a company either partly or completely controls the channels of production and distribution of a particular media market, whereas horizontal integration implies a policy of growth which goes beyond the idea of controlling the channels of production and distribution of a specific media industry -i.e horizontal integration exists when a company owns the same type of media in different markets: newspapers, radio stations, television stations, etc.

Both vertical and horizontal integrations are the defining characteristics of the music markets. It is important to remember that, currently musical production appears as a separate division of multinational entertainment industries. Specifically, horizontal integration in music industry marks the increasing level of concentration and control. Through acquiring different types of media, the corporations develop

several cross-promotion techniques to support operations within different media sectors. In this sense, a corporation who owns newspapers, television stations, film studios and music companies can perform 'cross-promotion' to increase the level of profits from a single investment. Vertical integration, on the other hand, refers to multinationals' acquisition of the control of the whole production process from the process of creation to the stages of manufacture, and then to the distribution phase. A vertically integrated phonogram company owns the recording studios, CD and cassette manufacturing plants, distribution and retail units.

³ The prosperity's illusion lies in here since such a strategy necessitated an alliance between capital, labour and the state, which was proved to be a deception as the needs of capital satisfied and accumulation matured to return back to a violent state of capitalism (through new right policies) by 1980s. Consequently, the alleged alliance was declared null except conserving the consumerist ideals (but through individualising them), which had turned out to be institutionalised habits impossible to give up.

⁴ This marked the further diversification and heterogeneity, which for culture industries meant the existence of many different homogeneous markets. See also T. Hine, Populuxe, New York: Knopf, 1986.

⁵ The "independents" are generally smaller record companies targeting the domestic market and not affiliated with any major company. However, as they cannot supply all of the services needed for record manufacturing (usually they do not own a studio, a pressing plant, or a distribution network) they are highly depended on majors in their production and distribution. In short, the term "independent" or "indie" stems from the fact that these firms do not exist as a branch

of a major company, however, enduring their existence highly depends on the services provided by major companies.

⁶ This line of argumentation is widely accepted by many writers and the emergence of new genres is explained accordingly. For example, the growth of rhythm and blues (Gelatt; 1965), the emergence of Rock'n'Roll (Chapple and Garofalo; 1980), the punk rock (Laing; 1985) and recently what is called as "world music" (Wallis and Malm; 1992) were all first initiated by indie labels and appeared as new genres with new audiences. After a commercial success, these genres (and sometimes the indie labels) are absorbed by the major companies. However, one of the first and most typical example was the story of Elvis Presley in 1950s. His potential was first realised by an independent company, namely The Sun, then he was transferred to one of the major firms in which "he was quickly used as a way of selling records, cinema seats, magazines, merchandise and advertising time on radio" (Frith; 1992: 63).

⁷ Beginning of radio's dependence on music industry dates back to 1950s when television, through replacing radio, began to appear as the primary medium of entertainment. Enthroning of television in the living room not only changed radio's domestic space but also the function of radio in social life began to transform. A new programming and commercial function was devised to radio so that radio and television became separate and not competing entertainment media. However, radio, although became a separate medium, was constrained by television. Such a constraint forced radio to become dependent on music industry. Due to the strategies of music industry, existence of multiple music formats was directly reflected in the new programming strategies of radios. Consequently, technologies that are more mobile were developed for radio. It was after 1950s that -through employing new transistor technologies- radio sets became smaller and 'pocket radios'

were provided for the consumer. Emergence of these battery operated and small transistor radios while allowing a greater fragmentation, gave people an opportunity to listen to it almost in everywhere, including work. However, together with the appearance, the content of what people hear from radio also changed.

The new programming strategies first targeted teenagers, which considered a new market of listeners who could be delivered to advertisers through radio. Moreover, through the increasing fragmentation of listeners due to the introduction of mobile transistor technology, broadcasters found an opportunity to become more specific about the listeners that they were selling to advertisers. In this framework, the "format programming" was born. Accordingly, "formatting ensures that a station is clearly distinguishable from other stations (unlike television, which distinguishes programs and times), through a clear musical identity constructed in harmony with the precise demographics and researched common tastes of the targeted audience" (Berland; 1993: 107).

It is widely argued that "radio formats are mechanisms for managing the audience and selling airtime to advertisers" (Rothenbuhler and McCourt; 1992: 106). In this context, according to Fornatale and Mills (1980: 61) "the purpose of formats is to enable radio stations to deliver to advertisers a measured and defined group of consumers". However, it is often neglected, if not rejected, that the *raison detre* of radio formats is the music industry. This connection not only negates the autonomy of radio but also reveals the fact that cultural economy is a whole in which particular dependencies are established for the general purpose of reproduction of capital.

As a matter of fact a radio format can be defined as a system that exhibits the musical (or informational) boundaries and approaches of a particular radio station (Rothenbuhler and McCourt; 1992: 106). Formats cause diversification, but this

is not for the sake of satisfying listeners' demands. On the contrary, formats function as a means of what Ewen calls 'demand management'. Employing format programming necessarily fragments the total radio audience. Through dividing the audience in the market, the competition is minimised -which can be considered as a response to the needs of monopolistic structure of culture industry. Hence, the term (format programming) itself explains radio's increasing dependency on music industry. Although every format follows a complex set of rules for programming⁷, the nature of these formats are determined parallel to the music formats generated by music industry (rock, country, classical, disco, etc.).

The music industry presents wide-ranging musical styles which forces the organisation of audiences by music format in radio market. Thus, radios use formats to "institutionalise standardisation" (Rothenbuhler and McCourt; 1992: 106) for the elimination of uncertainty and sustaining predictability, which is vital to maximise profits both in radio and music industry.

³ The groups like Pink Floyd or King Crimson were popular in 1970s. For example, Pink Floyd's "The Dark Side of the Moon" had become a myth staying more than 610 weeks in Billboard charts between 1970s and early 1980s. However, today, this kind of music format, if still exists, stayed marginal. It is not primarily because tastes of consumers changed and this music is not demanded but because this kind of music is not appropriate for promotion (at least it is impossible for producers to make a music video of which its duration is more than four or five minutes since none of the music televisions can reserve more than this for a single music video). If this kind of music is not demanded today, it is possible to argue that the tastes and demand is manipulated to eliminate this format. Consequently, Pink Floyd is now changed its style parallel to the necessities of the industry.

⁹EMI was controlling 10% of the American music market since the mid 1970s. However, in 1979, it was hit by a serious cash-flow problem, which caused a dramatic decline in its profits (to the level of 0.4%, which was about 30 times less than the level in 1972). As a result of this crisis, EMI was absorbed by Thorn-Electrical Industries in 1982 (Wallis and Malm; 1984: 88). In fact, the English company Thorn-Electrical Industries was not a music industry major, but a conglomerate in consumer electronics, white goods, and television-rental. Through purchasing EMI for about 350 million dollars, it entered into the music industry and this new music division of the company was labelled as Thorn-EMI.

¹⁰ Then MCA was sold to Seagram for a price of \$5.7 billion - lower than the price paid by Matsushita.

¹¹ For example, although not realised, Warner and PolyGram had planned to merge their music divisions when pressures from international competition increased. Similarly, RCA merged its record, music publishing and music video divisions with Ariola-Eurodisk (Burnett; 1993).

¹² Stock turnover ratio is the proportion of records actually sold in a year within the total record held in stocks. The increase in this ratio means, what is produced is sold (or encouraged to be sold) as immediate as possible. Majors' discouraging stocking enables them to realise their profits more quickly while diminishing retailers' possible benefits from stocking.

¹³ It should be remembered that, the precautions taken to secure maximising profits are always at the expense of workers.

¹⁴ Majors' real profits in music industry come from the 'invisible' components. As Negus (1993) exemplifies, in England in 1993, the numbers illustrate this: "£222 million

from royalties, £146 million from music publishing, £73 million from musical theatre and other factors, £54 million from performance income and £101 million from software sales". In other words, the income from music software (CD, Audio cassette or LP) only worth 17% of whole net earnings whereas royalties worth about 40%. It should also be remembered that the value that is created by the production of music is not limited by the music. It may be interesting to note that, for example at many concerts, T-Shirts brings more revenue than tickets. As Qualen (1985: 16) states, "[in 1985] Frankie Goes to Hollywood sold more T-Shirts than records". In a vertically and horizontally integrated structure, conglomerates find various ways of maximising their profits (through utilising means of cross promotion).

¹⁵ Although sale of sound recordings constitute the most important part, it is the only 50% percent of the total revenues in advanced music industries. According to EMO (European Music Office) statistics of 1996, the other 50% comes from performing rights and publishing (about 15%), concerts and other performances (about 10%), subsidies and sponsorship (about 10%), and finally musical instruments (about 15%).

¹⁶ The countries in the first group are chosen as representatives of the average trends in the developed music industries. The countries in the second group, on the other hand, represent the average trends of their own category which is marked by relatively high levels of album sales accompanied with lower retail values.

¹⁷ After the audiocassette experience in advanced music industries, promoting the CD format, rather than for example DCC (Digital Compact Cassette), was completely an ideological preference. If the real problem had been the "sound quality" as suggested, then DCC format should have been introduced

(instead of CD) by the entertainment corporations, since it was offering a digital sound quality (even higher than the CD format) together with digital recording capabilities (as in audiocassette). In other words DCC was offering a combination of the higher sound technology of a CD, and flexibility (it is a re-recordable medium unlike CD) of an audiocassette. However, DCC was not developed as a consumer good (currently it is used for professional purposes); and its price has always stayed beyond the limits of an average consumer's afford.

¹⁸ For example, it can be argued that the proliferation of cassette technology in late 1960s and early 1970s has had a considerable impact on the development and proliferation of "arabesk" music in Turkey.

¹⁹ It should be stated that, on this issue, there is a considerable similarity between our findings on Turkish music market (presented in Chapter 6) and Manuel's on Indian music market.

²⁰ British Phonographic Industry Statistical Handbook 1996. Unfortunately the data for other countries are not available since in most regions (including America and Japan) music videos are considered as a part of general video retail sales market.

²¹ For example through the introduction and rapid proliferation of MP3 music format, major music producers had been disquieted. However, currently, it is known that they are seeking new means for profit through producing MP3 players as well as including MP3 format in their repertoire to commerce over the internet.

²² Although MD format had released a few years ago, according to IFPI statistics of 2000, its sales had exceeded five million copies in American and Japan markets in 1999.

²³ It should be stated that since mergers continue within the world market, also the names of the corporations that dominate the market continuously change.



CHAPTER 4

THE OTTOMAN MUSIC PRACTICE: MUSICA PRACTICA REVISITED

This chapter will present a historical analysis of the music practice in the Ottoman society. In order to understand the special features of musical production and its particular differences from Western practice, the specific conditions for the existence of *musica practica*, as well as its dissolution, in the Ottoman society will be discussed.

In order to develop a better understanding of Ottoman musical practice and its place in social and cultural life, it will be appropriate, here, to stress at the outset that the model of development of the music as commodity in the West, as explained in Chapter 2, does not conform to the Ottoman musical practice. The basic difference lies in the nature of labour process embodied in the musical activity. In the Western practice, musical work, as a product of labour had appeared as an object even before the spread of the capitalist relations, and with the ulterior changes in the relations of production all productive activities (including music production) had been transformed into a commodity production. Thus music was produced, packaged and standardised through

musical notes. Hence, it acquired a separate existence in this process. On the contrary, as will be examined, in the Ottoman musical practice, the activity of music existed as a form of collective action -i.e. the product of labour was not an objectified work of labour. In other words, the labour embodied in the production/reproduction of musical work was functioning for the reproduction of *technē* -and at the same time it was reproducing the collective action depending on *technē*.

As a matter of fact, two specificities of the Ottoman music tradition, namely the lack of notation and the existence of the institution of *meşk*, differentiates it from the Western practice. Accordingly, the lack of notation, which actually continued until the late nineteenth century, can be evaluated as a symptom for the existence of a dealienated musical practice; and (the existence of) the *meşk* (oral transmission and education), an institution through which the music and its culture is orally transmitted to following generations, can be considered as a primary mechanism producing and reproducing the collective action. In such a context, it is possible to argue that the dominance of music as action (in contrast to music as text) was the basic characteristic of the Ottoman music tradition, which in its turn would enable us to talk about the existence of a particular structure that we can discern as the *musica practica*.

4.1 Musica Practica In Ottoman Society: The Symptoms

4.1.1 The Absence Of Notation In Ottoman Music Practice

One of the basic distinctive characteristics of the Ottoman music tradition (and practice) was the absence of notation in producing and reproducing music. It can be argued that, this was an all-inclusive peculiarity of Ottoman music, which lasted for about five hundred years until the late nineteenth century. It must be stressed that not only the folk music of rural areas but also the whole of urban music tradition was unwritten.

In musicology, the musical note is considered as a basic raw material for the analysis of the development of musical styles and techniques. In this sense, musicological analyses on Ottoman music began only by the construction of a written repertory of almost five hundred years of Ottoman (urban) music after the first decade of the twentieth century. Moreover, the studies on the compilation and notation of folk music had started later, only in the era of Republic.

However, it should be noted that, a musicological analysis of the consequences of the absence of notation in Ottoman/Turkish musical tradition is not our concern here. Rather, in this chapter, the absence of notation will be considered in the context of its relation to the organisation of material production of culture. In this context, it can be argued that understanding the reason(s) behind the absence of

notation can contribute to understand the objective conditions under which *musica practica* existed in Ottoman society.

As a matter of fact, it is not easy to bring a sufficient answer to the question concerning the absence of notation in Ottoman musical practice. For example, although it is plausible to justify the lack of notation in folk music due to extensive illiteracy in rural areas, the same argument would not be valid for explaining the similar situation of the urban music -especially the music of the Ottoman courts. As Behar (1993) notes, almost all of the Classical Turkish Music composers were not only literate, but also most of them were from a strata of scholars (of religion) or of statesmen. Moreover, almost every information about the music, only with the exception of musical notes, had appeared in *güfte* anthologies of the epoch -i.e. the name of the composers (*bestekâr*), singers (*hânende*), instrumentalists (*sâzende*) as well as the lyrics ("*güfte*)-. Moreover, even in some instances, musical notes and notating music was considered as an "animosity to the art/science of music" (*fen-i musiki*)¹.

However, since the seventeenth century, several arguments had been developed to explain the "lack of notation" in the Ottoman music. Generally, the basic motif behind these arguments was the claim suggesting the musicians' theoretical incompetence and/or inadequacy to write music. As a matter of fact these views were mostly advanced by the Western

travellers and musicians visiting Istanbul. For example, according to Behar, evoking the views of Laborde;

This [i.e. notation] was ... a kind of magic, or at least a competence beyond their understanding².

It is quite interesting that, a century before Laborde's 'observation', a Polish convert Ali Ufkî was narrating similar anecdotes to his friend Cornelio Magni³. It is known that Ali Ufkî, in the years he lived in Istanbul, not only notated many samples from Ottoman court music, but also tried to teach various systems of notation to court musicians (Behar 1990). Consequently, leaning on the memories of Ali Ufkî, Popescu-Judetz (1999: 24) argues that in the seventeenth century, Ottoman musicians had "(begun) to show a genuine interest in notation". However, there is no evidence to prove Popescu-Judetz's claim. On the contrary, about a hundred year later, the memories of Laborde show that nothing had changed in the Ottoman musical practice. Similarly, about 30 years after Laborde's visit, Kantemiroğlu, in a book submitted to Sultan Ahmed III (*Kitab-ı ilm' ül-mûsikî*), had argued that notation was "something unknown for the Turks" (Popescu-Judetz; 1999: 26). Kantemiroğlu's book was about the theory and practice of Turkish music, in which a specific system of notation was suggested. Kantemiroğlu argues that with the use of this notation system:

... Turks say that practical music as well as theoretical music has become easier and clearer (quoted in Popescu-Judetz; 1999: 25).

However, again, there is still no evidence for any use of Kantemiroğlu's notation system within Turkish music. On the contrary, about forty years later, Charles Fonton (1987: 65), after his visit to Istanbul, reports that:

If Easterners had known how to use notes, this would have been beneficial both for them and for the foreigners who wish to learn their music. However, they are unaware of this opportunity.

It is possible to increase examples to the absence (and resistance to use) of notation in Turkish Music⁴. Actually, neither for Westerners the absence of notation, nor for Ottomans the use of notation was understandable. Thus, despite the fact that the claims on the reasons behind the absence of notation were far from being explanatory, these observations on Ottoman music tradition are still valuable for they had substantiated that the idea of notating music was resolutely excluded in the Ottoman music tradition.

Consequently, it can be argued that neither the question of literacy, nor "musicians' theoretical incompetence" sufficiently explain the absence of notation in Ottoman musical tradition. The absence of notation should be considered as an outcome of the social situation and function of music in the Ottoman society. In this context, a deeper analysis of a specific institution of the Ottoman musical practice; *meşk* can shed further light on the question.

4.1.2 Music As Action: The Institution Of Meşk and the Constitution of Musica Practica

Despite the absence of notation in Ottoman music practice the activity of composition was strictly guided by particular rules and rhythmic patterns. Hence, making music had never been subject to a free (individual) artistic creation (Baran; 1995, Behar; 1992). More importantly, the limits of artistic creation in the process of composition was widely determined by the tradition. However, regardless of the existence of a web of norms and rules in composing music, in the face of the lack of notation, "performance" appeared as the only means for the incarnation of a musical work. The material existence of a musical work depended on the musical performance rather than note sheets on which the music was recorded. Consequently, it can be concluded that, the existence of music in the Ottoman society was not separated from "performance" -for example, the material existence of music depended not on its composer's individual activity, but on the active participation in performing music. In this framework, not only the music but also the tradition, in which the rules, norms and rhythmic patterns are structured, is transmitted to the following generations within this process. Consequently, there is no individual musical work (original composition) in Ottoman practice. In other words, music composition, in Ottoman musical practice, rather than expressing the feelings of its creator, appears as an expression of the collective action defined by the lived experiences of its performers -since, a

musical work could not exist independent from its performance. Hence, the imperatives of creative artistic production (musical composition) is widely determined by the tradition (which constitutes the collective memory), and the tradition is subject to continuous change due to the changes in the musical practice (signified by the experiences of the performers).

The patterns of music consumption as well as production is determined in Ottoman society within a specific framework: The Ottoman music is not a spectacle; it is performed (i.e. produced and consumed) in small spaces through active acts of the participants in the performance.

The basic institution signifying this framework is *meşk* (oral transmission and teaching)⁵. As a matter of fact, *meşk*, in the Ottoman society, is a particular way of teaching music. However, in the absence of notation, *meşk* does not only stand as a basic medium of musical training but also serves as the only way of transmitting music to following generations. In this regards, Behar (1993: 11) argues that;

Meşk was, both a total education system and a means for solidarity and consistency in the musical world; and in this sense it was carrying through a practical, as well as a symbolic, function.

It is possible to argue that the musical activity, which is organised around the institution of *meşk*, can be considered as a *technē*. However, it should be stressed that *meşk* is a

technē, which is not mediated by technology. This signifies that the division of labour between the mental and material is not (yet) reflected in the activity of music. Thus, the musical activity organised around *meşk* is one of the direct and unmediated form of the production activity. Consequently, the musical activity through *meşk* appears as a specific practice that merits to be called as *musica practica*. In other words, based on the institution of *meşk*, it can be argued that what is actually produced in a session of *meşk* is the reproduction of what is already existing in the collective memory -a sine quo non condition of performing music in the Ottoman practice. Neither instrumentalists (*sazende*) nor singers (*hanende*) could perform a musical piece if they had not memorised it before in a *meşk* session. In other words, the only chance for the reproduction of a work of music was its inclusion in the sessions of *meşk*.

In conformity with the social function of *meşk*, it can be concluded that the musical work in the Ottoman society was not considered something that could be appropriated as a commodity. The reason behind the absence of notation finds its explanation at this point.

Situated within the daily practices, production of music appeared as a continuously changing mode of expression organised within the collective actions based on the collective memory. Collective memory does not simply reflect the "lived experiences" but also incorporates the changes it

undergoes in every new performance. What refreshes memory is not the continuous repetition of the musical work since collective memory is not a mechanical storage unit. In other words, every performance, in the Ottoman musical practice, appears as a new experience, which in turn is articulated with the collective memory to alter it. This means that the activities of composition and performance are not differentiated from one another. Therefore, during each performance music is reproduced (but not repeated).

However, a system of notation, as in the case of Western musical practice, can only develop as an outcome of a differentiation between the activities of composition and performance, and signifies a development towards the objectification of a musical work. In the notated music, composition always limits the performance. Such a development brings further differentiation within the musical practice: Once the music is objectified through notation, repetition becomes possible and this leads a further differentiation between performing and listening (and in commodified music, between production and consumption). Consequently, a crucial point that differentiates Western musical culture from the Ottoman practice should be sought at this point. In the Ottoman musical practice, transmission of music from one generation to the other is accompanied with a change in the form/performance of the musical work concurrent to changes in objective conditions of the new era.

Consequently, it can be argued that the musical practice in the Ottoman society (which was extensively experienced in the courts, tekke squares, semahanes, mosques, coffee houses, or even in public festivities⁶) until the late Ottoman era, constitute a specific example of the *musica practica*.

4.2 The Dissolution Of Musica Practica

Music practice is situated within the realm of culture, however it is not autonomous from social, political and economic realms. In this sense, *musica practica* -also reflecting the basic characteristics of whole social organisation- in Ottoman society has dissolved parallel to the deterioration of its whole social and political organisation which had been based on a specific land regime. This specific land regime (*dirlik* regime), which was highly based on rent in kind, unadulteratedly continued until mid sixteenth century. What followed later was the extensive alternation of money rent (*mukataa* regime), which appeared as the perpetrator of the collapse of the land regime.

As a matter of fact, an analysis of the making of Ottoman social and economic structure and its gradual deterioration is beyond the confines of this study. However, it should be noted that, the institutionalisation of money rent had helped to the development of capitalism within the European Feudalism through its contribution to the formation and expansion of new relations of production, whereas, the same institution had led to the gradual collapse of the whole Ottoman social and

political order. This may be seen as a congestion and a specificity of the Ottoman society in the transition to capitalism. In this process, some particular superstructural institutions, like the "musica practica" of the old social formation had persisted to exist for a considerably long time. It should also be stressed that the following changes that took place were gradual and triggered by the external events (like attempts for reformation and Westernisation).

As a matter of fact, an irreversible decline/deformation of the two indispensable pillars of the Ottoman social structure, i.e. the land regime (*dirlik*) and an economy based on conquest, necessarily caused to search for a new way out. Since military conquest was a *raison d'être* of Ottoman social formation, the basic solution was found in the amendment of the military organisation.

Consequently, as is well known, by the end of seventeenth century, being aware of the 'technical superiority' of the West -at least accepting its military superiority- attempts to utilise its developed (military) techniques began. What followed later was simply a change imposed (from above) upon the administrative structure which also finally affected the culture of the country.

As a matter of fact what will be later referred as the Westernisation was esteemed as an absolute necessity for the Ottoman society, however, at the same time, it became a catalyst of the dislocation of the regime. This had also

profound consequences on the organisation of culture and cultural institutions. Consequently, understanding the changes in the Ottoman music practice as one of the indirect consequences of the reform movements is particularly important to understand the specific dissolution of *musica practica* in Ottoman society. Moreover, it should also be noted that the consequences of this change was dissimilar with the Western music practice in which the production (as well as the consumption) of music had structured around the market relations as a result of the dissolution of *musica practica*.

4.2.1 An Intruder: Westernisation And Music

Convergence with the Western music in the Ottoman Palace dates back to sixteenth century⁷. However, until the early nineteenth century, listening to the Western music was not a matter of special choice for the Ottomans, but this music was occasionally played in the Ottoman Palace (by the musicians of Royal Orchestras sent to Ottoman Sultans by the monarchs of several countries either as a gift or gesture) as an indirect outcome of the closer relationship with European states (Aksoy: 1986).

The first serious attempt to introduce Western musical forms took place in 1794 by the inclusion of a small military band among the *Nizam-ı Cedid* units; a first breakaway from *Mehter* music. In 1826, Mahmud II closed the *Mehterhane* when he abolished the Janissary corps to establish a new military unit (*Asakir-i Mansure-i Muhammediye*). In this new army corps,

together with the new training system, a military music unit was introduced in conformity with the Western norms. In fact, even before institutionalising a new education system according to Western norms (particularly through the foundation of *Mekteb-i Harbiye* -School of War- in 1834), a musical education institution (*Muzika-yı Hümeyun*) was founded in 1827.

The disclosed views to explain the reasons of the cessation of the activities of *Mehterhane* concedes to link it with janissaries⁸. Moreover, it is also pointed out that Mehter was inevitably abolished because of the dissonance between the rhythms of the "Mehter" music and new (Western) concept of military order. However, this line of argumentation not only ignores the social function of *Mehter* music in the Ottoman society, but also neglects the consequences of the process, since neither *Mehterhane* nor its successor *Muzika-yı Hümeyun* was merely a military institution. Abolishment of the *Mehterhane*, which also led to the end of *Mehter* music, was also important in the sense that it was one of the representative examples of destruction of a whole tradition.

Muzika-yı Hümeyun was an institution aiming to construct a formal education system teaching both Turkish and Western music to its students. However, a Western type formal system of education was not suitable for teaching Turkish music, which extensively depended on *meşk* in teaching and transmitting music. It can be argued that the foundation of

this institution signalled the advent of a break from Classical Turkish music.

The new military band, founded within *Muzika-yı Hümayun* (*Muzika*), had excluded the repertoire of *Mehter* band and was playing only Western melodies (either Western marches or Western popular songs) on many different occasions. The band assisted to all ceremonies that the Sultan had participated. It also performed at almost all diplomatic meetings, meals, ceremonies and even at wedding processions and at public festivities. It seems that the new band completely replaced the whole of the functions of *Mehter* Band. The following excerpt from Aksoy (1986: 1216-17) is quite interesting:

Soldiers' march accompanied by the band in the city, was contributing to introduce the *Muzika* to people. Mac Farlane, a Scotch traveller, and Adolphus Slade, an English military officer who had come to Istanbul in 1829 as a naval force observer, had both written in their memories that they had often heard melodies from Italian and other operas, played by the *Muzika* in the streets of Istanbul or in the coasts of Bosphorus ... Dr. Spitzer, the physician of Abdülmecid, in 1850, had narrated one of the country outings of the Sultan as such: *Muzika teams were following Sultan's convoy ... at a moment when the convoy bivouacked, the sounds of several melodies from operas, and even from the French national anthem, coming from Sultan's tent, were clearly heard.*

As *Mehter* music was situated within the daily practices of social life, the reasons behind its replacement with the new band of *Muzika-yı Hümayun* exceeds the mere military purpose and signifies the beginnings of a broader chaos in cultural

life. After the foundation of *Muzika-yı Hümayun*, Western music lodged in the Palace, and even, in a short time, displaced Turkish music. An opera and an operetta section during the reign of Abdülmecid I, and a permanent opera group in the reign of Abdülhamid II were founded in the Palace (Özasker; 1997).

Meanwhile, by the beginning of 1840s, various musical plays, operas and operettas were staged in the several newly founded theatres outside the Palace. The "French Theatre", founded by Giustiniani (a Venetian entrepreneur) in 1840 was the first example (And; 1971). Later, in the Bosko Theatre (after a while its owner had changed and its name had become Naum Theatre) various Italian operas and operettas were staged for about thirty years (And; 1971).

In the first years of such activities, the foreigners or minorities constituted the majority of the audience. However, in a short time, particularly the members of the Palace, as well as the wealthier sections of the Ottoman society also attended such events.

Under Abdülmecid I, Giuseppe Donizetti⁹ began to teach singing, chorus, dance and the basics of orchestra to some musicians in the Ottoman Palace. Additionally, in 1848 some Italian musicians were invited to Palace and began to work as salaried teachers (Kosal; 1999). Eventually, a symphony orchestra was founded in the Ottoman Palace. This orchestra

also played in the operas staged by several opera companies visiting Istanbul (Sevengil; 1961).

Following the *French* and *Bosko (Naum) Theatres*, another important example was the "Ottoman Theatre" (or what was known as "Güllü Agop Gedikpaşa Theatre"), which was founded in 1869 (And; 1971). It became more popular than the previous trials since first examples of Turkish operettas were staged there.

In 1874, Dikran Çuhacıyan founded a company called *Opera-Hane-i-Osmani* and managed to take a licence from the government to stage musical plays. Thus, *Opera-Hane-i-Osmani* began to stage *Karagöz* (under the name *Canlı Karagöz* [Live Karagöz]) and *Ortaoyunu*, in the *Ottoman Theatre* (Sevengil: 1969). Introduction of the popular genres in the repertoire of *Opera-Hane-i-Osmani* by Çuhacıyan should be stressed as a pioneering attempt to popularise theatre and widen its audience. By 1870s both *Karagöz* and *Ortaoyunu* had also become popular genres among the wealthier sections of the Ottoman society. In this context, it can be said that Çuhacıyan's attempt had attained a considerable commercial success¹⁰

Another innovation that also widened the audiences was to stage entertaining musical dances in the theatres. A typical example was Kanto music¹¹. It appeared for the first time in the *Ottoman Theatre*, as separate songs performed during the intervals between plays or acts of plays. However, in a short time, thanks to an increasing popularity, staging Kanto music in the *Ottoman Theatre* turned out to be a strategy to increase

the audiences. This popular interest caused the spread of Kanto music, which began to appear in several coffee houses and "tuluat" theatres (a kind of improvisatorial theatre). It can be argued that Kanto music was the first example of a popular urban genre, which translated its popularity into a commercial success.

According to Aksoy (1986), first examples of Kanto music must have existed in a Western style, however in line with the accommodation to where it is performed the style had also changed to acquire a local character. Consequently, "Kanto music acquired a specific style which can neither be labelled as Western nor as (purely) Turkish" (Aksoy; 1986: 1223). Kanto as a show music began to disappear in 1920s¹² leaving its place to other popular genres like, Tango, Rumba, Charleston.

4.2.2 A Vanishing Tradition: Changes In Music Practice

The period after the dislocation of *Mehterhane* and the formation of *Muzika-yı Hümayun*, as seen in above-mentioned developments, was marked by a restricted attempt to impose the Western music. This was the period in which for the first time (although not constructed extensively and intentionally) a state intervention to the spontaneous organisation of culture (through a restricted music policy aiming to imitate a Western model) took place. Thus, in the context of the emerging consequences, the period beginning by the mid eighteenth

century also signified the destruction of the ancient musical culture of Ottoman society.

Practical consequences emerged in the nineteenth century were the apparent conflicts between the advocates of the Western and the Turkish music. For example, these words "this game loses its charm" addressed by the famous Turkish music composer İsmail Dede Efendi to his student Dellalzade İsmail Efendi indicates his distress in regards to the negative attitude of the Ottoman government against Turkish music (Gazimihal; 1939). Indeed, it is known that after a short while, İsmail Dede Efendi had left Istanbul for a pilgrimage to Mecca, but had never come back. İsmail Dede Efendi's self-imposed exile was not an isolated act. By the mid nineteenth century many musicians had left the Palace and had either travelled to other countries or continued their activity out of the Palace¹³. Such developments were signifying the fact that the central location of the classical music was changing: it was transferring itself from the Palace to the city. Consequently private places (such as houses or private *meşk* places) became the new locations of the traditional Turkish music within the urban settlements (Aksoy; 1986, Behar; 1993).

What should be retained for the purpose of this study is that the foundation of private theatres together with the exclusion of the traditional music in the Ottoman palace -and thus the necessary change of its location of performance- contributed to the commercialisation of musical activity. By

the mid nineteenth century the music had increasingly become a professional activity. The hitherto salaried musicians of the Ottoman Palace were now performing in various musical plays or giving private music lessons to earn their living.

Another development that took place by the second half of the nineteenth century was the emergence of notation in the Ottoman music. As is known, after 1830, Western notation system began to be taught in Muzika-yı Hümayun under the auspices of Donizetti. Hence, Donizetti's students succeeded to learn this system in a short time and even some became teachers of Western Music in the Muzika-yı Hümayun (Gazimihal; 1955). As a consequence of these developments, Turkish music began to be notated¹⁴.

The prevalence of notation should be considered an indicator of a major transformation within the Ottoman music practice. Actually, it can be argued that, what guided such a need was mainly based on a commercial motivation. For example, in 1864, Ahmet Haşim Bey had decided to print and sell sheet music in Istanbul. Thus, in a magazine (Haşim Bey Mecmuası), he had announced his plans with an enthusiastic spirit as such:

Popular peşrev, semai and other songs, in all tonalities, will be printed in the alafranga (Western) format, and these (sheet music) magazines will be sold at a reasonable price where available. (quoted in Behar; 1987: 42)

Although Ahmet Haşim Bey could not succeed to realise this (Behar; 1987: 42), such an attempt, in itself, can be regarded

as an evidence not only for the widespread use of sheet music but also for its commercial potential.

In 1875, ten years after Ahmet Haşim Bey's dreams, Hacı Emin Efendi began to print such note sheets for commercial purposes (Behar; 1987: 42). The printed notes were generally comprised of piano transcriptions of popular songs of the day. It is known that the importation of pianos and sheet music had started in 1850s and these were sold in the newly emerging music shops in Istanbul (Paçacı; 1999: 11). According to Paçacı (1999: 11), in these years, an average of 400 pianos and about 6000 music sheets were sold annually. Hacı Emin Efendi's enterprise indicate that this trend was still continuing in the last quarter of the nineteenth century.

Another important development was the emergence of commercial Turkish music concerts -especially by the end of nineteenth century. Consequently, it can be argued that together with the commercial interests that motivated both the notation (to produce sheet music) and concert activities, an elementary music market made its debuts in the Ottoman society by the second half of the nineteenth century. The emergence of a music market, although still considerably small in volume, was a major indicator of the transformation of the Ottoman musical practice. Resulting "alienation" was accompanied with the vanishing tradition. Its symptoms -at least in the context of the changing forms of musical practice- were also expressed by musicologists:

Because traditional composition techniques and the system of meşk has been already forgotten, and because younger Turkish music composers were composing via notation, unfortunately, the older smoothness and beauty of Turkish musical works were lost. Now it is evident that our masters, who had insisently suggested that Turkish music will be defective if it is composed and notated through Western techniques, were right. As a matter of fact, Western notation system is not sufficient to reflect the true character of our music ... Due to the lack of necessary symbols in notation system, many performance types and styles are now forgotten (Eren; 1954: 18).

However, rather than stemming from a kind of "technical incapacity", such a forgetfulness was due to the vanishing away of the collective memory. Even, the very existence of such a problem; "forgetfulness", can be considered an expression of "alienation" per se in music production. In other words, rather than the musical work, what was lost was a whole tradition of the collective action -and in particular, *musica practica*.

Consequently, with the disappearance of the collective memory, which hitherto signified "music as action", the music practice and its social function in society is redefined. In this sense, for example, both the emerging notation and the expanding commercial concert activities (both of which were signifying a newly arising music market) were the particular expressions of this "redefinition" - appearing as the particular consequences of the "alienation" of music production. In other words, as an active participation is

replaced by a passive consumption, consumption of music (rather than its reproduction via active participation) became the dominant form of musical practice in the society -hence, an audience is created. This necessarily caused a change in the form of the music produced: existent forms were mutated and diversified (and new forms were created) through various articulations. It is needless to stress that the basic motive behind this process was merely commercial. The increase in the quantity of music (genres) consumed (through various means) was at the same time signifying a widening of the audience - which had signified an increasing potential for a music market.

By the beginnings of the twentieth century, the number of the concert halls (concert activities) considerably increased (the music reserved to special and small places like tekkes or courts was now attracting a larger audience); the music genres were further diversified; and most importantly the gramophone entered into the daily life.

It should be noted that, this extensive commercialisation caused a further mutation in the form/practice of the traditional music. In other words, the entertainment function of music commenced to increasingly dominate the whole musical practice. One of the cogent evidences of this development was the expansion of the "easy listening" (light) forms (like Hacı Arif Bey's *Şarkı* form which had first appeared in the *Fasıl Music*) within the traditional music. It is argued that the

"Şarkı form had dominated the Classical Turkish Music and after Hacı Arif Bey, compositions made in other (traditional) forms had dramatically decreased" (Eren; 1954: 17). In sum, it can be concluded that, one of the important consequences of this process was the increasing popularisation of the traditional Ottoman music (or what is sometimes referred as Classical Turkish Music):

Although western music bands were preferred in several festivities and in official meetings; Ottoman music was the only preferred genre in private entertainments in courts and in houses alongside the Bosphorus. Actually, these places were the permanent locations of entertainment in Istanbul. Several times a week, the most outstanding musicians of the age were invited to these places in which the entertainment and music was continuing until the very first lights of the following day. (Alnar; 1947: 7).

Additionally, it can be argued that this music was also popular within the middle classes:

The most popular examples of Classical Turkish Music were (also) performed in "musical coffeehouses" [çalgılı kahvehaneler] which was appearing as one of the most important elements of urban culture. Moreover, specific importance of such places lies in the fact that that the very first examples of the musical synthesis [between urban music and folk music] had appeared there. (Eren; 1954: 18).

A special name was given to such performances: "Piyasa Tarzı" (light music). "Piyasa Tarzı" was used to denote free musical performances (or new compositions) in Turkish music,

which generally ignore the strict methods, rhythmic patterns or norms of the traditional music -in this sense the music was made "easier" to listen and perform. These performances were generally popular and commercially motivated. In other words, "Piyasa Tarzı" was the first example of the production of music for the market.

Consequently, it can be said that the expansion of "Piyasa Tarzı" (through performances in entertainment outlets, and in gramophone records, or through the sale of sheet music) provided the further popularisation of the Classical Turkish music.

However, as will be discussed in the following chapter, in contrast to the development of the music industry in the West, the expansion of commercial music did not led to the industrialisation of the musical production. For example, in the same period, in European countries and in America the print of sheet music (for individual consumption) had already become an industrial activity much before the emergence of recording companies. In other words music was produced in different commodity forms not only for the consumption in entertainment places, but also for the private individual consumption at homes. This model of consumption was constructed on the basis of a complex -and intervened- sectors of production. In addition to the (existence of) commercial music concerts and various entertainment activities in the music halls, night clubs and in other places; a huge industry

realising the fabrication of musical instruments (particularly piano), the production of sheet music, together with a web of retail outlets (for the sale of piano and sheet music), and institutions of music education had constituted a complex of entertainment industry in the West.

It is obvious that there are very few common points between this structure and the emerging commercial musical activity in the Ottoman society. Neither the production of musical instruments (actually it is quite difficult to find a sector of production of musical instruments) nor the sheet music was industrialised and diversified. Moreover, the structure of Turkish music was also inappropriate for individual performance at homes. Furthermore, it can be argued that the limited number of attempts to transcribe music had not been sufficient to create a new (commodity) format. Consequently, the commercial music activity was limited with the entertainment places (like taverns, musical coffeehouses, etc.), and the emergence of gramophone records did not bring a considerable change in this structure.

The next chapter will examine the emergence of record companies and the market for music in late Ottoman period together with their ulterior development in the Republican period.

Notes to Chapter 4

¹ In İbnülemin Mahmut Kemal İnal, Hoş Sada, İş Bankası Yayınları, İstanbul, 1958 p.26; quoted in Behar (1987) p.20

² Quoted in Behar (1987: 21-22) from J. B. Laborde's *Essai sur la Musique Ancienne et Moderne*. Laborde was a French traveller and his book was published in 1780.

³ Ibid. p. 21.

⁴ For example, even the attempts of Ali Ufki, who was a musical page for about twenty years in Ottoman Palace (in mid seventeenth century) and who had compiled a musical anthology, named "Mecmua-i Saz-ı Söz", in which the notes of some 300 tunes took place, had not been successful to introduce notation. For the absence of notation, see Behar (1987, 1990, 1993); Uzunçarşılı (1977); Elçin (1976); Toderini (1987); Fonton (1987).

⁵ *Meşk* is not an easy term to translate in English. Martin Stokes uses the "oral transmission" while Cem Behar suggests "oral transmission and education". However, both are, in my opinion incomplete suggestions to give the term its meaning. Because, *meşk* is not merely an institution for music education. *Meşk* also defines the whole musical activity: How music is taught, how it is produced, transmitted and reproduced. It is true that *meşk* provides the "transmission of a work of art to the next generation" (Behar; 1993: 12). However, it should also be noted that one of the practical consequences of its existence was that every *meşk* session turns out to be a recreation of the original work (or a re-composition). Through *meşk*, the memory was also refreshing through this recreation, which reflected continuity of change parallel to the changes in practical life. It is possible to listen to Beethoven today as it was two hundred years ago, but to search for an "original" work in Turkish music is not a meaningful attempt.

⁶ It should be noted that *Mehter* music was an indispensable element of such activities. In this context, *Mehterhane* was a very important institution not only in the context of its

military function but also for its social and political place and function within the society. It would be misleading to see *Mehter* as a military band performing marches. Its repertoire was so extended to include several musical genres like *peşrev*, *saz semaisi*, *nakış*, *murabba*, *semai*, *fasıl*, and even folk songs. *Mehter* music was an expression of a cultural tradition which dates back to antiquity and through preserving its meaning in the complex of activities such as ceremonies to festivities inseparably existed as a sine quo non element of daily life. In this context, arguments of Popescu-Judets (1996: 49) are noteworthy: "The expanded dimension of images included in the mehter event shows the absorption of all aspects of life into a cloud of allusive symbols and conceptual abstractions. All together the mehter act of performance has been a forceful spectacle of majesty and grandiloquence matching only that of the ancient theatres." Hence, unlike the other genres of music in Urban life, the music of *Mehter* was dispersed to every corner of society with a privilege stemming from its popularity. In other words, *Mehter* symbolised an ancient social organisation, which finds an appropriate explanation in the context of the term *musica practica*. As Popescu-Judetz (1996: 51) states, "symbolically, mehter appearances and performances brought together into one communal voice and at a unique time of the day the entire population making up the social fabric of the Ottoman empire."

⁷ For more information, see And (1959), Aksoy (1986), Gazimihal (1939), Özalp (1986a and 2000) Kosal (1999), Zümrüt (2000)

⁸ See Aksoy (1986), Kosal (1999), Popescu-Judetz (1996), Turan (1999).

⁹ The brother of famous Italian opera composer Gaetano Donizetti. A year after the foundation Muzika-yı Hümayun

Giuseoee Donizetti had become its head and stayed in this office for 28 years.

¹⁰ Meanwhile, such plays also proliferated within courts and houses. In this sense, most famous musicians of Istanbul had become the most demanded elements of these plays for making the music (among these musicians, Tanburi Cemil Bey, Kanuni Hacı Arif Bey, Udi Nevres Bey, and Hafız İsmail Bey were the most outstanding ones) (Sevengil: 1961).

¹¹ Introducing a different style in lyrics and melody as well in singing, *Kanto* appeared as a new genre in urban popular music by the end of nineteenth century. According to Aksoy, (1985: 1223) it should have appeared as an amalgamation of light French operetta songs and Italian urban popular music genres [like *canzone*]. Also see Hiçyılmaz (1999), Belge (1997).

¹² As is discussed in the next chapter, although *Kanto* had disappeared as a show music, this disappearance did not mean that *Kanto* music was terminated (it only disappeared from theatre stages). Hence, although its musical form and content transformed, *Kanto* music continued to remain popular through gramophone records.

¹³ Meanwhile, many of the musicians (like Dede Zekai Efendi, Veli Dede, Enderuni Ali Bey, Lavtacı Andon, Melekset Efendi, Şekerci Cemil Bey) had preferred to go to Egypt. It is stated that these musicians were welcomed and supported by Egyptian state (Aksoy; 1986: 1228).

¹⁴ It should be noted that that Western notation system was used to write Turkish music, and this system was insufficient to represent particular sounds that are used in (and characterise) Turkish music.

CHAPTER 5

THE DEVELOPMENT OF THE MUSIC MARKET IN TURKEY

This chapter examines the development of Turkish music market beginning from the emergence of recording companies until recent developments.

In order to grasp the conditions under which a music market emerged in Turkey, the economic situation in the late Ottoman period should be recalled. Only on the basis of such a context that the establishment of recording companies and the other developments in the market can be understood. Thus, the particular conditions that gave birth to a "monopolistic" market structure can be elucidated.

Similarly, the ulterior developments that led to a drastic change in the nature of the market, namely the dislocation of the monopolistic structure and the rise of a competitive music market led by small firms can only be understood with reference to specific economic conditions that prevailed in the period 1955-1980. And finally, the current structure can only be situated and comprehended after such clarifications.

5.1 The Basis: Peripherisation Of Ottoman Economy

As is known, expansion has been the general strategy of capital to sustain continuous accumulation. Infusion of capital into pre-capitalist social formations had initiated a process of articulation of these specific social formations into the division of labour in a world scale -particularly, as a result of capital's fostering the development of (or increasing) the commodity production in these geographies. As a matter of fact, it was through the emergence of peripheries that the capitalist market had expanded into a world scale.

As generally accepted, the commercial capital in the periphery plays an intermediary role between capitalist and pre-capitalist formations in integrating local commodity production to world market through the export of goods as well as in creating an extended consumption pattern through fostering import. However, this latter dimension is also related with an indirect effect of the introduction of financial capital. Financial capital while actively encouraging commodity production (through various bank credits and direct loans) provides a profound increase in the consumption of commodities. Consequently, both the financial and the commercial capital serve for the articulation of pre-capitalist forms to the world capitalist system. In doing so, commercial capital in the periphery always services the industrial capital in the centre, for commerce appears as the only means for industrial capital to utilise the value created

in the periphery (Kay; 1975). In this process, foreign commercial capital (of course together with the local elements within the periphery) infuses into the traditional economies and thus commodity production under the control of the commercial capital reinforces the continuity of this structure in the periphery (Keyder; 1982). Consequently, while pre-capitalist forms begin to evolve towards consolidation of capitalist relations in the periphery, the centre increasingly holds the control of capital flow (and thus accumulation). In fact, this is a process guaranteeing the continuity of the structure in the periphery by the infusion and functioning of financial capital. Because financial capital not only realises a valorisation through pushing the peripheral countries into debt but also establishes a control over the economic activity in these areas through this process.

In this context, according to Pamuk (1994), peripherisation can occur at three levels: First category of level is colonial development, in which the economy in the periphery is manipulated directly either through economic or extra-economic means. Colonies were not open to commercial activities or capital investments of other imperialistic states. The second category that Pamuk suggests is what is labelled as "informal empires", denoting the peripheral countries under the influence of one imperialistic state. Finally, the third category signifies the peripherisation under the conditions of a competition between several imperialistic states. The specificities of this dimension are, first, the absence of a

monistic control of an imperialistic power over the periphery, and second, the existence of a relatively strong local bureaucracy -and a centralised state- in the periphery.

The Ottoman Empire, together with China and Iran, falls in the third category (Pamuk; 1994, Keyder; 1983b). Until the late eighteenth century, Ottoman had succeeded to establish a centralised political control over the economy. However, by the beginnings of nineteenth century this centralised control was impaired -at least bureaucracy lost its political control over the economy. This signified the emergence of a competitive market, which is open to direct access. In other words, in the absence of a centralised political control over the economy, the spontaneous functioning of market brought on the one hand a competition of imperialistic powers within the Ottoman economy and on the other hand, the fragility of the Ottoman economic structure in the face of economic fluctuations out of the borders of the Empire (Keyder; 1985). This characterised the specific process of peripherisation of the Ottoman Empire.

The commercial relations between Europe and Ottoman Empire entered into a concentrated phase by the beginnings of 1830s. For example, the imports from France and England had doubled by the end of 1830s (Keyder; 1982: 20) and the trade agreements made with strong European states signified that the tendency was continuing. In the years between 1838-1841, several trade agreements took place between Ottoman Empire and

England, France, Germany, Spain, Prussia, and Scandinavian states (Cem, 1970: 177).

As a result, a new regulation started through such agreements. First, government's right to give monopoly privileges to some merchants was abolished (Yerasimos; 1976). The Ottoman government, in this sense, lost almost all of its political control over the regulation of trade by these agreements. Second, foreign merchants gained an advantageous status since they had to pay less tax than the Ottoman merchants. For example, while both groups were paying 5% for exports, Ottoman merchants were under the burden of an additional tax of 12% in internal trade (Avcioğlu; 1968: 52).

One of the most important consequences of this regime of capitulation was the displacement of Ottoman merchants through the rising influence of Armenian, Greek and other Mediterranean merchants since most of them were left outside the Ottoman taxation system. As a result, they appeared as the agents of foreign commercial companies.

Despite the increasing financial crisis of Ottoman budget, development of the market, concurrent to the process of Peripherisation, was continuing. Keyder (1983b) explains the reasons behind this continuous development through the relative autonomy of the economic level. In other words, under the influence of European commercial capital, the commodity production as well as commerce was developing while at the same time facilitating the bankruptcy of the Ottoman budget.

The development of a recording sector in the pre-Republic period coincides with this peripherisation process. However, as will be seen, such a development did not lead to the spring of an industrial scale of production within the sector. Consequently, although production for the market was realised to some extent, the principal activity within the sector stayed as commerce for a long time.

5.2 Debuts Of the Turkish Music Market

Phonograph was included in the daily life of Istanbul a very short time after it had become a marketable product in Europe (1890s). The first entrance of phonograph was around 1895. Sermed Muhtar Alus (1949), one of the first witnesses of phonograph in Istanbul, talks about a shop in *Direklerarası* exhibiting a phonograph in its show window. According to Alus (1949), in that shop people were listening to phonograph through earphones in return of one *kuruş*¹. In 1899, Ali Muzaffer, a columnist, had mentioned the widespread usage of phonograph in Istanbul in a newspaper article titled *Fonograf* (Anhegger and Ünlü; 1991: 24). According to Ünlü (1996), the price of a phonograph had fallen seriously after only three or four years of its introduction. Parallel to its widespread acceptance, various records of the Turkish Music -especially of Tanburi Cemil Bey's *tanbur* and *kemençe taksims*- began to be recorded on cylinders² (Anhegger and Ünlü; 1991).

By the end of the nineteenth century, two companies' phonograph machines were sold in Istanbul -viz. *Victorola* of

Victor and *Graphophone* of Columbia-. Moreover, the number of phonograph shops was continuously increasing in that period. As far as we deduct from the names of the shops, the owners were either foreigners or from minorities³. Consequently, it can be argued that, in this period, the existence of more than one phonograph companies together with the increasing number of retail shops were signifying the existence of a promising market potential.

Phonograph shops were consisted of two main parts. One part was for the sales of the machines and cylinders; and the other part was for recording (Karabey; 1999: 168). In other words, these shops also functioned as recording studios -unlike gramophone records, there was no way for mass production of phonograph cylinders. Each recording was made for once, and a new recording was necessary to reproduce the record. Hence, in these small studios acoustic recordings of famous artists of the period were realised.

It can be said that, the technical incapacities of phonograph cylinders helped to construct a market dominated by the Turkish music from the beginnings. Thanks to the phonograph's (necessarily) flexible nature of recording, rather than importing pre-recorded cylinders of Western music, domestic recordings were preferred -since it was more marketable and profitable without any additional cost.

Gramophone entered into the market just a few years after the introduction of phonograph. Although there was no apparent

distinction between the phonograph and the gramophone in terms of their sound quality, the latter hardware dominated the world market in a very short time -because the gramophone disk was mass productively made. Hence, by the very beginning years of the twentieth century, the phonograph left its place to gramophone both in the world and in the Ottoman market.

5.2.1 From Oligopolistic Competition to Monopolistic Control

During the first years of the introduction of gramophone, an oligopolistic competition had begun between major record companies. However, as explained previously in the Chapter 3 of this study, the nature of the recording industry, from the beginning, was defined by a monopolistic tendency for profit maximisation. Similarly, in the Turkish music market, the competition lasted until late 1920s and ended up with several major mergers to consolidate a monopolistic control of the market by a major company. It should be stated that, this rapid seizure of the monopolistic control over the market did not assure a continuous increase in profits since the expansion of the market in the beginnings did not continue in the following years. However, this structure had lasted more than 30 years -until the end of 1960s.

The first European record company, which entered into the Ottoman market (a very short time after its foundation in 1897) was an English firm, named **The Gramophone and Typewriter Co.** This company had performed the first commercial recordings

in the Ottoman Empire in 1900. In the same year, the German company **Deutsche Grammophone Ges.**, and a year later an American company, **International Zonophone Co.** began to operate in Ottoman market. In 1901, the first merger that affected the Ottoman market occurred between **The Gramophone and Typewriter Co.** and **Deutsche Grammophone Ges.** to form a new company, named **The Gramophone and Typewriter Co. and Sister Companies.** Hence, between 1901 and 1903 there were only two competing record companies in Ottoman record market. In 1903, **The Gramophone and Typewriter Co. and Sister Companies** bought **International Zonophone Co.** and formed four new record divisions, namely **Gramophone Record, Monarch Record Gramophone, Disque Pour Zonophone** and **Gramophone Concert Record.** Two of the latter functioned in the Ottoman market through producing Turkish titles. The monopoly of the firm lasted a year until 1904, and later the number of the firms in the market began to increase by new entries; namely, German-American **International Talking Machine Co.**, which was producing **Odeon Records, Beka** (producing **Beka Records**), German **Homophon Co.** (producing **Homocord**) and finally, German **Carl Lindström.** By 1905 German **Favorite** and **Lyrophon** and finally by 1906 French firm, **Pathé** also entered the market.

By 1907, there were as much as 8 major firms in the market and if the entrance of **Columbia Gramophone Co.** in 1913 can be excepted; no other new entries took place. The relative high number of the record firms operating in the market pointed to the existence of a competition of imperialistic powers within

the Ottoman economy. This competition was mainly carried out, as was already stressed in the previous pages, by the Christian minorities operating as intermediary agents of the foreign companies. Recording sector was a typical example of this situation.

Although, by the end of the first decade of twentieth century, in the face of increasing opposition of Muslim merchants and landowners together with the policies of Union and Progress to displace usurers and merchants of the Christian minorities challenged to some extent the foreign dominance, it did not affect the "objective conditions of integration to the world market" (Keyder; 1985: 1067). In other words, neither the ownership patterns nor the organic composition of capital had changed in the period of the Union and Progress. Rather, the ethnic origin of intermediary agents had begun to change and the Muslim and Jewish merchants replaced Greeks and Armenians as usurers or entrepreneurs in the ongoing process of peripherisation.

One of the profound consequences of this development was the emergence of local (Muslim and Jewish) representatives of major companies as well as the foundation of new companies with local labels. For example, in 1912, the first local record company was founded under the name **Blumenthal Record and Talking Machine Co.** In fact, the founder of the company, the Blumenthal brothers (Julius and Herman Blumenthal), were Jewish Germans living in Istanbul for more than 30 years⁵. In

1906, Blumenthal brothers had signed a contract with **International Talking Machine Co.** and became the legal representative of *Odeon Records* in Istanbul. In the period between 1906-1912, Blumenthal brothers, in the name of *Odeon Records*, had signed contracts with several musicians to make new records⁶. These kinds of contracts bore clauses that prevented musicians to make records for other companies.

In 1912, the **Blumenthal Record and Talking Machine Co.**, had managed to convince and sign contracts with many of the already well-known musicians as well as new talents. Moreover, Blumenthal Brothers managed to eliminate their dependency on foreign firms in record manufacturing through establishing a record plant in Feriköy, Istanbul. Hence, from that day on the recordings as well as the production of the disks were made in that plant.

Blumenthal Record and Talking Machine Co., in a short time, founded two more recording divisions (*Radio Records* and *Regent Records*) in addition to its major label *Orfeon/Orfeos Records*. One of the most profound consequences of this development was the establishment of small local record firms, which were not depended on foreign capital in their production. The record plant in Feriköy also offered its services to these companies⁷.

Just before the beginning of World War I, between 1911-1913, the German firm *Carl Lindström Ag.* had acquired *Beka*, *Favorite*, *Lyrophon* and *International Talking Machine Co.* (the

Odeon Records). Meanwhile, in 1913, *Columbia Gramophone Co.* opened a representative agency in Istanbul.

Another noteworthy development during the war was that the Germans had terminated their partnership with the English entrepreneurs in **The Gramophone and Typewriter Co. and Sister Companies**. As a result, two separate firms emerged: English entrepreneurs founded **The Gramophone Co.** producing *His Master's Voice Records* and German entrepreneurs founded **Polyphon Musikwere Deutsche Grammophon Ag.** producing *Polyphon* and *Polydor Records*.

Another important development in the music sector came in 1916. Jack Grünberg, a former manager of the *Blumenthal Record and Talking Machine Co.*, resigned from his office and set up the representative agency of *Odeon Records* of **Carl Lindström Ag.** in Istanbul. Jack Grünberg's first attempt, in his new company, was to sign a contract with the famous musician, Hafiz Ahmet Bey. Leon Grünberg, Jack Grünberg's son, states that the records of Hafiz Ahmet (under the label *Odeon*) had caught the commercial success of Cemil Bey (by *Orfeon Records* of *Blumenthal Brothers*), and their sales had exceeded 100.000 copies even in those years⁸.

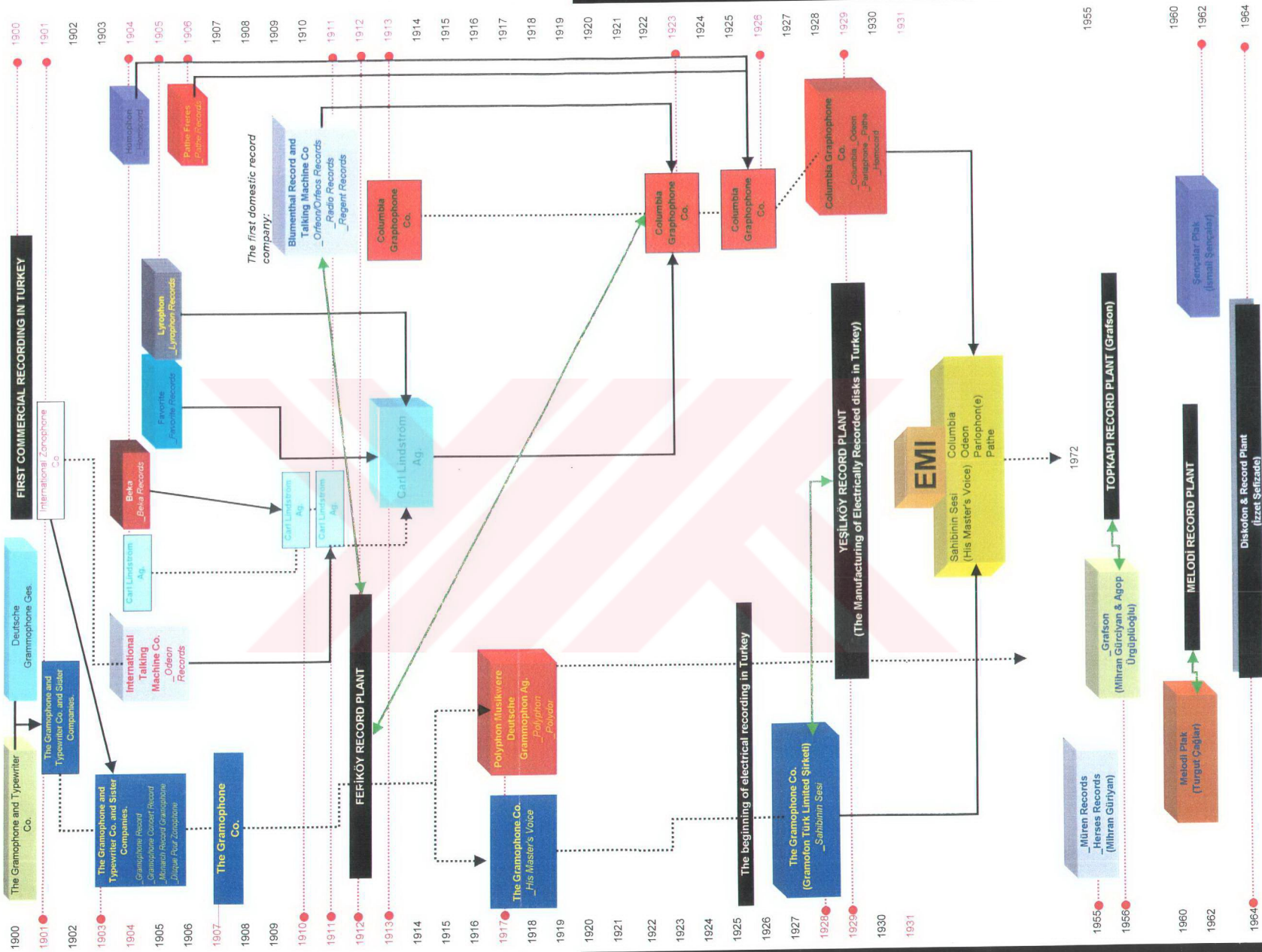
The Republic did not bring a challenge to, or change into the structure of music market. As a matter of fact, during the period between 1923-1929 the governments had encouraged partnerships with foreign capital in almost all sectors of the economy. For example, in 1923, Hasan Bey, the Minister of

Economics, referring to 'Chester concession', had declared, "the claim that we are against the foreign capital is completely untrue" (Ökçün; 1968: 10, 16). Similarly, Atatürk had stated that "if they are ready to be respectful to our laws, then we are ready to guarantee foreign capital investments" (Ökçün; 1968: 253). Actually, the basic reason behind this inviting attitude was the insufficiency of domestic capital investments. Consequently, in manufacturing sector the total share of foreign capital in the newly established joint ventures had exceeded 65% in this period⁹ (Keyder; 1982: 85).

Concurrently, as can be followed from Figure 5.1 (see footnote 4), the foundation of the Republic did not bring a change in the ownership patterns within the recording sector. With the exception of Blumenthal Record and Talking Machine Co., major record companies of Europe and America had dominated the music sector until 1960s. As a matter of fact, the motive for maximising profits was forcing mergers between the major companies. This process, which had started in 1903, resulted in the emergence of a monopolistic market structure at the very beginning of 1930s.

In 1926, Columbia Graphophone Co. bought Pathe and Homophon Ag. -just three years after swallowing the other two major firms, namely Carl Lindström Ag. and Blumenthal Records (see Figure 5.1). Moreover, by acquiring Blumenthal Records, Columbia had become the new owner of the only record plant in

Figure 5.1



Feriköy-Istanbul and had continued to produce records in this plant until 1929.

Finally, in 1928, there were only three major companies operating in Turkish music market. These were, **Polyphon Musikwere Deutsche Grammophon Ag.**, producing Polyphon Records and Polydor Records; **Gramofon Türk Limited Şirketi** (which was actually owned by The Gramophone Co.), producing His Master's Voice, Gramophone Record, Gramophone Concert Record, Monarch Record, Disque Pour Zonophone; and **Columbia Graphophone Co.** producing Columbia Records, Odeon, Parlaphone Records, Pathe and Homocord. Meanwhile, by 1925, electrically recorded disks had entered into the Turkish music market. In addition to the existing acoustically recorded disks, these new disks were generally consisted of the microphone recordings performed in Turkey and manufactured in European record plants of the respective companies. This development is considered as a cornerstone in the expansion of Turkish recorded musical repertoire (Akçura; 1990, Anhegger and Ünlü; 1991b, Ünlü; 1991, Kalan Müzik Arşivi; Özalp; 1986a).

With respect to the introduction of electrical recording, the years between 1925-1929 had marked with a boom in record production and consumption in European and American music markets. This also had profound influences on Turkish music market, since a notable increase in the new labels, which was accompanied with an increase in the album sales can be observed during this period (Akçura; 1990; Anhegger and Ünlü;

1991b). In sum, due to the increase in album sales together with the decreasing prices of musical hardware, the music market was gradually expanding under an oligopolistic competition.

These developments led The Gramophone Co. (generally known as His Master's Voice) to set up a new company in Istanbul in 1928 (namely, *Gramofon Türk Limited Şirketi*)¹⁰. The aim of this company was to set up a new record plant, which would manufacture 78 rpm electrically recorded disks in Istanbul. The plot of land required for the construction of the new plant was donated by Atatürk¹¹. *Gramofon Türk Limited Şirketi's* record factory was built in Yeşilköy-Istanbul in 1929 and all necessary hardware equipments were supplied by The Gramophone Co¹².

The boom days of worldwide record sales in 1929 had been dramatically reversed by the Great Depression in the same year. Thus, bankruptcy had been an unavoidable faith for most of the record companies in Europe and America. These circumstances forced major companies to merge to avoid such bankruptcies. Consequently, in 1931 two majors of Turkish -as well as international- music market, **Columbia Graphophone Co.** and the **Gramophone Company** merged to form **Electrical and Musical Industries (EMI)**. By the year 1931, EMI, together with the ownership of Yeşilköy record plant, seized a monopolistic control over the market. EMI's monopoly, not only over music production, but also over record manufacturing, had become a

general characteristic of the Turkish music market for about 30 years. Hence, Yeşilköy record factory continued to manufacture disks until its liquidation in 1972.

5.2.2 An Uneasy Development: The Turkish Music Market Until 1945

5.2.2.1 The Structure

As was explained in the previous section, by the beginnings of twentieth century, the major record companies of Europe and America had begun to produce gramophone disks of Turkish music. Due to the increasing demand for gramophone machines and its records, these companies had increased their production over the years. Consequently, as was explained above, this process had led to the constitution of a music market in a very short time.

Mesud Cemil's (1947), narration of his father, Tanburi Cemil Bey's memories highlights the rising popularity of Gramophone machines and records even before 1910s. Accordingly, gramophone machines were used in coffee houses, taverns, caiques of Kağıthane, and in the houses. In these years, it is highly probable that major record companies were considering Turkish music market promising for they were not hesitant in signing expensive contracts with various artists¹³. Consequently, by 1910s, the sales of recordings reaching 100.000 copies were no more exceptional cases - especially the sales of the records of Tanburi Cemil Bey,

Hafız Ahmed and Hafız Osman were exceeding 100.000 copies (Akçura; 1990).

As a matter of fact, in the beginning of the century, the existence of an expanding music market may seem in contradiction with the general economic conditions, in which the majority of the people were suffering from poverty and unemployment. However, as Keyder (1982: 73) states, the metropolis of a periphery is always in a privileged position, hence consumption patterns, which are similar to those of the metropolis of centre, can also develop in the metropolis of the periphery.

Istanbul [in the beginning of century] was a typical example of this articulation. It was possible to see the agencies of major fashion stores of Paris in Beyoğlu. Wealthiest people of the city were preferring to buy Panhard automobiles rather than Ford (Keyder; 1982: 73).

Concurrently, it can be argued that one of the reasons behind the development of a music market in Istanbul can be found in this connection. Thus, Istanbul always stayed as the centre of music and entertainment sector in Turkey.

It should also be stated that one of the reasons behind this expanding music market was the interest of wealthier minorities in gramophone and its records. However, although the gramophone and its disks were extensively consumed by minorities in Istanbul, it should be remarked that a

considerable demand from other segments of the city was also rising gradually.

Another reason can be found in the development of radio broadcasting¹⁴. As is known, after its very first introduction, the proliferation of radio broadcasting has developed very slowly. As a matter of fact, not only the geographical and technical obstacles prevented extensive use of radio receivers in Anatolia, but also the particular preferences in music broadcasting kept audiences distant from radio. In other words, by the second half of 1920s, due to the not yet developed infrastructure of radio broadcasting together with the high prices of radio receivers, gramophone appeared as a cheaper medium of entertainment also in other cities of Anatolia. Additionally, the lack of electricity in many regions of Anatolia pushed gramophone to a more advantageous position, since, contrary to radio, the gramophone did not need electricity to operate. However, more importantly, it can be argued that the cultural policies of the Republic (between 1924-1950) had contributed to promote the use of gramophone, since as an extension of these policies, the Radio Company (TTTAS) was forced to broadcast "Western" type of music which was actually alien to the wants of people (Kocabaşoğlu; 1980). Consequently, due to the lack of "appropriate" music programs in Radio, people had generally preferred to listen to music from gramophone records¹⁵. Consequently, contrary to the developments in Europe and in

America, it can be said that the radio broadcasting in Turkey did not discourage the consumption of gramophone disks.

It should be added that, the record companies, since the very beginning of their emergence in the Ottoman market, had been sensitive to the demands of the people in constructing their repertoire. In this sense, both in the late Ottoman era and in the Republican period, the most popular examples from Ottoman/Turkish music were the weighted parts of their catalogues. An examination of the record catalogues of the companies (and especially the categories under which the titles were collected) gives an opportunity to understand not only the popular genres of urban music but also their transformation through years.

It is known that the musical styles like Kanto, Gazel, and particular forms of Fasıl Music like Şarkı (song) and Taksim (which appeared as solo instrumental pieces¹⁶ -particularly of Tanburi Cemil Bey, Zurnacı Arap Mehmet, and Kemençeci Anestas) were the particular genres of urban music recorded in the early years of the development of the Ottoman music market in Istanbul. Additionally, some popular operettas (from musical theatres) and orchestral recordings -like marches-, as well as imported western classical music (although rare) took place as separate categories in the catalogues of the record companies. However, it should be stated that in contrast to the development of popular music for commercial recording in Western Europe and in America, none of these popular forms of

music -i.e. their composition and instrumental arrangement- has developed specifically for commercial recording and for the specific necessities of commercial recording (like the duration of the song or instrumental arrangements for better sound quality as necessitated by acoustical recording). In other words, the popularity of the songs owed much to their natural locations of existence (like meşk and Fasil sessions in houses, entertainment in taverns or in coffee houses etc.) rather than recorded disks. Thus, recorded music had never reflected the true character of this music, since the technical incapacities of recording was a major constraint. During the recording sessions, which were seriously constrained by the duration of a disk (of two or three minutes), the music was cut either from the beginning or from the middle without any planned arrangement. The recording engineer, generally working in cooperation with the performer(s), was determining how and where to cut the music with the aid of a chronometer just before the recording session. Due to the improvised nature of music (and lack of notation), the process was not repeatable, and this necessitated completing the session at once.

In sum, it should be stressed that the music sold as commercial gramophone disks was not specifically created for that purpose -i.e. for the market. Hence, what characterised the operation of the music market was a sheer activity of commerce (i.e. without any processing, merely transferring the music into a commercial medium to be sold at the market)

rather than industrialisation of musical production as a commodity production (specifically producing music via an industrialised process for the market). Consequently, it can be argued that the domination of a commercial logic has been the characteristic of Turkish music market for a long period of time.

It is possible to suggest further particular reasons behind the lack of a development towards industrialisation of music production. Depending on the general condition of economic development and the (irregular) structure of the music market, major (multinational) record companies had been hesitant for major capital investments on music production. Hence, they preferred to continue their operation via local agencies (rather than actively taking place) in the Turkish music market. Domestic companies, on the other hand, were short of capital, and it was impossible for them to invest capital to initiate industrial production. Consequently, both major and domestic companies had restrained their activity in the music market and particularly majors avoided launching themselves in a business at an industrial scale.

Reluctance of the major companies to increase their capital investments may have been also affected by the insufficient demand for Western type of music in the society because of their different musical tastes. It is obvious that the popular genres of music, from the last decade of nineteenth century to the end of first quarter of twentieth century, were actually

the derived forms of Ottoman court music or Tekke music. Hence, the urban music, although mutated gradually in the process of the dissolution of *musica practica* -and turned into an entertainment music by the beginning of twentieth century-, had not been suitable for standardisation yet -as necessitated by mass production technology of music commodity production.

Turkish music market, although regularly expanding through years, was limited by a certain geographical location. Actually, it is more appropriate to talk about "Istanbul's music market" rather than Turkish music market, for a great portion of the record sales as well as the whole production of the records (if not imported) were realised in Istanbul until the end of the first half of the twentieth century. Due to the inconvenient economic conditions (such as lower income levels, higher unemployment rates and poverty), in which there was no room for new entertainment expenditures, the possibility of the further expansion of the music market in other parts of Anatolia (with the exception of few cities like İzmir and Bursa) was highly questionable for the record companies.

With the foundation of the Republic, despite the (oppressive) cultural policies of the State, musical tastes of the people, consequently the general structure of the demand for music as entertainment did not radically change. However, a decade after the Republic, due to the increasing concentration in the ownership patterns and the construction of a monopolistic market structure, some attempts by

multinational corporations for major capital investments can be observed. The foundation of the Yeşilköy Record Plant in 1929 can be considered as an indication. However, even these attempts were reluctant, since it should be remembered that the land, on which this factory was founded, had been donated to the company (The Gramophone Co.) by Atatürk.

5.2.2.2 Commercialisation of the Popular Genres

It is quite interesting that the kind of music attempted to be imposed by the state (which was suggested to be analogous to the products of Western "high culture", and labelled as "alafranga") and the music commercialised by the multinational corporations (depended on the popular music demanded by the people, and labelled as "alaturka") had always been mutually exclusive genres. Moreover, in contrast to the general cultural strategies of the state, the companies operating at the music market had never attempted to manipulate the existing musical tastes and demand (probably due to the enormous gap between these two music genres).

Before analysing the cultural policies of the young Republic (particularly, what is called as *Musiki İnkılabı* - "Music Reform"-, as well as its influences on the development of music market, here, it is appropriate to examine the popular genres of music at the time for it is important to remember that this music, "alaturka", was not only the popular and commercialised genre of music, through which a music market was created, but also, despite its widespread

popularity, it was a music, which was announced by the State as an enemy of the Republic.

In this respect, the dominant genres of music, in the beginning years of the republic, were still Şarkı and Taksim (as Fasıl Music) together with Gazel Music (as extensions -or modifications- of Ottoman court music). Additionally, "Hafız tradition" in the recorded music was still popular. In this sense, it is possible to observe many re-recordings of "Hafız" disks in the record catalogues of companies in these years. Moreover, many new talents that followed this tradition also became popular in this period (for example, the records of Münir Nurettin Selçuk, Hafız Burhan, Hafız Kemal and Refik Fersan were the most popular ones).

By the end of 1920s, it was observed that several trials to create a new music genre (which was labelled by the advocates of "alafranga" as *Milli Musiki* -"National Music"), such as compositions by Turkish artists in Western styles and respective arrangements of folk melodies were rising. Such arrangements (of local melodies in the Western style through using Western instruments) were particularly apparent in the operas composed during the first years of the Republic¹⁷. However, it should be noted that these styles had never interested record producers. On the other side, there were also newly emerging popular styles¹⁸, namely, *Tango Türk* (Turkish Tango) and *Fantazi*¹⁹ (a kind of free style of

performance heavily based on *Şarkı* form of Fasil Music) which was acquiring a considerable commercial success.

However, among these various genres of music, Kanto Music had a specific importance in the development of commercial music recording. Belge (1997: 305) states that "Kanto was, probably, the first example of a popular art in the cultural history of Turkey". Additionally, it can be argued that the production of Kanto music (in the years between 1930-1945) was also the first example of the production of music for the market.

As a matter of fact, it is possible to divide the development of Kanto music into two periods. In the first period, which denotes to the period from the end of nineteenth century until the end of 1920s, Kanto, as an entertainment show/music, was played with the accompaniment of Western instruments and appeared as music of a particular kind of a stage show (Kanto Show), generally performed by the women artists of minorities in the theatres. Kanto was generally one of the entertainment facilities of what was known as Galata/Direklerarası. By 1920s, Kanto Shows had gradually disappeared from theatre stages. However, Kanto as a music genre continued and in the second period of its development, Kanto music although mutated seriously, continued to preserve its popularity via gramophone records. In the absence of a show, the lyrics and the "alaturka" style of its music had become its defining characteristics in 1930s. More

importantly, the Kanto Music of this second period was only available in the gramophone disks. In other words, it can be said that Kanto was a new popular genre, which was specifically designed and produced for commercial recording. Furthermore, this pioneering format has also caught a notable commercial success, which lasted for about 15 years. The rise of Kanto as a new genre specific to records coincides with the foundation of the record plant in Yeşilköy. It should also be noted that Kanto, which was neither Western nor Eastern but was a "spontaneous synthesis" of both (Tekelioğlu; 1996, Aksoy; 1986, Belge; 1997), had preserved its popularity as a musical genre for more than 40 years. A similar success has only been achieved by "Arabesk Music" about thirty years after the disappearance of Kanto.

An examination of the record catalogues of the companies in these years reveals the fact that in the second quarter of the twentieth century, especially by 1930s, a notable increase in the quantity of commercial music genres, as well as in the number of artists, had been a characteristic of the music market. It is stated that more than 10.000 separate record titles were produced (or imported) between 1925-1940²⁰ (Ünlü: 1991: 44).

An important development by the middle of 1930s was the emergence of a new category in the record catalogues: Türk Halk Müziği (Turkish Folk Music). As a matter of fact, *Türkü* (the general label for Turkish folk songs), which was actually

unknown for the people in urban areas, was rarely included in the record catalogues after 1920s, but had never been categorised as a separate title until 1935. As it is discussed in the next section, parallel to the cultural policies of the Republic since late 1920s, Turkish folk music was presented as representing the "true authentic music" of Turkey. Hence, it can be argued that the inclusion of folk music in the record catalogues was partially related with the outcomes of these policies. Especially, the studies on the compilation of folk songs in Darül Elhan (House of Melodies -an institution which functioned as a conservatoire until the mid 1920s), the formation of a Folk music choir named Yurttan Sesler (tunes from homeland), and various attempts to compose new songs based on Folk music motives and radio broadcasts of Folk Music can be given as additional examples for the increasing popularity of Turkish Folk Music in urban areas.

However, it should be stated that the practical objective that motivated record producers to include folk music in their repertoire was quite different than that of the state. Irrespective of the cultural policies of the state, record producers, especially by the second half of 1930s, needed to expand the market for a threat of the collapse of the music market had emerged as an outcome of the particular economic policies (of the State) and heavy taxes that had particularly hit the minorities in Istanbul. As it is known, the wealthiest segment of the population was constituted of minorities, and concurrently minorities were the major consumers of the

cultural, artistic and entertainment activities (including record consumption). Consequently, their leaving Istanbul, which had accelerated by 1930s, but particularly after levying the Tax on Wealth and Earnings (Varlık Vergisi) in 1942, had created a demand gap in the music market -moreover, it should be stated that, the Tax on Wealth and Earnings and similar taxes had also negatively influenced the production in the recording sector²¹ (and in other sectors of the economy). This was the main reason behind the threat of the collapse of the music market, which forced record producers to find new solutions. In other words, it can be said that record companies' attempt was towards expanding the music market through popularising folk music. For this reason, in this period, almost all famous artists recorded folk songs²² (or probably, the record companies forced them to record such music). Moreover, new artists who were merely performing folk music emerged in these years. The folk songs to be recorded were chosen from the archive of Darül Elhan²³ and in the new recordings (after 1935), authentic instruments of Turkish Folk music were preferred. It can be argued that, the emergence of folk music singers and their use of authentic instruments (without any further arrangement in the music) denotes to an attempt to construct a music market in Anatolia. However, it should be remembered that these attempts were market oriented and also aimed to popularise and transform folk music to attract the general audience in Istanbul. For example, it is reported that in these years entertainment oriented folk music

records had become quite popular and reached commercial success in Istanbul (Ünlü; 1991).

It is true that the existence of diverse music genres available in gramophone disks characterise the music market of 1930-1945 period. This fact is generally interpreted as signifying a rich and expanding music market. However, as Ünlü (1991: 42) notes "in 1930s, although it is possible to see many records from many new artists, most of them could not succeed to be permanent and retreated from the market after one or two unsuccessful attempts". Consequently, the increase in the diverse records issued, which is not accompanied with an equal increase in the consumption should rather be interpreted as a quest (by the record companies) for understanding the possibilities for future developments, as well as the structure of the demand for music in the society.

5.2.3 Music Reform

"Music Reform", as one of the most important components of the "cultural revolution" of the young Republic, had aimed at constructing a new and national identity through breaking off almost all cultural ties with the past. In doing so, Gökalp's thesis on articulating national culture with western civilisation was followed to construct a "specific" synthesis in music. Gökalp (1997: 127-128) had already argued that:

Today, we are facing three kinds of music: Eastern music; Western music; Folk music. Which of these, I wonder, is our national music? We have seen that Eastern music is both inaccurate and non-national.

Folk music belongs to our culture, and Western music is that of our new civilisation; thus neither of them is alien to us. Then, our national music will be born out of the amalgamation of Folk music and Western music. Our folk music has given us various melodies. So, we can achieve a music which is both national and Western, if we collect and harmonise our Folk songs with respect to the specific norms of Western music ... this is the basis of the programme of Turkism in the field of music.

As Tekelioğlu summarises; "the problem and its solution have been defined as follows: the enemy is Eastern Music; the source is Folk Music; the model is Western Music and its harmony, while the purpose is to achieve [a] national music" (Tekelioğlu; 1996: 202).

The music reform, from 1924 until early 1940s, has been developed as a part of an education plan and carried out by the Ministry of Education²⁴. As a first practice of the Music Reform in 1924, the Ministry of Education founded a new school, Musiki Muallim Mektebi, (Music Teachers School) that would educate its students as music teachers for primary and secondary schools. Moreover, in the same year, music lectures in all primary and secondary schools were banned until the first graduates of Musiki Muallim Mektebi are engaged as music teachers in these schools. Here, what is important is that there were no lectures on Turkish music in the Musiki Muallim Mektebi, thus the music teachers who graduated from this school would only teach Western music in the primary and secondary education.

In 1925, the state began to send competent students to the conservatoires of the major cities of Europe (Paris, Berlin, Budapest, or Prague) to be educated as artists.

In 1926, Mustafa Necati Bey, the minister of education, had abolished the Department of Turkish Music in Darül Elhan and changed its name as İstanbul Belediye Konservatuarı (Istanbul Municipality Conservatoire). Studies on the compilation of the folk music had already started in 1925 in Darül Elhan, however, the use of this material for educational purposes was strictly prohibited (Oransay; 1986, Tüfekçi; 1987). Banning Turkish music in Darül Elhan has been criticised by Rauf Yekta (Köseihal) Bey:

In the name of our national culture, this is an unforgivable mistake ... in the present or in the past, there is no other nation in the world that had broken its cultural ties with the past and that had appropriated a music which is alien to its cultural character. There is no such happening in history. Think about the Japanese people. This intelligent nation had appropriated the Western civilisation, however managed to preserve its own national language, literature, art and music without making a concession in its education system (quoted in Özalp; 1986b: 7).

The response to Rauf Yekta Bey came from one of the members of Sanayi-i Nefise Encümeni (The Commission for Fine Arts, which was founded in 1926 to carry out the "music reform" in Turkey)

The Eastern music, the favourite of Rauf Yekta, cannot compete with modern Western music. He does

not comprehend why our young people are running to Europe to be educated as pianists or composers of Western music ... If one accepts Rauf Bey's views, then everything coming from West, which is new, useful and modern, should be rejected. Automobiles should go back, physicians' therapy should be replaced by the prayers of the hodjas, veterinarians should leave their office to blacksmiths, and all the Turkish people, with hands on their knee and with crooked mouths, should murmur ... the "kar"²⁵ of their grandfathers' (quoted in Özalp; 1986b: 8).

Actually, in conjunction with the practice of cultural policies of the state, an apparent struggle between the old (traditional) and new music (concurrent to Gökalp's suggestion, the "new" music was defined in the Western classical style, "inspired" by the Turkish folk melodies) has been initiated by 1924. For example, in 1924, Refet Süreyya Hanım had argued, in a newspaper article (Sada-yı Hak), that;

[Classical] Turkish music is nothing but an old kitchen rag; thanks to ones who had caused this annoying music to plague us. This music is an oxcart in an age of automobiles. The ones who manage to listen to this music without a headache, should have a head made from pumpkin (quoted in Yenigün: 24).

The struggle between the supporters of the "alaturka" music (Turkish style of music) and of the "alafranga" music (Western style of music) continued in the following years. However, it can be argued that this polemic had initiated as a consequence of particular publications favouring Western music and its

"high-cultural" nature (particularly published in the "semi-official" newspapers and magazines of the State).

The attitude of the State, as against Turkish music, was quite clear, and consequently, in 1928, Atatürk has broken up his reticence on the subject, and declared that:

This music, this unsophisticated music, cannot feed the needs of the innovative Turkish soul, the Turkish sensibility in all its urge to explore new paths. We have just heard music of the civilised world, and the people, who gave a rather anaemic reaction to the murmurings known as Eastern music, immediately came to life ... Turks are, indeed, naturally vivacious and high-spirited, and if this admirable characteristic was for a time not perceived, that was not their fault (quoted in Tekelioğlu; 1996: 204).

Following Atatürk's clear attitude, by 1928, attempts for the "music reform" intensified. For example, the hours reserved for the Western music in the radio increased, Western classical music began to be played in several public places - like in the ships of Istanbul maritime lines. However, it should be stated that neither of such applications succeeded to render "alafranga" music popular. Moreover, as observed by Rauf Yekta Bey, in 1928, "as a consequence of the restrictive attitude of the Government [on Turkish music], particular gramophone companies and some shrewd people benefited from the existing situation, and the sale of alaturka records enormously increased" (quoted in Üstel; 1994: 45)²⁶.

Consequently, more radical measures were taken to consolidate the "music revolution". The most typical of these was the exclusion of Turkish music from radio in 1934 (which lasted until 1936), two days after Atatürk's opening speech of the parliament on November 1st, in which he had argued that:

The music, which today is impertinently presented to the world as if our music, is not ours ... We must face with this fact. We have to collect those high expressions of our national and refined sentiments and thoughts and immediately arrange them in accordance with the modern musical norms. This is the only path for rising Turkish national music to its merited place within universal music of the world (quoted in Oransay; 1965: 24)²⁷.

In 1936 and onwards, the ban was replaced by a more reasonable and applicable policy. From that date on, until 1990s, a policy of control over the music, which meant a certain censorship over the broadcast of Turkish music in the radio (and later in television) constituted the means of implementation of the State policies in the field of music. In the radio (and later in television) broadcasting signified the most important means of implementing "music policies" of the State.

5.2.4 The Effects of the Music Reform on the Development of Music Sector

First twenty years of the Republic was a period in which the contradiction between the ideological needs of the state and the commodity production of music was much more apparent than ever. On the one hand, the record companies, through

responding to the demand for the existing (traditional) music in the society to make more profits in the music sector. However, on the other hand the cultural policies of the Republic (particularly the music reform), which targeted to eliminate this demand through a particular public policy, has become one of the most important functions of the state. As is known, the aim of these cultural policies was to break ties with the past and thus, to contribute to construct a new national identity. Concurrently, the governments consistently attempted to struggle against the existent musical tastes, for this music was seen as the cultural extension and continuation of the old regime. In this sense, the (popular) music which was extensively demanded and consumed by the people was announced as the "enemy" of the Republic, while, due to its existent popularity, this music was naturally preferred and supported by the recording companies.

It can be claimed that the music imposed by the state was not accepted by the people. For example, it is known that people were preferring to listen to music either from gramophone disks or from Arab radios (where available) when Western (or Western type of) music was broadcasted. Consequently, the massive resistance to the "Music Reform" was supported by the record companies -i.e. the "traditional" music demanded by people was commercially available in the form of gramophone disks. In other words, it is also possible to argue that the "Music Reform" was not supported by the Recording sector, which provided the capital investments for

musical production. In this framework, the cultural policies of the state in the field of music had failed depending on the failure of winning the consent of not only masses but also of the recording companies. On the other hand, the further development of existent forms of popular music (for further expansion of the market) was also hindered due to the lack of an ideological support (for example, the state had an absolute control over the means of mass communication).

As a matter of fact, in the short run the recording companies had benefited from the existent situation and increased their profits due to an increase in the sales of records. However, it can be said that, in the long run these policies had contributed to impede the further expansion of the music market. Hence, it can be concluded that the later development of the music sector in Turkey, until 1990s, has been marked by this contradiction.

5.3 The Challenge of Domestic Production: From Monopoly to a Competitive Market

As an extension of the post-war capitalist expansion, the period between 1946-1953 in Turkish economy was marked by a notable growth in GNP, with a yearly average of 11% (Boratav; 1998: 80), particularly stemming from populist economic policies of DP governments encouraged by the foreign aid and credits together with several capital investments of American origin. As a consequence, not only the entertainment sector (particularly the music market) in big cities was revived, but

also the use of radio and gramophone machines in rural areas increased²⁸ (Karabey; 1999).

Parallel to the increase in GNP, increasing consumption during this period prepared the ground for domestic capital investments in recording sector. By mid 1950s the monopoly of EMI in recording sector began to be challenged by native entrepreneurs. The first attempt came from Mihran Gürciyan, who was previously working for His Master's Voice of The Gramophone Co. After leaving His Master's Voice, he signed a contract with the famous singer Zeki Müren for his recording rights. Hence, he founded a new record company, named *Müren Records*. The recordings of Zeki Müren's songs were performed in Istanbul and the records were manufactured in Czechoslovakia (Karabey; 1999). The result was a notable commercial success. However, it should be stated that rather than investing the capital, Gürciyan had operated as a subcontractor in the recording sector. Following the commercial success of *Müren Records*, Gürciyan founded another record company, named *Herses Records*, and made records for numerous artists in the same manner.

Meanwhile, in 1956, another domestic record company (named *Grafson Plak*) was founded in the partnership with Mihran Gürciyan and Agop Ürgüplüoğlu. The foundation of Grafson is crucially important for the history of sound recording in Turkey, since it was the second native firm (44 years after Blumenthal Records) investing important sum of capital in the

recording sector. In 1957, Grafson set up a record plant in Topkapı (Istanbul) and a recording studio in Beyazıt (Istanbul).

Grafson's successful enterprise, while encouraging native entrepreneurs to invest in record production, forced EMI, which had been hesitant for new capital investments, to respond through installing new and modern manufacturing hardware in Yeşilköy plant. Thus manufacture of 45 rpm records began by the end of 1950s. Such developments had demonstrated that, a new and competitive period was about to begin in Turkish music market. Hence, in the beginning of 1960s, a new record company together with a record plant producing 45 rpm records was founded (*Melodi Plak* by Turgut Çağlar)

In 1962, an entrepreneur named İsmail Şençalar, with a minimum capital investment, succeeded to set-up a mono-channel home-studio at the basement floor of his house and began to produce records there. As a matter of fact, this seemingly unimportant attempt not only demonstrated that realising record production at lower costs was now possible, but also heralded the emergence of many small recording firms which would begin to dominate the music market in the near future.

1964 was the beginning year of a structural change in the Turkish recording sector. A businessman, named İzzet Şefizade, founded a modern record plant (for producing 45 rpm records) as well as a record company (named *Diskofon*) in that year. However, Şefizade, rather than merely producing records for

the contracted artists of *Diskofon*, preferred to manufacture records for smaller firms. This attempt caused a further increase in the number of small domestic record companies while providing Şefizade to acquire vast amounts of profit from manufacturing records in the name of small companies. After a short time, Şefizade also imported new machines to press covers for records²⁹.

More importantly, the small record companies dealing with Şefizade were generally the ones reproducing the most popular records of the major firms -particularly of EMI's recording divisions' popular records. In other words, piracy had extensively started through the foundation of Şefizade's record plant. Moreover, such an act was not considered illegal since there was no legal sanction to prevent piracy.

The proliferation of 45 rpm records and its players³⁰ by mid 1960s brought a radical change in the music consumption patterns. The new record players (as well as its records) were not only cheaper but also small and more flexible. Thus, the popular music recorded on 45 rpm vinyl disks, could now be listened extensively in houses, in cars and more importantly in mass transportation vehicles (like in busses and in *dolmuş*). This provided further expansion of the music market.

More importantly, the expansion of the market and the increase in the record sales owed much to lower levels of retail prices which reflected the decreasing costs of record production. However, it should be stated that lower costs of

producing a record was due to minimal promotional costs (as mentioned at the end of previous section, this was largely stemming both from the state ownership of means of mass communication and contradiction between TRT policies and interests of recording companies) as well as lack of royalty payments. Consequently, it can be claimed that a lower level of breakeven point (as low as 1000 units of sales in 1970s as compared to an average of 60000 units of sales in American music market for the same period³¹) due to lower costs of production not only encouraged record producers for producing new albums, but also prepared favourable conditions for new entrances to the market. Below words of an interviewed producer describes the situation quite clearly:

... even we had never heard the word promotion. What is called promotion, in 1970s and in 1980s, was only a quarter page newspaper advertisement. Moreover, with the exception of *Polis Radyosu*, the music we produced was not accepted by the state television and radio ... In producing a record, our main costs were plastic expenses together with album's coloured cover page and etiquette. The others were negligible. There were no royalty payments. The fees of musicians, on the other hand, were very low, for they were already almost hungry and were ready to work for any rate. Since sound quality was not that much important, the studio costs were also cheap. Consequently, a sale of 4000 or 5000 records was enough for us to make profit.

However, it should also be stressed that such conditions caused not only to higher levels of uncertainty in the demand for music (due to the lack of promotional investments), but

also to lower rates of profitability (due to the increasing piracy). In this respect, it can be claimed that, increasing number of small firms accompanied with increasing piracy had defined the basic characteristic of Turkish music market in the beginning of 1970s. Consequently, because of the extensive proliferation of piracy together with governments' reluctant attitude to take measures against it, in 1972 EMI liquidated its recording plant in Yeşiköy. Then, larger domestic companies (like Melodi Plak and Grafson) bankrupted.

Consequently, by mid 1970s the hitherto monopolistic structure was already broken and the Turkish music market was dominated by many small recording companies. Proliferation of audiocassettes and its players, by the beginning of 1970s, have also supported this development. By the end of 1970s, many audiocassette recording plants were founded in Istanbul³².

Thanks to simpler and cheaper technology introduced by audiocassettes, the market structure based on the competition of many small firms prevailed all throughout 1980s. However, this feature of audiocassette production also encouraged further proliferation of piracy which hindered profitability³³ and thus further capital investments in the sector.

5.4 Towards an Industry: A Reconsideration

From what is narrated up until now, it can be it can be concluded that what characterised the structure of music market in Turkey, until 1990s, was high levels of demand

uncertainty stemming from low levels of capital investments and insufficient promotional expenditures by the firms. However, as was discussed previously, the organisation of cultural commodity production as an industrial production not only necessitates the existence of particular consumption patterns but also some extra-economic measures that foster and regulate consumption. This is a process, which entails both financial and ideological support both from other sectors of the economy (such as advertising/promotion) and the state. It can be easily claimed that such channels of support, needed for the development of industrial music production were blocked in Turkey. First, it is a fact that the amount of capital invested in the business was not enough to foster such a development. Second, the ideological motivations of the state, which was in direct opposition with the economic interest of the recording companies, led to policies and measures (such as reluctance to enact a protective copyright law or state controlled broadcasting policies that discouraged spread of popular music for mass consumption) that would not allow the expansion of the music market. In other words, they were the impediments of industrialisation of music production.

Moreover, State's monopoly over broadcasting until early 1990s, did not allow recording companies to establish a control over music market. Thus, deprived of the principal means for the promotion of the popular music recording companies were forced to confine their activities within a commercial sphere. Indeed, the lack of promotional investments

in the market meant further uncertainty in the demand (or spontaneous development of demand). Consequently, the recording sector organised under such conditions existed as a highly speculative field in terms of profit.

In sum, it can be claimed that such problems of the music market in Turkey denoted a structural impediment in the process of "creation of value". Consequently, until 1990s, recording companies in Turkish music market had failed to create new audiences and new genres of popular music but extensively depended on forms, like "arabesk" which had developed spontaneously as a "synthesis"³⁴.

As has been already explained (in Chapter 3), one of the important means of creation of an economic value in the context of cultural commodity production (the process of creation of new use values -the content- is articulated to the process of creation of [exchange] value) has been the "star system" and the effective functioning of the star system was highly depended on the existence of a horizontally and vertically integrated market structure.

It is obvious that such market organisation did not exist in Turkish the entertainment sector. However, it should also be noted that, in 1970s, some entrepreneurs in the entertainment business had succeeded to translate the "spontaneous synthesis" (particularly the "arabesk") into a lucrative business through an organisation that can be labelled as "pseudo star system". More precisely, the already

existent popularity of some artists were exploited separately by the (disintegrated) elements of the entertainment sector - such as cinema producers, record producers, night clubs and taverns, concert organisers etc. Contrary to the mechanism in the West, the "pseudo star system" did not lead to the creation of new stars, nor it aimed such a goal. The capital investments in various sectors of the entertainment business (especially in recording and in cinema sectors) were made on already popular (or spontaneously popularised) artists -like Orhan Gencebay, Küçük Emrah etc. In this context, through an "unintended cross promotion" (since these sectors were not integrated in terms of their ownership patterns) the popularity of such artists further increased, and this brought further profits to the respective sectors. In other words, during 1970s and 1980s, it can be said that both cinema and record producers utilised the popularity of "arabesk" -since melodrama films and their soundtracks were mutually promoting³⁵. According to the findings of a research (Çelikcan and Güzel; 1995), melodramas constituted 40% of the total number of films made between 1974-1990. This shows the importance of cinema for the music sector, but more importantly, this also shows the importance of "promotional activities" for increasing the profitability in recording sector. As a matter of fact, the end of melodramas, which had been the principal source of promotion opportunity for the music sector for more than fifteen years, strikingly coincides

with the advent of private radio and television channels, which then have undertaken the promotion activity.

It can be said that, through the emergence of private radio and television channels, by 1990s, an important obstacle in front of the process of creation of "[economic] value" (in the music market) began to be eliminated. Consequently, record companies could find an opportunity to promote their artists in private radios and television channels. In this framework, by 1993, the extensive production of music videos (to be broadcasted in the private television channels) began³⁶.

Consequently, through the increasing number of private radio and television channels, together with the emerging video music channels, an increase in the new popular genres of music together with the emergence of new audiences (particularly the younger population, who hitherto had preferred to listen to foreign pop music, began to listen to the rising Turkish pop music) can be observed³⁷ in this period.

To sum up, it can be argued that through installing the means of creation of an economic value, music production, by 1990s, rapidly evolved towards an industrial activity. However, the problem of realisation of value (in the market) continued to remain as the main obstacle in the path towards the completion of the process. As was mentioned previously, the solution of this problems depends, to a large extent, on some factors (like the level of consumer income and

entertainment expenditures) independent of the development of music sector/market. On the other hand, there are also some imperatives, related with the organisation of the music sector, to sustain the realisation of value. The problem of copyrights can be given as an example -since piracy is one of the most important reasons behind the low levels of profitability. It should be remarked that high levels of piracy, which marked the operation of music market in Turkey since late 1960s, is still continuing today.

To prevent piracy, the first serious attempt, by the government, was realised in 1986. In that date, some changes were made in the Fikir ve Sanat Eserleri Kanunu (The Law on Intellectual and Artistic Property), which was in force since 1952 (but remained non-operational until 1986), and a new addition, entitled Sinema, Video ve Müzik Eserleri Kanunu (The Law on Cinema, Video and Musical Property) was enacted. According to this law, before the mass distribution of a musical work, official registration and sealing of the music albums became compulsory. Moreover, to prevent piracy, the sale of unsealed albums were also banned.

Together with this law, a professional association, entitled *Türkiye Musiki Eserleri Sahipleri Meslek Birliği* (MESAM; Musical Work Owners Society Turkey), to protect the rights of musicians (composers and lyricists) was founded. However, it should be noted that, neither the legal framework

nor the operations of such organisations had been sufficient to prevent the piracy until today.

Notes to Chapter 5

¹ Some melodies heard in phonograph, according to Alus, was Faust, Carmen or other famous operas. A very similar story was also told by Ercüment Ekrem Talu (1943). The only difference was in the time and space of exhibition. According to Talu, Phonograph was first appeared in 1896 in a shop in *Beyoğlu*.

² In the same source, it is also stated that listening to Turkish Music was much more expensive than the imported cylinders in which some operatic arias and entertainment songs were pre-recorded.

³ See Paçacı (1999a).

⁴ The record companies functioning in Ottoman/Turkish market and their origin was compiled for the first time by Hugo Strötbaum who is a professor of Turkish History and Literature at Nijmegen University, Amsterdam. His specific area of concentration is the history of record companies. The table he prepared to exhibit the record companies operated in Turkish market between 1897-1931 was published in *Tarih ve Toplum* No: 86 p. 34; 1991. It should be stated that, the basic source of our schema on record companies (Figure 5.1) is Strötbaum's research. However, Figure 5.1 is extended and detailed through our research.

⁵ Based on an interview with Marcel Blumenthal (the son of Julius Blumenthal) by Gökhan Akçura (1990a).

⁶ Tanburi Cemil Bey, Hafız Sami Efendi, Hafız Osman Efendi, Hafız Aşir Efendi, and Bahriyeli Şehap were the most famous musicians. However, among these musicians Tanburi Cemil Bey has had a particular importance. For example, in 1908 the

company had offered him a hundred Napoleon Golds to make new Gramophone Records (Akçura; 1990a).

⁷ Some of these companies were Disque Odé (which was imitating Odeon Records), Ottoman Record, Chukri Record, Turk's Record, Hafız Achir Record, Turmaphon Türkiyat Recor, Perfectaphone, Fabrication Ottomane, Jupiter, Corona Record etc.

⁸ Interview with Leon Grünberg by Akçura (1990b).

⁹ It can be said that almost all large-scale investments in this period were controlled and directed by the foreign capital, and governments encouraged this process. For example, according to a law enacted in 1924, foreigners were given right to obtain property (Tezel, Y.S., *Turkish Economic Development, Policy and Achievements*, 1975, quoted in Keyder; 1982: 89). Even in the law on the encouragement of domestic industry in 1927 (*Teşvik-i Sanayi Kanunu*), the foreign companies were not excluded from the privileges (Keyder; 1982: 89).

¹⁰ According to Akçura (1990) Gramofon Türk Limited Şirketi was founded with a capital of 250.000 TL. The local partners of the company were Norbert Schorr and Vehram Gesar (with shares of 1000 TL), both of whom were the local representatives of The Gramophone Company (His Master's Voice), which was the owner of the remaining 248 shares (Worthing 248.000 TL.).

¹¹ Interview with Turgut Çağlar - in the beginning of 1960s, he was one of the first music producers of newly emerging domestic music production and also he was the founder of *Melodi Plak* (a music production company) and *Melodi Plak Fabrikası* (a record manufacturing plant). Today, Çağlar is 85 years old and still actively involving in record production business. Actually, Atatürk's donating a piece of land to *Gramofon Türk Limited Şirketi* for a new record plant is quite

interesting since it is known that the music genres recorded, produced and sold by these companies were the ones declared as the enemy of the "modern Republic". Unfortunately, there is no detailed information about Atatürk's donation. However, limited information can be found in Özalp (1986a, 106-7). Additionally, Celal Bayar (1951), in his memories, tell about Atatürk's interest in recording his voice on a small gramophone machine capable of recording as well as playback, which had been donated him by English Gramophone Co. (His Master's Voice) as a "beau geste". Similar stories can also be found in the memories of Atatürk's waiter, Cemal Granda (1971).

¹² Interview with Turgut Çağlar.

¹³ For example, in 1908, Odeon record company had signed a contract with Tanburi Cemil Bey. According to terms of this contract, the company had paid a hundred Napoleon gold to Cemil Bey in return of a series of recordings (from the memories of a studio director who had worked for Blumenthal brothers, quoted in Akçura; 1990). However, as it is discussed in the following pages, these companies, for a long period of time (until 1929), had been highly reluctant for major capital investments within the market.

¹⁴ For a detailed analysis of the development of radio broadcasting in Turkey, as well as the content of radio programming, see Kocabaşoğlu (1980).

¹⁵ By the beginning of 1930s, a new hardware called electrogramophone, which was a combination of a radio receiver and gramophone, entered into the market. This machine had become common in a very short time and had widely used in coffee houses, tea gardens, restaurants and taverns.

¹⁶ As a matter of fact Taksim appeared as introductory (like an overture) or a modulation but in either case, as an

improvised and inseparable part of Fasıl Music. The Taksim was generally played by a single (solo) instrument to warm performers to the following mode or for smooth transition between modes at the beginning or within the Fasıl. However, the technical incapacity of gramophone records was not permitting to record a complete Fasıl session. Consequently, particular parts of Fasıl Music (like Taksim) appeared as if separate forms (or genres of music) in the gramophone disks. Among these, Taksim was the most preferred style for the record producers because solo instrumental recordings were the most appropriate means of maximum sound quality in acoustical recordings.

¹⁷ Probably, these operas were composed through the directive of Atatürk. First examples were, *Özsoy, Taş Bebek* (by Adnan Saygun), and *Bayönder* (by Necil Kazım Akses). For more information on the development of Opera in Turkey see Altar (1993).

¹⁸ The cultural policies of the state might have an indirect effect on the development of these new styles. However, it should be stated that what was developed as a new musical style (like operetta, Tango -or what was labelled as *Tango Türk-*, foxtrot or -although an atypical example- *Kanto*), under the Western influence, was not a desired musical form for the theoreticians and practitioners of State's "music reform". However, what is important is that both the musical styles and lyrics of these songs support Keyder's thesis (1982) suggesting, "consumption patterns in the metropolis of periphery follows (or imitates) the centre". Concurrently, the titles of some popular operettas of the period were *Vals Boston* (Boston Waltz), *Sevimli Güzel Matmazeller* (Pretty Beautiful Mademoiselles), *İçelim Bol Bol Şampanya* (Let's Drink a lot of Champagne), and *Bir Adada Bir Modada* (Once in the Island, Once in (the) "Moda" -*Moda*, which means "fashion" and at the same time the name of a district of beau monde in

Istanbul, was an often used theme in the songs of that period). However, this kind of music, together with their lyrics, was not only criticised but also attacked either directly by the higher officers of the state or by several newspapers known as the official voice of the government (like *Hakimiyet-i Milliye* and *Ulus*). Accordingly, both this "new music" and "Ottoman music" were considered equally decadent.

¹⁹ Although, the very first examples of Fantazi music (experiments) as an "unrestricted performance" (*serbest icra*) is seen in these years, the genre became popular in 1950s.

²⁰ The categories and their subtitles that took place in the record catalogues of the period were:

- A) Songs in Turkish (with lyrics): Basically the popular forms of Fasil Music, like *Beste* and *Şarkı*. Additionally, *Gazel* and *Uzunhava* were the other popular genres of this category.
- B) Instrumental Turkish Music: Instrumental music (without lyrics), generally derived from respective forms of Fasil Music consisted this category (*Peşrev*, *Sazsemâisi*, *Taksim*).
- C) Tango Music: Particularly *Tango Türk* (Turkish Tango). Additionally, imported Tango Music records were also popular.
- D) Kanto Music
- E) Foxtrot
- F) Charleston:
- G) Operettas
- H) Orchestral Music: Particularly marches
- I) Religious Music
- J) Folk Music of Minorities
- K) Dialogues, Monologues and Sketches (*Sözlü Plaklar*) (*Karagöz*, *Meddah*, *Sport*, *Monologues*, *Poems*, *Sketches*)
- L) Dance Music
- M) Jazz
- N) Western Classical Music
- O) Music from the world: Records on Arab, Spanish, Russian, etc. music.

²¹ Akçura (1990) states that Grunberg family had paid more than a million TL. as tax in this period.

²² Among these, artists from Hafız tradition (Hafız Kemal, Hafız Saadettin, Hafız Burhan); as well as classical Turkish music singers (Münir Nurettin Selçuk, Safiye Ayla) and Tango

and Kanto singers (Fikriye [Şakrakes] Hanım, Seyyan Hanım) can be given as examples.

²³ It is known that, after the foundation of Republic, and especially by 1926, more than a hundred separate *Türkü* recordings were performed with the cooperation of Columbia Graphophone Co. However, these songs were interpreted through the performance of Classical Ottoman/Turkish music instruments.

²⁴ For Music Reform in Turkey, see Paçacı (1999), Belge M. et. al. (1980), Hasgöl (1996), Üstel (1994), Tekelioğlu (1996), Aksoy (1996), Tura (1987), Stokes (1992).

²⁵ "Kar" is one of the most ponderous song forms of Ottoman court music.

²⁶ Rauf Yekta, "Türkiye'de Musiki Hareketleri", Tiyatro ve Musiki, No. 2 p. 2, 1928.

²⁷ Some parts of this translation is taken from Oransay's (1986: 199) translation.

²⁸ The growth was particularly evident in agriculture. In other words, in this period the greatest share of the increasing wealth belonged to the agricultural sector (Boratav; 1998: 80).

²⁹ Interview with Turgut Çağlar.

³⁰ Actually the 45 rpm record players (turntables) were generally capable of playing both 45 rpm and older 78 rpm record formats.

³¹ For example, in 1971, a rock album cost between \$20000-80000 to make, but by the later 1970s, a fairly modest album cost \$50000 and some reached \$200000 (Stokes; 1977: 52). By

1970s it was reported that the break-even point for album sales went from 20000 to 100000 copies (Straw; 1983: 98).

³² The first audiocassette production plant was founded by Melodi Plak in the beginning of 1970s. By the end of 1970s, another audiocassette plant, named Plaksan, was founded by Roni and Dani Grunberg, who were the close relatives of Blumenthal brothers. What followed was the recording plants founded by Yaşar Plak (Yaşar Kekeva), Kervan Plak (Orhan Gencebay) and Kamel respectively. By the beginning of 1980s, the firm called Raks (which was producing small electrical devices for home use) began to produce empty and recorded audiocassettes.

³³ In 1980s, many retail record shops in big cities had imported high speed dubbing machines capable of recording a 60 minute audiocassette in several minutes. Hence, pirate copies of many foreign or domestic popular albums were produced (on demand) in those retail shops.

³⁴ Tekelioğlu (1996) conceptualises the synthesis which is imposed from above (like cultural policies of the republic) as West-East synthesis in music. According to Tekelioğlu this synthesis had begun with a model based on Western practices and forms. Hence, he argues, "it may be perhaps for this reason that it has failed to undergo the transformations which has yielded the present day synthesis we designate as East-West" (1996: 197). Accordingly, the move from West-East to East-West denotes to the direction of change, and the latter appears as a spontaneous synthesis, as an outcome of a "natural development".

³⁵ The boom in Arabesk films, which had begun in 1971, is a typical example. In 1971, following the enormous sales success of the 45 rpm record, "Bir Teselli Ver", of Orhan Gencebay (the record was sold more than 300.000 copies in a month, and its total sales had reached several millions of copies in one

year), the cinema director Lütüfi Akad had made a film for Gencebay having the same name. From that date on arabesk films rapidly increased (particularly by the arabesk artists like, Orhan Gencebay, Ferdi Tayfur, İbrahim Tatlıses, Küçük Emrah and Bülent Ersoy).

³⁶ It should be stated that the emergence of music videos in Turkey was much before 1993 (for example music videos of Barış Manço can be given as examples). However, these music videos were mostly financed by TRT (until 1990) or private television channels (between 1990-1993). By 1993, through the beginning of extensive production of music videos, their production costs began to be financed by the recording firms -in this sense through the introduction of music video as a sine qua non of the promotion activity, the total costs of production began to increase in music sector.

³⁷ The first example of the rising "Turkish pop" was Sezen Aksu's album, named "Git", through which its leading song "Hadi Bakalım" the album had sold more than 2.5 million copies. Moreover, "Hadi Bakalım" was the first Turkish song played in the discos as a dance music. Additionally, Kayahan's album "Yemin Ettim" and Yonca Evcimik's "Abone" had also sold more than million copies. Through these albums, for the first time in Turkish recording history, the sales of "pop music" had exceeded "arabesk". It should be stated that, in terms of the strategy of creation of value, both Kayahan and Evcimik had a special importance as their being the pioneers of the new organisation of Turkish music sector. Kayahan had appeared "in-between" with "arabesk" and "pop music". In other words, as Solmaz (1996) states, what Kayahan did was to intersect "arabesk" and "pop" and thus he could manage to mobilise a considerable mass of audience who were ready to accept a "modernised" form of arabesk. On the other hand, the case for Yonca Evcimik, it can be argued, is much more interesting, since Şahin Özer, who was her producer, confesses that "I was

well aware that both her voice and her physical appearance was far from being satisfactory". However, what brought success was, for Özer, the true strategy that they followed: "For the first time in Turkey, we used a music video to present a new image. I mean, for the first time, with this video, we managed to combine 'an image of a dancer' with Turkish pop. Until that date there was no 'dancing pop artist' in Turkey. Yonca did this ... The 'Abone' [most popular song of Evcimik] targeted neither "arabesk" listeners, nor TRT style, middle aged 'light music' listeners; but our target audience was the teenagers, and even the children. From her necklace to her dresses and to her modern dances, Yonca became a model for teenagers. That's why her cassette had sold millions" (Interview with Şahin Özer, June 4, 1999).



CHAPTER 6

TURKISH MUSIC INDUSTRY TODAY

In this chapter, the current structure of the Turkish music market will be examined. The study is mainly based on three sources: First, the raw data taken from The Directory of Copyrights of The Ministry of Culture and Tourism; second International Federation of The Phonographic Industry (IFPI) annual statistics; and finally the interviews made with several producers, music critics, musicians, studio owners, radio directors, composer and lyricists, as well as the authorities of particular music organisations, namely, *Türkiye Musiki Eserleri Sahipleri Meslek Birliği* (MESAM; Musical Work Owners Society Turkey) and *Müzik Yapımcıları Derneği* (MÜYAP; Music Producers Society)¹. Additionally, population statistics and household consumption statistics of State Statistics Institute (DIE) are also consulted.

As a matter of fact, in Turkey, the data on record sales is formally collected by three institutions: First, Directory of Copyrights of The Ministry of Culture and Tourism and second, MESAM and finally MÜYAP. Actually, there are mainly two channels of data flow, i.e. from Directory of Copyrights to MESAM and second the information flow from major warehouses in

several regions to MÜYAP. It should be noted that since MÜYAP is the local partner of IFPI, Turkey's recording industry statistics, which is published annually by IFPI, depends on the data provided by MÜYAP.

The data available on record sales in The Directory of Copyrights is based on the sales of seals². Since 1986, there is a legal obligation for record companies to seal the music albums (Long Plays, Audio Cassettes or CD's) separately. Hence, each album in the market is identified through a separate seal code. The record of each seal code that corresponds to respective music album is kept in the archives of the Directory of Copyrights and one copy of each record is sent to MESAM. However, it should be noted that the Directory of Copyrights began to keep these records regularly since 1991. Moreover, still the records in the Directory of Copyrights are not kept in a computer database, and even, they are not compiled to form a database³. They are just separately filed as official documents to be presented to courts in case of probable future disagreements between the record companies and The Directory of Copyrights⁴.

The method of organisation of seals by The Directory of Copyrights merits to be specially stressed: To prevent the piracy of seals, The Ministry of Culture and Tourism orders and imports special seals (which are said to be made difficult to duplicate) at the beginning of each year. However, due to the lack of any market research to predict annual demand for

seals, the seals imported often finish at the middle of the year. Since the types and codes of seals are different for different genres of audial or visual material (for example there are different types of seals for domestic music cassettes, CDs, foreign music cassettes, CDs, video cassettes, video CDs, and DVDs), in the case of an exhaustion of a type of seal, the officers prefer to use other types in the place of the one exhausted. This often causes a confusion in determining the exact number of annual CD and audiocassette sales together with the origin of the repertoire (i.e. whether domestic or international). Overcoming such a problem, during the research, has been possible by the cooperation of the responsible officer who had recorded the seal sales⁵.

Table 6.1: Directory of Copyrights, Seal Sales and IFPI Data of Real Album Sales

Years	SEAL SALES THE DIRECTORY OF COPYRIGHTS*			REAL SALES IFPI**			Difference (millions)
	Audio Cassette	CD	TOTAL	Audio Cassette	CD	TOTAL	
1991	52.266.010	512.412	52.778.422	51.000.000	500.000	51.500.000	-1.27
1992	60.235.286	923.539	61.158.826	58.700.000	900.000	59.600.000	-1.56
1993	46.227.373	1.656.708	47.934.081	41.900.000	1.500.000	43.400.000	-4.53
1994	52.252.086	1.489.876	53.741.962	49.100.000	1.400.000	50.500.000	-3.24
1995	35.765.084	3.545.227	39.310.311	34.300.000	3.400.000	37.700.000	-1.61
1996	42.147.064	6.322.060	48.469.124	40.000.000	6.000.000	46.000.000	-2.47
1997	49.412.264	4.392.201	53.804.465	45.000.000	4.000.000	49.000.000	-4.80
1998	48.721.451	5.180.788	53.902.239	44.200.000	4.700.000	48.900.000	-5.00

* Seal Sales are compiled from the record books of The Directory of Copyrights.

**Source for IFPI data: The Recording Industry in Numbers 2000, IFPI

As is explained above, there are mainly two channels of data flow on record sales, which signifies two separate sources for record sales. Table 6.1 shows the differences

between IFPI data (its original source is MÜYAP) and Directory of Copyrights data (issued seals).

A certain amount of difference between two sources of data is expected, since unsold albums return to their producers and these do not appear in IFPI's database (IFPI's statistics exhibit only the realised sales in the market). Directory of Copyrights is not interested in returned albums, hence the total seal sales signify the total produced albums irrespective of whether they are actually sold or returned. Therefore, the difference between two (The Directory of Copyrights data and IFPI data) normally should give us the number of returned (or unsold albums) in the respective year. However, it should be noted that, a sealed album, whether sold or returned, produces the same amount of value in the context of royalty payments -since copyrights are paid on the basis of seal sales (8% of wholesale value of each sealed album). In this sense, producers often act cautiously in buying seals. In other words, rather than sealing all albums at once, they prefer to buy seals just before they are sent to warehouses. In actual practice, producers prefer to buy maximum of 10.000 sales at a time -even for very a promising album this number is generally no more than 100.000 (actually, the seal sales for a album differs between 500-3000 at a time).

Another source of information for the analysis of Turkish music market has been the mentioned interviews. In 1999, a total of 51 interviews made, 33 of which were with music

producers/record company owners or record company employees, and of the remaining 18, three with music critics, seven with musicians, two with studio owners. Among the interviews there was also a radio director, three lyricists, two MESAM board members, the chairman of MÜYAP and the director of the Directory of Copyrights of The Ministry of Culture and Tourism.

These interviews had invaluablely contributed to reveal the general structure of the market and organisational structure of the firms operating at the market. It should be noted that some of the interviews (or some parts of the interviews) were made "off the record" as requested by the interviewees. In such cases, the name of the person is not given in the text, only his position (or function) within the sector/company is indicated.

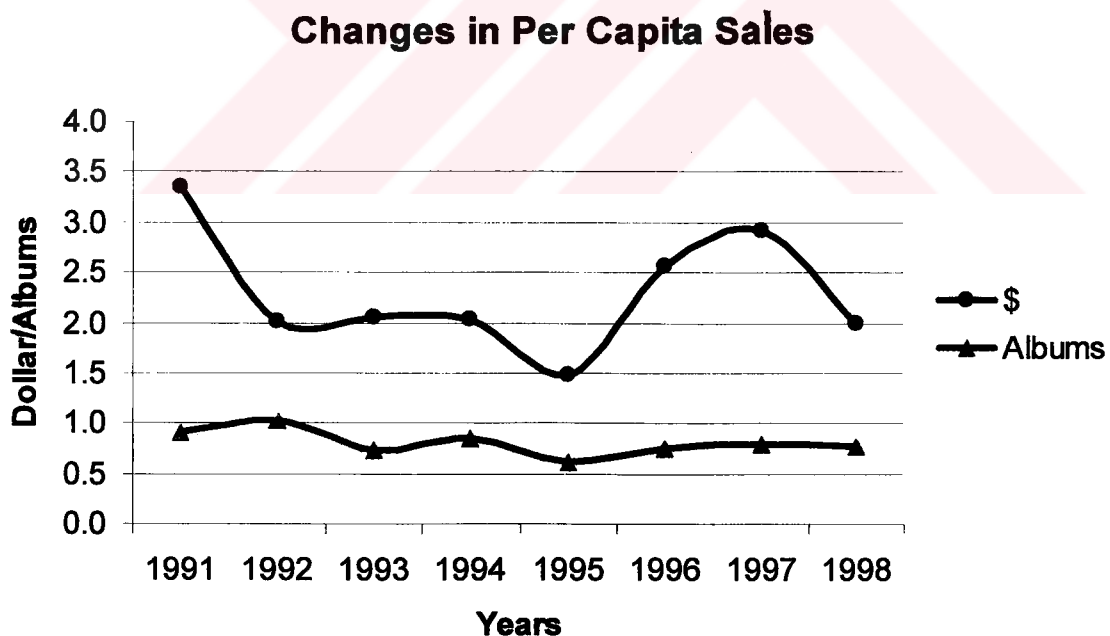
The chapter is comprised of three main parts: in the first part the general structure of the Turkish music market is analysed, in the second part the structure of the record companies is examined and finally in the third part the production process of music together with the costs of production is analysed.

6.1 Turkish Sound Carrier Market: An Overview

Although Turkish music market is the largest market in the Middle East with a share of 46% in unit sales and 40% in retail value (IFPI: 2000), the total retail value of the market (with an average of 138 million dollars between 1990-

1999) is extremely low when compared to advanced music markets of Europe, US and Japan. Although on the basis of unit sales, Turkish music market is the sixth largest market of Europe and fourteenth of the world in 1999⁶, according to IFPI world music sales ranking in retail value in the respective year the rank of Turkish music market, with a retail value of 127 million dollars, falls into the twenty-ninth position out of eighty calculated markets. Concurrently, (on the basis of per capita sales), although number of per capita album sales are virtually same with the average of the world market, amount of per capita sales in dollars are incomparably low (Table 6.2). In other words, with an average of the retail value of 2.3 dollars per album (see Figure 6.1 for the change through years), Turkish music sector is above only three countries in Europe (namely Russia, Ukraine and Bulgaria).

Figure 6.1: Changes in Album Sales Through Years



Source: Compiled from the record books of *The Directory of Copyrights*

Table 6.2 presents a comparison between Turkish and world music markets in average values between 1991-1998.

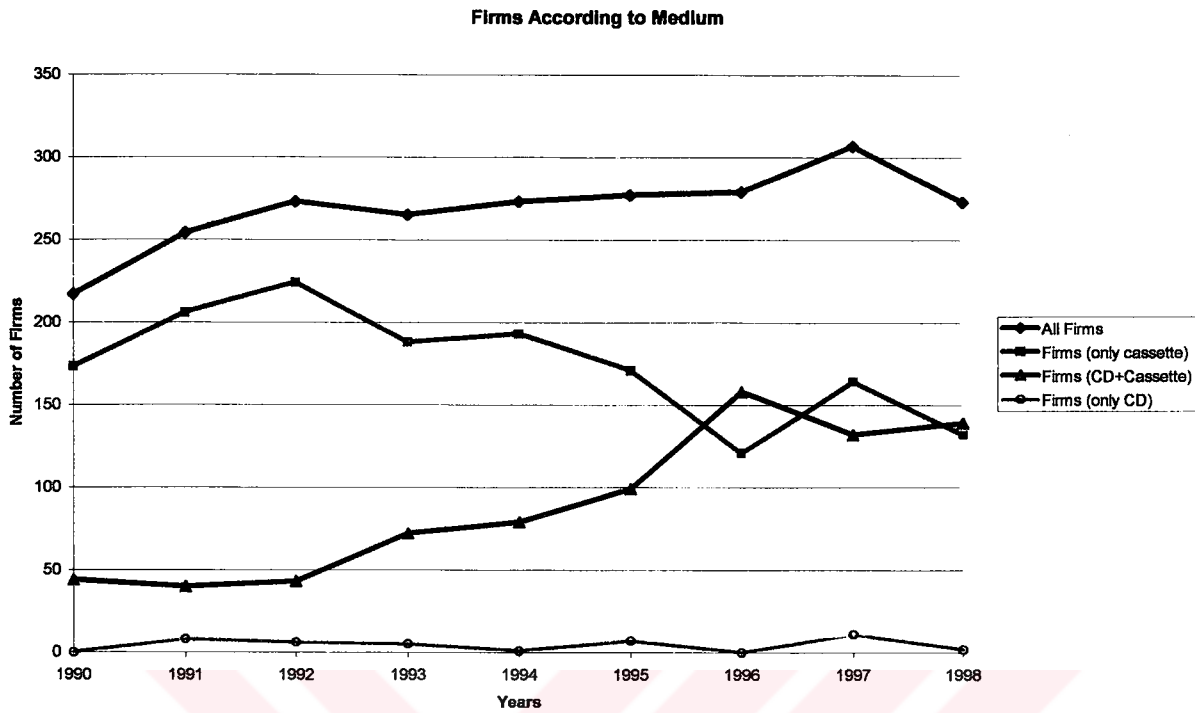
Table 6.2: A Comparison of Average Recorded Music Sales

UNITS		Turkish Market	World Market *	
AVERAGE SALES BETWEEN 1991-1998	Genre	<i>Domestic</i>	44,095,000 (91.25%)	64.60%
		<i>International</i>	4,230,000 (8.75%)	35.40%
	Audio Cassette		45,525,000 (94.21%)	32.10%
		<i>Domestic</i>	41,883,000 (86.67%)	N/A
		<i>International</i>	3,642,000 (7.54%)	N/A
	CD		2,800,000 (5.79%)	63.37%
		<i>Domestic</i>	2,212,000 (4.58%)	N/A
		<i>International</i>	588,000 (1.22%)	N/A
	TOTAL		48,325,000	3,727,200,000
	Average Value (\$)		138,950,000	35,139,000,000
Average Value (\$ 1999 prices)		154,561,125	38,758,213,750	
Average Real Growth (1999 prices)		-5.60%	2.20%	
Per Capita Sales	Unit (album)	0.80	0.80	
	Unit (\$)	2.30	5.96	
CD Value (\$)		16,806,916 (12.10%)	N/A	
Cassette Value (\$)		122,143,084 (87.90%)	N/A	
Unsold Albums (Returned Albums)		3,062,429 (6.34%)	N/A	
Piracy (Estimated)		50%	N/A	
Average Value of Copyrights (\$)		11,116,000 (8%)	N/A	

Source: Compiled by comparing IFPI (2000) statistics and Directory of Copyright of Ministry of Tourism and Culture record books. * Denotes to all IFPI members.

One of the most striking properties of the Turkish music market is the dominance of domestic repertoire which has been an everlasting characteristic since the emergence of a music market at beginning of twentieth century. In other words, in terms of the repertoire origins, Turkish music market is particularly dominated by domestic music (regardless of the type of the music media -audiocassette or CDs-, 91.25% of whole number of albums in the market is Turkish music -namely, arabesk, pop, folk, rock etc)⁸. Moreover, it can also be observed that, contrary to the general tendency in the world market, audiocassette format is the dominant music medium in Turkey. Thus, an average of 94% of whole album sales has realised in cassette format between 1991-1999 (in contrast to 32% at the level of world market). Although CD consumption increasingly rises (it increased 800% between 1991-1998 and number of firms producing CD's increased 215% in the respective period -see Figure 6.2) the dominant medium is still the cassette. For example, in 1998, almost 90% of the whole repertoire was still in audiocassettes.

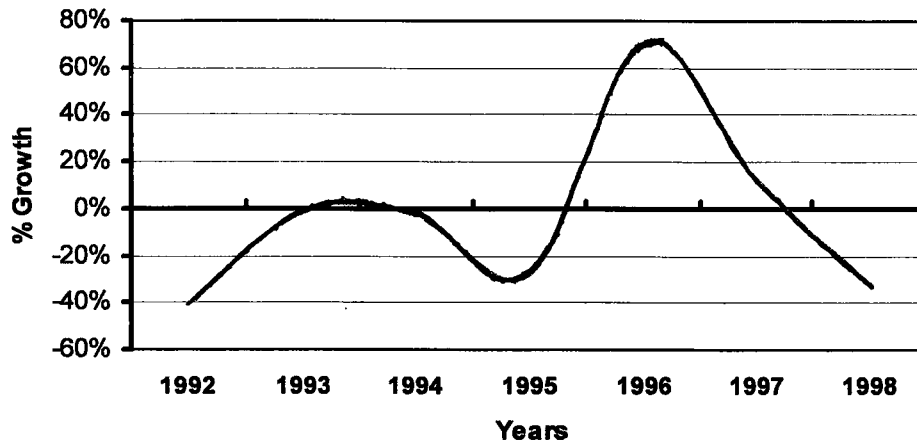
Figure 6.2: Changes in the Number of Companies According to Format



Source: Compiled from the record books of *The Directory of Copyrights*

More importantly, depending on the data compiled from Directory of Copyrights seal sales as well as IFPI statistics (Table 6.2), it can be argued that, in contrast to the general trends in world music market, Turkish market is not growing. However, it should be noted that although the average growth rate between 1991-1998 signifies that the market is annually shrinking with an average of 5.6%, as illustrated in Figure 6.3, the instable trend in annual sales and total retail value of the market does not allow to talk about a general trend. In sum it would be more appropriate to qualify the Turkish music market as highly instable, rather than a shrinking market.

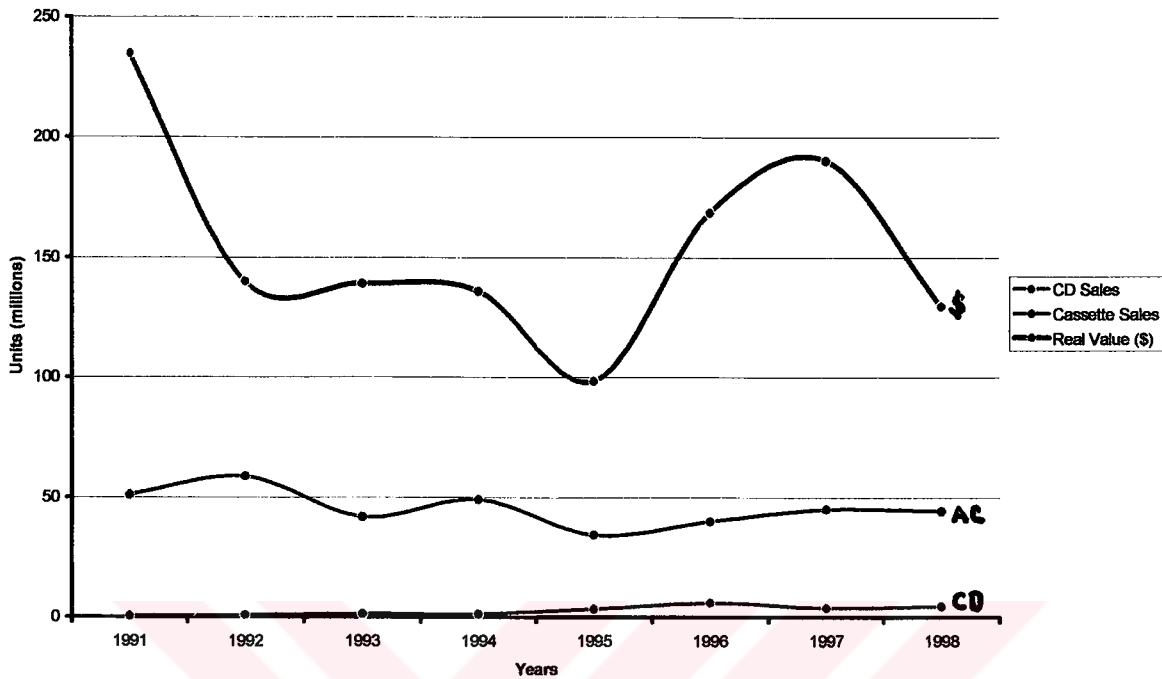
Figure 6.3: Changes in the Growth Rate of the Market Through Years



Source: Compiled from the record books of The Directory of Copyrights

As indicated in the Figures 6.1, 6.4 and in the Table 6.1, the instability of the market is apparent. It can be observed that there is no consistent trend in the changes in annual album sales as well as in the retail value in dollars. The level of sales never equalled the boom year of 1992 within a decade.

Figure 6.4: A Comparison of Changes in CD and Audiocassette Sales and Actual Retail Value of The Market (\$ in 1999 Prices)



Source: Compiled from the record books of *The Directory of Copyrights*

As can be seen in the Figure 6.4, years 1991-1992 signify a period in which an increase in total album sales is accompanied with a profound decrease in the retail value of the market, whereas the opposite situation is valid for the years 1992-1993 and 1997-1998.

6.2 The Structure Of The Turkish Music Market

During the last decade an average of 265 firms were operational in the Turkish music market. However, not all of these firms are actively in production business. Each year an average of 150 firms actively produce new labels and the rest try to remain standing either through retail sales or

warehouse activities -in other words, it can be claimed that, they are staying in a "standby position" hoping to find an artist for a new production. As a matter of fact, this last group of "inactive" firms may be luckier than the album producing firms, since only an average of 80 out of 150 firms have succeeded to reach the break-even point of 100.000 sales, and actually only an average of 20 firms can really make profits from the sales of their production. Table 6.3 presents the general situation of firms in terms of album sales.

Table 6.3: Number of Firms According to Sales Between 1990-1998

	YEARS									
Sales (x1000)	1990	1991	1992	1993	1994	1995	1996	1997	1998	
<i>Below 100</i>	122	159	189	186	198	208	202	215	199	
<i>100-500</i>	59	69	59	56	57	57	62	65	54	
<i>500-1000</i>	24	16	12	10	10	11	9	17	11	
<i>More than 1000</i>	12	11	13	13	8	1	5	10	9	

Source: Compiled from the record books of *The Directory of Copyrights*

Such a picture can lead to think the existence of a concentrated market. However, in contrast to the general condition of the world music market⁹ (see Appendix 7), we do not see a high level of concentration in the Turkish music market. Concurrently, it can be observed that the number of firms that took place in the top eight ranking is considerably high within ten years of time (see Appendix 8). Moreover, a relatively even level of market share for top eight firms can also be observed. For example, in the years between 1990-1998

there has been 23 firms in the top eight -more than half of which had stayed in the top eight ranking only one or two years. It is only Şahin Özer's firm that has managed to stay among the top eight ranking for nine years, however, Özer's market share had never exceeded 7% in the respective period. The number of firms that could stay in top eight ranking for more than six years is not more than three (Appendix 8).

Table 6.4: Changes in Concentration Ratios in Turkish Music Market Between 1990-1998

CONCENTRATION RATIOS									
	1990	1991	1992	1993	1994	1995	1996	1997	1998
# of Firms	217	254	273	265	273	277	279	307	273
CR 1	6,71%	5,45%	16,59%	16,60%	24,68%	28,88%	24,20%	15,23%	25,54%
CR 2	11,95%	10,69%	23,36%	23,28%	29,59%	31,41%	29,67%	21,45%	38,95%
CR 4	20,40%	18,61%	33,27%	34,28%	36,79%	36,12%	38,87%	29,09%	47,94%
CR 8	31,46%	30,94%	44,12%	45,06%	47,42%	44,56%	46,78%	38,65%	57,34%

Source: Compiled from the record books of *The Directory of Copyrights*

Table 6.4 shows the changes in the concentration ratios together with the number of firms operated between 1990-1998. Accordingly, it can be observed that although four firms concentration ratio (CR4) and eight firms concentration ratio (CR8) slightly increases, there is no corresponding fall in the number of firms operating at the market. This means that, currently, new entrances to the market is not restricted. It is observed that an average of 49 firms enter into music market each year (Table 6.5).

Table 6.5: Number of Firms Entered and Left the Market Between 1990-1998

	1990	1991	1992	1993	1994	1995	1996	1997	1998
Firms Entered*	N/A	70	52	N/A	56	39	43	52	31
Firms Left**	N/A	17	25	N/A	44	32	38	50	81
Firms Left Later***	N/A	42	36	N/A	34	21	25	21	N/A

*Indicates the number of firms that appear and make a production for the first time in the market

**Does not indicate that the firms are closed, but refers the firms, which did not make any production, or which did not reprint any previously made production from that date on.

***Indicates the number of firms that left the market in later years (due to the condition stated above). For example, in 1992, 52 firms entered to market and between 1992-1998, 36 firms out of this 52 had left the market.

Source: Compiled from the record books of The Directory of Copyrights

Despite the instability in respect of production costs, some entrepreneurs seem to be attracted by the promise of huge profits if they are "lucky", and thus, are deciding to try their chance in the music sector. This is why, beside the ones who has "taken over the trade from their father", there are some newcomers in the business, who has accumulated some capital in other sectors of the economy (such as textile, construction, warehousing, speculators, etc.). They are mostly labelled as "aliens" or "visitors" by the older "residents" of *Unkapanı* -where almost the entire recording companies are located. It should be stressed that, almost 85% of these firms do not assure their permanence in the market (Table 6.5).

Despite there has always been some room for entries to the market, especially in the recent years there is an increasing tendency for concentration as one can observe from table 6.4.

In Turkish music market, the tendency of increasing concentration is more apparent with regards to CD production. Increase in the number of firms engaged in CD production does

not bring a substantial competition to the market. As a matter of fact, even, in the boom year of 1996¹⁰, when almost about 6.5 million CDs were marketed by more than 150 firms; the eight firm concentration ratio did not fall below 59.47%. Moreover, the lowest concentration ratio of 8 firms never fell below 57% (1994) since the beginning of CD production in Turkey (Table 6.6).

A peculiarity of the Turkish music market is that the make-up of the market vary according to the dominant music media. As stated in the previous chapter, with the introduction of the cassette technology, the multinational corporations had left the Turkish music market and the monopoly they enjoyed had been broken¹¹ leading to a new configuration in the market shape.

In this respect, the emergence of compact disks, as a new music media, brings another major change in the whole production process, as well as, in the organisation of music production. Compact Disk format has appeared as a response to an expectation of a higher quality in music consumption, accompanied with higher costs of production due to an enormous increase in the promotion expenditures¹². The fact that a music album, today, denotes more than the quality of music installed in (in other words, currently not only the audial content of popular music, but also its visual content including the "image" of an artist, as well as the music

videos, signify the use value of this commodity), has been an expression of the collapse (or at least dependency) of small firms which are unable to meet such higher costs. In other words the expansion of compact disk technology together with the necessary reorganisation it brought in the production process, forces record companies to "play this game" with the rules established by major multinational entertainment corporations -which had never hesitated to increase costs to block small firms.

Consequently, it will not be surprising to expect the rise of compact disk format to lead to a similar reconfiguration in the Turkish music market. Currently, the symptoms of such an evolution can be observed: For instance, although the record companies which solely produce audiocassettes are highly hesitant (but mostly indifferent) about increasing their promotional expenditures, the opposite is valid for the companies which produce albums both in audiocassette and compact disk formats. Currently, although the target audience of these two groups of record companies are completely different¹³, a change in the consumption patterns (and thus the homogenisation of audiences) are expected due to the expanding promotional activities.

Table 6.6: A Comparison of Concentration Ratios of CD and Cassette Production

	CR 2		CR 4		CR 8		HHI (Hirschmann Index)	
	CD	Cassette	CD	Cassette	CD	Cassette	CD	Cassette
1991	30.74%	10.41%	51.15%	18.27%	71.81%	30.63%	858.59	192.88
1992	40.82%	23.29%	57.97%	33.24%	72.86%	44.10%	1161.45	449.50
1993	34.48%	23.15%	45.96%	33.12%	58.27%	43.97%	901.92	446.62
1994	35.82%	29.57%	44.78%	36.57%	57.43%	47.19%	944.55	721.01
1995	41.58%	31.15%	51.23%	35.75%	59.42%	44.02%	1447.29	889.03
1996	36.78%	29.67%	47.42%	38.87%	59.47%	46.78%	923.23	709.24
1997	33.40%	20.90%	43.40%	28.28%	55.62%	37.85%	826.79	354.04
1998	41.38%	38.71%	54.53%	48.00%	63.98%	57.98%	1029.04	944.18

Source: Compiled from the record books of The Directory of Copyrights

When the concentration ratios of CD and audiocassette production are compared (Table 6.6), there is a considerable difference in favour of the CDs. Therefore, if, as is the case in most markets, the compact disk emerges as the dominant album format in Turkey, a move towards concentration in the market should be expected in the coming years.

Following these preliminary remarks, we can now proceed to have a more closer look to the structure of the Turkish music market.

6.3 The Record Companies

The Turkish music market is comprised of many small and five major recording companies. However, in contrast to the general framework that characterise the structure of music market in advanced capitalist countries, Turkish music market is dominated by small record companies and these companies accomplish about 60-70% of total sales annually. It should be remarked that all of the major companies, except one, are either branch offices or joint ventures of multinational corporations¹⁴.

In this section, the market position of major and minor record companies, the relation between these companies, as well as their organisational structures will be examined.

6.3.1 Multinationals

As was mentioned in Chapter 5, 1970s was marked with the withdrawal of major international companies from the Turkish market. After that date (especially in 1980s), most of the multinational corporations in the sector, including CBS, EMI, Polygram, Warner and BMG, have continued their operations in the Turkish market through the licence agreements with domestic firms -for example, CBS with Uzelli Plakçılık Ltd., EMI with Kent Müzik, Polygram with Raks Music Group (1990s), and Warner and BMG with Balet Plakçılık Ltd¹⁵ have signed such agreements. As for the content of the agreement the stake was the international repertoire of the multinational company. The native firms were leasing multinational's catalogue in return

of certain percentage of the revenue to be obtained from the sales of albums¹⁶. As a matter of fact, during these years, multinational corporations did not prefer to make direct investments in the Turkish music market, and managed to stay in a "stand-by" position through these licence agreements. Although the revenues they acquired from the sales of international repertoire was not significant, such agreements were enabling them to track the developments in the Turkish music market.

Such a relation between multinational corporations and domestic companies continued until mid 1990s, and after that date some multinational corporations (namely, BMG, EMI, and Polygram) decided to actively take place in the Turkish music market through several joint ventures particularly with their previous licensees¹⁷. Thus, the Turkish music market has been the scene of joint ventures between BMG and Balet (BMG acquired 25% of Balet), EMI and Kent (EMI acquired 49% of Kent) and finally Polygram and Raks¹⁸.

Another giant of the world music market, Sony Music Corporation, chose a different path and preferred to establish a separate music division in Turkey called *Sony Music Turkey* (in 1994) and preferred to market its international repertoire itself. Moreover, Sony also established a production department aiming to produce Turkish hits.

Table 6.7 presents the general position of multinational corporations in the Turkish music market between 1990-1998.

Table 6.7: Multinational Corporations in Turkish Music Market and the Change in Their Market Shares Through Years

	Balet-BMG			Kent-EMI			Sony		
	Cassette	CD	Total	Cassette	CD	Total	Cassette	CD	Total
1990	0.06%	-	0.06%	1.87%	-	1.87%	-	-	-
1991	0.05%	-	0.05%	1.68%	-	1.76%	-	-	-
1992	0.06%	0.62%	0.07%	1.81%	13.93%	1.95%	-	-	-
1993	0.06%	0.66%	0.08%	1.81%	7.72%	1.94%	-	-	-
1994	0.04%	0.42%	0.04%	0.62%	2.61%	0.66%	0.95%	0.30%	0.94%
1995	1.09%	1.96%	1.13%	1.22%	2.03%	1.25%	1.07%	0.94%	1.06%
1996	1.25%	N/A	1.25%	0.55%	N/A	0.55%	0.69%		0.69%
1997	1.20%	2.65%	1.28%	0.37%	1.18%	0.41%	0.48%	2.03%	0.57%
1998	0.65%	2.84%	0.85%	0.62%	1.95%	0.74%	0.94%	9.13%	1.68%

Source: Compiled from the record books of The Directory of Copyrights

As shown in this table, the share of multinational corporations in the Turkish music market is almost negligible if the Universal Music Group (which has bought Raks Music in 2000) is excepted. Indeed the total share of EMI, BMG and Sony has never exceeded 3.5% of total sales until 1998¹⁹.

6.3.2 Domestic Record Companies

Domestic companies within Turkish music market can also be examined in two main categories: Major Record Companies and Small Record Companies.

6.3.2.1 Majors

Until the year 2000, i.e. before the complete takeover of the most powerful labels of the Raks Music by the Universal Group, two major domestic companies, Raks Music Group and Prestij Music were virtually controlling the 25 to 30% of the total album sales in Turkish market. Moreover, in addition to

their size in the music market, these two companies are also distinguished from the other domestic labels in terms of their organisational structure.

6.3.2.1.1 Raks Music Group

The Raks Group was founded in mid 1970s under the name of Tekoplast as an electronics-hardware manufacturing company. Raks Group, unlike the other record companies in Turkey, had initially accumulated its capital in the electronics sector, and then entered into the music market after more than 15 years of its foundation²⁰.

Currently, Raks has two main manufacturing plants. One is continuing to produce electrical and electronic goods and the other is producing both empty and recorded audio-visual material (including cassettes, and CDs). These plants are connected to a sales department, which have two main divisions: Raks Foreign Trade and Raks Industrial Products. The former is responsible for the export and sales of the manufactured goods in foreign markets and the latter targets the domestic market. Nejat Yıldırım, the general director of Raks Music Production, tells that neither of the manufacturing plants have direct connection with the customers. Hence, the relations with the customers are established via the sales department. The products of audio and videocassette and CD plant, which were formerly marketed directly to the customer, had also integrated to this structure in 1985. Consequently, Raks abolished its sales office in Unkapanı and from that date

on marketing cassettes and CDs was left to Raks Industrial Products division.

As a matter of fact, Raks's Cassette and CD plant was producing both for the consumer market and for other music companies. On the one hand empty cassettes were directly marketed to end-users, and on the other hand, in its duplication plant Raks was also producing pre-recorded cassettes for the music companies from the master tapes they provided. Raks, in its manufacturing plant, was supplying more than 60% of the empty and recorded cassette demand of the Turkish market. Hence, although Raks did not enter into music production until 1990, it was in direct relation with more than 150 recording companies for more than 15 years. It can be said that, Raks Group, before entering into music production, was familiar with the music market in the sense that through manufacturing over 60% of total album production it could easily track the changes in musical trends and album sales without any additional effort.

Consequently, Raks utilised this advantageous position and began music production in 1990 under the name Raks Music Production. Nejat Yıldırım narrates this entry as:

We have chosen the right time to enter the music production business. The year 1991 was the time coinciding with the decline of arabesk and beginnings of the rise of pop music. As is known producing arabesk is highly risky. Actually, music production is a risky business but producing arabesk is a gamble. We waited because we preferred to invest on pop music which we saw more

promising. And it is seen that we were not mistaken. In a very short time, we seized the leader position of the market and stayed in there. However, our entrance was not welcomed by the existent producer companies since we were raising all the standards. In institutionalising Raks Industrial Products, we have established formal and impersonal relationships in the music market. Then, in our music production firm, we had applied the same norms, and this was something alien to existing relations in the sector²¹.

Actually, the structure of the Turkish music market had dramatically changed by the entrance of Raks. The data presented in Appendix 8 confirms the words of Nejat Yıldırım.

In the very first year of its foundation, Raks had reached the top position of the market with a share of 5.45%, which was followed by the firms labelled Yaşar Plak (owned by Yaşar Kekeva), Şahin Özer and Emre Grafson with shares of 5.24%, 4.01%, and 3.91% respectively. However, this competition did not last long, since, in the following year, the share of Raks in the music market exceeded almost three times more its closest rival company with a market share of 16.59% against 6.77% that of Şahin Özer. As indicated in the Appendix 8 the music production firm(s) of Raks controlled an average of 21% of total production between 1992-1998.

Table 6.8: A Comparison Between the Changes in Album Sales and Concentration Ratio of Eight Firms Through Years

Years	Album Sales	CR 8
1990	55,000,000	31.46
1991	51,500,000	30.94
1992	59,600,000	44.12
1993	43,400,000	45.06
1994	50,500,000	47.42
1995	37,700,000	44.56
1996	46,000,000	46.78
1997	49,000,000	38.65
1998	48,900,000	57.34

Source: Compiled from the record books of The Directory of Copyrights

Table 6.8 shows that through Raks's acquisition of the leader position in music production in 1992, concentration ratios in the market had profoundly increased. However, the fact that the total album sales remained unchanged (or even exhibited a declining trend in some years²²), signifies that other firms' profits were continuously decreasing. In other words, although Raks was increasing its share in the total album production, this did not effect the total volume of the market (it remained unchanged through years). It can also be argued that slightly increasing concentration in music market does not coincide with an increase in the total retail value of the market. This signifies the fact that the volume of the market is not increasing over years²³.

As mentioned above, the success of Raks stems mainly from its broad information about the market and the trends in music sector due to its control over a great portion of the total empty cassette and CD manufacturing. Concurrently, the

financial support behind Raks also enabled it to enter into many music productions simultaneously. And finally, the success can also be related with its appearing as the first vertically integrated corporation in Turkish music market. From the recording studios to manufacturing plants, and from distribution network to promotion facilities, and even to retail shops, Raks utilised its own resources.

Initially, the organisational structure of the Raks Music Production company was not different than that of the small recording companies as explained by its general director below:

Until 1994, Raks Music Production was a centralised company. We had several small groups within the company and each group was administered by a salaried producer. Each producer was working with almost equal number of artists, and these producers were responsible from the production of the albums of their artists. When a production was realised, these producers were sending the master copies to our manufacturing plant, and their responsibility included providing and tracking the distribution of the album via our central distribution channel. The central administration of Raks Music Production was directly controlling these producers²⁴.

However, Raks Music Group later gave up this model of organisation and decided to establish a more flexible and decentralised model. According to Nejat Yıldırım;

This was a necessity. Because, as we extend our production, intra-organisational relations became more intricate and to establish a central control over our production organisation got harder. In

this respect, we were unable to analyse the costs of production of a particular album as well as its particular revenues definitely. This was directly affecting our decision-making capability in determining which production should continue or which one should be abandoned. Moreover, job classifications were also intermingled, which was causing several personal conflicts and distress among our personnel.

By 1994, through breaking the centralised organisational model, Raks established four smaller and "more dynamic" recording firms -viz. Neşe Müzik, Marş Müzik Yapım, Plaza Müzik, and S Müzik. Later, four more companies were added, viz. Tempo, Mix Müzik Aş., Karma Müzik, and Stüdyo Marşandiz²⁵. Although these firms were responsible to Raks Music Production, they were autonomous in their decisions and investments. Hence, each firm had a separate management and budget utilised in productions.

During the process of reorganisation, Raks also bought some record companies (like Hamle Plak and Sembol Plakçılık Ltd.), but these stayed as idle companies and currently they are not functioning as record producing firms.

As this new organisation model matured, Raks Music Production began to function like a coordinator of its divisions, leaving the active production to its minor labels. In this context, as can be observed, the organisational structure of Raks Music Production, with its ten recording companies, as well as a complex of studios, its manufacturing plant and a distribution network with retail shops (which is a

chain with two channels; Raksotek and D&R²⁶), is very similar to the structure of multinational entertainment corporations. However, it should also be stressed that the organisational model of Raks Music Production was unique among the domestic recording companies in Turkish music market.

Until the end of 1999, Raks Music Production was the largest and most powerful record company in the Turkish music market. It should not be forgotten that this power stemmed not only from its average market share of 20% between 1991-1998, but also from controlling a great portion of the total record manufacturing (either in the form of empty cassettes and CDs, or in the form of pre-recorded cassette and CDs especially servicing for other companies) -Raks owns the largest record manufacturing plant, and currently supplying almost 40 to 50% of total recorded material²⁷.

This position of Raks, has always been a source of distress for other recording companies. According to Nejat Yıldırım

Raks Group is completely institutionalised. This is the main reason behind their [other record companies'] distress. When they demand something from Raks, they are directed to our professional managers. This is something that they do not like. The fact that they have to solve their problems with our sales managers eliminates any possibility of bargaining. As a matter of fact, what they face in here is not the persons (boss of a company) but an institution. If two bosses bargain on a business affair, the result is always reconciliation. However, their relation with Raks cannot be like this. We have formal rules, and what we can or we cannot accept is predetermined formally. In this sense, a sales manager cannot

exceed these limits. The limits of their authority are drawn by the policies of our institution. Consequently, -of course, with a particular degree of flexibility- almost all the business contacts with Raks are determined according to our preferences. There is no other way to make business with Raks.

It seems that Raks, especially in cassette and CD manufacturing, utilises its (nearly) monopolistic position (in the name of an institutional identity) to sustain maximum profits.

In 1990, Raks made a licence agreement with Polygram Group and became the official distributor of its international albums in Turkey. Later, in 1996, a joint venture was set up between by two firms and Polygram acquired 25% share of four major music production labels of Raks (viz. Neşe Müzik, Marş Müzik Yapım, Plaza Müzik, and S Müzik). Nejat Yıldırım explains the reason behind the joint venture as such:

It is a business. We saw that it would be more beneficial for us and we made an agreement with Polygram. Polygram chose Raks because we were the most powerful and profitable company in Turkish music market. However, we did not leave the music market, we are still continuing with our other record labels as well as our studios and manufacturing plant. Moreover, according to our agreement we are still the only distributor of Polygram's international labels in Turkey. Additionally, the productions made by Polygram will be distributed via our channels.

According to Şevket Gözalan (Erk; 1999), who was the vice-president of Polygram International-Europe between 1992-1999,

In Turkish music market, domestic repertoire is dominant with a share of 95%. Turkey, following China, is one of the two or three markets in which the domestic repertoire is that much dominant. There is no doubt that Polygram is a giant in the world music market, but in Turkish market your international repertoire loses importance. That is to say, you cannot be a king if you enter only with international repertoire. When Polygram decided to enter into Turkish market, they had realised that the only way to do this was to buy an existing and powerful domestic company. That is why we chose Raks's four companies. Consequently, at the end of 1996, we established a joint venture through buying 25% of these companies.

In 1998, Polygram bought Plaza Müzik completely. Later Seagram, which owns Universal Music, bought Polygram. But, the new company's plans on Turkish music market did not change and Universal decided to continue the take-over strategy Polygram had initiated. By the beginnings of 1999, almost 50% share of four firms of Raks passed to the hands of Universal Group and finally, by the beginnings of 2000, 100% of the four firms was bought by Universal Group. Today Raks Music Group, although exists in the market with six idle record companies, is not actively functioning as a producer.

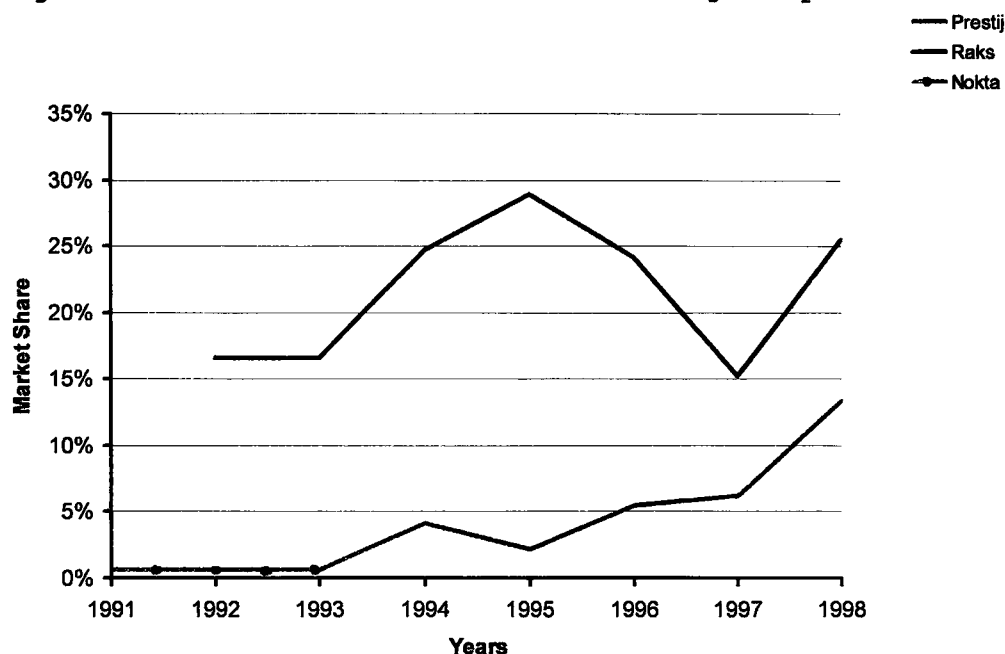
6.3.2.1.2 Prestij Music Production Company

The other major company, Prestij Group, was first founded as a small recording company under the name Nokta Müzik in 1991²⁸. About two years later, in 1993, the firm closed and two of its founders, Hilmi Topaloğlu and Burhan Aydemir decided to set up a new firm, called Prestij Müzik. At the

beginning, Prestij music company did not have sufficient capital to compete with others²⁹. However, what differentiated Prestij Müzik from others was the strategy that it followed. Because, unlike other small record companies, Prestij Müzik had opted to reinvest the profits they obtained from album sales. This let them to grow up as a company.

The turning point for the company was the enormous sales success of Mahsun Kırmızıgül's album, entitled "Alem Buysa Kral Benim" which was sold over 1 million copies between 1993-1994. With the commercial success of this album Mahsun Kırmızıgül had not only caught popularity but also he had become a shareholder of the company. Kırmızıgül's later albums³⁰ proved a permanent success and appeared as the motor force of the company's sales. By 1994, Prestij, for the first time, appeared in top 8 firms and by 1996, following Raks Music Production; it became the second major firm of the Turkish music market. Figure 6.5 illustrates a comparison between Raks and Prestij Müzik in terms of their market shares over years.

Figure 6.5: Market Shares of Raks and Prestij Groups



Source: Compiled from the record books of The Directory of Copyrights

As can be seen from the Figure 6.5 that that the Prestij Music Company has achieved an annual growth rate of 266% whereas Raks realised a growth rate of 45% in the years between 1991-1998. Consequently these two groups (Raks -now Universal- and the Prestij) can be, and should be considered as principally responsible for the increasing concentration in the Turkish music market with their control of an average of 30% of the total album sales (Appendix 8).

As Prestij Müzik expanded in the music market, the organisational structure of the firm began to change accordingly. Prestij Müzik, like Raks Music Production, has set up a decentralised organisational structure. In this respect six small recording companies founded since 1997, namely, Orijin Müzik, İlke Müzik, Pika Müzik, Krallar Müzik

Prodüksiyon, Aks Müzik, and finally, Stop Müzik. In addition to these firms, Prestij Müzik also founded two more companies, one of which was an advertisement agency labelled Per Reklam Ajansı, and the other, a managerial and promotion company particularly aimed at producing music videos, was entitled Starlar Organizasyon. However, unlike Raks Music Production which had began to function as a coordinator of its minor firms, Prestij Müzik, after establishing such an organisational structure did not give up active production of music albums in its own name and it can be said that it is still the most powerful and effective firm among its other sister six firms.

The organisational structure of the Prestij Müzik has profound differences from Raks Music Production. As a matter of fact, Mahsun Kırmızıgül's becoming a shareholder after his commercial success constituted a model for the future organisation of the company since from that date on Prestij Müzik preferred to found its other small companies with the same logic. Accordingly, Prestij Music, sets up a new record company, makes its successful artists a shareholder of this company. The share of the artist varies according to his/her commercial success and popularity -however the lion's share always belongs to the Prestij Müzik. In other words, through this strategy, the artist, as a shareholder, becomes not only responsible from the success or failure of his/her production, but also feels concerned with the success of the other contracted artists' performances. In the same manner, newly

emerging talents, or potential "star candidates", "feel themselves strongly tied to their record company because they always keep in mind the possibility of becoming a shareholder in the future"³¹. "This is why we call Prestij as Prestij Family" says Burhan Aydemir³².

In 1999, Prestij Music became the first and the unique Company in the sector to benefit from the state incentives including several tax exemptions granted to investors. In this respect, the company could import audio-visual recording hardware to establish high-tech recording studios capable of editing audio and video material for both preparing master tapes and music videos. Moreover, the state incentives granted to the company encouraged it to construct a new building (named "Prestij Plaza") which would host all units of activity of production and administration.

From what has been said until now, it can easily be claimed that the Raks Music Production and the Prestij Müzik, the two major companies of the Turkish music market, represent two completely different models of organisation within the sector.

As mentioned above, Raks Music, with its vertically integrated ownership pattern, together with its organisation of production approximates to the model of recording companies in advanced capitalist countries. Raks Music Production had established its domination over the music market through utilising/transferring its previously accumulated capital in other sectors. However, in the beginning years, rather than

issuing new labels and styles, Raks preferred to transfer commercially successful artists from other small companies³³. Such a strategy, while contributing to increase Raks's share in total production did not lead to an increase in the total volume of the market.

Prestij Müzik, however, had to follow a different path, since it lacked a previously accumulated capital. Prestij's success depended on launching new artists at the right time. Prestij Music's success in quick response to a potential demand brought commercial success and a rapid increase in its market share.

However, it is observed that neither the attempts of Raks nor Prestij could provide a considerable increase in the number of the audience. Thus, rather than the total volume of the market, market shares among recording companies had changed with the emergence and operation of such major firms at the market.

6.3.3 Small Recording Companies

The significance of small recording companies in the Turkish music market has been stressed previously. Concurrently, it can be argued that, the function of the small record companies of Turkish music industry is completely different than the independent labels of American and European music markets. In this it can be claimed that, rather than operating through the principle of innovation and diversity, the Turkish small companies generally prefer the formulae

"tried and succeeded" to guarantee their profits and survival. In this context, rather than producing new pop music albums - which they consider highly risky and expensive productions- they prefer more popular genres like Arabesk, Fantezi-Arabesk, and Folk Music (FM).

As a matter of fact, the owners of these small recording companies, who are almost in all cases the producers, make a distinction between two types of production activity: The production of "Pop music" and the production of "Arabesk music". This distinction is explained by a record company manager as such³⁴:

These are two distinct worlds. If you want to produce a pop album you must have a lot of money to burn in order to catch the possibility of success. First you have to work with famous lyricists, composers and arrangers. You must spend a lot for the music video; and finally you must persuade the media to promote this album. All of these stages are highly costly. And at the end the success is still not guaranteed. However, Arabesk is a completely different business. In producing Arabesk, almost every producer know the kind of melodies or lyrics that would sell. The main problem is to find an appropriate voice. If you can find that voice, then even the image of the artist is not important. Then if you choose the right combination you catch a standard success. You don't need to spend much for promotion. The formulae of the Arabesk is simple and standard.

Consequently, most of the small companies prefer to produce Arabesk, Fantazi, TFM, or Ethnic Music (mostly in Kurdish) rather than "pop". The production of "pop music", on the other

hand, is realised by either major companies or by the companies which hold sufficient capital to afford such productions. Moreover, it is observed that the number of companies that produce albums in both groups are very few. In other words, pop music producers do not attempt to invest in Arabesk and vice versa. It can be said that there is a tacit division of task between the companies producing pop music and the ones producing Arabesk/FM; and the competition between these two groups are minimal.

Moreover, there are also considerable differences between these two groups of companies in terms of their organisational structure. Since the production of pop music necessitates a greater capital investment, the organisational structure of the firms producing pop are relatively complex and they are generally departmentalised³⁵ to execute simultaneous operations efficiently during the production process. On the contrary, the other group (with some exceptions) is generally composed of smaller firms which do not even have an organisational structure and which employ minimum number of personnel to avoid extra costs. Generally, the owners of this latter type of record companies personally undertake almost all departmentalised functions of the complex and industrialised music production. In this sense, they do not only invest capital in music production, but also actively function as a producer, or even as a music director in the production process of a music album.

It can be said that the distinction between pop music production and Arabesk/FM music production denotes to a distinction between industrialised production of music and music as a commercial activity. In other words, while the former is structuring the production process in the context of a notion of "demand management" (Ewen; 1976) -which includes several strategies to increase the audience-, the latter merely aims at meeting the existing demand for music in the society. For this reason, it can be argued that, the current structure of the production of Arabesk/Folk music by small firms seems to reflect an archaic model.

6.4 The Production Of Music For The Market

6.4.1 Producers

Contrary to the case of the small recording companies that dominate the Turkish market, the "producer" constitutes a specific and important category of occupation in the music production industry in advanced capitalist countries. In the music divisions of multinational corporations, to monitor the budget reserved for each production, a producer, either independent, a contractor who may simultaneously work for more than one company, or an employee of the company, a staff producer, is assigned. He/She is always under the control of the corporation he/she works for. A producer, in this context, is an important figure in the production of an album, however, he is not the owner of the capital³⁶.

In the small record companies in Turkey, the producer, as the owner of capital is merely responsible to himself in taking decisions and in investing his/her capital. Consequently, all phases of the record production is under his/her control. Özkan Turgay³⁷, an independent composer and arranger who has also made some productions for the Raks Music Group, summarises the function of a producer as such:

In Turkey, a producer means everything for making records. He is the only decision maker. This is natural because the capital needed for production is in his pocket. Then, a producer, in order to be successful in his project, need not to have a musical knowledge but necessarily, he should have a good sense of music. He should necessarily also have a foresight in determining the kind of music that will create a demand in the market.

The quotation indicates that, in Turkish music market, the term "producer" denotes to the owner of the record company rather than a professional occupation. Hence, producers in Turkey do not necessarily have a background in the music sector³⁸. Following words of the lyricist and poet, Ahmet Selçuk İlkan³⁹, testifies to this practice with a certain aversion:

The ones who view the music business profitable, without any hesitation, enter into the market irrespective of their background. They do want to make money from the music business despite the fact that most of them do not have any sense of music. But because they have the money, they become producers. Unfortunately, the music we listen to reflects their cheap musical understanding and we, as artists, are to serve for

them to make our living. It hurts me to say that, most of the invaluable composers and lyricists in Turkey are satisfying these producers' distasteful musical ear to feed and cloth their family.

6.4.2 Composers and Lyricists

Lyrics and compositions produced in the Turkish music market exceeds the demand and it can be argued that, one of the profound consequences of this overproduction is the excessive exploitation of the majority of lyricists and composers. Generally, the money paid to a composer or lyricist is very low compared to total production costs of an album unless the composer/lyricist is one of the few popular and famous artists in the market (such as Sezen Aksu, Kayahan, Aysel Gürel, Şehrazat, Ahmet Selçuk İlkan, Atilla Özdemiroğlu, etc.) As one of the lyricists clearly states⁴⁰;

What I write as lyrics does not reflect my feelings. I am not writing what I want, but I am writing what is demanded. These are generally slogans rather than lyrics. I have to do this to earn my living. However, what I earn from a song is far from being satisfactory. We, as lyricists, are living in miserable conditions.

In addition to the excessive supply of compositions and lyrics, most of which cannot find place in an album, a particular strategy that the producers employ in making albums reinforce this structure. In other words, the lower costs of the majority of compositions and lyrics in an album cannot merely be explained through their excessive supply compared to demand. There are always two groups of songs in an album:

potential hits and ordinary songs. Accordingly, in producing an album, record companies prefer to place a maximum of two or three promising songs that they view as "potential hits" and the rest consist of the songs placed for filling up the remaining free space. Actually, "Potential hits" consist of "high cost" songs that the producer buy from famous composers and lyricists. These "potential hits" may or may not become actual hits, but more importantly, these songs are used for the promotion of the album. As a producer states⁴¹:

When producing an album, it is important to buy, at least a song from (for example) Sezen Aksu, or Kayahan. This is not because they make good songs but because you need some popular (labelled) names in an album to prove that your album is not ordinary.

The basic reason behind this strategy can be found in Turkish music industry's desire to overcome the previous distinction between the two major music media formats, viz. the 45 rpm disk and 33^{1/3} rpm disk. It should be noted that, currently both of these formats are disappeared, and the hitherto distinction (as two competing commodity forms) has transformed into a reconciliation in such a way that 45 rpm format had turned into the singles format (in the form of either audiocassettes or CDs) while 33^{1/3} rpm disks, as albums consisting of ten to twelve songs, had continued in the form of audiocassettes and CDs.

Today, singles and albums are not considered as competing media. On the contrary, the former appears as the promotional

medium of the latter. Additionally, in European and US music markets any possible competition between these formats are prevented through separating their markets⁴². Consequently, although a single spontaneously promotes its successor (i.e. the album), the promotional strategies for a single has profound differences from an album.

In Turkish music market, a singles market does not exist. The reasons for the absence of singles in Turkish music market have been discussed before (see section XX The Sound Carrier Market). However, such an absence has profound implications on the promotional strategies. For example, an album is generally promoted as if it is a single. In other words, rather than the complete album, a single song within the album is targeted. A producer states that as;

Almost all albums are made for a song or maximum two. Actually, most of the audiences are buying the complete album for these songs and even they are not listening to the other songs more than once. Anyway, these songs are recorded just for filling up the free space⁴³.

Consequently, rather than constructing and promoting an album as a whole project, mostly an album is made for one or two targeted songs. In fact, this has as an effect on lowering the production costs rather than promotional expenses. In other words, through targeting one or two songs, producers are willing to spend less for other "ordinary" songs of the album. Hence, in planning an album project, producers prefer to spend less for the majority of songs that will take place in the

album, which causes lower payments for composers and lyricists irrespective of the demand for and supply of the song. Unless a composer/lyricist becomes very popular in the market, both himself and the producer knows well that irrespective of the artistic value of the song, its cost will remain lower for the producer.

For the reasons stated above and as a consequence of a particular promotional strategy (i.e. promoting an album as if it is a single), producers generally think that, releasing a new album with one or two "labelled" songs will have a profound influence on its sales. However, all the interviewed producers concord to reveal the fact that, a "labelled" song costs at least 60.000 dollars (there is no upper limit), which means that a producer should pay a minimum of 120.000 dollars for two. Remaining ten or eleven songs are chosen from that of "ordinary" composers and lyricists which costs to producers only a maximum of 1000 or 1.500 dollars per song.

It should be stated that, there is always a possibility of a song from this category to become a hit. Even a producer may have targeted a song from this category from the very outset. However, it should be remarked that a producer's spending for the former category is for promotional purposes. That is to say the producers pay not for the song but for their already popular composers and lyricists. Therefore, even if the marketed song is a failure, they (producers) continue to demand new songs from the same lyricists and/or composers. If

a song from the latter category (i.e. "ordinary" songs) becomes a hit, this will not immediately increase the price of the songs of its composer/lyricist:

We generally view an unknown composer's success as temporary. I know many composers who produced a hit once but later failed in other projects. They have to prove that their success is permanent to demand more for their compositions⁴⁴.

6.4.3 The Contract: Producer-Artist Relationship

In US and European countries where an advanced music industry is institutionalised, album deals are made either between producer and artist or between the record company and artist. Although in both cases the greatest portion of the revenue from album sales goes to the record company, the former case signifies a situation in which the record company signs an additional contract with the producer and in this respect, the share of the producer is greater than that of the latter case. However, in Turkish music market, almost all record deals are made between the company (i.e. the producer) and the artist -since the activity of a producer does not appear as a separate area of the profession.

The contracts between the artist and the company are not standard. The terms vary due to the relative power of the artist which is determined by his/her popularity and previous commercial success. In other words, more popular artists are in an advantageous position compared to new or "less popular" artists in the contracts within the company.

In any case, a contract contains, first, the term of the contract, second, the number of albums to be recorded under the contract, third, an agreement of exclusivity indicating that the artist is not signed to any other contract and will not sign one during the term of the contract, and finally, a royalty rate (or fixed amount of payment per album) indicating the amount of money that the artist will share in the sales of records.

Generally, a contract binds the artist for a term of five years **and** five albums. This means that the producer not only engages an artist for a period of five years, but also finds the opportunity to extend this period if the number of albums produced did not reach to five. It is known that the preparation period for a pop album lasts at least one year. Moreover, it is also known that producing an album each year for an artist is an exceptional case. Hence, it is not difficult to suggest that the actual term of a five-years contract lasts much more than five years. As one producer explains⁴⁵;

The term of a contract, especially when made with a new artist, should not be less than five years. Because a production is at the same time an investment, and while investing on an artist we are taking some risks. Turnovers may or may not be realised quickly. But we, as producers, cannot risk this. If the term of a contract is less than five years, then another company may grasp your artist to benefit from your investment which means you will lose just at a time you should begin to make profits from your investment.

Similarly, for another producer⁴⁶:

Generally, the cost of producing the first album for a new artist is much higher than the others. Nevertheless, spending more money does not always bring commercial success and the album may not reach to an expected level of sales. However, there is always a possibility to catch a commercial success in later albums. The producer should guarantee himself by binding the artist at least for five years. In this respect we employ a twofold mechanism in the contracts: five years and five albums.

The term of the contract is not the only sanction over the artist. Actually, the contract appears as a means to transform the artist into a commodity from which the record company (the producer) maximises its profits. Once the contract is made between the artist and the company, the company acquires the right to sell any configuration of sound and vision of the artist to third parties. These include interviews in television or radio programs, artist's taking a role in the television serials or in advertisements (even in an advertising jingle), concert programs and even singing in night clubs. The artist, after signing the contract, becomes dependent to the producer. Any occasion that bears an income potential for the artist is controlled and exhausted by the producer. As one of the new talents who had previously signed a contract with a producer argues⁴⁷:

For example, making a duet with your friend in a concert, or singing for an advertising jingle (even not for money) are impossible without the permission of your producer. Even a TV interview

is subject to his control -if he doesn't permit, you cannot do anything. You cannot sing a single note or spend a word without his permission. But more importantly, you cannot sing in a night club without paying his share -usually not less than 30% of your fee per a night program. The worst provision of a contract is the impossibility of its repealing by the artist. Hence, if a producer refuses to make an album for you, the contract never ends. And mostly, they use this to threat their artists. However, an artist is to sign a contract since it is the only possibility of becoming popular. You cannot attain the aimed fame without the aid of a producer.

However, as was stated above, the contracts are not standard. For example, contracts with famous and popular artists are completely different than the ones signed with new talents. As a producer explains⁴⁸:

We are making a concession when signing contracts with popular artists. You have to win them over, so you cannot claim much from them. However, this is not very important since, generally you do not have to worry about sales of an album by a popular artist.

Another type of contract between producers and artists exist when the artists themselves undertake the expenses. The company only assures the promotion and the distribution of the album. Actually, both of these are the phases which an artist cannot realise him/herself alone. In such a case, a specific contract is made between the parties -in such cases the contract is limited with the concerned album, and the revenue is shared equally⁴⁹.

However, the above situations should be considered as rare and exceptional cases. The majority of the contracts between the artists and record companies appear as one sided, i.e. the artist, particularly a new artist, cannot benefit more than the company from these contracts⁵⁰. In other words, contracts are the basic means for a record company to guarantee its possible future profits from a particular artist. As one of the managers of a record company argues, "actually, artists - especially the new ones- do not earn money from their album sales"⁵¹. In a similar manner, but more explicitly, another producer pronounces these striking words⁵²:

Nowadays, making a production is costly. You have to spend much to introduce a new talent, and in so doing financing all the costs belong to us. In any case, producing an album for a new artist and making him (her) a star is a sufficient prize for him. I mean, if the sales of the album is successful, then we can only pay a symbolic percentage of only profitable sales as an extra prize to him. Exceeding this limit would be unjust since in the beginning he was nothing and we have created him. Rather than reproaching, they [artists] have to thank us for this.

The profitable turnover rate is generally accepted as 100.000 sales per album⁵³. A royalty is paid to an artist only if this level is exceeded. The royalty rates for a new artist are generally as low as 4% to 5%⁵⁴. Moreover, although these rates are generally fixed in the contract, there is still no guarantee for an artist to acquire these royalties since there is no mechanism for an artist to receive the amount of his/her

album sales⁵⁵. In this context Kemal Güzaltan, accounting manager of Raks Music Group, argues that, "whether paying or not paying the artist's royalty completely depends on the goodwill of the producer, since in the current configuration of the system of sales, in which there is no any other institution controlling the sales of cassettes and CDs, a singer cannot claim any right"⁵⁶.

In this context, Ali Eyüboğlu, one of the few music critics, criticising the current configuration of the contracts between artists and producers, argues that "most of the producers claim that they are the masters of artists". There is a truth in this claim, since "through these contracts, artists are converted into slaves". With a hope to achieve fame instantly, "artists easily sign these kinds of contracts and then suddenly they find themselves in a merciless struggle to purchase the freedom they have delivered with the contract"⁵⁷. Concurrently, a producer explicitly describes the nature of the contracts as follows⁵⁸:

There is one basic law in commerce: Money! Anyone who invests money has the right to establish the rules of the game. If you want to play this game, you have to obey these rules, or you should stay outside. Certainly, we are not making art, we are businessman and are making business. The name of this game is music business. If I were to run a bakery I would have to buy flour to process and sell; and as I am a producer, the raw material I buy is the artist. Why I am doing this? Of course, I will process and sell it to others. There is no difference. Here comes the second law in commerce: You have to buy cheap and sell expensive to make

more money. If one has to earn money from a cassette, surely it is the producer who profits, not the artist. Because the producer makes the cassette via processing the artist. The income of an artist never comes from album sales. The fame and popularity I produced rises the price of the artist. (S)He should benefit from this. When his price rises, (s)he begins to earn better in nightclubs, concerts etc. This surplus is also created by the producer, so, again, (s)he has to pay producer's share in return.

Actually, the contracts between producers and artists appear as one of the areas in which the domination of the commercial logic in music sector can be observed clearly. In this sense, these contracts are not only the means to guarantee producers' investment in a very short time, but also appear as the future assets in themselves to be converted into cash in the hands of small producers. To be more explicit, it can be claimed that if an album becomes commercially successful, then small record companies, rather than attempting to prepare a costly second album (which could fail to repeat the commercial success of the former), prefer to seek opportunities to transfer the artist to bigger firms in return of a transfer payment. Most of the small producers prefer this option as a secure way of maximizing their income rather than proceeding further with the risky investments⁵⁹.

In some occasions, producers immediately sign contracts with the artists they view as promising, however, they do not make albums for them. Instead, they hold the artist until another producer (usually a major company) intends to produce

an album for that artist. Thus, without any substantial investment, they aim to make money from the probable transfer of this artist to a major company.

Finally, it should be stressed that, despite the fact that the terms and conditions of contracts are generally against the interests of artists, they could easily find other opportunities to make money as claimed by the producers - especially through singing in night clubs, or performing in concerts etc. But, as examined in the previous section, for the majority of composers and lyricists, such chances are even more remote than an average artist.

6.4.4 The Production Process

After a deal is made between the artist and producer, what follows is the stage of preparation of the album. Thus, in this section the process of producing an album for a new talent will be described⁶⁰.

After signing a contract with the artist, the producer chooses a music director, and begins to search for an appropriate repertoire for the artist. In this respect, as examined in the previous section, several contacts are made with some composers and lyricists. At this stage, the composers and lyricists are asked whether they can produce particular songs which are viewed as appropriate to the style and image of the new talent. Then, the songs and lyrics are ordered for purchasing⁶¹.

Once, the lyrics and compositions are purchased, they are arranged and changed (if esteemed as necessary) under the control of the music director. Mostly, the music director passes these raw compositions to one or more professional music arrangers. The arranger cooperates with the music director, but the music director has always right to approve or refuse the arrangement done. In this context, the basic function of the music director is to assure the harmony between composition, lyrics, arranger, and the singer as well as between them and the producer. The final approval of the work is always given by the producer.

Arrangement of a musical composition can be defined as writing the orchestral partitions and chords by a professional music arranger. Through arranging, a composition is transformed into a format which is familiar to and acceptable by the general musical taste of the society. In other words, arrangement is the phase in which a particular composition is reproduced as a marketable commodity⁶². As Özkan Turgay states⁶³,

Arrangement is not an artistic production. It is purely a technical work. A perfect musical knowledge is a prerequisite for an arranger. However, this is not enough. An arranger should also have a perfect knowledge of the society he lives in. He must understand the tastes of the audiences and foresee what would sell and what would fail. A good arranger knows well that a technically perfect arrangement is not a guarantee for its selling in the market. Then a perfect arrangement is the one which makes the composition marketable; that is to say, it should be done

without exceeding the boundaries of the general taste.

In so doing, it should be stated that the arranger is limited by particular factors, such as the capital invested by the producer, the technical facilities of the recording studio, the quality of the musicians, as well as the musical tastes of the targeted audiences. In this respect, the most critical limitations of an arranger is as follows: first, the arranger should consider the style, performance and the capacity of the artist; second, the arranger should also consider the capacity of the musicians that will accompany the artist in the recording sessions and finally, the arranger should consider the technical capacity of the recording studio and should make the arrangement in such a way that the songs should not require more than the technical capacity of the studio. Actually, these points highly depend on the capital reserved for the production, since choosing better musicians, or better studios for the production are much more expensive. Atilla Özdemiroğlu, a famous composer and arranger, states that⁶⁴;

Although, the contribution of an arranger is invaluable, he is not a magician. Actually, an arranger is just like a cook in a kitchen. He is dependent on the material given to him. Regardless of the cook, if the foods are rotten then the meal cannot be delicious. The same is true for an arranger. To make a good music, a good arranger is not enough. Not only the composition but also the lyrics, the musicians, and the studio as well as the talent of the artist should be good.

The arrangement of the compositions are first performed by computers and computerised music devices through employing sampling technology⁶⁵. Then tracks are recorded to a CD-R (recordable compact disk) and this disk is given to the artist to get acquainted with the style and format of the songs. At this stage music director tracks the degree of progress in the performance of the artist, and if finds it necessary, provides a professional aid for the artist to sing these songs with minimum error⁶⁶.

The next stage is the studio recording. Before the final recording in the studio, a proto-recording session is performed with only rhythm instruments. These tracks are overdubbed with either music director's singing or a basic instruments' (for example violin or kanun) playing the notes of the song⁶⁷. This process is called "pilot recording", and it is esteemed to be as one of the most important phases of studio stage:

Pilot recording is vital, because most of our artists do not know how to read notes. They are learning the songs by ear. The CD of proto-recording is given to them and until they are ready for studio recording, they study these songs (by singing together with the pilot recording) at home. They study at home because studio hours are very expensive and a producer would not like to spend money to teach the songs in the studio. Of course, whether to apply pilot recording or not depends on the capacity and musical knowledge of the artist. For example, Bülent Ersoy never prepares for the studio. Generally, she takes the notes, read once and then directly sings the song from the printed notes⁶⁸.

Finally, if the music director decides that the artist is ready for studio recording then the recording sessions begin in the studio. Generally, an album consists of ten or twelve songs. However, more than twelve songs are recorded in the studio for the producer and the music director chooses the best ten or twelve songs later. The final recording is performed after the definite choice of the songs are made. As one of the studio engineers explain⁶⁹;

Generally producers, before the final recording, prefer to record more songs than the capacity of a CD. The main reason is that, they do not want to waste their money. Because some instruments, especially strings, are really expensive and they do not want to pay for a song that will not take place in the album. Consequently, first a trial recording with sampling technology is made for fourteen or fifteen songs, then producers choose the songs they want and only after this the final recording is made with real instruments.

The first stage in the final recording is to record what are known as the basic tracks. These generally consists of rhythm instruments (drums, bass and guitars) and background keyboards. Each of these instruments are recorded on a separate track⁷⁰. After that stage, background vocals are overdubbed. The next overdub is employing extra instruments called "sweeteners" -their main purpose is to enhance and enrich the main vocal track. Mainly, these "sweetening" instruments are strings, violin, ud, kanun, ney, bağlama, cura, zurna, kemençe, saxophone, trumpet etc. In short, these

are the instruments which are added to critical "infrastructural" instruments:

Each sweetening instrument is recorded on a separate track, and if their performance is found satisfactory these tracks can be overdubbed again. At this stage, it is possible to increase sounds of particular section of instruments. For example a string group consisting of five musicians are increased to fifteen if overdubbed three times. This process of simulation enriches the sound.

The other tracks are reserved for featured instruments like lead guitar, synthesizer, and other keyboards. The final stage of the recording is the main vocal tracks in which the artist sings the songs already accompanied in the previous stages. It should be mentioned that, as each instrument is recorded on a separate track, an error is easily compensated through rerecording the relevant partition of the single instrument rather than completely repeating the process.

After all the material on the multitrack tape has been recorded, a process of mixing the recorded material down to a two-track master tape is performed. This process is called "mastering". And then the final process, which is called "editing", follows. In this final stage, unwanted sounds in the beginning and in the end of each song is cleaned and more importantly, the producer determines the order of the songs that will take place in the album at this stage. The process ends up with the creation of a master disk, which is copying the songs from edited master tape to a CD-R. The record

company, before manufacturing the album, sends a sample copy of the album (as copied on a CD-R) to several radio stations for airplay.

Finally, the album is manufactured in the form of both CD and cassette in a record manufacturing plant. However, CD and cassette manufacturing are subject to different processes. Pre-recorded audiocassettes are mass-produced by a special tape, which is prepared from the original two-track master stereo tape, in cassette duplicating plants. The duplicating plants in Turkey are capable of handling the complete process (from the production of plastics to duplication of the cassette and its packaging). For pressing CDs in one of the manufacturing plants in Turkey, a special master copy, which is called "stamper", is needed. As "electroplating processes"⁷¹ to produce stampers cannot be performed in Turkey, a copy of the master-tape recorded in the studio is sent to a country where it is turned into a stamper (usually Germany). Through this stamper, CD is also manufactured in the CD Pressing plants in Turkey.

6.4.5 Distribution System

The first edition of a new album is generally manufactured 10.000 copies⁷² unless the album is thought to be extremely promising. If all these copies are sold, the producer may decide to increase the number in the second edition.

The market for distribution network of music albums is highly concentrated. There are mainly two major organisations

that control a great portion of the total distribution: First, the company called MÜYADA (Müzik Yapım Dağıtım -Music Production and Distribution), and second is a joint venture founded by Raks and Doğan Medya Group. These two groups also control central warehouses in several regions, however, unlike the market for distribution network, the ownership is not concentrated in local warehouse outlets.

An album, once produced, is sent to central warehouses in each region of Turkey and then distributed to local outlets. Each warehouse works with its contracted retailers. Hence, a new album, without considering the demand, is directly distributed to these retail shops from the warehouse. The contracted retailer exhibits the album and the poster in its show window. However, if an extra demand comes from other (not-contracted) retailers, the warehouse also sends the album to those retailers as well (however, it should be mentioned that, the album is distributed to other (not-contracted) retailers only if it is demanded).

Before distributing the album, a sales contract is made between the producer and warehouse owner. According to this contract, a fixed period of three months is given for the sale of the album. At the end of this time, either a new party is ordered and the period is extended for an additional three months (if the albums are sold) or the unsold albums are returned to producer and the sales is cancelled. However, in

either case, the producer collects the revenue of sold albums at the end of each three months period.

This configuration of distribution system has profound influences on the organisation of production of popular music. First, it is clear that record companies cannot realise their profits immediately. Especially, together with the impacts of high levels of uncertainty, this impedes record companies to make further investments in the music sector. In this respect, record companies prefer to reinvest their revenues either at the financial markets or at the real estate business. Second, and more importantly, the current configuration of the distribution system forces record companies to make promotion plans for three months periods. As the first three months is the most critical period (since if the sales fail during the first three months the warehouse owner returns the unsold albums and refuse the distribution for the next months), the promotion campaign of an album is specifically concentrated in this period. It should be mentioned that, since the company is unable to collect the turnovers in the first three months, generally, an additional expenditure is needed to finance the promotion costs in this period. Most of the record companies (especially the ones running with a low budget) hesitate to finance these extra expenses. As a consequence, a considerable amount of new productions fail due to inefficient promotions. As one of the producers describe:

A promotion campaign should start much before the release of an album. You have to arrange TV

interviews (especially in magazine programs such as Televole and -if possible- in news hours) in the stage of studio recording. However, to arrange such interviews are quite expensive. TV channels are demanding a lot of money, especially if the record company is small and the artist is unknown to the public. Moreover, in addition to sending three or four tracks of the album to radio stations, a music video should also be prepared before the release of the album. You don't have much time to do all this work. You have to reach at least 30.000 sales in the beginning and if you are late, your loss will have no compensation after three months. If the sale trends are disappointing in the first 45 days, a final remedy is to prepare the second music video.

6.4.6 Production Costs of An Album

As was stated earlier, the production costs of an album vary according to the type of the produced music. Interviews with several producers showed that it was possible to produce an Arabesk/FM album at a price as low as \$50,000 in 1999. On the other hand, it is generally stated that the cost of producing a pop album is incomparably higher. Consequently, since the retail value of albums are nearly equal (regardless of the music genre), it can be argued that the breakeven point for Arabesk album sales are much lower than pop album sales. Concurrently, the possibility of maximising profits through Arabesk productions are much higher than pop productions.

In this section average costs of producing a pop album in Turkish music market will be investigated. It should be noted that the numbers given here are compiled from the information provided by the interviewed music producers in 1999, and they

must not be taken as exact or official, but rather should be considered as representing a tendency to make an idea about the production costs of a pop album.

Table 6.9 presents the necessary amount of capital investment (such as studio costs, packaging and promotion) to produce a pop album on the basis of the assumption that the artist is not known nationwide and considered only a promising talent.

Accordingly, regardless of the number of copies manufactured, a minimum of \$296,500 is needed to produce a pop album. If it is assumed that the album sells about 100,000 copies, which means that the album reaches a high chart position nearly at the beginning of the sales (if the timing is right). Then, the income from the sales of 100,000 copies and other costs (such as manufacturing, distribution, and royalties) will occur as presented in Table 6.10

As indicated in the Table 6.10 the record company cannot make any profit until 100,000 copies are sold. More importantly, in order to realise 100,000 copies as a breakeven point, the ratio of CDs sold should not fall below 30%⁷³. In sum, the record will become profitable if at least another 50,000 albums are sold without any further promotion expenditures. In such a case the record company is expected to make a 50% profit while the artist acquires about \$15,000 to \$30,000 only after this extra 50,000 copies are sold (as it was stated earlier, the company/producer pays artist a royalty only after the breakeven point of 100,000 copies).

Table 6.9: Necessary Capital Investments For A Pop Album in Turkey

Item		Unit Cost	Total Cost (\$)	Description
STUDIO AND SONGS	Studio Costs	\$80 per hour	~30000	Producers state that minimum 120 hours of studio work is necessary to produce an album. 350 to 400 hours is suggested as an average value. It is stated that, these prices increase if the producer decides to work with one of the famous recording engineers (an additional \$1000 per song)
	Music Arranger	\$1000 per song	~12000	It is assumed that there are 12 in an album
	Instrumentalists	\$1200 per song	~15000	It is assumed that there are 12 in an album. Producers state that the most expensive group is the strings. Accordingly, a group composed of five strings get about \$1000 per song (and rises proportionally due to the number of strings used) and if strings are used only in one song, then this price doubles. The price of strings are neglected in this example.
	Composers	\$1000 per song	~30000	If the respective composer or lyricist is a famous one the price increases up to \$60000 per song.
	Lyricists	\$1000 per song		
PACKAGING	Photos and Other Materials		~1000	Materials supplied with the album (such as booklets etc.), studio costs for cover photographs.
	Cover Design and Graphics		~1000	
PROMOTION	Video clip and/or presentation video	\$20000 per clip	~40000	The costs of producing a video clip varies from \$10000 to \$50000 due to the chosen video clip director, the quality of the material and techniques used and the scenario. In our example, it is assumed that two clips are produced for the album with average prices.
	Print Advertising Campaign		~75000	Newspapers, music magazines, teenagers' magazines, some general interest magazines as well as arranging meetings or cocktails (for magazine journalists) and arranging (ordering) specific interviews etc.
	Point of Sales Advertising Campaign		~2500	
	TV Advertising on music TV channels			Producers state that this is not an efficient type. It costs about \$5000-\$15000.
	Broadcast in Music Televisions		~40000	4 times a day for 15 days per clip costs \$20000. Producers state that much more should be paid to respective TV channels to take place in music charts.
OTHER COSTS			~50000	Posters, tour organisations, concerts, personnel costs (vary according to size of the firm), sales meetings, parties etc.

Table 6.10: The Costs of Production and Revenues

Item		Unit Cost	Total Cost (\$)	Description
COSTS (PRODUCTION PROCESS)	HARDWARE			
	Manufacturing Audiocassette or Compact Disk	\$0.68 per album	~70000	This is the cost of producing the plastic cover of a cassette together with the cost of producing magnetic band strips (i.e. the amount paid to the cassette plant). In the CD manufacturing process an additional cost for a stamper should be added (approximately \$1500).
	DISTRIBUTION			
	Share of Distributors	\$0.5 per album (\$0.38 for a cassette and \$0.78 for a CD)	~\$50000	The unit cost given here is an average value. It is approximately 10% of the retail value of an album. However, it should be noted that retail values of cassettes and CDs are different. In June 2001 the retail value of an audiocassette (domestic) is about \$3.8 whereas a CD is about \$7.8
	Other Distribution costs	\$1 per album	~\$100000	Manpower, warehousing, sales administration, transportation. However, it should be remarked that these are the most ambiguous figures, since none of the warehouse owners interviewed had given the exact quantities. Probably, all the ratios are conditional in respect to the risk factor that the album bears. In other words, the cost of distributing, for example, a famous artist's album and a new artist's album are not the same.
MECHANICAL ROYALTIES				
Composers and lyricists	\$0.4 per album	~\$40000	8% of the retail value is paid as mechanical royalty. 40% of this payment goes to lyricist and the rest (60%) to composer.	
INCOME	Income from sales	\$3.8 per cassette \$7.8 per CD	~\$500000	It is assumed that 70000 copies of cassette and 30000 copies of CDs are sold
	Income from concerts and night club performances	N/A	~\$30000	Producers state that a gross average of \$20000 to \$30000 are gained from a concert tour in three months. Additionally, producers generally appropriate 30% of artist's income from night club and other performances.

It should be noted that, producing pop records for a new artist is generally considered as a part of a long term project. In other words, if the first album of a new artist is sold at least 100,000 copies, the producer finds an opportunity to acquire higher profits through lower investments on promotion in the other albums of the same artist. As a pop producer states:

What we generally expect from the first album [of a new artist] is nothing but a successful promotion. Because you cannot really earn from the first album unless it sells 200,000 copies. However, the sales success of the first album will lower the promotion expenses of the second, and it will continue like this. You can make a profit with 100,000 sales in the second album and the rate of profit will increase if the third album sells again 100,000 copies.

However, producers state that the cost of producing an average Arabesk album is only \$70000, which means that the breakeven point for spending \$70000 can be realised through selling as low as 20,000 copies.

6.4.7 The Control of Album Sales

Tracking of album sales is one of the most important tasks of a recording company to calculate its gains and loses. However, in the Turkish music market, this is an ambiguous issue blurred by an interesting claim: "commercial secret". There is no central institution that publicise the sales numbers, and any information as to the album sales is not within the reach of general public.

As previously mentioned, there are mainly two channels of information flow that can reveal the real sales. The first channel of information flow is from central warehouses to MÜYAP; which is collected in a database in the central office of MÜYAP in Unkapanı-Istanbul. MÜYAP compiles the data on the basis of total album sales, and send it to IFPI for annually world sales statistics. The second channel is the information flow from contracted warehouses to respective producers. Producers, utilise this data to track their own album sales. This data on album sales can be referred as real sales, which is different (and normally lower) than the seal sales. Real sales are basically calculated through subtracting returned albums from the total number of distributed albums. However, whatever its source, the data is strictly kept secret and not publicised.

It should be mentioned that, this secrecy has become a "norm" for the Turkish music market and constitutes a source of extra profits for the producers. As it was mentioned earlier, the producer is to pay a particular amount of royalty to the artist as fixed by the contract. However, as the real data of an album's sale is only known by the concerned producer, he may or may not announce the real sales to the artist. Furthermore, the information gathered by warehouses is not only closed to public but also closed to the artist as well. This means that, the artist has no means of access to information on his/her album sales and thus left to the mercy of his/her producer. For example, if an album actually sells a

certain number of copies, there is no legal mechanism or institution to prevent the producer to claim a different number⁷⁴. As Ali Eyüboğlu states:

In fact the chaos originates in the manufacturing plants. They never give information about what they produce and how much they produce. This prepares a ground for cheating in the purchase of the seals. The same is true for warehouses. Consequently, it can be said that the artist is always in desperate straits.

Concealing the real album sales has further consequences. The interviews made with several producers revealed the fact that even competing companies cannot have access to each other's sales data. Such an ambiguity gives birth to the emergence of several speculative fields for profit. For example, each week different television and radio channels announce their own charts. It can be observed that, these charts have no common points even in the same genres of music. Actually, there is a widespread claim that these charts are constructed through a kind of auction -i.e. it is claimed that the albums produced by the companies who pay higher "promotion fees" to concerned radios or televisions, find a better chance to have a place in the higher ranks of their charts⁷⁵.

Notes to Chapter 6

¹ The data taken from The Directory of Copyrights of The Ministry of Culture and Tourism is compiled by the author of this study. For a better understanding of the structure of the music market in Turkey, the respective data is compared with

IFPI statistics. The raw data is also given in the Appendix. Various tables and figures used in this chapter depend on this comparative analysis of the data. In other words, unless otherwise stated, all the tables and figures presented in the chapter is derived from the data compiled by the author. Such tables and figures are referred as "Compiled from the record books of The Directory of Copyrights".

² Seals are small stickers to be attached into the plastic covers of all albums. Sealing is compulsory for the record companies since it is mainly used as an authenticity certificate to prevent piracy.

³ Companies prefer to buy small amounts of seals at once (generally 500 to 3000 seals per album), and continue to buy seals if the demand increases. In this sense, albums are sealed daily and sent to warehouses. However, in The Directory of Copyrights, a separate record is kept for the same album in each seal sale. Thus, it is almost impossible for a researcher to track the sales of a particular album. Moreover these records are neither compiled according to the name of the firm or the album, nor put together according to a date sequence. Consequently, depending on the number of albums issued, there are minimum of 3000-4000 record sheets for each year. In this sense, in addition to the extreme difficulty of compiling these scattered and unsystematic papers, archives are not open to researchers unless a 'special' permission is taken. On the other hand, a separate record book is registered for total seal sales. Officers manually write the daily total seal sales for each firm in here. Fortunately, I could find an opportunity to compile these record books, and the data I used throughout the chapter highly depends on these record books. It should be noted that, a more systematic information can be obtained from MESAM, since the same data is compiled and entered into a computer database in MESAM. However, unfortunately, MESAM, does not open its database to

researchers, claiming the 'secrecy' of the sales data hence my respective demand is refused by MESAM authorities for its being a "secret information" (A short interview with Ms. Güner -I was unable to learn her surname- in March, 8 1999). On the other hand, the other channel, information flow from warehouses to MÜYAP, which gives the most accurate information about the sales of albums together with returns of unsold albums, is also not open to public. MÜYAP only gives information about the total album sales, but strictly conceals the information on the basis of individual sales. Aydın Oskay, the president of MÜYAP, had stated that the decision to declare the individual album sales were not in their responsibility and any declaration was at the disposal of the producer of the respective album (Interview with Aydın Oskay, in May 20, 1999). Actually, this is really a critical point since the related terms of contracts between singers and producers are based on these real sales rather than the sales of seals. As will be discussed later in the chapter, most producers act reluctant to declare the real sales of the album.

⁴ Interview with Asaf Koçtürk, director of the Directory of Copyrights (March, 15 1999).

⁵ The seal sales in the years 1993, 1996 and 1998 suffer from such a problem. However, the most difficult year to compile was 1996, since even videocassette seals were given to CDs for probably no one had expected the boom in CD sales in this year (a total of almost 6.5 million CDs which doubles previous year's sales). Consequently, with the aid of the responsible officer, compilation of total CD and cassette sales became possible.

⁶ World ranking according to total unit sales in 1999 is as follows (IFPI; 2000)

	Unit Sales (millions)
1 USA	1084,7
2 JAPAN	322,6
3 GERMANY	251,9
4 UK	224,7
5 INDIA	133,7
6 FRANCE	133,1
7 RUSSIA	103,1
8 BRASIL	96,9
9 CANADA	79,1
10 MEXICO	72,8
11 CHINA	71,9
12 SPAIN	63,4
13 INDONESIA	59,6
14 TURKEY	49,2

⁷ The list of IFPI members and their shares in the world music market is given in Appendix 6.

⁸ It should be stated that, in terms of the music genres, there is a profound incompatibility between the results of our research and IFPI data. According to IFPI statistics the average share of Turkish music is about 82.6% and international repertoire is continuously increasing with a rate of 6,25% per year. On the contrary, according to the findings of our research the average share of Turkish music is about 91.25% and there is no evidence for its increase down through years.

⁹ The general tendency in the world music market, has always been towards establishing a monopolistic control over the production by majors. As can be seen in Appendix 7, the concentration ratio of top 8 firms has never fallen below 47% in 42 years.

¹⁰ It should be noted that particularly in 1996, a considerable amount of music sets and CD players were distributed as the promotions of newspapers. This also contributed to the boom in 1996.

¹¹ This is not a sui generis property of Turkish music market. For a similar development in Indian music market see Manuel (1993).

¹² The expectation of a higher quality is not restricted with the sound quality. It also denotes to a change in the consumption patterns. In other words, although the costs of producing a compact disk is not higher than producing an audiocassette, with the emergence of compact disk technology, the promotion activities (including music video production, music televisions and radios, public relations, etc.) have been indispensable elements of the production process. Consequently, it can be said that the production costs of compact disks (in terms of its hardware) are virtually negligible when compared with the software costs (including copyrights, wages, promotion expenditures).

¹³ The former group (producing albums solely in audiocassette format) aims at the music market specifically in the provinces whereas the latter group (producing albums in both formats) generally aims at the music market in larger cities.

¹⁴ The basic distinction between a major and small firm does not lie solely in the capacity of production and sales. The issues relating the organisational structure and ownership patterns are also equally important for determining whether the firm is a major or a small company (in our analysis the following criteria is employed: the scale of the organisation and level of departmentalisation, vertical integration, financial resources and investments, its studios and other production facilities, its manufacturing facilities and its separate distribution network). Consequently, Raks and Prestij are evaluated as major firms and their market shares are excluded when calculating the total market share of small firms.

¹⁵ Interview with Kemal Güzaltan, accounting manager of Raks Music Group, March 18, 1999.

¹⁶ Interview with Kemal Güzaltan.

¹⁷ It should be stated that, this is the conventional strategy of multinationals to enter into third world music markets; i.e. first making licence agreements with domestic firms, then establishing joint ventures with the firms they find powerful, and finally realising complete buy outs.

¹⁸ Polygram after the joint venture in 1996, completely bought four production firms of the Raks Music Group in 2000. At the end of 1998, the Universal Group -the film and music division of the electric and media giant, Seagram Company- bought Polygram, however, Universal did not modify the buyout strategy of Polygram and continued to operate in Turkish music market.

¹⁹ Although we do not have any information on the album sales after 1999, their sales trend is not promising a boom for the years 1999 and 2000. However, as can be observed from the Table Table 6.7, Sony music gradually increases their sales over the years and could manage to take place within the top 10 firms in 1998. It can be argued that this success is partly due to Sony's new strategy of including the genre called "Fantazi-Arabesk" music in their repertoire.

²⁰ It should be noted that, Raks still continues manufacturing electrical and electronic goods in its plant in Manisa. Nejat Yıldırım, general director of Raks Music Production, argues that it is one of the leader firms in the electric-electronics market. The information about Raks Group and its organisational structure presented in here and within the text depends on the interviews with Nejat Yıldırım, in April 19 and 20, 1999.

²¹ Interview with Nejat Yıldırım, in April 20, 1999

²² Unfortunately, there is no data available on album sales per firm before the year 1990. However, in the interviews with producers, almost all of them had stated that the music market in Turkey was highly competitive between 1975-1990.

²³ Due to high levels of piracy, one should be careful about the total volume of the market.

²⁴ Interview with Nejat Yıldırım, in April 20, 1999

²⁵ Stüdyo Marşandiz was the main music studio complex of Raks Music Group. In its new organisational structure, it appeared as a new music production company as well as the recording studio of other Raks companies. Stüdyo Marşandiz is also serving as a recording studio for other recording companies.

²⁶ Raksotek, a music store chain, is the direct retailer of Raks Music Production. Additionally, D&R, which was founded as a product of a joint venture between Raks Group and Doğan Media Group, was added to this chain. D&R is at the same time a bookstore.

²⁷ Raks owns one of the few manufacturing plants in Turkey. Although after 1990 the number of record manufacturing plants increased, the share of Raks's production did not fall parallel to such increase. The other major manufacturing plants are respectively; Bantsan (owned by Prestij Group), Plaksan, Kamel, and İhlas Plakçılık Aş. According to the records in Directory of Copyrights, currently these five major companies controls almost 90% of total cassette and CD manufacturing.

²⁸ Its founders were Mustafa Topaloğlu, a Turkish folk music singer, Hilmi Topaloğlu and Burhan Aydemir, both of which had worked in several places as salaried workers and later occupied with commerce until 1992. Mustafa Topaloğlu did not

continue with his partners, and he founded his own record company in 1993. After his leaving, Hilmi Topaloğlu and Burhan Aydemir founded Prestij Müzik. The information about Prestij Müzik presented in here and in the text depends on the interview with Burhan Aydemir, in March 23, 1999.

²⁹ Interview with Burhan Aydemir.

³⁰ The album entitled "Alem Buysa Kral Benim" was the second album of the artist from Prestij Müzik. After that album, Kırmızıgül had made five more albums, each of which had caught a considerable commercial success.

³¹ Interview with Burhan Aydemir.

³² Nejat Yıldırım criticises this strategy of Prestij Müzik as such:

Although they tried to establish a decentralised structure, I must say that, they are different from us. In founding new companies and in organising their functions, they do behave like a merchant rather than an industrialist. They could not manage to realise institutionalisation yet. For example, one can directly find Mr. Aydemir in his office in Unkapanı, and directly attempt to make business with him, buy or sell goods through bargaining. He is a producer and at the same time a boss -just like the others in Unkapanı. You cannot find such a structure in Raks. The boss of Raks never buys or sells goods. Our sales managers do this in the name of our company.

³³ Ebru Gündeş and Serdar Ortaç can be given as particular examples. When Raks transferred them, both were already stars, and through further promotions, the quantity of the sales of their albums (under the label Raks) had approximated to the level of 1,000,000 copies. A producer/owner of a small recording company has told me a story on this subject:

"Everybody knows the great quarrel between Okan Bayülgen [A talkshow star] and Serdar Ortaç [a pop star]. If you remember, in his talkshow program, Okan was insisiently attacking to Serdar Ortaç. However, after Serdar was transferred to Raks, the quarrel suddenly terminated. It is known that Raks, which also has a good relationship with Doğan Medya Grup [owner of the TV channel in which Okan Bayulgen's show is broadcasted], had exerted a pressure on Okan. Consequently, Okan not only gave up attacking, but also announced explicitly that he had no problem with Serdar and with his music. Later, as a means of promotion, he invited Serdar to his program several times". As a matter of fact, this story is not special, however exhibits the close relationship between media organisations and powerful recording companies. It should be mentioned that, being capable of establishing such relations with media organisations, which small recording companies are unable to do, reinforce major record companies' advantageous position in the market.

³⁴ Interview with Tuncay Yaman, September 2, 1999.

³⁵ For example, these companies generally have a separate and permanent accounting department, public relations and promotion department etc. However, it should be noted that the level of organisational complexity and departmentalisation in these companies should not be compared with those major companies like Raks Müzik Yapım.

³⁶ If the company works with an independent producer, then the producer generally earns from the royalty payments which is at least 10% of the retail price of the record (the share of the artist is usually about half). However, if the contract is made between the record company and the artist, then producer's share falls almost 2 to 5 percent range. Record

company staff producers, on the other hand, are paid a regular salary and a royalty on their production up to 4%. (see Garfield; 1986, Hennion; 1983, Fink; 1996)

³⁷ Interview with Özkan Turgay, February 23, 1999.

³⁸ For example, according to Fink (1990), having a background in music (like, as a musician, former musician or a recording engineer in a studio etc.) is considered a precondition for serving as a producer.

³⁹ Interview with Ahmet Selçuk İlkan, May 3, 1999. He is one of the famous lyricists who is currently working as a manager in İbrahim Tatlıses's record company -namely, İdobay Müzik.

⁴⁰ An interview with a lyricist in MESAM, March 16, 1999.

⁴¹ Interview with Gürkan Söğütoğlu (Yaşar Plak), February 24, 1999.

⁴² Accordingly, singles market and albums market are strictly separated from each other (i.e. their sales, chart positions, and even radio airplays -for example separate programs for singles- are separated). In doing so, the possibility of jeopardising promotional function of singles is prevented.

⁴³ An Interview in Unkapanı, March 25, 1999.

⁴⁴ Interview with Gürkan Söğütoğlu (Yaşar Plak), February 24, 1999.

⁴⁵ Interview with Metin Güneş (Levent Müzik), March 4, 1999.

⁴⁶ Interview with Mustafa Kekeva (Yaşar Plak), February 24, 1999.

⁴⁷ An interview with an artist in Özkan Turgay's studio, February 23, 1999.

⁴⁸ Interview with Mustafa Kekeva (Yaşar Plak), February 24, 1999.

⁴⁹ Interview with Özdemir Arkan (a lawyer working for MESAM), March 16, 1999. Also, an interesting example is the contract between İbrahim Tatlıses and Raks Music Group. Although Tatlıses owns a record company -named İdobay-, he prefers to produce his albums under the label of Raks. However, as Bektaş Türk argues "no one can interfere in his work. You cannot tell him what to include in his repertoire, what to sing or what to do. He does his own production, we promote and distribute it".

⁵⁰ Interview with Özdemir Arkan.

⁵¹ Interview with Bektaş Türk (manager of Karma Müzik of Raks Music Production), July 1, 1999. Actually, this idea is manifested by almost all producers and artists interviewed.

⁵² An Interview in Unkapanı, March 25, 1999.

⁵³ 100.000 sales, as the level where a company begins to make profit from the sales of a new production is also manifested by almost all producers interviewed.

⁵⁴ Sometimes producers employ fix amounts as royalty payments. In 1999, when the interviews were made, this amount was varying 5000 to 50000 TL. per album. However, it should be stated that Both Raks Music Production and Prestij Music apply higher rates, 5 to 10% per album which is almost the same rate applied in developed music industries of Western countries.

⁵⁵ See the section on "Control of Album Sales" (6.3.1.6)

⁵⁶ Interview with Kemal Güzaltan, March 18, 1999.

⁵⁷ Interview with Ali Eyüboğlu, March 26, 1999.

⁵⁸ Interview with Mehmet Öz (Öz Müzik), May 10, 1999.

⁵⁹ As it was discussed in the previous section, Raks music had first established its repertoire through transferring the artists from other companies. It should be added that the "transfer market" within the music sector has always been very active. A great portion of the small producers interviewed stated that these transfer payments are one of their vital income sources.

⁵⁰ A more detailed information on the production process of a popular album can be found in the following sources: Barszcz (1982), Buxton (1983), Fink (1996), Frith (1990b), Garfield (1986), Hale (1990), Kealy (1979), O'Shea (1993), Parsons (1992), Stokes (1977). However, the information presented in the text on the specific functioning of the process in Turkey depends on the interviews with several producers, composers, lyricists and music arrangers.

⁶¹ It should be stated that, most of the producer view lyrics as much more important than the composition. In this sense, first lyrics are chosen and then composers are asked to produce appropriate songs for these lyrics. Of course, this process is related with the majority of artists who do not compose their own songs. However, even the songs composed by the artist are also subject to the control of and change by the producer.

⁶² The number of arrangers functioning in the Turkish music market is very limited. Prominent arrangers are Onno Tunç, Ergüder Yoldaş, Atilla Özdemiroğlu, Turan Yükseler, Buğra Uğur, Ümit Eroğlu, Garo Mafyan, and Özkan Turgay. Most of the commercially successful albums are arranged by these musicians.

⁶³ Interview with Özkan Turgay.

⁶⁴ Interview with Atilla Özdemiroğlu, .

⁶⁵ Sampling is a new technology in which voices of the music instruments (for example strings, guitars, piano, etc.) are entered and processed in a computer. Once the instruments are introduced, the computer synthetically reproduces and records almost all the audible sounds of these instruments via MIDI (MIDI -Musical Instrument Digital Interface- is the de facto standard for connecting digital musical devices and instruments to one another, to computers and to software). Through the sampling technology it becomes possible to produce a very approximate imitation of real sounds of music instruments -even including human voice. In this sense, one can play, for example, strings, bass guitar, violin, drums, etc. together in the computer and generally it is almost impossible for a standard ear to separate these synthetic sounds from the real ones.

⁶⁶ It should be noted that, with the current studio technology it is possible to eliminate particular errors through applying several filtering to vocals.

⁶⁷ Overdubbing is a special process used in studio recording. It denotes adding one or more new tracks of sound to a tape that contains previously recorded material.

⁶⁸ Interview with Özkan Turgay

⁶⁹ Interview with Duyal Karagözoğlu, (studio engineer), March 18, 1999.

⁷⁰ During recording the rhythm section, the artist or someone else may sing along on a reference track (which will be disregarded later in the album) to help the musicians gain a better performance. Basic tracks are the important elements of the "infrastructure" of an album. So, a perfect performance is expected in this stage. However, obtaining good basic tracks may require many "takes" (a "take" is a version of recorded performance and it may involve one or more tracks of the tape)

and sometimes the music director (or producer) may decide to splice segments from two or more takes. This process is performed by the recording engineer.

⁷¹ Manufacturing a stamper (mother copy of a CD) from a master tape is performed in a series of processes called electroplating processes. Accordingly, first, the master tape is recorded on a *glass master disk* by burning the tiny pits with laser beam. Then through a series of processes a negative *stamper* is prepared from the positive *glass master disk* (Fink; 1996).

⁷² This number is given by the producers interviewed during the study.

⁷³ It should be stated that, hypothetically, the company can reduce the level of breakeven point if it manages to sell 70000 copies of CDs rather than audiocassettes.

⁷⁴ Lets assume that a producer and an artist signed a contract on the basis of 5% royalty payments per album after 100.000 sales. Again lets assume that, after a three months period the album sells 250.000 copies, but the producer announces its sale as 125.000 copies. In this case, although the artist should acquire a royalty payment of 18.75 billion TL. for the extra 150.000 copies sold, the producer pays only 3.12 billion TL. due to his claim of extra 25.000 copies, and directly absorbs about 15 billions (in this example, the retail value of an album is calculated as 2.500.000 TL. -in 1999 prices).

⁷⁵ Producers state that the price rate applied by music televisions vary. For example, it is stated that Kral TV acquires about \$20,000 for 15 days in return of a four times broadcast per day (only one of which is at prime-time); Eko TV acquires \$7000 for 15 days; Genç TV acquires \$15000 for the same period. Moreover, producers argue that these music televisions (particularly Kral TV) applies different rates to

place the music videos in their charts. Accordingly, it is stated that after 15 days of broadcast, the price rates for charts vary \$30,000 to \$50,000 depending on the artist and producer -i.e., on the personal agreement between the Television channel and producer.



CONCLUSION

The use value of music for its consumer is "pleasure". Translation of this "pleasure" into an economic value signifies a process of commodification of music. However, a precondition for the existence of this kind of relation lies in the historically constructed differentiation between the "production" and the "consumption" of music. In other words, this is a process, in which the consumption of music - irrespective of whether its being a passive consumption or a signifying practice contributing to the production of new use values- leads to the realisation of value (which at the same time causes the creation of conditions for the reproduction of value) rather than to the reproduction of the collective memory -"music as expression" as defined by *musica practica*.

In this framework, currently, industrial production of music denotes to a process in which any system of meanings embodied within a (popular) music can be translated into exchange value. But more importantly, industrial production of music, which appears as an integral sector of cultural industries, denotes to a specific organisation of (cultural) commodity production, as well as consumption, under the control of an increasingly monopolising market structure.

Within this framework, it can be argued that a critical political economy of cultural production can reveal an important characteristic of contemporary capitalism: "The dream of free market", of (neo)classical economics, has never been valid in "commoditised" cultural production. Hence, the study of the processes, in which the culture is commodified, may contribute to reveal the (new) mechanisms of "oppression" situated within capitalist social relations. The production of music, as a cultural commodity production, is a typical example of how culture and economy is articulated to realise extensive accumulation of capital -and within this conjunction, as discussed in Chapter 3, there is no room for (uncontrolled) competition to maximise profits (as in the case of "indie labels", even the existent competition is manipulated to serve for majors' profit maximisation -in other words, competition exists insofar as majors permit). Consequently, what defines the contemporary structure of the music industry is high levels of concentration, which leads to the consolidation of monopoly -and absolute control over production and consumption. Moreover, as is explained in this study, with respect to the specific nature of the commodified music production, the possibility of profit maximisation, in music market, cannot be realised through a competitive structure. In other words, it can be argued that concentration and control are the preconditions for a proper accumulation of capital. Here, it should be remarked that this never means that there is an absolute control (by capital) over the

constitution of "pleasures" -or over the creation of content/meanings- which define the use value(s) of the respective musical commodity. However, if one has to explain why multinational capital of major record companies also support the most radical artists who are generally against this system, the answer should be searched within the structure of the organisation of cultural commodity production -i.e. in the "power" to translate any system of meanings to exchange value.

It is quite difficult to argue that the current structure of Turkish music industry reflects the above mentioned characteristics of the music industry of advanced capitalist countries. As is presented in chapters four and five, the reasons behind this distinction can be explained through an analysis of the specific historical development of "commodification" of music production in Ottoman/Turkish musical practices -a process which has had considerable influences on the current structuring of the music industry in Turkey.

Currently, in Turkish recording sector, the production of music for the market bears a double dimension (for practical purposes, to differentiate between these dimensions, the first dimension will be called as "first sector" and the second dimension will be referred as "second sector"). In the first sector, as an outcome of the recent changes (after 1990s) in the ownership patterns of the means of mass communication (the

emergence of private radio and television channels) together with rising concentration in media ownership, the structure of the production process began to evolve towards industrialisation.

As is known, other media markets (such as radio and television, press -newspapers, magazines and books-, and recently internet) in Turkey are already highly concentrated. Moreover, it can be observed that these markets are horizontally and vertically integrated. However, it seems that music market, until today, is not articulated to this structure¹. It can be said that despite the existence of vertically integrated record companies (as was analysed in the examples of Raks Müzik Yapım and Prestij Müzik), the absence of cross media ownership between music and other media markets exhibit that the process is still in an immature phase.

The second sector of the Turkish music market, which is often neglected in the studies on Turkish popular music, reflects the archaic side of the musical production. As it was suggested in Chapter 6, Turkish music market is dominated by many small firms. It can be said that there is a spontaneously created division of labour between these firms. Some are producing only "pop" albums, some are engaged in the production of "arabesk/fantezi/folk music"; and generally these two groups do not attempt to cross each others' "specialised areas". In other words, the competition occurs only between the companies within each group.

It can be said that production of pop (together with few examples of arabesk -especially of famous artists') generally represents the first sector of Turkish music market -in other words the production of music in the first sector is closer to an industrial production. On the other hand, the rest of the firms, operating in the second sector, which generally produce genres like arabesk, "oyun havası" (folk dance air -a tune which accompanies a folk dance²), or several folk tunes, realise their production with minimum possible costs, and without considering sound quality. These types of albums are issued in audiocassette format and even their CD releases are virtually absent. Quite interestingly, these productions generally sell more than pop music albums³, although neither these firms, nor their artists are promoted in television channels or through music videos⁴. However, as it was explained in Chapter 3, high levels of album sales does not always bring profit maximisation with respect to the hardware-software ratio in costs of producing an album. In this respect, since the share of hardware is much higher than that of software in producing such albums, it can be concluded that, in the second sector the profitability and accumulated capital is considerably low. More importantly, the interviews made with several producers showed that the profit acquired from record production is not generally reinvested in music for expanding production -but rather utilised for several speculative means such as investing capital in real estates.

Currently, one of the indicators of the development of music industry is the ratio of CD sales over audiocassette sales in the music market. One of the findings of our research is that, the ratio of CD sales, in Turkish music market, is enormously increasing. More importantly the quantity of firms producing merely audiocassettes (to a large extent, signifying firms functioning in the second sector) is continuously decreasing. Hence it can be concluded that second sector, in Turkish music market is beginning to shrink. Moreover, in the recent years, larger firms of the market, which invented the "sales potential" in the second sector, began to transfer "their" artists in return of higher transfer payments. Consequently, it can also be suggested that, expanding firms of the first sector is constructing a new organisation, which establishes a link between the first and second sectors, and this process may result in the emergence of a new structure - similar to those of advanced music markets in which the market is structured through a special relation between majors and independent labels.

However, it should be noted that, despite the vision of particular developments towards the reinforcement of an industrial organisation in the music sector in recent years, there are significant structural barriers. As is known, profit maximisation in cultural commodity production highly depends on vast amounts of capital investments (which causes enormous increases in costs of production and which necessitates a

highly concentrated market) and their return largely depends on the general welfare of the society.

In Turkish music market, small firms, which dominate the market, cannot meet such higher costs with respect to the lower quantity of accumulated capital they own. In this context, they are generally left no choice but realising their production at lower costs. Major firms, on the other hand, generally fail when they invest higher amounts of capital in production, because the returns, in such cases, does not meet their investment⁵.

Consequently, it can be argued that realisation of profit maximisation in Turkish music market is structurally constrained by the lower levels of welfare.

Within this framework, in Turkish music market, which is market by lower levels of profitability and higher levels of demand uncertainty, also multinational corporations act reluctant in investing capital. It can be argued that this is the main reason behind their lower market shares. It seems that they are remaining in a "stand-by" position.

Additionally, another barrier, which hinders profitability, is the continuing piracy in the music market. In the interviews made, producers had argued that the percentage of piracy, in Turkish music market is over 60%. It should be stated that, as suggested by some producers in Unkapanı, piracy is considered by some recording companies a means for maximising profits -in other words, a considerable amount of

recording companies actively produce "pirate albums"⁶. Actually, this is not a new development. In 1986, Yaşar Kekeva, the head of MÜYAP, had argued that, "the quality, not the quantity, of our members is high. In contrast to many other producers and the associations that they are in (in Unlapanı), our members never produce pirate albums. One of the functions of our association is to struggle against piracy"⁷.

Consequently, due to the reasons outlined above, it can be said that the volume of Turkish music market remains stable, even if production of music is increasingly industrialising. In other words, recording companies are still unsuccessful to overcome the problem of uncertainty of demand for music - actually, this can be considered as an indicator of continuing problem of "creation of value". However, a more important problem for the Turkish music market is the "realisation of value" -which is more evident in the crisis conditions, which iterate often in Turkish economy. In other words, the process of industrialisation does not bring further profit maximisation in Turkish music market -at least until currently.

Notes

¹ It should be remarked that, the new record company (Doğan Music Company), owned by Doğan Medya Group (Aydın Doğan), which is one of the few firms controlling the media market in Turkey, was not founded during our research. It is obvious that Doğan Group, with its new Doğan Music Company, aims to utilise the advantages of horizontal integration (also) in

music market. As its being the first horizontally integrated company in the recording sector, it would be interesting - after a few years- to investigate the changes in its market share. However, it should be stated that, until recently, any considerable success of the firm is not observed.

² However, this music, "oyun havası", is currently far from being authentic, but more likely to be a distorted extension of original folk dances, generally played with an electrical "bağlama" accompanied with a music synthesizer.

³ A typical example is Oğuz Yılmaz -known as Sincanlı Oğuz Yılmaz, however, it should be noted that Yılmaz is not the only example. Although recently Yılmaz has gained a nationwide popularity with the song named "Bas Bas Paraları Leylaya", he has been in the music market since late 1980s. Until recently, his albums were only sold in Anatolia (particularly around Ankara) and the sales of his albums had never fallen below 100.000 copies (interview with Oğuz Yılmaz in a program in Show Radio, May 7, 2001). For example, in 1991, his album named "Çilli Horoz" was sold more than 500.000 copies.

⁴ In Turkey, music charts and sales figures are generally prepared and announced selectively. Additionally, there is no independent institution (like Billboard) tracking and publishing weekly, monthly and yearly quantities of album sales. More importantly, concealing album sales, as discussed in chapter 6, has become a particular strategy (or speculative field for acquiring profit) in Turkish music market. In this context, even if the albums produced by these companies sell more than pop albums, they do not have any chance to take place in music charts. However, if a contracted artist of these firms is transferred to one of the "known" firms (as in the case of Oğuz Yılmaz and Ankaralı Turgut) then it becomes possible to track their sales.

⁵ Two typical examples are Raks and Prestij groups. Despite its being the leading firm of the Turkish music market, which realised vast amounts of capital investments, Raks group was suffering from lower levels of profitability (Interview with Nejat Yıldırım), and consequently, Raks Group sold their recording companies to Universal Group. A similar trouble, in Prestij group, had started in the year 2000. Like Raks, Prestij had also invested vast amounts of capital in production. However, again similar to Raks, their returns did not meet the capital investment they realised. Today it is known that Prestij Group is about to go bankruptcy.

⁶ It should be stated that piracy has been the main reason (today and in the past) preventing the consolidation of a concentrated market structure. Orhan Gencebay, the most famous arabesk composer and singer, has some interesting views on the subject: "It is true that today we are fighting against piracy, and moreover, currently, I am the head of an association, of which its principle goal is to terminate piracy in Turkey. However, we should not forget that, in 1970s, if there had not been extensive piracy in Turkish music market, probably, today, we would not talking about a 'domestic' music industry. Because, in those years, it was the power of piracy that could manage to expel foreign capital. I'm saying these words being aware of the fact that I am one of the most injured artists from the defects of piracy" (interview with Orhan Gencebay, July 12, 1999).

⁷ Müzik Magazin, 1986, No 1; other associations were Müzik, Temin Tevzi Kooperatifi and Plak Prodüktörleri Derneği.

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Radikal 2 1996-1999 music articles

APPENDICES



APPENDIX A: IFPI DATA FOR ALBUM SALES IN TURKISH MUSIC MARKET BETWEEN 1991-1998 AND THE CHANGES IN THE TOTAL RETAIL VALUE OF THE MARKET



	Per Capita Sales		\$Value
	\$	album	per album
1991	3.35	0.90	3.74
1992	2.02	1.02	1.97
1993	2.04	0.73	2.79
1994	2.02	0.84	2.40
1995	1.48	0.62	2.40
1996	2.57	0.74	3.46
1997	2.91	0.78	3.73
1998	1.99	0.77	2.60
AVERAGE	2.30	0.80	2.89

Source: IFPI Annual Statistics and Devlet İstatistik Enstitüsü Statistics (Internet Site)

IFPI DATA FOR 1991-1998

	Real Album Sales		Value				Real Growth				
	Audio Cassette	CD	TOTAL	\$ Value of the Market (Current Prices)		CD		Turkish Market	World Market		
				(1999 prices)	Share	Value (\$)	Share			Value (\$)	
1991	51,000,000	500,000	51,500,000	192,400,000	0.97%	4,557,825	99.03%	230,170,175			57.4
1992	58,700,000	900,000	59,600,000	117,500,000	1.51%	4,222,903	98.49%	135,602,097	-40.43%	3.00%	58.3
1993	41,900,000	1,500,000	43,400,000	120,900,000	3.46%	9,610,714	96.54%	129,424,286	-0.56%	6.00%	59.2
1994	49,100,000	1,400,000	50,500,000	121,400,000	2.77%	7,538,820	97.23%	128,429,180	-2.21%	10.00%	60.1
1995	34,300,000	3,400,000	37,700,000	90,300,000	9.02%	17,753,411	90.98%	80,673,589	-27.61%	2.00%	61.0
1996	40,000,000	6,000,000	46,000,000	159,100,000	13.04%	43,994,609	86.96%	124,651,391	71.34%	2.00%	61.9
1997	45,000,000	4,000,000	49,000,000	183,000,000	8.16%	31,072,653	91.84%	159,247,347	12.85%	0.00%	62.9
1998	44,200,000	4,700,000	48,900,000	127,000,000	9.61%	24,907,350	90.39%	104,638,650	-31.94%	2.00%	63.8
AVERAGE	45,525,000	2,800,000	48,325,000	138,950,000	6.07%	17,956,536	93.93%	136,604,589	-5.60%	2.20%	

APPENDIX B: 1990-1998 ANNUAL ALBUM SALES ON THE COMPANY BASIS AND THEIR MARKET SHARES

Explanation: In the following pages, total album sales (comprised of CD and audiocassete sales) of companies according to years are given. The first column (Rank) denotes to position of the company; the second column (Firm) is the name of the company. The third column (Units) is the total number of albums (CD + Audiocassete) that the company sold; and finally the fourth column (Share) is the market share of the company in the respective year. It should be noted that, at the first page of each year four firm and eight firm concentration ratios (CR4 and CR8) as well as the Herfindahl-Hirschman Index (HHI) for the respective year is given. See Appendix 11 for the explanation and calculation methods for Concentration Ratio and Herfindahl-Hirschman Index.

DIRECTORY OF COPYRIGHTS 1990 SEAL SALES

HHI:	209,18	1990
CR4:	20,40	
CR8:	31,46	
		ALBUM SALES

RANK	FIRM	UNITS	SHARE
1	EmreGrafson	3.886.180	6,71%
2	Özer	3.038.126	5,24%
3	RaksGroup	2.845.425	4,91%
4	Kekeva	2.048.097	3,54%
5	Fono	1.937.437	3,34%
6	Göksoy	1.621.383	2,80%
7	Kervan	1.572.842	2,72%
8	Uzelli	1.272.281	2,20%
9	Özlem	1.231.159	2,13%
10	Tatlıses	1.187.636	2,05%
11	Kent	1.080.479	1,87%
12	Oskar	1.018.879	1,76%
13	Baysu	975.723	1,68%
14	Plaksan	957.013	1,65%
15	Yavuz	906.986	1,57%
16	Barış	877.970	1,52%
17	Bey	876.970	1,51%
18	Erdal	857.659	1,48%
19	Çakır	832.946	1,44%
20	Güney	802.230	1,38%
21	Jet	792.425	1,37%
22	Güneş	787.822	1,36%
23	Ferdifon	757.406	1,31%
24	Sarp	753.904	1,30%
25	Aziz	724.388	1,25%
26	Elenor	720.766	1,24%
27	Sembol	711.481	1,23%
28	Özkan	705.378	1,22%
29	Topkapı	702.476	1,21%
30	Gökalp	701.776	1,21%
31	Okey	695.173	1,20%
32	Bayar	687.969	1,19%
33	Çaçan	653.350	1,13%
34	Harika	605.625	1,05%
35	Taç	534.286	0,92%
36	Şah	522.730	0,90%
37	Diyanet	495.606	0,86%
38	Özbir	488.712	0,84%
39	Altınses	468.151	0,81%
40	Cinan	457.245	0,79%
41	Kalite	426.229	0,74%
42	Disco	412.891	0,71%
43	Ceylan	382.205	0,66%
44	Çetinkaya	379.604	0,66%
45	İleri	344.685	0,60%
46	Midas	341.183	0,59%
47	Gözde	293.057	0,51%
48	Yüksel	286.554	0,49%
49	Karnaval	275.148	0,47%
50	Özdemir	268.544	0,46%
51	Özpınar	264.142	0,46%

DIRECTORY OF COPYRIGHTS 1990 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	EgeMüzik	258.139	0,45%
53	Görsev	252.436	0,44%
54	Nepa	245.232	0,42%
55	Çağdaş	244.331	0,42%
56	Yalçın	237.428	0,41%
57	Osmanlı	235.627	0,41%
58	Uğur	234.126	0,40%
59	Kazan	233.525	0,40%
60	Çimen	233.325	0,40%
61	Armoni	224.521	0,39%
62	Günelp	218.117	0,38%
63	Lider	218.117	0,38%
64	Özaklar	218.117	0,38%
65	Güner	211.113	0,36%
66	Beşler	208.112	0,36%
67	Cem	205.110	0,35%
68	Major	202.609	0,35%
69	A.S.M.	200.109	0,35%
70	Deniz	199.707	0,34%
71	Sevilen	197.974	0,34%
72	Karadeniz	194.705	0,34%
73	Akbulut	191.103	0,33%
74	Orhan	190.102	0,33%
75	Zaman	183.098	0,32%
76	ÖzdemirErdogan	177.095	0,31%
77	Odvi	175.577	0,30%
78	Sedef	174.094	0,30%
79	Diyar	172.393	0,30%
80	Türküola	172.393	0,30%
81	Ada	171.092	0,30%
82	Asır	158.585	0,27%
83	Azim	151.582	0,26%
84	Uras	144.478	0,25%
85	ABC	143.627	0,25%
86	Çağ	134.372	0,23%
87	Duygu	131.071	0,23%
88	Coşkun	128.919	0,22%
89	İhlas	128.569	0,22%
90	Anılar	124.467	0,21%
91	Hülya	117.363	0,20%
92	Berakat	117.063	0,20%
93	Şölen	112.561	0,19%
94	Modem	109.659	0,19%
95	Net	102.055	0,18%
96	Sevkan	98.153	0,17%
97	Nil	96.052	0,17%
98	İlkan	93.050	0,16%
99	İnan	91.049	0,16%
100	AlfaKaset	86.097	0,15%
101	ÜnerMüzik	84.045	0,15%
102	Pınar	83.345	0,14%
103	Özgür	83.045	0,14%
104	Güven	81.544	0,14%
105	Ulus	79.043	0,14%
106	Şenay	73.540	0,13%
107	Savaş	68.037	0,12%
108	Akdeniz	66.536	0,11%

DIRECTORY OF COPYRIGHTS 1990 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	Yankı	65.335	0,11%
110	Ercan	62.884	0,11%
111	TürtasInsaat	62.034	0,11%
112	Dedeoglu	61.033	0,11%
113	MünervaMüzik	60.033	0,10%
114	Akalın	59.032	0,10%
115	Damla	58.532	0,10%
116	Uzunca	58.032	0,10%
117	ÖzgüMüzik	55.030	0,10%
118	Özleyis	52.028	0,09%
119	Öztürk	49.027	0,08%
120	Ses	47.526	0,08%
121	BirNumara	45.025	0,08%
122	Sayan	44.674	0,08%
123	Flaş	43.024	0,07%
124	İstanbul	43.024	0,07%
125	YeniAsya	40.322	0,07%
126	Minerva	40.022	0,07%
127	Şahinler	40.022	0,07%
128	ÇokSesli	39.722	0,07%
129	Elif	38.521	0,07%
130	Atılım	38.021	0,07%
131	Saltuk	36.520	0,06%
132	Balet	35.219	0,06%
133	Atakan	35.019	0,06%
134	Şahin	34.019	0,06%
135	Yıldızlar	34.019	0,06%
136	Aygün	33.518	0,06%
137	Özderya	31.617	0,05%
138	Enes	31.017	0,05%
139	Arzu	30.217	0,05%
140	EgitimGelistirme	30.034	0,05%
141	Aytaşı	30.017	0,05%
142	Safa	30.017	0,05%
143	TürkDünyası	30.017	0,05%
144	Seda	29.516	0,05%
145	Inkilab	29.416	0,05%
146	Kaynak	29.016	0,05%
147	Servet	29.016	0,05%
148	YeniDünya	27.015	0,05%
149	Gonca	25.814	0,04%
150	Kartal	24.714	0,04%
151	As	21.012	0,04%
152	Çokran	20.011	0,03%
153	İlMüftülüğü	20.011	0,03%
154	Simge	20.011	0,03%
155	ÇınçınPlak	19.411	0,03%
156	Diskotür	18.060	0,03%
157	Bay	18.010	0,03%
158	YavuzBurç	18.010	0,03%
159	LozanKitap	17.775	0,03%
160	Ertok	17.210	0,03%
161	Can	17.010	0,03%
162	Sabah	17.010	0,03%
163	Çetiner	16.009	0,03%
164	Anadolu	15.009	0,03%
165	SemaVideo	14.758	0,03%

DIRECTORY OF COPYRIGHTS 1990 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	AFSYayıncılık	14.408	0,02%
167	IpekYolu	14.008	0,02%
168	Alpdoğan	13.608	0,02%
169	Giz	13.007	0,02%
170	Düzzgit	12.337	0,02%
171	Engin	12.007	0,02%
172	Emrah	10.606	0,02%
173	Erkan	10.006	0,02%
174	Feza	10.006	0,02%
175	GülerPlak	10.006	0,02%
176	MüzikMarket	10.006	0,02%
177	VideoExport	10.006	0,02%
178	Roleks	9.005	0,02%
179	Bahar	8.005	0,01%
180	Sakarya	8.005	0,01%
181	ÜmitMüzik	8.005	0,01%
182	Solfej	6.004	0,01%
183	Teklif	6.004	0,01%
184	Abalıoğlu	5.003	0,01%
185	AnasMüzik	5.003	0,01%
186	Canbay	5.003	0,01%
187	Esen	5.003	0,01%
188	ILVI	5.003	0,01%
189	İslamoğlu	5.003	0,01%
190	Kalan	5.003	0,01%
191	Kök	5.003	0,01%
192	Kubbealtı	5.003	0,01%
193	ÖzenPlak	5.003	0,01%
194	Özge	5.003	0,01%
195	PakZarf	5.003	0,01%
196	Seiko	5.003	0,01%
197	Şan	5.003	0,01%
198	Uçar	5.003	0,01%
199	VideoMarket	5.003	0,01%
200	Linelli	4.503	0,01%
201	Sefa	4.503	0,01%
202	APSYayıncılık	3.502	0,01%
203	Gözlem	3.002	0,01%
204	MahsuniKaset	3.002	0,01%
205	Piccatura	3.002	0,01%
206	AskeriMüze	2.002	0,00%
207	BirlikSanat	2.002	0,00%
208	Özoklar	2.002	0,00%
209	Umut	2.002	0,00%
210	Hatıra	1.501	0,00%
211	Bülbül	1.001	0,00%
212	Çetin	1.001	0,00%
213	M.Kaynakçı	1.001	0,00%
214	TütünSanat	1.001	0,00%
215	Epik	851	0,00%
216	AysunPlak	801	0,00%
217	HasKoop	501	0,00%

DIRECTORY OF COPYRIGHTS 1991 SEAL SALES

HHI:	195,32	1991
CR4:	18,61	
CR8:	30,94	
		ALBUM SALES

RANK	FIRM	UNITS	SHARE
1	Raks	2.741.565	5,45%
2	Kekeva	2.634.382	5,24%
3	Özer	2.017.292	4,01%
4	EmreGrafson	1.968.918	3,91%
5	Bayar	1.627.837	3,24%
6	Coşkun	1.598.293	3,18%
7	Uzelli	1.492.141	2,97%
8	Okey	1.487.487	2,96%
9	Kervan	1.189.001	2,36%
10	Baysu	1.178.177	2,34%
11	Güneş	1.123.152	2,23%
12	Kent	978.743	1,95%
13	Emre	929.188	1,85%
14	Harika	904.550	1,80%
15	Şah	889.327	1,77%
16	Karnaval	845.596	1,68%
17	Aziz	836.759	1,66%
18	Göksoy	801.540	1,59%
19	Elenor	797.201	1,58%
20	Barış	699.891	1,39%
21	Sembol	674.305	1,34%
22	Çaçan	629.575	1,25%
23	Çakır	626.850	1,25%
24	Ferdifon	612.099	1,22%
25	Topkapı	605.499	1,20%
26	Oskar	570.832	1,13%
27	İhlas	504.499	1,00%
28	Erdal	462.086	0,92%
29	Özpınar	448.756	0,89%
30	Sevkan	439.076	0,87%
31	Yonca	414.057	0,82%
32	Nepa	408.720	0,81%
33	Altınses	385.578	0,77%
34	Nil	362.964	0,72%
35	Güney	356.013	0,71%
36	Çetinkaya	353.285	0,70%
37	Şan	332.382	0,66%
38	Disco	309.201	0,61%
39	Gözde	305.638	0,61%
40	Nokta	301.810	0,60%
41	Yavuz	296.151	0,59%
42	Güner	293.011	0,58%
43	Kalite	289.876	0,58%
44	Özbir	278.976	0,55%
45	Fono	271.180	0,54%
46	Diyar	270.573	0,54%
47	A.S.M.	263.974	0,52%
48	Ataman	263.182	0,52%
49	Özkan	250.863	0,50%
50	Hamle	250.775	0,50%
51	Görsev	244.528	0,49%

DIRECTORY OF COPYRIGHTS 1991 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	Özlem	244.264	0,49%
53	Özdemir	241.888	0,48%
54	Beşler	240.084	0,48%
55	Plaksan	234.257	0,47%
56	Gün	233.177	0,46%
57	Jet	225.317	0,45%
58	Özaklar	214.699	0,43%
59	Taç	209.419	0,42%
60	Bey	206.956	0,41%
61	Güenalp	206.780	0,41%
62	Sarp	206.148	0,41%
63	Sabah	200.620	0,40%
64	Yalçın	199.741	0,40%
65	Peker	185.662	0,37%
66	Saltuk	185.662	0,37%
67	VideoExport	180.382	0,36%
68	Ercan	176.422	0,35%
69	Cinan	174.047	0,35%
70	Uras	171.143	0,34%
71	Kazan	170.703	0,34%
72	Diyanet	158.736	0,32%
73	Zümrüt	158.385	0,31%
74	Kalan	156.624	0,31%
75	Ses	155.745	0,31%
76	Uğur	146.946	0,29%
77	Minerva	146.066	0,29%
78	Hülya	142.722	0,28%
79	Orhan	136.386	0,27%
80	Ada	129.787	0,26%
81	Karadeniz	127.763	0,25%
82	Özbulut	124.948	0,25%
83	İleri	123.100	0,24%
84	Sedef	122.632	0,24%
85	Armoni	120.284	0,24%
86	Seda	120.109	0,24%
87	Cem	119.229	0,24%
88	Deniz	118.789	0,24%
89	MüzikMarket	116.149	0,23%
90	Simge	113.949	0,23%
91	Akbulut	112.629	0,22%
92	Asır	109.109	0,22%
93	Lider	108.305	0,22%
94	Flaş	107.525	0,21%
95	Zaman	107.350	0,21%
96	Savaş	102.070	0,20%
97	Şenay	87.200	0,17%
98	Duygu	87.112	0,17%
99	Berakat	83.592	0,17%
100	Çağdaş	81.595	0,16%
101	Pınar	81.392	0,16%
102	Dünya	80.512	0,16%
103	Odvi	76.817	0,15%
104	Türtasİnsaat	76.552	0,15%
105	İstanbul	74.661	0,15%
106	Karaca	72.593	0,14%
107	Yüksel	71.274	0,14%
108	Çağ	71.097	0,14%

DIRECTORY OF COPYRIGHTS 1991 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	CazPlak	70.393	0,14%
110	Yıldızlar	69.162	0,14%
111	Sevilen	68.633	0,14%
112	Şahin	67.402	0,13%
113	Aygün	67.050	0,13%
114	Azım	66.214	0,13%
115	İslamoğlu	65.554	0,13%
116	Damla	62.342	0,12%
117	Midas	58.222	0,12%
118	Özfon	58.075	0,12%
119	ÖzdemirErdogan	55.875	0,11%
120	Elmas	54.555	0,11%
121	Major	53.675	0,11%
122	Gonca	53.147	0,11%
123	Atakan	52.795	0,10%
124	Nurtaç	52.795	0,10%
125	Panaroma	52.795	0,10%
126	Giz	51.476	0,10%
127	AFSYayıncılık	49.452	0,10%
128	Akdeniz	48.395	0,10%
129	IpekYolu	47.164	0,09%
130	ABC	46.636	0,09%
131	Kubbealtı	46.636	0,09%
132	ÜnerMüzik	44.876	0,09%
133	Şölen	44.436	0,09%
134	Koda	43.996	0,09%
135	VideoMarket	43.996	0,09%
136	Özgür	42.500	0,08%
137	Balet	40.701	0,08%
138	Net	40.476	0,08%
139	BirNumara	40.125	0,08%
140	Ceylan	37.837	0,08%
141	Yankı	35.400	0,07%
142	Erkam	35.197	0,07%
143	Erkan	35.197	0,07%
144	ÇokSesli	35.021	0,07%
145	Ulus	34.317	0,07%
146	Kartal	33.437	0,07%
147	Osmanlı	33.437	0,07%
148	Sönmez	32.997	0,07%
149	Yıldırım	31.238	0,06%
150	Çorluk	30.798	0,06%
151	Dilan	30.798	0,06%
152	Uzunca	29.917	0,06%
153	Ezgi	29.037	0,06%
154	BirlikSanat	28.597	0,06%
155	YeniAsya	28.422	0,06%
156	As	28.157	0,06%
157	Teklif	28.157	0,06%
158	Sayan	27.806	0,06%
159	RemziKamman	27.804	0,06%
160	Modem	27.451	0,05%
161	Aras	26.398	0,05%
162	Durubey	26.398	0,05%
163	Türker	26.398	0,05%
164	Türküola	25.037	0,05%
165	İnan	24.638	0,05%

DIRECTORY OF COPYRIGHTS 1991 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	AlfaKaset	23.954	0,05%
167	YavuzBurç	22.177	0,04%
168	Diskotür	22.100	0,04%
169	Sefa	21.998	0,04%
170	TürkDünyası	21.998	0,04%
171	Inkilab	20.643	0,04%
172	Abalioğlu	20.238	0,04%
173	Çimen	19.359	0,04%
174	Alpdoğan	18.655	0,04%
175	Öztürk	18.479	0,04%
176	Safa	18.479	0,04%
177	AltuğAltınay	18.400	0,04%
178	Gökalp	18.270	0,04%
179	Elif	17.686	0,04%
180	AmaçMüzik	17.599	0,03%
181	Budaklar	17.599	0,03%
182	Meis	17.599	0,03%
183	PeriSanatProdüksiyon	17.599	0,03%
184	Sitrın	17.599	0,03%
185	Bahar	16.939	0,03%
186	Akalın	16.718	0,03%
187	Milletlerarası	16.671	0,03%
188	Enes	14.959	0,03%
189	Emrah	14.299	0,03%
190	İmece	13.199	0,03%
191	Murat	13.199	0,03%
192	PakZarf	13.199	0,03%
193	SpotVideo	13.199	0,03%
194	Çokran	12.319	0,02%
195	EğitimGelistirme	11.024	0,02%
196	Güvercin	11.000	0,02%
197	Destebaşılar	9.679	0,02%
198	Güven	8.843	0,02%
199	Filiz	8.799	0,02%
200	İlkan	8.799	0,02%
201	Karaal	8.799	0,02%
202	NaciEray	8.799	0,02%
203	Öz	8.799	0,02%
204	Özderya	8.799	0,02%
205	Rahmet	8.799	0,02%
206	CengizÇekiç	8.712	0,02%
207	YeniDünya	8.095	0,02%
208	Özbek	7.920	0,02%
209	Roleks	7.920	0,02%
210	Mert	7.040	0,01%
211	Ozan	7.040	0,01%
212	Özleyis	6.864	0,01%
213	Anılar	6.511	0,01%
214	Kaynak	6.160	0,01%
215	Sakarya	6.160	0,01%
216	Uçar	6.160	0,01%
217	ÖmerUmar	5.660	0,01%
218	Altınboynuz	5.280	0,01%
219	AysunPlak	5.280	0,01%
220	ÖzcanPlak	5.280	0,01%
221	Vural	5.280	0,01%
222	Bülbül	4.400	0,01%

DIRECTORY OF COPYRIGHTS 1991 SEAL SALES

RANK	FIRM	UNITS	SHARE
223	Gözlem	4.400	0,01%
224	Kanbay	4.400	0,01%
225	Otantik	4.400	0,01%
226	PiramitYap.	4.400	0,01%
227	Tan	4.400	0,01%
228	Müzikotek	4.080	0,01%
229	Dedeoglu	3.520	0,01%
230	Esen	3.520	0,01%
231	ILVI	3.520	0,01%
232	Selçuklu	3.520	0,01%
233	Klip	3.124	0,01%
234	Atılım	2.640	0,01%
235	Öncü	2.640	0,01%
236	Şenol	2.640	0,01%
237	ÜmitMüzik	2.640	0,01%
238	Tatlıses	2.530	0,01%
239	AndMüzik	1.800	0,00%
240	AskeriMüze	1.760	0,00%
241	Aytaş	1.760	0,00%
242	Canbay	1.760	0,00%
243	Engin	1.760	0,00%
244	Ertok	1.760	0,00%
245	Hafiz	1.760	0,00%
246	Sözler	1.760	0,00%
247	LozanKitap	924	0,00%
248	Anadolu	880	0,00%
249	Arzu	880	0,00%
250	Canan	880	0,00%
251	Gold	880	0,00%
252	Mega	786	0,00%
253	Kayıran	776	0,00%
254	Banko	668	0,00%
255	LotusElektronik	480	0,00%

DIRECTORY OF COPYRIGHTS 1992 SEAL SALES

HHI:	452,93	1992
CR4:	33,27	
CR8:	44,12	
		ALBUM SALES

RANK	FIRM	UNITS	SHARE
1	RaksGroup	9.651.298	16,59%
2	Özer	3.940.677	6,77%
3	Kekeva	3.843.729	6,61%
4	EmreGrafson	1.927.447	3,31%
5	Kervan	1.740.468	2,99%
6	Uzelli	1.719.642	2,96%
7	Güneş	1.454.883	2,50%
8	Ferdifon	1.394.826	2,40%
9	Göksoy	1.305.015	2,24%
10	Yonca	1.276.518	2,19%
11	Okey	1.235.364	2,12%
12	Kent	1.137.382	1,95%
13	Harika	1.073.361	1,84%
14	Türker	829.095	1,42%
15	Elenor	789.573	1,36%
16	Fono	780.783	1,34%
17	Erdal	713.058	1,23%
18	Emre	698.499	1,20%
19	Baysu	674.291	1,16%
20	Altınses	655.411	1,13%
21	Aziz	611.270	1,05%
22	Güney	604.999	1,04%
23	Çakır	550.755	0,95%
24	Majör	543.881	0,93%
25	Şah	504.922	0,87%
26	Çaçan	450.463	0,77%
27	Türküola	437.100	0,75%
28	Nokta	379.069	0,65%
29	Ataman	355.342	0,61%
30	Nil	340.784	0,59%
31	Görsev	335.284	0,58%
32	Özdemir	318.079	0,55%
33	Bayer	310.588	0,53%
34	İhlas	305.736	0,53%
35	Özaklar	298.726	0,51%
36	Yavuz	290.919	0,50%
37	Bey	289.344	0,50%
38	Özpınar	286.324	0,49%
39	Hamle	284.645	0,49%
40	Müziksan	283.088	0,49%
41	Topkapı	272.889	0,47%
42	Diyanet	266.588	0,46%
43	Oskar	255.633	0,44%
44	Kalite	253.985	0,44%
45	Disco	236.177	0,41%
46	Diyar	234.537	0,40%
47	Kazan	229.490	0,39%
48	Şan	228.707	0,39%
49	Sabah	225.931	0,39%
50	Koda	224.157	0,39%
51	Duygu	212.128	0,36%

DIRECTORY OF COPYRIGHTS 1992 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	A.S.M.	210.294	0,36%
53	Kalan	209.432	0,36%
54	Özbir	204.902	0,35%
55	Peker	201.010	0,35%
56	Taç	197.353	0,34%
57	Coşkun	192.224	0,33%
58	VideoExport	188.834	0,32%
59	Komedi	188.725	0,32%
60	Yalçın	184.951	0,32%
61	Özkan	184.735	0,32%
62	Ulus	177.187	0,30%
63	Özlem	177.078	0,30%
64	Ercan	173.736	0,30%
65	Berakat	170.932	0,29%
66	İstanbul	170.392	0,29%
67	İleri	161.117	0,28%
68	Karnaval	154.216	0,27%
69	Karadeniz	152.167	0,26%
70	Çetinkaya	143.432	0,25%
71	Sembol	141.429	0,24%
72	Özbulut	130.814	0,22%
73	Midas	128.118	0,22%
74	IpekYolu	127.255	0,22%
75	Sevkan	123.589	0,21%
76	Ses	120.785	0,21%
77	Mezopotamya	113.236	0,19%
78	Sarp	109.939	0,19%
79	Asır	106.765	0,18%
80	Şahin	105.256	0,18%
81	MüzikMarket	104.835	0,18%
82	Dilan	104.608	0,18%
83	BirNumara	103.530	0,18%
84	Dünya	100.186	0,17%
85	Ada	97.275	0,17%
86	Simge	96.756	0,17%
87	Özfon	96.736	0,17%
88	Uras	96.412	0,17%
89	Cinan	95.981	0,16%
90	Akalın	91.668	0,16%
91	İslamoğlu	91.668	0,16%
92	KadirKarakoç	91.668	0,16%
93	Barış	89.726	0,15%
94	Beşler	88.108	0,15%
95	Altınboynuz	87.353	0,15%
96	Zaman	87.353	0,15%
97	Akbaş	85.197	0,15%
98	Durubey	80.883	0,14%
99	Yıldırım	77.647	0,13%
100	Modem	77.108	0,13%
101	Sitran	76.569	0,13%
102	Günelip	76.030	0,13%
103	Jet	75.570	0,13%
104	Osmanlı	73.873	0,13%
105	Seda	73.010	0,13%
106	Çağdaş	70.351	0,12%
107	Hülya	68.373	0,12%
108	Orhan	66.864	0,11%

DIRECTORY OF COPYRIGHTS 1992 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	Sedef	66.654	0,11%
110	Özsah	65.785	0,11%
111	Şenay	65.677	0,11%
112	Akbulut	65.354	0,11%
113	Uçar	63.951	0,11%
114	Erkam	62.550	0,11%
115	CazPlak	61.686	0,11%
116	Filiz	60.393	0,10%
117	Yankı	58.020	0,10%
118	Çorluk	57.373	0,10%
119	Pınar	55.540	0,10%
120	Çağ	53.544	0,09%
121	Deniz	52.844	0,09%
122	Giz	52.844	0,09%
123	Minerva	52.197	0,09%
124	AFSYayıncılık	52.034	0,09%
125	Aygün	51.765	0,09%
126	Armoni	51.225	0,09%
127	Yıldızlar	50.794	0,09%
128	Sevilen	50.579	0,09%
129	Abalıoğlu	49.608	0,09%
130	Aras	49.393	0,08%
131	Gözde	48.529	0,08%
132	Azim	47.452	0,08%
133	Enes	46.373	0,08%
134	Sakarya	46.373	0,08%
135	Sefa	46.373	0,08%
136	N.Kılıçkını	45.402	0,08%
137	ABC	45.294	0,08%
138	Atakan	45.294	0,08%
139	Damla	45.294	0,08%
140	İnan	42.059	0,07%
141	Çokran	41.628	0,07%
142	ÇokSesli	41.628	0,07%
143	Balet	40.465	0,07%
144	Özgüven	39.902	0,07%
145	Mega	39.870	0,07%
146	Lider	38.932	0,07%
147	Net	38.823	0,07%
148	Cem	38.392	0,07%
149	İmece	38.285	0,07%
150	Şölen	37.746	0,06%
151	Alpdoğan	36.451	0,06%
152	Uzunca	35.157	0,06%
153	Güven	34.996	0,06%
154	İnkilab	34.726	0,06%
155	Güner	34.510	0,06%
156	Güvercin	34.510	0,06%
157	As	33.971	0,06%
158	Elif	33.971	0,06%
159	Kanbay	33.432	0,06%
160	Akdeniz	32.354	0,06%
161	Gökalp	31.702	0,05%
162	YeniDünya	30.951	0,05%
163	Sayan	29.118	0,05%
164	NaciEray	27.609	0,05%
165	Uğur	27.500	0,05%

DIRECTORY OF COPYRIGHTS 1992 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	Bayar	26.961	0,05%
167	Engin	26.961	0,05%
168	Gonca	26.961	0,05%
169	Hafiz	26.961	0,05%
170	RemziKamman	26.192	0,05%
171	Hades	25.939	0,04%
172	Ozan	25.883	0,04%
173	Savaş	25.883	0,04%
174	Karaca	25.344	0,04%
175	Mazlum	24.804	0,04%
176	Nurtaç	24.804	0,04%
177	Ezgi	24.265	0,04%
178	Özleyis	23.726	0,04%
179	BirlikSanat	22.648	0,04%
180	Erkan	22.648	0,04%
181	Rahmet	22.648	0,04%
182	Servet	22.648	0,04%
183	Şenol	22.108	0,04%
184	Yüksel	21.569	0,04%
185	AlfaKaset	20.592	0,04%
186	Özgür	20.490	0,04%
187	Zümrüt	20.490	0,04%
188	Destebaşilar	19.628	0,03%
189	Arzu	19.412	0,03%
190	Panaroma	19.412	0,03%
191	Murat	18.334	0,03%
192	Renk	17.255	0,03%
193	StüdyoBaskent	17.255	0,03%
194	Anılar	17.039	0,03%
195	Diskotür	16.824	0,03%
196	Bahar	16.177	0,03%
197	Gökyüzü	16.177	0,03%
198	Müzikotek	16.177	0,03%
199	Özbek	16.177	0,03%
200	Sözler	16.177	0,03%
201	Turfaş	16.177	0,03%
202	Gülüm	15.098	0,03%
203	ÖzdemirErdogan	15.046	0,03%
204	CengizÇekiç	14.128	0,02%
205	Türtasİnsaat	14.021	0,02%
206	Elmas	13.481	0,02%
207	YeniAsya	13.481	0,02%
208	MaviDeniz	13.049	0,02%
209	Flaş	12.942	0,02%
210	Selçuklu	12.942	0,02%
211	Ayço	12.511	0,02%
212	İzmir	11.863	0,02%
213	Öztürk	11.863	0,02%
214	Safa	11.863	0,02%
215	Saltuk	11.863	0,02%
216	Kunuz	10.785	0,02%
217	Özyalçın	10.785	0,02%
218	PakZarf	10.785	0,02%
219	SerkanTicaret	10.785	0,02%
220	ToprakMüzik	10.785	0,02%
221	Roleks	10.246	0,02%
222	Sönmez	10.246	0,02%

DIRECTORY OF COPYRIGHTS 1992 SEAL SALES

RANK	FIRM	UNITS	SHARE
223	Kubbealti	9.706	0,02%
224	AhenkAjans	8.628	0,01%
225	Aydin	8.628	0,01%
226	Gün	8.628	0,01%
227	Pentagram	8.628	0,01%
228	Anahtar	8.305	0,01%
229	Göksel	7.550	0,01%
230	Gold	7.151	0,01%
231	EgitimGelistirme	6.471	0,01%
232	Öncü	6.471	0,01%
233	ÖzgüMüzik	6.471	0,01%
234	Sera	6.471	0,01%
235	Tüncer	6.471	0,01%
236	Vural	6.471	0,01%
237	ÖmerUmar	6.121	0,01%
238	ÇocukVakfi	5.474	0,01%
239	Çetiner	5.392	0,01%
240	EvrenPlak	5.392	0,01%
241	FakirProdüksiyon	5.392	0,01%
242	Hasan	5.392	0,01%
243	HedefPlak	5.392	0,01%
244	Meis	5.392	0,01%
245	Melki	5.392	0,01%
246	Otantik	5.392	0,01%
247	ÜnerMüzik	5.392	0,01%
248	YönTicaret	5.392	0,01%
249	İstekÖz.Eg.	4.315	0,01%
250	KoyutürkLtd.	4.315	0,01%
251	Seiko	4.315	0,01%
252	AsuPlak	3.236	0,01%
253	Cihan	3.236	0,01%
254	Lades	3.236	0,01%
255	OraDeriYayin	3.236	0,01%
256	PiramitYap.	3.236	0,01%
257	Teklif	3.236	0,01%
258	Tuncer	3.236	0,01%
259	Piccatara	2.805	0,00%
260	AmaçMüzik	2.157	0,00%
261	Emrah	2.157	0,00%
262	MehmetFethi	2.157	0,00%
263	Odvi	1.941	0,00%
264	Buyurgan	1.461	0,00%
265	Kaynak	1.079	0,00%
266	Öz	1.079	0,00%
267	Promiks	1.079	0,00%
268	S.S.HalkAsik.	1.079	0,00%
269	YavuzBurç	1.025	0,00%
270	Beste	917	0,00%
271	Ufuk	540	0,00%
272	Senseç	446	0,00%
273	VakkoTekstil	50	0,00%

DIRECTORY OF COPYRIGHTS 1993 SEAL SALES

HHI:	458,59	1993
CR4:	34,28	
CR8:	45,06	
		ALBUM SALES

RANK	FIRM	UNITS	SHARE
1	RaksGroup	9.066.484	16,60%
2	Özer	3.650.392	6,68%
3	Kekeva	3.579.349	6,55%
4	EmreGrafson	2.433.568	4,45%
5	Kervan	1.642.784	3,01%
6	Uzelli	1.591.362	2,91%
7	Güneş	1.355.828	2,48%
8	Ferdifon	1.296.619	2,37%
9	Göksoy	1.231.012	2,25%
10	Yonca	1.222.560	2,24%
11	Okey	1.151.101	2,11%
12	Kent	1.058.505	1,94%
13	Harika	1.005.880	1,84%
14	Türker	771.825	1,41%
15	Elenor	749.909	1,37%
16	Fono	734.105	1,34%
17	Erdal	663.579	1,21%
18	Baysu	645.651	1,18%
19	Altınses	619.714	1,13%
20	Aziz	583.183	1,07%
21	Güney	563.018	1,03%
22	Çakır	512.537	0,94%
23	Major	510.211	0,93%
24	Şah	463.863	0,85%
25	Çaçan	420.486	0,77%
26	Türküola	405.787	0,74%
27	Nokta	356.265	0,65%
28	Ataman	330.686	0,61%
29	Nil	317.137	0,58%
30	Görsev	312.019	0,57%
31	Özdemir	301.251	0,55%
32	Bayer	289.336	0,53%
33	İhlas	284.520	0,52%
34	Özaklar	278.997	0,51%
35	Yavuz	270.943	0,50%
36	Bey	269.266	0,49%
37	Özpınar	266.455	0,49%
38	Hamle	264.946	0,48%
39	Müziksan	263.445	0,48%
40	Topkapı	257.255	0,47%
41	Diyanet	248.090	0,45%
42	Kalite	245.531	0,45%
43	Oskar	233.437	0,43%
44	Koda	222.242	0,41%
45	Disco	219.788	0,40%
46	Şan	219.595	0,40%
47	Diyar	218.263	0,40%
48	Kazan	213.566	0,39%
49	Sabah	210.254	0,38%
50	Kalan	204.771	0,37%
51	Peker	204.043	0,37%

DIRECTORY OF COPYRIGHTS 1993 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	Coşkun	202.004	0,37%
53	Duygu	200.208	0,37%
54	A.S.M.	198.702	0,36%
55	Özbir	190.684	0,35%
56	Taç	190.659	0,35%
57	VideoExport	179.730	0,33%
58	Komedi	179.130	0,33%
59	İstanbul	172.170	0,32%
60	Yalçın	172.117	0,32%
61	Özkan	171.917	0,31%
62	Özlem	165.791	0,30%
63	Ulus	164.891	0,30%
64	Ercan	161.680	0,30%
65	Berakat	159.071	0,29%
66	İleri	150.938	0,28%
67	Karadeniz	141.608	0,26%
68	Şahin	140.095	0,26%
69	Çetinkaya	133.479	0,24%
70	Karnaval	132.475	0,24%
71	Özbulut	122.740	0,22%
72	Sembol	122.439	0,22%
73	Midas	119.228	0,22%
74	İpekYolu	118.425	0,22%
75	Sevkan	115.013	0,21%
76	Ses	112.403	0,21%
77	BirNumara	111.447	0,20%
78	Mezopotamya	105.378	0,19%
79	Sarp	101.364	0,19%
80	Asır	99.357	0,18%
81	Dilan	97.349	0,18%
82	MüzikMarket	97.048	0,18%
83	Dünya	95.235	0,17%
84	Uras	91.222	0,17%
85	Ada	90.525	0,17%
86	Özfon	90.023	0,16%
87	Simge	89.656	0,16%
88	Akalın	85.306	0,16%
89	İslamoğlu	85.306	0,16%
90	KadirKarakoç	85.306	0,16%
91	Barış	83.500	0,15%
92	Beşler	81.994	0,15%
93	Altınboynuz	81.292	0,15%
94	Zaman	81.292	0,15%
95	Akbaş	79.285	0,15%
96	Cihan	75.270	0,14%
97	Durubey	75.270	0,14%
98	Günalp	72.754	0,13%
99	Yıldırım	72.259	0,13%
100	Modem	71.758	0,13%
101	Sitran	71.256	0,13%
102	Jet	70.598	0,13%
103	Osmanlı	68.747	0,13%
104	Şenay	68.068	0,12%
105	Seda	67.944	0,12%
106	Sedef	67.127	0,12%
107	Uçar	65.535	0,12%
108	Çağdaş	64.085	0,12%

DIRECTORY OF COPYRIGHTS 1993 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	Hülya	63.629	0,12%
110	Erkam	63.227	0,12%
111	Orhan	62.924	0,12%
112	Özsah	61.220	0,11%
113	Akbulut	60.818	0,11%
114	CazPlak	57.406	0,11%
115	Filiz	56.202	0,10%
116	Mega	54.205	0,10%
117	Yankı	53.994	0,10%
118	Çorluk	53.392	0,10%
119	Deniz	52.177	0,10%
120	Pınar	51.686	0,09%
121	İmece	50.629	0,09%
122	Çağ	49.829	0,09%
123	Giz	49.177	0,09%
124	Minerva	48.575	0,09%
125	AFSYayıncılık	48.424	0,09%
126	Aygün	48.173	0,09%
127	Armoni	47.671	0,09%
128	Yıldızlar	47.270	0,09%
129	Sevilen	47.069	0,09%
130	Abaloğlu	46.166	0,08%
131	AnasMüzik	45.965	0,08%
132	Gözde	45.162	0,08%
133	Azim	44.159	0,08%
134	Enes	43.155	0,08%
135	Sakarya	43.155	0,08%
136	Sefa	43.155	0,08%
137	N.Kılıçkını	42.252	0,08%
138	ABC	42.152	0,08%
139	Atakan	42.152	0,08%
140	Damla	42.152	0,08%
141	Balet	41.406	0,08%
142	YapıKredi	40.602	0,07%
143	İnan	39.141	0,07%
144	ÇokSesli	38.739	0,07%
145	Çokran	38.338	0,07%
146	Özgüven	37.134	0,07%
147	Net	36.455	0,07%
148	Lider	36.230	0,07%
149	Cem	35.729	0,07%
150	Şölen	35.126	0,06%
151	Alpdoğan	33.922	0,06%
152	Uzunca	32.718	0,06%
153	Güven	32.567	0,06%
154	İnkilab	32.316	0,06%
155	Güner	32.116	0,06%
156	Güvercin	32.116	0,06%
157	As	31.614	0,06%
158	Elif	31.614	0,06%
159	Kanbay	31.112	0,06%
160	Servet	31.112	0,06%
161	Akdeniz	30.108	0,06%
162	Gökalp	29.707	0,05%
163	YeniDünya	28.804	0,05%
164	Turfaş	28.101	0,05%
165	Sayan	28.098	0,05%

DIRECTORY OF COPYRIGHTS 1993 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	NaciEray	25.693	0,05%
167	Uğur	25.592	0,05%
168	Bayar	25.090	0,05%
169	Engin	25.090	0,05%
170	Gonca	25.090	0,05%
171	Hafiz	25.090	0,05%
172	Hades	24.656	0,05%
173	Ozan	24.087	0,04%
174	Savaş	24.087	0,04%
175	Karaca	23.585	0,04%
176	Mazlum	23.083	0,04%
177	Nurtaç	23.083	0,04%
178	Ezgi	22.581	0,04%
179	Özleyis	22.080	0,04%
180	Ayço	21.418	0,04%
181	RemziKamman	21.306	0,04%
182	BirlikSanat	21.076	0,04%
183	Rahmet	21.076	0,04%
184	Panaroma	21.065	0,04%
185	Şenol	20.574	0,04%
186	Yüksel	20.072	0,04%
187	Müzikotek	19.154	0,04%
188	Özgür	19.069	0,03%
189	Zümrüt	19.069	0,03%
190	AlfaKaset	18.853	0,03%
191	ÖzdemirErdogan	18.797	0,03%
192	Destebaşilar	18.266	0,03%
193	Arzu	18.065	0,03%
194	Cinan	17.062	0,03%
195	Murat	17.062	0,03%
196	Diskotür	16.207	0,03%
197	Erkan	16.058	0,03%
198	Öztürk	16.058	0,03%
199	Renk	16.058	0,03%
200	StüdyoBaskent	16.058	0,03%
201	Anılar	15.857	0,03%
202	Bahar	15.054	0,03%
203	Gökyüzü	15.054	0,03%
204	Özbek	15.054	0,03%
205	Sözler	15.054	0,03%
206	Emrah	14.553	0,03%
207	Gülüm	14.051	0,03%
208	Saituk	14.040	0,03%
209	CengizÇekiç	13.148	0,02%
210	YeniAsya	12.545	0,02%
211	MaviDeniz	12.144	0,02%
212	Selçuklu	12.044	0,02%
213	Plaksan	12.000	0,02%
214	İzmir	11.040	0,02%
215	Safa	11.040	0,02%
216	Kunuz	10.036	0,02%
217	Özyalçın	10.036	0,02%
218	PakZarf	10.036	0,02%
219	ToprakMüzik	10.036	0,02%
220	Roleks	9.535	0,02%
221	Sönmez	9.535	0,02%
222	Kubbealtı	9.033	0,02%

DIRECTORY OF COPYRIGHTS 1993 SEAL SALES

RANK	FIRM	UNITS	SHARE
223	Tuncer	9.033	0,02%
224	Gold	8.654	0,02%
225	AhenkAjans	8.029	0,01%
226	Aydın	8.029	0,01%
227	Gün	8.029	0,01%
228	Pentagram	8.029	0,01%
229	Anahtar	7.728	0,01%
230	Göksel	7.026	0,01%
231	EğitimGelistirme	6.022	0,01%
232	Öncü	6.022	0,01%
233	ÖzgüMüzik	6.022	0,01%
234	Vural	6.022	0,01%
235	ÇocukVakfi	5.094	0,01%
236	Çetiner	5.018	0,01%
237	EvrenPlak	5.018	0,01%
238	FakirProdüksiyon	5.018	0,01%
239	Hasan	5.018	0,01%
240	HedefPlak	5.018	0,01%
241	Meis	5.018	0,01%
242	Melki	5.018	0,01%
243	ÜnerMüzik	5.018	0,01%
244	YönTicaret	5.018	0,01%
245	GiritMüzik	5.000	0,01%
246	İstekÖz.Eğ.	4.015	0,01%
247	KoyutürkLtd.	4.015	0,01%
248	Seiko	4.015	0,01%
249	Lades	3.127	0,01%
250	AsuPlak	3.011	0,01%
251	OraDeriYayın	3.011	0,01%
252	PiramitYap.	3.011	0,01%
253	Teklif	3.011	0,01%
254	Piccatura	2.610	0,00%
255	AmaçMüzik	2.008	0,00%
256	Bengisu	2.008	0,00%
257	MehmetFethi	2.008	0,00%
258	Odvi	1.807	0,00%
259	Kaynak	1.004	0,00%
260	Promiks	1.004	0,00%
261	S.S.HalkAsik.	1.004	0,00%
262	Beste	854	0,00%
263	Ufuk	502	0,00%
264	Zafer	201	0,00%
265	Buyurgan	170	0,00%

DIRECTORY OF COPYRIGHTS 1994 SEAL SALES

HHI:	725,35	1994
CR4:	36,79	
CR8:	47,42	
		ALBUM SALES

RANK	FIRM	UNITS	SHARE
1	RaksGroup	11.669.347	24,68%
2	Özer	2.324.610	4,92%
3	PrestijGroup	1.935.622	4,09%
4	İstanbul	1.471.359	3,11%
5	Kekeva	1.330.707	2,81%
6	Ferdifon	1.322.754	2,80%
7	Fono	1.214.317	2,57%
8	Kervan	1.156.783	2,45%
9	Elenor	849.038	1,80%
10	Peker	815.034	1,72%
11	Göksoy	782.906	1,66%
12	Mega	686.063	1,45%
13	EmreGrafson	586.636	1,24%
14	Özdemir	566.402	1,20%
15	Uzelli	555.475	1,17%
16	Harika	552.214	1,17%
17	Çaçan	511.922	1,08%
18	Koda	503.364	1,06%
19	Okey	480.739	1,02%
20	Sony	445.287	0,94%
21	Güneş	445.209	0,94%
22	Major	438.994	0,93%
23	Bayer	426.337	0,90%
24	Berakat	413.328	0,87%
25	Duygu	376.640	0,80%
26	Akbaş	375.205	0,79%
27	Kalan	375.178	0,79%
28	Erdal	370.791	0,78%
29	Ercan	357.746	0,76%
30	Komedi	336.120	0,71%
31	Aklar	331.261	0,70%
32	Görsev	317.620	0,67%
33	Baysu	314.679	0,67%
34	Kent	310.051	0,66%
35	Diyanet	309.133	0,65%
36	Çakır	303.776	0,64%
37	Müziksan	298.055	0,63%
38	Giz	281.906	0,60%
39	Aziz	274.419	0,58%
40	Bay	264.851	0,56%
41	Güney	260.838	0,55%
42	Nii	256.324	0,54%
43	MakroMüzik	255.806	0,54%
44	A.S.M.	239.062	0,51%
45	Selçuklu	229.136	0,48%
46	Armoni	221.712	0,47%
47	Midas	213.180	0,45%
48	Ulus	206.848	0,44%
49	Coşkun	203.807	0,43%
50	Net	197.403	0,42%
51	Uğur	182.074	0,39%

DIRECTORY OF COPYRIGHTS 1994 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	Özpınar	178.574	0,38%
53	Kazan	170.448	0,36%
54	Türküola	166.322	0,35%
55	Bey	162.874	0,34%
56	Uçar	156.001	0,33%
57	Mert	152.277	0,32%
58	Ses	145.262	0,31%
59	InterMüzik	145.202	0,31%
60	Gökhan	140.953	0,30%
61	Hülya	139.649	0,30%
62	Akbulut	138.445	0,29%
63	Sembol	137.633	0,29%
64	Uras	131.946	0,28%
65	Müzikotek	131.919	0,28%
66	İhlas	130.419	0,28%
67	Banş	126.406	0,27%
68	Diyar	124.300	0,26%
69	Kalite	120.355	0,25%
70	Karadeniz	118.180	0,25%
71	Kaya	116.374	0,25%
72	Şah	110.355	0,23%
73	BirNumara	108.152	0,23%
74	Yıldırım	104.602	0,22%
75	DomProdüksiyon	104.323	0,22%
76	Aras	98.015	0,21%
77	Erkan	97.313	0,21%
78	Çorluk	94.303	0,20%
79	Lider	93.698	0,20%
80	Dilan	93.300	0,20%
81	Çağ	93.044	0,20%
82	Asır	90.286	0,19%
83	ÖzdemirErdogan	88.418	0,19%
84	Aydın	85.274	0,18%
85	Ayço	85.118	0,18%
86	Seda	84.171	0,18%
87	Taç	79.450	0,17%
88	Özbir	78.245	0,17%
89	Yılmaz	78.151	0,17%
90	Ozan	78.051	0,17%
91	İmece	72.016	0,15%
92	İslamoğlu	70.226	0,15%
93	Harile	68.019	0,14%
94	Ada	67.216	0,14%
95	Panaroma	63.605	0,13%
96	İleri	63.200	0,13%
97	Özbulut	63.103	0,13%
98	CazPlak	62.194	0,13%
99	Zaman	61.699	0,13%
100	OxfordYayıncılık,	60.898	0,13%
101	Safa	60.194	0,13%
102	Arzu	59.793	0,13%
103	Vural	56.181	0,12%
104	Sabah	55.479	0,12%
105	Enes	54.174	0,11%
106	Orhan	54.174	0,11%
107	N.Kılıçkını	53.873	0,11%
108	Özaklar	52.165	0,11%

DIRECTORY OF COPYRIGHTS 1994 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	Türker	45.635	0,10%
110	Mazlum	45.145	0,10%
111	Sakarya	43.641	0,09%
112	As	41.735	0,09%
113	Özfon	41.534	0,09%
114	Çetinkaya	41.133	0,09%
115	ABC	40.756	0,09%
116	AjansÇehre	40.129	0,08%
117	Polo	40.129	0,08%
118	Bayar	38.123	0,08%
119	Metropol	37.621	0,08%
120	Özlem	37.116	0,08%
121	Devsan	35.515	0,08%
122	Azim	34.612	0,07%
123	2000Müzik	33.107	0,07%
124	Senseç	33.107	0,07%
125	Sitran	33.107	0,07%
126	Gökalp	32.921	0,07%
127	Yonca	32.906	0,07%
128	Gonca	32.304	0,07%
129	ÇokSesli	31.602	0,07%
130	Klip	31.602	0,07%
131	Anılar	31.401	0,07%
132	Deniz	31.397	0,07%
133	AFSYayıncılık	30.298	0,06%
134	Cihan	30.097	0,06%
135	Sefa	30.097	0,06%
136	Umut	30.097	0,06%
137	Simge	28.370	0,06%
138	Şölen	25.783	0,05%
139	Renk	25.081	0,05%
140	Özkan	24.981	0,05%
141	YeniDünya	24.379	0,05%
142	Diskotür	24.078	0,05%
143	MüzikMarket	24.078	0,05%
144	EkenMüzik	23.075	0,05%
145	Pınar	23.075	0,05%
146	Engin	22.071	0,05%
147	Roleks	22.071	0,05%
148	Hades	20.864	0,04%
149	Bahar	20.667	0,04%
150	Balet	20.453	0,04%
151	Yavuz	20.159	0,04%
152	Damla	20.065	0,04%
153	Disco	20.065	0,04%
154	Hisar	20.065	0,04%
155	Piccatura	20.062	0,04%
156	Özgüler	19.463	0,04%
157	Aygün	19.062	0,04%
158	Kanbay	19.062	0,04%
159	Güvercin	18.858	0,04%
160	İpekYolu	18.560	0,04%
161	İzmir	18.259	0,04%
162	Alpdoğan	18.058	0,04%
163	Dünya	18.058	0,04%
164	Koçer	18.058	0,04%
165	Elmas	17.557	0,04%

DIRECTORY OF COPYRIGHTS 1994 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	Filiz	17.055	0,04%
167	Günel	17.055	0,04%
168	Atakan	16.052	0,03%
169	Inan	16.052	0,03%
170	Şafak	16.052	0,03%
171	Ortadoğu	16.049	0,03%
172	Osmanlı	15.651	0,03%
173	Sayan	15.550	0,03%
174	Akgün	15.049	0,03%
175	Canan	15.049	0,03%
176	Cem	15.049	0,03%
177	Kamaval	15.049	0,03%
178	Motif	15.049	0,03%
179	Saltuk	15.049	0,03%
180	SunuReklam	15.049	0,03%
181	Şan	15.049	0,03%
182	Hammer	14.337	0,03%
183	Gold	14.046	0,03%
184	Tavaslı	14.046	0,03%
185	Teknik	14.046	0,03%
186	Uzunca	14.046	0,03%
187	Jet	13.845	0,03%
188	Hafiz	13.042	0,03%
189	SevraPlak	13.042	0,03%
190	Yalçın	13.042	0,03%
191	Durubey	12.842	0,03%
192	Erol	12.641	0,03%
193	Aytaşı	12.039	0,03%
194	Gülüm	12.039	0,03%
195	Plaksan	12.039	0,03%
196	SerkanTicaret	12.039	0,03%
197	Sedef	11.059	0,02%
198	KırmızıMüzik	11.036	0,02%
199	Özgür	11.036	0,02%
200	Topkapı	10.860	0,02%
201	Şenol	10.735	0,02%
202	Kunuz	10.033	0,02%
203	Öncü	10.033	0,02%
204	Özyalçın	10.033	0,02%
205	Ufuk	9.732	0,02%
206	Önal	9.330	0,02%
207	Şahin	9.330	0,02%
208	Çağdaş	8.923	0,02%
209	Meis	8.729	0,02%
210	Çokran	8.227	0,02%
211	Erkam	8.026	0,02%
212	GiritMüzik	8.026	0,02%
213	Candost	7.525	0,02%
214	Reca	7.525	0,02%
215	Seiko	7.525	0,02%
216	YeniAsya	7.525	0,02%
217	ÖmerUmar	7.239	0,02%
218	Doruk	6.923	0,01%
219	Kıtsan	6.822	0,01%
220	Anadolu	6.020	0,01%
221	Beşler	6.020	0,01%
222	Kamel	6.020	0,01%

DIRECTORY OF COPYRIGHTS 1994 SEAL SALES

RANK	FIRM	UNITS	SHARE
223	Kaynak	6.020	0,01%
224	MedeniUçar	6.020	0,01%
225	Adım	5.518	0,01%
226	AskeriMüze	5.017	0,01%
227	Deksan	5.017	0,01%
228	Doğu	5.017	0,01%
229	Ezgi	5.017	0,01%
230	Karaca	5.017	0,01%
231	Koç	5.017	0,01%
232	Marmara	5.017	0,01%
233	NaciEray	5.017	0,01%
234	PakZarf	5.017	0,01%
235	Rahmet	5.017	0,01%
236	Sarp	5.017	0,01%
237	Sera	5.017	0,01%
238	Sevkan	5.017	0,01%
239	TRTGenelMüdürlüğü	5.017	0,01%
240	Uçak	5.017	0,01%
241	Yankı	5.017	0,01%
242	Çetiner	4.615	0,01%
243	ÇocukVakfi	4.565	0,01%
244	MetroAlisveris	4.114	0,01%
245	M.Ü.İlahiyat	4.013	0,01%
246	Yıldızlar	4.013	0,01%
247	İncilay	4.012	0,01%
248	Milletlerarası	3.917	0,01%
249	Göksel	3.411	0,01%
250	Güner	3.010	0,01%
251	HasKoop	3.010	0,01%
252	Nurtaç	3.010	0,01%
253	SeyraPlak	3.010	0,01%
254	Şenay	3.010	0,01%
255	Türkmen	3.010	0,01%
256	HedefPlak	2.107	0,00%
257	AhenkAjans	2.007	0,00%
258	AksoyTunç	2.007	0,00%
259	Cinan	2.007	0,00%
260	Ferhat	2.007	0,00%
261	Gözde	2.007	0,00%
262	Gözlem	2.007	0,00%
263	Öz	2.007	0,00%
264	Elif	1.856	0,00%
265	Karun	1.139	0,00%
266	Buket	1.004	0,00%
267	Destebaşılar	1.004	0,00%
268	İnkilab	1.004	0,00%
269	Koçak	1.004	0,00%
270	Altınses	1.000	0,00%
271	Nokta	1.000	0,00%
272	SaxonPress	903	0,00%
273	VideoExport	250	0,00%

DIRECTORY OF COPYRIGHTS 1995 SEAL SALES

HHI:	906,01	1995
CR4:	36,12	
CR8:	44,56	
		ALBUM SALES

RANK	FIRM	UNITS	SHARE
1	RaksGroup	11.390.313	28,88%
2	Ulus	998.053	2,53%
3	Özer	932.514	2,36%
4	İstanbul	923.583	2,34%
5	EmreGrafson	902.010	2,29%
6	PrestijGroup	857.727	2,17%
7	Elenor	803.726	2,04%
8	Kervan	764.574	1,94%
9	Peker	628.307	1,59%
10	Ferdifon	617.763	1,57%
11	Duygu	551.967	1,40%
12	Ozan	513.333	1,30%
13	Kent	493.047	1,25%
14	Akbaş	475.859	1,21%
15	Özdemir	456.449	1,16%
16	Klip	446.856	1,13%
17	NazMüzik	420.784	1,07%
18	Sony	418.420	1,06%
19	Aziz	396.958	1,01%
20	A.S.M.	389.943	0,99%
21	Ada	384.469	0,97%
22	Çakır	352.636	0,89%
23	Harika	338.905	0,86%
24	Bay	322.315	0,82%
25	Uzelli	320.734	0,81%
26	BMG	319.708	0,81%
27	Topkapı	316.685	0,80%
28	Selçuklu	310.177	0,79%
29	Ses	300.882	0,76%
30	Erdal	291.616	0,74%
31	Göksoy	289.507	0,73%
32	Mert	287.694	0,73%
33	Nil	285.957	0,73%
34	Müziksan	277.363	0,70%
35	Berakat	273.832	0,69%
36	Mega	272.704	0,69%
37	Uçar	271.490	0,69%
38	Kazan	268.971	0,68%
39	Güney	249.884	0,63%
40	Levent	244.471	0,62%
41	Banş	223.299	0,57%
42	Ercan	219.343	0,56%
43	Aydın	207.873	0,53%
44	Güneş	202.521	0,51%
45	Koda	197.444	0,50%
46	Kekeva	183.122	0,46%
47	Kalan	177.758	0,45%
48	Dilan	176.829	0,45%
49	Karadeniz	174.405	0,44%
50	YapıKredi	173.628	0,44%
51	Diyanet	167.482	0,42%

DIRECTORY OF COPYRIGHTS 1995 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	Bey	159.631	0,40%
53	Özpınar	157.327	0,40%
54	Fono	156.568	0,40%
55	Komedi	149.442	0,38%
56	Lider	137.369	0,35%
57	Uras	136.263	0,35%
58	Erkam	129.035	0,33%
59	Özbulut	128.327	0,33%
60	Baysu	126.475	0,32%
61	Balet	124.708	0,32%
62	Devsan	124.265	0,32%
63	Uğur	111.650	0,28%
64	Ankara	111.150	0,28%
65	Kalite	109.252	0,28%
66	Çağdaş	104.779	0,27%
67	Sıla	104.077	0,26%
68	Coşkun	101.720	0,26%
69	2000Müzik	101.045	0,26%
70	Anadolu	96.972	0,25%
71	Şah	93.770	0,24%
72	N.Kılıçkını	92.848	0,24%
73	Major	91.941	0,23%
74	Deniz	89.873	0,23%
75	Görsev	89.627	0,23%
76	Senseç	88.213	0,22%
77	Armoni	84.362	0,21%
78	Okey	82.365	0,21%
79	2019	80.836	0,20%
80	Erkan	80.331	0,20%
81	Bayar	79.774	0,20%
82	Hamle	78.815	0,20%
83	Asır	76.795	0,19%
84	Özdiyar	72.753	0,18%
85	Aykut	72.711	0,18%
86	Vural	71.237	0,18%
87	OxfordYayıncılık,	70.732	0,18%
88	Enes	67.700	0,17%
89	Çetinkaya	65.680	0,17%
90	Gülüm	65.669	0,17%
91	Altınses	65.153	0,17%
92	Atakan	64.669	0,16%
93	Net	64.052	0,16%
94	İhlas	63.659	0,16%
95	Çaçan	63.138	0,16%
96	Taç	62.782	0,16%
97	Banko	61.627	0,16%
98	Teknik	60.627	0,15%
99	ABC	60.274	0,15%
100	Çağ	60.072	0,15%
101	Ortadoğu	59.706	0,15%
102	Dünya	56.586	0,14%
103	İmece	56.512	0,14%
104	Umut	56.383	0,14%
105	Yıldırım	54.219	0,14%
106	Gonca	54.059	0,14%
107	Güner	52.544	0,13%
108	Sembol	52.512	0,13%

DIRECTORY OF COPYRIGHTS 1995 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	Türküola	51.700	0,13%
110	Promiks	51.533	0,13%
111	Azim	50.523	0,13%
112	Metropol	50.523	0,13%
113	Ayço	49.560	0,13%
114	Şafak	49.512	0,13%
115	Akbulut	48.502	0,12%
116	Jet	48.500	0,12%
117	Öz	46.481	0,12%
118	Safa	46.481	0,12%
119	Orhan	45.771	0,12%
120	Giz	45.471	0,12%
121	Modem	45.471	0,12%
122	Polo	45.471	0,12%
123	Piccaturo	44.929	0,11%
124	Özlem	43.450	0,11%
125	Saltuk	42.022	0,11%
126	Aklar	41.618	0,11%
127	Asya	40.418	0,10%
128	Özyalçın	40.418	0,10%
129	RastNey	40.418	0,10%
130	Uçak	37.387	0,09%
131	Ezgi	36.882	0,09%
132	Yavuz	34.819	0,09%
133	Öncü	34.760	0,09%
134	Arzu	33.345	0,08%
135	Filiz	33.345	0,08%
136	Motif	33.345	0,08%
137	YavuzBurç	33.345	0,08%
138	Aras	33.156	0,08%
139	Akgün	32.335	0,08%
140	Türker	31.714	0,08%
141	Servet	31.324	0,08%
142	Cihan	30.516	0,08%
143	Damla	30.314	0,08%
144	Marmara	30.314	0,08%
145	Şölen	30.314	0,08%
146	Hades	28.257	0,07%
147	MedeniUçar	27.783	0,07%
148	Sedef	26.288	0,07%
149	Diskotür	26.241	0,07%
150	Seda	26.070	0,07%
151	As	25.666	0,07%
152	Kanbay	25.262	0,06%
153	YeniAsya	24.756	0,06%
154	Özbird	24.251	0,06%
155	Zaman	24.251	0,06%
156	İzmir	23.645	0,06%
157	Berkay	23.209	0,06%
158	Hammer	23.178	0,06%
159	Yonca	22.760	0,06%
160	Çetiner	22.230	0,06%
161	EkenMüzik	22.230	0,06%
162	AhenkAjans	21.220	0,05%
163	Sitran	21.220	0,05%
164	Durubey	21.007	0,05%
165	Ekol	20.209	0,05%

DIRECTORY OF COPYRIGHTS 1995 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	Özbek	20.209	0,05%
167	Sözler	20.209	0,05%
168	Yankı	20.209	0,05%
169	Cinan	19.199	0,05%
170	Özgür	18.694	0,05%
171	ÇokSesli	18.239	0,05%
172	Ar-can	18.189	0,05%
173	Aytaşı	18.189	0,05%
174	Disco	18.189	0,05%
175	Koç	18.189	0,05%
176	Güniz	18.157	0,05%
177	ÖzdemirErdogan	18.055	0,05%
178	Diyar	17.784	0,05%
179	Gökalp	17.276	0,04%
180	Buket	17.178	0,04%
181	Hisar	16.673	0,04%
182	Gürdil	16.157	0,04%
183	Özgüler	15.763	0,04%
184	İnan	15.561	0,04%
185	Çapan	15.157	0,04%
186	Sözdemir	15.157	0,04%
187	Şura	15.157	0,04%
188	Gold	14.636	0,04%
189	Hülya	14.147	0,04%
190	Koçer	14.147	0,04%
191	Güvercin	13.945	0,04%
192	Sakarya	13.642	0,03%
193	Trikont	13.626	0,03%
194	Gökhan	13.136	0,03%
195	IpekYolu	13.136	0,03%
196	Sayan	13.136	0,03%
197	Aygün	12.126	0,03%
198	Çorluk	12.126	0,03%
199	Engin	12.126	0,03%
200	Menekşe	12.126	0,03%
201	SeyhanMüzik	12.126	0,03%
202	Akalın	11.722	0,03%
203	Hafız	11.520	0,03%
204	Alpdoğan	11.115	0,03%
205	İnterMüzik	11.105	0,03%
206	AnıtKabirDerneği	10.105	0,03%
207	ElitTurizm	10.105	0,03%
208	Erol	10.105	0,03%
209	Karaca	10.105	0,03%
210	MüzikMarket	10.105	0,03%
211	SeçimMüzik	10.105	0,03%
212	SelamGazetesi	10.105	0,03%
213	Sevilen	10.105	0,03%
214	TunaKitap	10.105	0,03%
215	Turtas	10.105	0,03%
216	MetroAlisveris	10.046	0,03%
217	Kitsan	9.701	0,02%
218	Adım	9.600	0,02%
219	Özfon	8.084	0,02%
220	Şahin	8.084	0,02%
221	Şenay	8.084	0,02%
222	Osmanlı	7.276	0,02%

DIRECTORY OF COPYRIGHTS 1995 SEAL SALES

RANK	FIRM	UNITS	SHARE
223	Bağlan	7.074	0,02%
224	Çağrı	7.074	0,02%
225	Özsah	7.074	0,02%
226	Ufuk	7.074	0,02%
227	Şan	7.063	0,02%
228	Çokran	5.861	0,01%
229	Seiko	5.760	0,01%
230	Roleks	5.558	0,01%
231	Önal	5.356	0,01%
232	YeniDünya	5.255	0,01%
233	Bahar	5.053	0,01%
234	ÇizgiMüzik	5.053	0,01%
235	Feza	5.053	0,01%
236	Mazlum	5.053	0,01%
237	PakZarf	5.053	0,01%
238	Pandora	5.053	0,01%
239	Türkmen	5.053	0,01%
240	Öztürk	4.548	0,01%
241	Elif	4.042	0,01%
242	Flaş	4.042	0,01%
243	Karaal	4.042	0,01%
244	Panaroma	4.042	0,01%
245	Yılmaz	4.042	0,01%
246	Doruk	3.739	0,01%
247	CazPlak	3.537	0,01%
248	Anahtar	3.335	0,01%
249	Bölük	3.032	0,01%
250	Kaya	3.032	0,01%
251	NaciEray	3.032	0,01%
252	Orfa	3.032	0,01%
253	Özbaranİnsaat	3.032	0,01%
254	Tevhid	3.032	0,01%
255	Destebaşılar	2.628	0,01%
256	AFSYayıncılık	2.527	0,01%
257	Karun	2.381	0,01%
258	ÇocukVakfi	2.173	0,01%
259	Kubbealtı	2.122	0,01%
260	Akkaya	2.021	0,01%
261	Gözlem	2.000	0,01%
262	Şenol	1.819	0,00%
263	ÖmerUmar	1.800	0,00%
264	BirNumara	1.511	0,00%
265	AskeriMüze	1.050	0,00%
266	Boyut	1.011	0,00%
267	Ferhat	1.011	0,00%
268	HedefPlak	1.011	0,00%
269	Pınar	1.011	0,00%
270	UmarProd.	1.006	0,00%
271	Türtasİnsaat	1.000	0,00%
272	SaxonPress	809	0,00%
273	Odeon	667	0,00%
274	MüjdeYayın	438	0,00%
275	Zümrüt	405	0,00%
276	VakkoTekstil	374	0,00%
277	Plaksan	300	0,00%

DIRECTORY OF COPYRIGHTS 1996 SEAL SALES

HHI:	709,24	1996
CR4:	38,87	
CR8:	46,78	
		ALBUM SALES

RANK	FIRM	UNITS	SHARE
1	RaksGroup	11.286.614	24,20%
2	PrestijGroup	2.549.993	5,47%
3	Özer	2.389.821	5,13%
4	Levent	1.897.194	4,07%
5	Ulus	1.426.076	3,06%
6	Akbaş	766.513	1,64%
7	Elenor	761.463	1,63%
8	Kervan	735.711	1,58%
9	Ferdifon	700.364	1,50%
10	Çaçan	647.345	1,39%
11	Aziz	604.525	1,30%
12	Öz	582.812	1,25%
13	Nil	533.731	1,14%
14	Ada	518.280	1,11%
15	Çakır	469.805	1,01%
16	Özdemir	462.937	0,99%
17	Koda	449.405	0,96%
18	Klip	445.870	0,96%
19	Erdal	436.276	0,94%
20	Harika	426.985	0,92%
21	Peker	422.138	0,91%
22	Aydın	414.058	0,89%
23	A.S.M.	394.264	0,85%
24	Ses	389.518	0,84%
25	Okey	389.417	0,84%
26	EmreGrafson	384.771	0,83%
27	Duygu	383.761	0,82%
28	BMG	370.936	0,80%
29	Banş	351.445	0,75%
30	Banko	348.415	0,75%
31	Kekeva	343.366	0,74%
32	Uzelli	338.316	0,73%
33	Topkapı	323.370	0,69%
34	Sony	320.643	0,69%
35	Berakat	319.936	0,69%
36	Kalan	316.098	0,68%
37	Diyar	308.272	0,66%
38	İstanbul	289.639	0,62%
39	Bey	273.733	0,59%
40	Selçuklu	272.673	0,58%
41	Özpınar	266.108	0,57%
42	Tutku	259.292	0,56%
43	Kent	258.736	0,55%
44	Güneş	256.514	0,55%
45	Karadeniz	254.899	0,55%
46	Ercan	247.425	0,53%
47	Çağdaş	242.780	0,52%
48	Mert	232.277	0,50%
49	Kazan	225.410	0,48%
50	Göksoy	217.330	0,47%
51	Şah	212.584	0,46%

DIRECTORY OF COPYRIGHTS 1996 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	Balet	210.019	0,45%
53	Erkan	204.000	0,44%
54	Lirik	181.782	0,39%
55	Sıla	174.208	0,37%
56	Sözler	166.634	0,36%
57	Uçar	154.515	0,33%
58	Promiks	149.869	0,32%
59	Spotek	148.455	0,32%
60	Umut	147.950	0,32%
61	Armoni	146.436	0,31%
62	Mega	144.315	0,31%
63	Bay	140.679	0,30%
64	Çetinkaya	133.307	0,29%
65	Günalp	129.267	0,28%
66	Teknik	121.188	0,26%
67	Fono	117.149	0,25%
68	Damla	116.896	0,25%
69	RastNey	116.139	0,25%
70	Özbulut	115.937	0,25%
71	Liberal	111.089	0,24%
72	Senseç	105.030	0,23%
73	Özdiyar	102.758	0,22%
74	N.Kılıçkını	102.101	0,22%
75	Ajansmesnevi	100.990	0,22%
76	Emrah	100.990	0,22%
77	Şafak	99.980	0,21%
78	Görsev	96.951	0,21%
79	Net	96.749	0,21%
80	Dilan	95.941	0,21%
81	Asya	91.396	0,20%
82	Karaca	91.144	0,20%
83	Komedi	90.891	0,19%
84	Atakan	89.881	0,19%
85	ÖzdemirErdogan	86.448	0,19%
86	Aykut	84.428	0,18%
87	Özbir	83.822	0,18%
88	Özyalçın	82.812	0,18%
89	Vural	81.802	0,18%
90	Atlantis	80.792	0,17%
91	Azim	80.287	0,17%
92	Yalçın	78.772	0,17%
93	Taç	76.955	0,17%
94	Dünya	76.753	0,16%
95	YavuzBurç	76.753	0,16%
96	Devsan	75.743	0,16%
97	Silvana	75.743	0,16%
98	Kalite	74.935	0,16%
99	Pınar	73.521	0,16%
100	Coşkun	68.976	0,15%
101	Major	68.674	0,15%
102	Deniz	65.644	0,14%
103	Bayar	65.139	0,14%
104	Trikont	64.432	0,14%
105	Gonca	63.321	0,14%
106	Şenay	62.614	0,13%
107	Anadolu	61.604	0,13%
108	İnan	61.099	0,13%

DIRECTORY OF COPYRIGHTS 1996 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	İhlas	57.565	0,12%
110	Uras	57.565	0,12%
111	2019	55.545	0,12%
112	Türker	55.040	0,12%
113	Türküola	55.040	0,12%
114	tekinalp	50.495	0,11%
115	Motif	47.668	0,10%
116	Bahar	47.466	0,10%
117	Sembol	47.466	0,10%
118	Akgün	46.866	0,10%
119	Buket	46.153	0,10%
120	Altıntaş	45.446	0,10%
121	Klas	45.446	0,10%
122	Akbulut	44.941	0,10%
123	Sözdemir	44.638	0,10%
124	Sefa	43.426	0,09%
125	Gökhan	42.416	0,09%
126	tekbir	42.416	0,09%
127	Dia	41.608	0,09%
128	Çağ	40.497	0,09%
129	Ozan	40.396	0,09%
130	Modem	39.134	0,08%
131	Özlem	38.377	0,08%
132	Sedef	37.165	0,08%
133	Asır	35.852	0,08%
134	Zaman	35.347	0,08%
135	Enes	34.337	0,07%
136	Çınar	32.317	0,07%
137	Kanbay	32.317	0,07%
138	Posta	30.297	0,06%
139	Sağlam	30.297	0,06%
140	Vizyon	30.297	0,06%
141	Arzu	29.288	0,06%
142	Menekşe	28.278	0,06%
143	Ezgi	28.177	0,06%
144	Çetiner	26.662	0,06%
145	İzmir	26.662	0,06%
146	Jet	26.258	0,06%
147	Metropol	26.258	0,06%
148	YeniAsya	26.258	0,06%
149	Güney	25.652	0,06%
150	Kaya	25.248	0,05%
151	Şölen	24.440	0,05%
152	Cinan	24.238	0,05%
153	Elif	24.238	0,05%
154	Koçer	24.238	0,05%
155	Ortadoğu	23.228	0,05%
156	Sakarya	23.228	0,05%
157	Erol	22.824	0,05%
158	Tevhid	22.420	0,05%
159	Aytaşı	21.814	0,05%
160	Diskotür	21.006	0,05%
161	Gürdil	20.703	0,04%
162	Cihan	20.602	0,04%
163	Arkalın	20.198	0,04%
164	Engin	20.198	0,04%
165	Güniz	20.198	0,04%

DIRECTORY OF COPYRIGHTS 1996 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	Uğur	20.198	0,04%
167	İmece	19.492	0,04%
168	Orhan	19.189	0,04%
169	Piccatara	19.189	0,04%
170	Şura	19.189	0,04%
171	AksoyTunç	18.179	0,04%
172	Hisar	18.179	0,04%
173	Önal	18.179	0,04%
174	MüzikMarket	17.371	0,04%
175	Epik	16.866	0,04%
176	Ferhat	16.159	0,03%
177	sinetel	16.159	0,03%
178	Hammer	15.351	0,03%
179	Durubey	15.149	0,03%
180	IpekYolu	15.149	0,03%
181	Kros	15.149	0,03%
182	Yankı	15.149	0,03%
183	As	14.341	0,03%
184	CazPlak	14.139	0,03%
185	Özgüler	14.139	0,03%
186	SeyhanMüzik	14.139	0,03%
187	Saltuk	13.533	0,03%
188	AhmetŞenyüz	13.331	0,03%
189	ABC	13.129	0,03%
190	Alpdoğan	13.129	0,03%
191	Beste	13.129	0,03%
192	Bölük	13.129	0,03%
193	Disco	13.129	0,03%
194	Osmanlı	12.523	0,03%
195	Yıldırım	12.523	0,03%
196	Akalın	12.119	0,03%
197	Kaynak	12.119	0,03%
198	Üçel	12.119	0,03%
199	Çokran	11.917	0,03%
200	Çağrı	11.109	0,02%
201	Sayan	10.907	0,02%
202	Roleks	10.604	0,02%
203	Yonca	10.402	0,02%
204	Hades	10.301	0,02%
205	Bastem	10.099	0,02%
206	Kocaman	10.099	0,02%
207	nuray	10.099	0,02%
208	Orfa	10.099	0,02%
209	Pandora	10.099	0,02%
210	Polo	10.099	0,02%
211	Tan	10.099	0,02%
212	Türkmen	10.099	0,02%
213	Yıldızlar	10.099	0,02%
214	Öncü	9.494	0,02%
215	Bayram	9.090	0,02%
216	Güvercin	8.888	0,02%
217	AhenkAjans	8.080	0,02%
218	Garip	8.080	0,02%
219	Kamel	8.080	0,02%
220	Seiko	8.080	0,02%
221	Giz	7.070	0,02%
222	Marmara	7.070	0,02%

DIRECTORY OF COPYRIGHTS 1996 SEAL SALES

RANK	FIRM	UNITS	SHARE
223	Murat	7.070	0,02%
224	Savaş	7.070	0,02%
225	serdar	7.070	0,02%
226	TunaKitap	7.070	0,02%
227	Ayço	6.666	0,01%
228	Gülüm	6.060	0,01%
229	Hamle	6.060	0,01%
230	Özgür	5.656	0,01%
231	NaciEray	5.555	0,01%
232	YapıKredi	5.555	0,01%
233	Doruk	5.252	0,01%
234	Uzunca	5.252	0,01%
235	Altınses	5.050	0,01%
236	Arca	5.050	0,01%
237	Aygün	5.050	0,01%
238	Boyut	5.050	0,01%
239	Feza	5.050	0,01%
240	Filiz	5.050	0,01%
241	Gölge	5.050	0,01%
242	İslamoğlu	5.050	0,01%
243	Karaal	5.050	0,01%
244	Koç	5.050	0,01%
245	Mitra	5.050	0,01%
246	Müzikotek	5.050	0,01%
247	Özfon	5.050	0,01%
248	PakZarf	5.050	0,01%
249	SesliKitaplar	5.050	0,01%
250	Sindoma	5.050	0,01%
251	Soner	5.050	0,01%
252	Yılmaz	5.050	0,01%
253	Kıtsan	4.848	0,01%
254	Destebaşılar	4.646	0,01%
255	Ekol	4.293	0,01%
256	Şenol	4.040	0,01%
257	YeniDünya	3.636	0,01%
258	Seda	3.232	0,01%
259	Candost	3.030	0,01%
260	Hafiz	3.030	0,01%
261	Kanneci	3.030	0,01%
262	laylaylom	3.030	0,01%
263	Mer	3.030	0,01%
264	Servet	3.030	0,01%
265	sezgi	3.030	0,01%
266	YeniStratejiler	2.626	0,01%
267	Gözlem	2.020	0,00%
268	Koçak	2.020	0,00%
269	Pegasus	2.020	0,00%
270	Sağıroğlu	2.020	0,00%
271	Uçak	2.020	0,00%
272	Meis	1.616	0,00%
273	Yavuz	1.616	0,00%
274	ÖzenPlak	1.515	0,00%
275	borluk	1.212	0,00%
276	Akdoğan	1.010	0,00%
277	Kom	1.010	0,00%
278	Şahin	1.010	0,00%
279	Çorluk	808	0,00%

DIRECTORY OF COPYRIGHTS 1997 SEAL SALES

HHI:	371,69	1997
CR4:	29,09	
CR8:	38,65	

RANK	FIRM	UNITS	SHARE
1	RaksGroup	8.217.656	15,23%
2	PrestijGroup	3.359.618	6,23%
3	İstanbul	2.565.042	4,75%
4	Levent	1.556.655	2,88%
5	Ulus	1.533.091	2,84%
6	Bay	1.322.842	2,45%
7	Akbaş	1.170.288	2,17%
8	Özer	1.132.147	2,10%
9	Peker	1.025.084	1,90%
10	Elenor	1.005.375	1,86%
11	Koda	988.557	1,83%
12	Klip	892.475	1,65%
13	Ada	785.932	1,46%
14	Dünya	762.467	1,41%
15	Topkapı	735.619	1,36%
16	BMG	665.480	1,23%
17	Ferdifon	646.703	1,20%
18	Aziz	618.481	1,15%
19	Ses	605.831	1,12%
20	Aydın	568.647	1,05%
21	Tutku	561.628	1,04%
22	Kervan	532.092	0,99%
23	Güneş	531.251	0,98%
24	Kalan	530.395	0,98%
25	EmreGrafson	528.160	0,98%
26	Duygu	522.220	0,97%
27	Barış	501.258	0,93%
28	Harika	465.271	0,86%
29	Sıla	447.799	0,83%
30	Mert	442.181	0,82%
31	Komedi	429.453	0,80%
32	Öz	424.375	0,79%
33	Nil	408.463	0,76%
34	Okey	406.548	0,75%
35	Özdemir	393.846	0,73%
36	Ozan	360.402	0,67%
37	Özpınar	353.202	0,65%
38	Kazan	347.491	0,64%
39	Selçuklu	318.856	0,59%
40	Sony	305.572	0,57%
41	Vizyon	295.336	0,55%
42	Major	294.871	0,55%
43	Ercan	287.326	0,53%
44	A.S.M.	283.207	0,52%
45	Pınar	280.319	0,52%
46	Görsev	277.316	0,51%
47	Erkam	271.809	0,50%
48	Erdal	266.603	0,49%
49	Çakır	261.096	0,48%
50	Berakat	253.288	0,47%
51	Dilan	252.287	0,47%

DIRECTORY OF COPYRIGHTS 1997 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	Karadeniz	251.283	0,47%
53	Bastem	242.276	0,45%
54	Bayar	235.760	0,44%
55	İmaj	230.229	0,43%
56	Kent	223.842	0,41%
57	Çağdaş	212.538	0,39%
58	Uzelli	206.793	0,38%
59	Silvana	188.615	0,35%
60	Diyanet	183.209	0,34%
61	TEkspres	183.205	0,34%
62	Yalçın	181.206	0,34%
63	Şah	174.198	0,32%
64	Kekeva	171.434	0,32%
65	Günalp	165.989	0,31%
66	Umut	164.570	0,30%
67	Sedef	162.159	0,30%
68	Şafak	158.179	0,29%
69	Çınar	156.426	0,29%
70	Özdiyar	152.170	0,28%
71	Lirik	152.160	0,28%
72	Asya	151.670	0,28%
73	İhlas	145.666	0,27%
74	Promiks	145.665	0,27%
75	Taç	142.756	0,26%
76	Trikont	141.507	0,26%
77	Azim	133.152	0,25%
78	Teknik	133.152	0,25%
79	Coşkun	132.619	0,25%
80	Bey	126.743	0,23%
81	Spotek	122.630	0,23%
82	Lider	120.928	0,22%
83	Vural	120.137	0,22%
84	Atlantis	118.631	0,22%
85	Göksoy	116.506	0,22%
86	Aşanlar	116.131	0,22%
87	Kom	113.921	0,21%
88	Gözyaşı	112.128	0,21%
89	RastNey	110.126	0,20%
90	Asır	106.212	0,20%
91	Senseç	103.568	0,19%
92	Kılıç	103.118	0,19%
93	Özbulut	99.914	0,19%
94	Klas	99.113	0,18%
95	Anadolu	93.506	0,17%
96	Mega	92.827	0,17%
97	Aykut	88.701	0,16%
98	Kalite	84.180	0,16%
99	Anılar	82.094	0,15%
100	Çaçan	81.086	0,15%
101	Posta	79.086	0,15%
102	N.Kılıçkını	78.587	0,15%
103	Çetiner	76.688	0,14%
104	Çetinkaya	75.085	0,14%
105	Sentez	75.080	0,14%
106	Çağ	74.485	0,14%
107	Gonca	70.881	0,13%
108	Kaya	70.581	0,13%

DIRECTORY OF COPYRIGHTS 1997 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	Soner	70.080	0,13%
110	Enes	68.078	0,13%
111	Devsan	68.076	0,13%
112	Karaca	65.074	0,12%
113	As	64.073	0,12%
114	Metropol	61.169	0,11%
115	Bİİa	60.069	0,11%
116	Koçer	60.069	0,11%
117	Türküola	59.557	0,11%
118	Müzikotek	58.057	0,11%
119	Güner	57.065	0,11%
120	Hisar	57.065	0,11%
121	Plaksan	56.055	0,10%
122	Armoni	55.062	0,10%
123	Ortadoğu	54.758	0,10%
124	Fırat	54.062	0,10%
125	Uras	54.062	0,10%
126	Alpdoğan	54.059	0,10%
127	İber	54.059	0,10%
128	Ayço	53.456	0,10%
129	Motif	52.659	0,10%
130	Alışan	52.460	0,10%
131	Altıntaş	51.859	0,10%
132	Emrah	51.036	0,09%
133	YavuzBurç	50.651	0,09%
134	Bayram	50.057	0,09%
135	Şenol	50.057	0,09%
136	YapıKredi	49.446	0,09%
137	Damla	48.055	0,09%
138	Elif	47.805	0,09%
139	Deniz	47.554	0,09%
140	Çorluk	46.654	0,09%
141	AhenkAjans	46.051	0,09%
142	Net	45.148	0,08%
143	Tümer	45.040	0,08%
144	ÖzdemirErdogan	43.442	0,08%
145	Şölen	43.044	0,08%
146	Akgün	42.799	0,08%
147	İzmir	42.399	0,08%
148	Cihan	41.547	0,08%
149	Fono	41.537	0,08%
150	CDVSTK	40.046	0,07%
151	Modem	40.046	0,07%
152	Atakan	37.043	0,07%
153	Enter	36.537	0,07%
154	Servet	36.041	0,07%
155	Geçit	36.040	0,07%
156	Safa	35.040	0,06%
157	Şenay	35.040	0,06%
158	Saltuk	34.339	0,06%
159	Segah	34.039	0,06%
160	Bahar	32.037	0,06%
161	Özgüler	32.037	0,06%
162	Cinan	30.035	0,06%
163	MüzikMarket	29.233	0,05%
164	İcmal	29.031	0,05%
165	Jet	28.631	0,05%

DIRECTORY OF COPYRIGHTS 1997 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	İmece	28.526	0,05%
167	Üçel	28.433	0,05%
168	YeniDünya	28.430	0,05%
169	Güvercin	27.829	0,05%
170	Platin	26.029	0,05%
171	Diskotür	25.327	0,05%
172	Piya	25.029	0,05%
173	Uzunca	24.829	0,05%
174	Balet	23.720	0,04%
175	Buket	23.527	0,04%
176	Orhan	23.027	0,04%
177	Esmâ	23.023	0,04%
178	Beğeni	22.026	0,04%
179	Menekşe	22.026	0,04%
180	Diaganol	21.123	0,04%
181	Polo	21.024	0,04%
182	AjansA.Filim	20.023	0,04%
183	Aysel	20.023	0,04%
184	Düzgit	20.023	0,04%
185	İnan	20.023	0,04%
186	Özbek	20.023	0,04%
187	Özbir	20.023	0,04%
188	Şura	20.023	0,04%
189	Uçar	20.023	0,04%
190	Aygün	19.022	0,04%
191	Sakarya	19.022	0,04%
192	Sözler	19.022	0,04%
193	Cemre	19.012	0,04%
194	Arzu	18.622	0,03%
195	Hades	18.421	0,03%
196	Aytaşı	18.021	0,03%
197	Ekol	17.821	0,03%
198	Özgür	17.120	0,03%
199	Ezgi	16.519	0,03%
200	Tevhid	16.019	0,03%
201	Divan	16.018	0,03%
202	Tan	16.018	0,03%
203	Berna	15.018	0,03%
204	Roleks	15.018	0,03%
205	Yıldırım	15.016	0,03%
206	Akalın	14.617	0,03%
207	Kadans	14.515	0,03%
208	Osmanlı	13.816	0,03%
209	Disco	13.015	0,02%
210	Engin	13.015	0,02%
211	Garip	13.015	0,02%
212	Genç	13.015	0,02%
213	Marmara	13.015	0,02%
214	Epik	12.965	0,02%
215	Kamel	12.815	0,02%
216	Banko	12.512	0,02%
217	Boyut	12.500	0,02%
218	Bebek	12.014	0,02%
219	Bölük	12.014	0,02%
220	Elmas	12.014	0,02%
221	İdobay	12.014	0,02%
222	Koç	12.014	0,02%

DIRECTORY OF COPYRIGHTS 1997 SEAL SALES

RANK	FIRM	UNITS	SHARE
223	Sera	12.014	0,02%
224	Tuncil	12.014	0,02%
225	Doruk	11.514	0,02%
226	Çokran	11.363	0,02%
227	İpekYolu	11.063	0,02%
228	Çizgi	11.013	0,02%
229	Uçak	11.013	0,02%
230	YeniAsya	11.013	0,02%
231	Yıldızlar	10.762	0,02%
232	Kaf	10.412	0,02%
233	Seiko	10.312	0,02%
234	Abaloğlu	10.012	0,02%
235	AhmetŞenyüz	10.012	0,02%
236	AnitkabirDemegi	10.012	0,02%
237	Berkay	10.012	0,02%
238	Can	10.012	0,02%
239	Erol	10.012	0,02%
240	Kardelen	10.012	0,02%
241	Önal	10.012	0,02%
242	Özlem	10.012	0,02%
243	Sevilen	10.012	0,02%
244	Yazgil	10.012	0,02%
245	Fidan	8.810	0,02%
246	Aras	8.208	0,02%
247	Çağrı	8.010	0,01%
248	Nüans	8.010	0,01%
249	SesliKitaplar	8.010	0,01%
250	Surat	7.509	0,01%
251	Uğur	7.509	0,01%
252	YeniStratejiler	7.509	0,01%
253	Kitsan	7.309	0,01%
254	Tavaslı	7.008	0,01%
255	Feza	6.608	0,01%
256	Durubey	6.607	0,01%
257	AskeriMüze	6.407	0,01%
258	AliAydın	6.007	0,01%
259	Çimen	6.007	0,01%
260	İncilay	6.006	0,01%
261	Ahsen	5.006	0,01%
262	Ajansmesnevi	5.006	0,01%
263	Ankara	5.006	0,01%
264	Giz	5.006	0,01%
265	Hafiz	5.006	0,01%
266	Kanbay	5.006	0,01%
267	Koçak	5.006	0,01%
268	Yelken	5.006	0,01%
269	Melki	4.956	0,01%
270	Karaal	4.205	0,01%
271	Akbulut	4.005	0,01%
272	Argovan	4.005	0,01%
273	Kunuz	4.005	0,01%
274	Öncü	4.005	0,01%
275	Dersim	3.004	0,01%
276	Gölge	3.004	0,01%
277	Mer	3.004	0,01%
278	Nihal	3.004	0,01%
279	Reca	3.004	0,01%

DIRECTORY OF COPYRIGHTS 1997 SEAL SALES

RANK	FIRM	UNITS	SHARE
280	Sađırođlu	3.004	0,01%
281	Türkmen	3.004	0,01%
282	Ufuk	3.004	0,01%
283	Ünal	3.004	0,01%
284	ÖmerUmar	2.625	0,00%
285	Kaynak	2.503	0,00%
286	Pegasus	2.403	0,00%
287	Seda	2.403	0,00%
288	Yavuz	2.100	0,00%
289	Diyar	2.003	0,00%
290	Düet	2.003	0,00%
291	Hamle	2.003	0,00%
292	Hammer	1.802	0,00%
293	Özfon	1.602	0,00%
294	Akkaya	1.502	0,00%
295	BirNumara	1.500	0,00%
296	Akser	1.402	0,00%
297	Ant	1.002	0,00%
298	GörmeÖzürlü	1.002	0,00%
299	Kule	1.002	0,00%
300	Arsel	1.000	0,00%
301	Kavala	1.000	0,00%
302	Emre	500	0,00%
303	Pozitif	500	0,00%
304	Yonca	500	0,00%
305	Nepa	401	0,00%
306	HedefPlak	300	0,00%
307	Kanneci	150	0,00%

DIRECTORY OF COPYRIGHTS 1998 SEAL SALES

HHI:	924,43	1998
CR4:	47,94	
CR8:	57,34	

ALBUM SALES

RANK	FIRM	UNITS	SHARE
1	RaksGroup	15.644.791	25,54%
2	PrestijGroup	8.216.703	13,41%
3	Ulus	3.451.046	5,63%
4	Levent	2.054.102	3,35%
5	Emrah	1.765.703	2,88%
6	İdobay	1.614.859	2,64%
7	Selçuklu	1.323.153	2,16%
8	Özer	1.055.419	1,72%
9	Sony	1.030.397	1,68%
10	Kalan	877.161	1,43%
11	Sıla	842.043	1,37%
12	Elenor	800.519	1,31%
13	İstanbul	716.414	1,17%
14	Öz	690.884	1,13%
15	Klip	685.926	1,12%
16	Komedi	671.197	1,10%
17	Ferdifon	603.464	0,99%
18	EmreGrafson	560.420	0,91%
19	Sindoma	553.448	0,90%
20	Umut	515.589	0,84%
21	Harika	489.446	0,80%
22	Ada	461.485	0,75%
23	Kent	454.420	0,74%
24	Özpınar	419.647	0,68%
25	Tutku	415.299	0,68%
26	Aydın	395.632	0,65%
27	BMG	391.420	0,64%
28	Özdemir	386.567	0,63%
29	Emir	354.625	0,58%
30	Erkam	333.274	0,54%
31	Akbaş	320.916	0,52%
32	Lirik	314.838	0,51%
33	Erdal	308.049	0,50%
34	Aziz	307.198	0,50%
35	Bay	297.046	0,48%
36	Ses	282.117	0,46%
37	Klas	279.610	0,46%
38	Bey	231.871	0,38%
39	YavuzBurç	226.964	0,37%
40	Bayar	226.864	0,37%
41	A.S.M.	222.155	0,36%
42	Peker	209.482	0,34%
43	Dilan	204.948	0,33%
44	Duygu	199.997	0,33%
45	Karadeniz	187.964	0,31%
46	Görsev	182.964	0,30%
47	Alışan	179.805	0,29%
48	Spotek	178.803	0,29%
49	Promiks	177.492	0,29%
50	Çağdaş	172.509	0,28%
51	Bastem	171.705	0,28%

DIRECTORY OF COPYRIGHTS 1998 SEAL SALES

RANK	FIRM	UNITS	SHARE
52	Güneş	169.490	0,28%
53	Kazan	167.712	0,27%
54	Kom	166.543	0,27%
55	Kervan	166.006	0,27%
56	Dünya	159.850	0,26%
57	Number1	158.280	0,26%
58	Göksoy	155.295	0,25%
59	Major	154.145	0,25%
60	Şafak	153.571	0,25%
61	Barış	146.597	0,24%
62	Çaçan	137.676	0,22%
63	İzmir	133.142	0,22%
64	Balet	128.253	0,21%
65	RastNey	123.850	0,20%
66	Silvana	121.929	0,20%
67	Akser	121.651	0,20%
68	Net	121.615	0,20%
69	Güenalp	119.150	0,19%
70	Özdiyar	115.373	0,19%
71	Azim	107.843	0,18%
72	Ozan	103.574	0,17%
73	Sedef	101.736	0,17%
74	Arya	101.651	0,17%
75	N.Kılıçkını	98.214	0,16%
76	Koda	98.205	0,16%
77	Sera	93.217	0,15%
78	Berakat	87.499	0,14%
79	Armoni	86.217	0,14%
80	Senseç	86.011	0,14%
81	Yeşil	85.190	0,14%
82	Kılıç	85.164	0,14%
83	Mert	81.087	0,13%
84	Ercan	81.079	0,13%
85	Topkapı	80.657	0,13%
86	Saltuk	78.550	0,13%
87	Türküola	77.322	0,13%
88	Gonca	75.094	0,12%
89	Fırat	74.941	0,12%
90	BirNumara	74.460	0,12%
91	İmece	72.638	0,12%
92	Ezgi	70.192	0,11%
93	Atlantis	69.924	0,11%
94	Mega	69.355	0,11%
95	Yalçın	68.294	0,11%
96	Kalite	68.277	0,11%
97	Özbulut	68.262	0,11%
98	Çetinkaya	67.536	0,11%
99	Bayer	65.741	0,11%
100	Sertaç	65.680	0,11%
101	Şahinler	63.700	0,10%
102	Metropol	62.564	0,10%
103	Türker	61.640	0,10%
104	Hades	61.329	0,10%
105	Plaksan	61.098	0,10%
106	Uğur	60.640	0,10%
107	Seda	59.009	0,10%
108	Fono	57.396	0,09%

DIRECTORY OF COPYRIGHTS 1998 SEAL SALES

RANK	FIRM	UNITS	SHARE
109	Bayram	54.529	0,09%
110	İber	54.529	0,09%
111	Koçer	53.512	0,09%
112	Coşkun	52.790	0,09%
113	Kekeva	52.517	0,09%
114	YeniDünya	51.655	0,08%
115	Aşanlar	51.477	0,08%
116	Liberal	50.460	0,08%
117	Müzikotek	50.072	0,08%
118	Asya	48.258	0,08%
119	Cinan	46.396	0,08%
120	İmaj	46.097	0,08%
121	Taç	43.810	0,07%
122	Damla	42.591	0,07%
123	Taylan	40.310	0,07%
124	Jet	40.202	0,07%
125	İhlas	40.139	0,07%
126	Arzu	39.323	0,06%
127	Özgüler	38.283	0,06%
128	Şenol	37.474	0,06%
129	Yıldırım	37.443	0,06%
130	Okey	37.352	0,06%
131	Uzelli	37.245	0,06%
132	Cemre	36.844	0,06%
133	Longman	36.764	0,06%
134	Zihni	35.398	0,06%
135	Çetiner	35.245	0,06%
136	Gözyaşı	35.245	0,06%
137	Devşan	33.711	0,06%
138	Özlem	33.222	0,05%
139	Canan	33.189	0,05%
140	Trikont	32.678	0,05%
141	Çağ	32.083	0,05%
142	Garip	31.806	0,05%
143	Asır	30.189	0,05%
144	Buket	30.189	0,05%
145	Karaca	30.189	0,05%
146	Abalıoğlu	29.684	0,05%
147	Boyut	29.654	0,05%
148	Fidan	29.262	0,05%
149	Menekşe	29.158	0,05%
150	Beşler	27.359	0,04%
151	Anadolu	27.358	0,04%
152	DMS	27.130	0,04%
153	AhenkAjans	26.148	0,04%
154	Maya	26.148	0,04%
155	İnan	25.947	0,04%
156	Emre	25.139	0,04%
157	Kayabaş	25.139	0,04%
158	Berkay	24.130	0,04%
159	Pınar	24.113	0,04%
160	Surat	23.868	0,04%
161	Servet	22.113	0,04%
162	Soner	22.113	0,04%
163	Deka	21.290	0,03%
164	Güner	21.105	0,03%
165	Pozitif	21.049	0,03%

DIRECTORY OF COPYRIGHTS 1998 SEAL SALES

RANK	FIRM	UNITS	SHARE
166	Modern	20.601	0,03%
167	Vural	20.597	0,03%
168	Cihan	20.097	0,03%
169	Önal	20.097	0,03%
170	Uras	20.097	0,03%
171	Kuzey	19.772	0,03%
172	Çınar	19.375	0,03%
173	Umman	19.089	0,03%
174	Elif	18.082	0,03%
175	TEkspres	18.061	0,03%
176	Turgay	17.068	0,03%
177	Şölen	17.049	0,03%
178	Beğeni	16.951	0,03%
179	Diskotür	16.242	0,03%
180	Bema	16.068	0,03%
181	İcmal	16.068	0,03%
182	Motif	16.068	0,03%
183	Uzunca	16.068	0,03%
184	YeniAsya	16.068	0,03%
185	Engin	16.061	0,03%
186	Disco	15.061	0,02%
187	Özyalçın	15.061	0,02%
188	Candost	15.039	0,02%
189	Yüksel	14.055	0,02%
190	ABC	13.652	0,02%
191	Çokran	13.452	0,02%
192	Ankara	13.049	0,02%
193	Kardelen	13.049	0,02%
194	Ayço	12.671	0,02%
195	Kamel	12.044	0,02%
196	Erol	11.039	0,02%
197	Orhan	11.039	0,02%
198	Uçak	11.039	0,02%
199	Akkılıç	11.034	0,02%
200	Dostlar	11.034	0,02%
201	Odeon	11.021	0,02%
202	Bölük	10.838	0,02%
203	Ahsen	10.034	0,02%
204	AkAjans	10.034	0,02%
205	Atakan	10.034	0,02%
206	Aygün	10.034	0,02%
207	Çevre	10.034	0,02%
208	Özgür	10.034	0,02%
209	Timas	10.034	0,02%
210	Lider	10.029	0,02%
211	Uçar	10.000	0,02%
212	Üçel	9.430	0,02%
213	Çağrı	9.029	0,01%
214	Hammer	8.627	0,01%
215	As	8.427	0,01%
216	Adım	8.025	0,01%
217	Apeks	8.025	0,01%
218	Arsel	8.025	0,01%
219	Akgün	7.523	0,01%
220	Koç	7.523	0,01%
221	ÖzdemirErdogan	7.110	0,01%
222	Dersim	7.021	0,01%

DIRECTORY OF COPYRIGHTS 1998 SEAL SALES

RANK	FIRM	UNITS	SHARE
223	Piya	7.021	0,01%
224	Anılar	6.519	0,01%
225	Güvercin	6.213	0,01%
226	Ant	6.017	0,01%
227	İleri	6.017	0,01%
228	Segah	6.017	0,01%
229	Enes	6.011	0,01%
230	Kucak	5.415	0,01%
231	Alpdoğan	5.410	0,01%
232	Ayans	5.013	0,01%
233	Boray	5.013	0,01%
234	Çözüm	5.013	0,01%
235	Divan	5.013	0,01%
236	Genç	5.013	0,01%
237	Gölge	5.013	0,01%
238	Karaal	5.013	0,01%
239	Marmara	5.013	0,01%
240	Nihal	5.013	0,01%
241	Şah	5.013	0,01%
242	Enter	5.010	0,01%
243	Sözen	5.000	0,01%
244	Yavuz	4.500	0,01%
245	Kaynak	4.010	0,01%
246	Şenay	4.010	0,01%
247	Tuncil	4.010	0,01%
248	Tümer	4.000	0,01%
249	Melki	3.555	0,01%
250	Hüseyin	3.508	0,01%
251	Aytaşı	3.007	0,00%
252	Nüans	3.007	0,00%
253	Kitsan	2.605	0,00%
254	Aykut	2.504	0,00%
255	Adıgüzel	2.004	0,00%
256	Akbulut	2.004	0,00%
257	Bahar	2.004	0,00%
258	Kanbay	2.004	0,00%
259	Sağiroğlu	2.004	0,00%
260	Seiko	2.004	0,00%
261	Çorluk	1.604	0,00%
262	Ekol	1.503	0,00%
263	Tan	1.500	0,00%
264	Topaloğlu	1.403	0,00%
265	Akkaya	1.002	0,00%
266	AliAydın	1.002	0,00%
267	Altıntaş	1.002	0,00%
268	Meis	1.002	0,00%
269	Şura	1.002	0,00%
270	Türkmen	1.002	0,00%
271	Mercan	1.000	0,00%
272	Müziksian	501	0,00%
273	Uyar	300	0,00%

APPENDIX C: 1990-1998 AUDIOCASSETTE AND CD SALES ON THE COMPANY BASIS

Explanation: In the following pages, CD and Audiocassette sales on the company basis for each year are given. The first column (Firm) denotes to names of the companies in alphabetical order. Each column, denoting a year, is divided into two: AC for audiocassette sales and CD for Compact Disk sales. For the year 1990, there was no (legal and sealed) CDs in Turkish music market. For the reasons explained in Chapter 6 CD sales for 1996 could not be calculated on the company basis. Thus CD columns for years 1990 and 1996 are marked as N/A (Not Available).

FİRME	1980		1981		1982		1983		1984		1985		1986		1987		1988	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
2000Müzik	-	N/A	-	-	-	-	-	-	33.107	-	101.045	-	-	-	-	-	-	-
2019	200.109	N/A	301.135	-	195.542	-	195.702	-	237.062	-	80.836	-	55.545	-	269.507	-	174.754	-
A. S. M.	5.003	N/A	23.087	-	46.128	-	46.166	3.000	237.062	2.000	381.343	8.600	394.264	N/A	13.700	13.700	47.401	-
Aballoğlu	143.627	N/A	53.201	-	42.117	-	42.152	-	40.756	-	60.274	-	13.129	N/A	10.012	-	13.652	-
ABC	171.062	N/A	148.058	-	90.451	-	90.525	-	67.216	-	364.368	20.101	518.290	N/A	728.829	57.103	357.083	104.402
Ada	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	2.004	-
Adigüzel	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	8.025	-
Adim	14.408	N/A	56.413	-	48.364	-	48.424	-	5.518	-	9.600	-	-	N/A	-	-	-	-
AFSYayincılık	-	N/A	-	-	8.023	-	8.029	-	30.298	-	2.527	-	8.080	N/A	44.051	2.000	26.148	-
AhenkAjans	-	N/A	-	-	-	-	-	-	2.007	-	21.220	-	13.331	N/A	10.012	-	10.034	-
AnımetŞenyüz	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	20.023	-	-	-
AlansaA. Filim	-	N/A	-	-	-	-	-	-	40.128	-	-	-	-	N/A	-	-	-	-
AlansaCentre	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Alansenteveni	-	N/A	-	-	-	-	-	-	-	-	-	-	100.960	N/A	5.006	-	10.034	-
AkAjans	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Akalin	59.032	N/A	19.072	-	85.237	-	85.306	-	-	-	11.722	-	12.119	N/A	14.617	-	303.916	17.000
Akbaş	191.103	N/A	128.484	-	79.220	-	79.285	-	375.205	6.000	469.859	-	766.513	N/A	1.131.286	39.002	2.004	-
Akbulut	66.536	N/A	55.208	-	60.769	-	60.818	-	136.445	-	48.502	-	44.941	N/A	4.005	-	-	-
Audentiz	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Akdoğan	-	N/A	-	-	-	-	-	-	-	-	-	-	1.010	N/A	-	-	-	-
Akgün	-	N/A	-	-	-	-	-	-	15.049	-	32.335	-	46.866	N/A	42.799	-	7.523	-
Akkaya	-	N/A	-	-	-	-	-	-	-	-	2.021	-	-	N/A	1.502	-	1.002	-
Akkılıç	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	10.034	1.000
Aklar	-	N/A	-	-	-	-	-	-	330.261	1.000	40.418	1.200	-	N/A	-	-	101.651	20.000
Akser	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
AksoyTunc	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Alfakaset	66.067	N/A	8.432	16.563	2.006	18.435	2.008	16.845	2.007	-	-	-	18.179	N/A	-	-	-	-
AliAydin	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Alişan	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	6.007	-	1.002	-
Alpdoğan	13.608	N/A	21.281	-	33.894	-	33.922	-	18.058	-	11.115	-	13.129	N/A	52.460	3.000	179.805	-
Altınboynuz	-	N/A	6.023	-	81.225	-	81.292	-	-	-	-	-	-	N/A	51.059	-	4.010	1.400
Altınsees	468.151	N/A	439.857	-	606.179	3.500	617.714	2.000	-	-	63.153	2.000	5.050	N/A	-	-	-	-
Altınbaş	-	N/A	-	-	-	-	-	-	-	-	-	-	45.446	N/A	-	-	-	-
AltınbaşAltınbaş	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
AmacMüzik	15.009	N/A	20.076	18.400	2.006	-	2.008	-	6.020	-	93.972	3.000	61.604	N/A	92.506	1.000	27.158	200
Anadolü	-	N/A	1.004	-	7.722	-	7.728	-	-	-	3.335	-	-	N/A	-	-	-	-
Anarhtar	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
AnasMüzik	5.003	N/A	-	-	-	-	45.965	-	-	-	-	-	-	N/A	-	-	-	-
AndMüzik	124.467	N/A	7.428	1.800	15.844	-	15.857	-	31.401	-	10.105	-	-	N/A	82.094	-	6.519	-
Anilar	-	N/A	-	-	-	-	-	-	-	-	111.150	-	-	N/A	10.012	-	13.049	-
AnitekarDermegi	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	6.017	-
Ankara	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	8.025	-
Anıt	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Apeks	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
APSYayincılık	3.502	N/A	30.114	-	45.928	-	-	-	98.015	-	18.997	14.159	-	N/A	7.008	1.200	-	-
Aras	-	N/A	-	-	-	-	-	-	-	-	18.189	-	-	N/A	-	-	-	-
Ar-çan	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Argovan	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Arca	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	4.005	-	-	-
Arca	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Arkalın	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Armoni	224.521	N/A	137.217	-	47.632	-	47.671	-	221.712	-	83.362	1.000	146.436	N/A	54.062	1.000	86.217	-

FIRIM	1980		1981		1982		1983		1984		1985		1986		1987		1988	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
Arsei	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	8,025	-
Arya	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	101,651	-
Aizu	30,217	N/A	1,004	-	18,050	-	18,065	-	59,793	-	33,345	-	29,288	-	18,622	-	23,323	16,000
As	21,012	N/A	32,121	-	31,388	-	31,614	-	41,735	-	25,666	-	14,341	-	64,073	-	8,427	-
Asir	158,585	N/A	124,469	-	99,275	-	99,357	-	88,786	1,500	76,795	-	35,852	-	98,112	8,100	30,189	-
AskeniMuze	2,002	N/A	2,008	-	-	-	-	-	5,017	-	-	1,050	-	-	5,707	-	-	-
AsuPlak	-	N/A	-	-	3,009	-	3,011	-	-	-	-	-	-	-	-	-	-	-
Ayaya	-	N/A	-	-	-	-	-	-	-	-	40,418	-	91,386	-	149,170	2,500	36,258	12,000
Agantar	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	115,131	1,000	51,477	-
Atakan	35,019	N/A	60,227	-	42,117	-	42,152	-	16,052	-	64,669	-	89,881	-	37,043	-	-	-
Ataman	300,231	N/A	300,231	-	330,686	-	330,686	-	-	-	-	-	-	-	-	-	-	-
Atlim	38,021	N/A	3,012	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Atlanitis	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Ayars	-	N/A	-	-	-	-	-	-	-	-	-	-	80,792	-	115,131	3,500	64,924	5,000
Ayars	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	5,013	-
Aygo	-	N/A	-	-	11,633	-	11,642	9,776	83,368	1,750	49,310	250	6,666	-	49,256	4,200	7,021	5,650
Ayudin	-	N/A	-	-	8,023	-	8,029	-	85,274	-	180,871	27,002	414,058	-	588,647	-	395,132	500
Aygun	33,518	N/A	76,489	-	48,134	-	48,173	-	19,062	-	12,126	-	5,050	-	19,022	-	10,034	-
Aygun	-	N/A	-	-	-	-	-	-	-	-	66,711	4,000	84,428	-	88,701	-	1,904	600
Aysel	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	20,023	-	-	-
AysuntPlak	801	N/A	6,023	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Aytasi	30,017	N/A	2,008	-	-	-	-	-	12,039	-	18,189	-	21,814	-	18,021	-	3,007	-
Azim	151,582	N/A	75,535	-	44,123	-	44,159	-	34,612	-	50,523	-	80,287	-	133,152	-	107,843	-
Azz	724,368	N/A	953,341	1,062	566,309	2,237	566,772	16,411	270,369	4,050	392,458	4,500	604,525	-	597,960	20,501	286,998	20,200
Baglan	-	N/A	-	-	-	-	-	-	-	-	7,074	-	-	-	-	-	-	-
Behar	8,005	N/A	19,323	-	15,042	-	15,054	-	20,667	-	5,053	-	47,466	-	32,037	-	2,004	-
Balet	35,219	N/A	41,155	4,625	33,463	4,445	33,521	7,865	16,453	4,000	114,408	10,300	210,019	-	16,920	6,800	82,215	46,036
Banko	-	N/A	-	668	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Banko	877,970	N/A	794,965	3,000	83,432	-	83,500	-	126,406	-	222,299	1,000	351,445	-	490,558	10,700	129,597	17,000
Bay	18,010	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bayar	687,968	N/A	1,856,994	-	25,070	-	25,080	-	264,851	-	301,114	21,201	140,879	-	1,266,439	56,403	174,543	122,503
Bayer	-	N/A	-	-	288,800	-	289,036	300	38,123	-	74,774	5,000	65,139	-	228,760	7,000	199,864	27,000
Bayrau	975,723	N/A	1,339,044	4,374	618,714	8,699	619,220	26,431	416,337	10,000	-	-	9,080	-	50,057	-	65,741	-
Bayrak	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bayrak	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bayrak	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bayrak	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Begleri	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bema	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Bengisu	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Berakat	117,063	N/A	95,360	-	158,941	-	159,071	-	413,328	-	273,832	3,000	319,936	-	253,288	-	85,489	2,000
Benkey	-	N/A	-	-	-	-	-	-	-	-	20,209	-	-	-	-	-	24,130	-
Beste	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Besler	208,112	N/A	273,882	-	853	-	854	-	6,020	-	159,631	-	13,129	-	125,743	1,000	27,359	-
Bey	876,970	N/A	236,090	-	269,046	-	269,266	-	162,874	-	300,754	-	370,936	-	60,069	-	595,077	111,803
Billa	2,002	N/A	32,623	-	21,059	-	21,076	-	103,132	5,020	1,011	-	-	-	125,743	-	-	-
BirikSanat	45,025	N/A	45,773	-	96,267	-	96,346	15,101	-	-	-	-	-	-	60,069	-	-	-
BirNumara	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
BMG	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Boray	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
borluk	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Boyut	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Boluk	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Budaidar	-	N/A	20,076	-	-	-	-	-	-	-	1,011	-	1,212	-	12,014	12,500	1,654	28,000
Budaidar	-	N/A	-	-	-	-	-	-	-	-	3,032	-	13,129	-	-	-	10,838	-

FIRM	1990		1991		1992		1993		1994		1995		1996		1997		1998	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
Buket	-	N/A	-	-	-	1.461	-	-	1.004	-	17.176	-	46.153	N/A	23.527	-	30.189	-
Buyurgan	1.001	N/A	5.019	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Buzbul	17.010	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Can	-	N/A	1.004	-	-	-	-	-	15.049	-	-	-	-	N/A	10.012	-	-	3.000
Canbay	5.003	N/A	2.008	-	-	-	-	-	-	-	-	-	-	N/A	-	-	30.189	-
Cardoast	-	N/A	-	-	-	-	-	-	7.525	-	-	-	3.030	N/A	-	-	-	4.000
CazPiak	-	N/A	80.303	-	57.359	-	57.406	-	60.194	2.000	3.537	-	14.139	N/A	-	-	-	-
CDVSTK	-	N/A	136.013	-	35.669	-	35.729	-	15.049	-	-	-	-	N/A	40.046	-	-	-
Cem	205.110	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	10.012	9.000	25.744	11.100
Cemre	-	N/A	9.938	-	13.137	-	13.148	-	-	-	-	-	-	N/A	-	-	-	-
CengizCekic	382.205	N/A	43.163	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Ceylan	-	N/A	-	-	-	-	-	-	30.097	-	30.516	-	20.602	N/A	41.047	500	20.097	-
Chinan	457.245	N/A	198.548	-	89.248	-	17.062	-	2.007	-	19.199	-	24.238	N/A	30.035	-	46.396	-
Çinlan	128.919	N/A	1.798.675	21.578	167.314	12.287	167.451	34.553	180.380	23.427	77.603	24.117	68.676	N/A	103.218	29.401	38.790	14.000
Coşkun	653.350	N/A	714.662	3.078	414.147	5.072	414.486	6.000	504.822	7.100	61.638	1.500	647.345	N/A	75.086	6.000	131.676	6.000
Çağ	134.372	N/A	81.106	-	49.788	-	49.829	-	93.044	-	104.072	-	40.487	N/A	73.985	500	29.563	2.500
Çağdaş	244.331	N/A	89.538	3.106	62.674	2.949	62.725	1.360	6.923	2.000	104.279	500	242.780	N/A	209.238	3.300	170.909	1.600
Çağın	-	N/A	-	-	-	-	-	-	-	-	7.074	-	11.109	N/A	8.010	-	9.029	-
Çakır	832.946	N/A	715.094	-	512.119	-	512.537	-	303.776	-	351.636	1.000	489.805	N/A	260.096	1.000	-	-
Çapan	-	N/A	-	-	-	-	-	-	-	-	15.157	-	-	N/A	-	-	-	-
Çetin	1.001	N/A	-	-	5.014	-	5.018	-	4.615	-	22.230	-	26.662	N/A	76.698	-	35.245	-
Çetiner	16.009	N/A	403.018	-	133.370	-	133.479	-	41.133	-	65.680	-	133.307	N/A	74.565	500	65.536	2.000
Çetinkaya	379.604	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	10.034	-
Çevre	233.325	N/A	22.084	-	-	-	-	-	-	-	-	-	-	N/A	6.007	-	-	-
Çinar	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	154.176	2.250	17.075	2.300
ÇinmPlak	19.411	N/A	-	-	-	-	-	-	-	-	-	-	32.317	N/A	-	-	-	-
Çiğci	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	11.013	-	-	-
ÇiğciMuzik	-	N/A	-	-	-	-	-	-	-	-	5.053	-	-	N/A	-	-	-	-
ÇocukVakfi	-	N/A	-	-	5.090	-	5.094	-	4.565	-	2.173	-	-	N/A	-	-	-	-
Çokran	20.011	N/A	14.053	-	38.708	-	38.338	-	8.227	-	5.861	-	11.917	N/A	11.363	-	13.452	-
ÇokSeeli	39.722	N/A	39.951	-	38.708	-	38.739	-	31.602	-	18.239	-	-	N/A	-	-	-	-
Çorluk	-	N/A	35.133	-	53.348	-	53.392	-	94.303	-	12.126	-	808	N/A	46.654	-	1.604	-
Cozum	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	5.013	-
Damla	58.532	N/A	71.118	-	42.117	-	42.152	-	20.065	-	30.314	-	116.896	N/A	48.055	-	42.591	-
Devedeglu	61.033	N/A	4.016	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Deka	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	19.290	2.000
Dekean	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Deniz	199.707	N/A	135.511	-	49.137	-	49.177	3.000	30.097	1.300	84.373	5.500	65.644	N/A	47.054	500	7.021	-
Dersim	-	N/A	11.042	-	18.251	-	18.266	-	1.004	-	2.628	-	4.646	N/A	3.004	-	-	-
Deştebaşilar	-	N/A	-	-	-	-	-	-	35.515	-	122.265	2.000	75.743	N/A	66.076	2.000	32.211	1.500
Devean	-	N/A	-	-	-	-	-	-	-	-	-	-	41.608	N/A	-	-	-	-
Die	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Dieganol	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Dilan	-	N/A	35.133	-	97.270	-	97.349	-	93.300	-	176.829	-	95.941	N/A	20.023	1.100	204.948	-
Disco	412.891	N/A	352.729	-	219.609	-	219.788	-	20.085	-	18.189	-	13.129	N/A	252.287	-	15.061	-
Dieroktur	18.060	N/A	22.284	2.566	15.644	-	15.657	550	24.078	-	23.241	3.000	21.006	N/A	13.015	-	11.642	4.600
Divan	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	23.427	1.900	15.518	-
Diyaret	495.606	N/A	181.062	-	247.887	-	248.090	-	309.133	-	167.482	-	-	N/A	183.209	500	5.013	-
Diyar	172.363	N/A	308.663	-	218.084	-	218.263	-	124.300	-	17.784	-	308.272	N/A	2.003	-	-	-

FİRM	1980		1981		1982		1983		1984		1985		1986		1987		1988	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
DMS	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	24.130	3.000
Dođu	-	N/A	-	-	-	-	-	-	5.017	-	-	-	-	-	-	-	-	-
Domiproduksiyon	-	N/A	-	-	-	-	-	-	100.323	4.000	-	-	-	-	-	-	-	-
Domuk	-	N/A	-	-	-	-	-	-	6.923	-	-	-	-	-	-	-	-	-
Dostlar	-	N/A	-	-	-	-	-	-	-	-	-	3.738	-	-	-	-	-	-
Duyubey	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Duygu	-	N/A	30.114	-	75.270	-	197.408	2.800	12.842	-	20.007	1.000	15.149	-	5.607	1.000	10.034	1.000
Dust	131.071	N/A	99.375	-	197.247	-	-	-	370.440	6.200	543.217	8.750	393.761	-	499.969	22.251	176.647	23.350
Dunya	-	N/A	91.846	-	93.158	-	93.235	2.000	18.058	-	56.586	-	76.753	-	762.467	-	159.850	-
Duzgit	12.337	N/A	-	-	-	-	-	-	-	-	-	-	-	-	20.023	-	-	-
EgeMuzik	258.139	N/A	-	-	6.017	-	-	-	-	-	-	-	-	-	-	-	-	-
EgitimGelistirme	30.034	N/A	12.576	-	-	-	-	-	23.075	-	22.230	-	-	-	-	-	-	-
EkenMuzik	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Eklol	-	N/A	-	-	7.820	-	7.820	-	836.687	12.351	20.209	-	4.293	-	17.821	-	1.503	-
Elenor	720.766	N/A	909.426	-	726.913	-	727.508	22.401	650.030	-	776.024	27.702	761.463	-	989.375	16.000	732.018	68.501
Elif	38.521	N/A	20.176	-	31.588	-	31.614	-	1.856	-	4.042	-	24.238	-	47.805	-	18.082	-
Elmas	-	N/A	62.235	-	12.535	-	-	-	17.557	-	10.105	-	-	-	12.014	-	-	-
Ertu'runizm	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Emir	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Emrah	10.606	N/A	16.312	-	2.006	-	-	-	-	-	-	-	-	-	-	-	-	-
Emre	-	N/A	1.059.993	-	649.489	-	14.553	-	246.793	-	-	-	100.990	-	30.035	-	347.625	7.000
EmreGratison	3.886.180	N/A	2.160.096	-	1.766.492	-	1.767.937	15.301	324.543	10.000	822.505	79.505	384.771	-	480.558	500	1.707.702	58.001
Enes	31.017	N/A	17.065	-	43.120	-	43.155	-	54.174	5.300	67.700	-	34.337	-	68.078	37.602	480.418	80.002
Engin	12.007	N/A	2.008	-	25.070	-	25.090	-	22.071	-	12.126	-	20.198	-	13.015	-	15.061	1.000
Enter	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	32.037	-	4.010	1.000
Epik	851	N/A	-	-	-	-	-	-	-	-	-	-	-	-	12.965	-	-	-
Ercan	62.884	N/A	201.258	-	161.548	-	161.680	-	356.746	1.000	216.843	2.500	247.425	-	286.326	1.000	76.579	4.500
Erdal	857.659	N/A	527.136	-	663.037	-	663.579	-	370.791	-	291.616	-	436.276	-	266.603	-	308.049	-
Erkam	-	N/A	40.152	-	58.162	-	63.227	-	8.026	-	129.035	-	204.000	-	271.809	-	332.274	1.000
Erkan	10.006	N/A	40.152	-	21.059	-	16.058	-	97.313	-	80.331	-	204.000	-	10.012	-	-	-
Erol	-	N/A	-	-	-	-	-	-	12.641	-	10.105	-	22.824	-	-	-	-	-
Ertok	17.210	N/A	2.008	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Esen	5.003	N/A	4.016	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Esmay	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
EvrenPlak	-	N/A	-	-	5.014	-	5.018	-	-	-	-	-	-	-	20.023	-	-	-
Ezgi	-	N/A	33.125	-	22.563	-	22.581	-	5.017	-	36.882	-	28.177	-	16.019	-	68.192	2.000
FakirProduksiyon	-	N/A	-	-	5.014	-	5.018	-	-	-	-	-	-	-	-	-	-	-
Fardifon	757.406	N/A	697.126	-	1.293.583	-	1.288.619	8.000	1.308.753	14.001	615.363	2.400	700.364	-	617.702	29.001	597.764	5.700
Ferhat	-	N/A	-	-	-	-	-	-	2.007	-	1.011	-	16.159	-	-	-	-	-
Feza	10.006	N/A	-	-	-	-	-	-	-	-	5.053	-	5.050	-	6.608	-	-	-
Fidan	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	8.210	-	27.562	1.700
Filiz	-	N/A	10.038	-	56.156	-	56.202	-	17.055	-	33.345	-	5.050	-	54.062	-	74.941	-
Firat	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Flag	43.024	N/A	122.662	-	12.034	-	726.605	7.500	1.187.815	26.502	4.042	-	117.149	-	32.037	9.500	46.396	11.000
Fono	1.937.437	N/A	307.157	-	726.011	-	-	-	-	-	151.568	5.000	8.080	-	13.015	-	31.806	-
Garip	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	35.040	1.000	-	-
Geçit	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	13.015	-	-	-
Genç	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
GriftMuzik	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Giz	13.007	N/A	56.722	-	49.137	-	49.177	5.000	8.026	-	45.471	-	7.070	-	5.006	-	-	-
Gold	-	N/A	1.004	-	6.649	-	6.654	2.000	281.906	-	13.136	-	-	-	-	-	-	-
Gonca	25.814	N/A	60.629	-	25.070	-	25.090	-	32.304	-	54.059	1.500	63.321	-	70.881	-	75.094	-

FIRM	1980		1981		1982		1983		1984		1985		1986		1987		1988	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
Gokalp	701.776	N/A	18.269	2.255	25.421	4.363	25.442	4.265	31.100	1.821	16.976	300	42.416	N/A	-	-	-	-
Gokhan	-	N/A	-	-	-	-	-	-	140.953	-	13.136	-	-	N/A	-	-	-	-
Goksel	-	N/A	-	-	7.026	-	7.026	-	3.411	-	-	-	-	N/A	-	-	-	-
Goksoy	1.621.363	N/A	893.591	18.220	1.165.052	30.559	1.186.021	44.991	740.388	42.518	260.443	29.064	217.330	N/A	96.310	20.196	132.195	23.100
Gokyuzu	-	N/A	-	-	15.042	-	15.054	-	-	-	-	-	-	N/A	-	-	-	-
Golge	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
GormeOzariu	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Gorsev	252.436	N/A	278.951	-	311.764	-	312.019	-	317.620	-	89.627	-	96.951	N/A	3.004	-	5.013	-
Gazde	293.057	N/A	348.664	-	45.125	-	45.162	-	2.007	-	-	-	2.020	N/A	1.002	-	182.964	-
Gaziem	3.002	N/A	5.019	-	-	-	-	-	2.007	-	-	2.000	-	N/A	277.316	-	-	-
Gozyasi	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	112.128	-	35.245	-
GulerPlak	10.006	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Gulum	-	N/A	-	-	14.039	-	14.051	-	12.039	-	64.669	1.000	6.060	N/A	-	-	-	-
Gun	-	N/A	-	-	8.023	-	8.029	-	-	-	-	-	-	N/A	-	-	-	-
Gunalp	218.117	N/A	266.002	-	32.089	-	32.116	-	17.858	1.000	13.945	-	8.888	N/A	24.829	3.000	5.213	1.000
Guner	211.113	N/A	235.899	-	23.887	250	23.906	750	19.864	1.000	27.757	500	10.301	N/A	17.921	500	57.379	3.950
Guner	334.259	N/A	334.259	-	25.070	-	25.090	-	13.042	-	11.520	-	3.030	N/A	5.006	-	21.105	-
Gunes	787.822	N/A	1.280.122	1.000	263.731	1.017	263.946	1.000	66.019	-	78.815	-	6.060	N/A	2.003	-	167.190	2.300
Guney	802.230	N/A	406.130	-	562.558	-	563.018	-	490.383	14.826	200.271	2.250	256.514	N/A	528.601	2.650	-	-
Guntiz	-	N/A	-	-	-	-	-	-	260.838	-	249.864	-	25.652	N/A	-	-	-	-
Gurdil	-	N/A	-	-	-	-	-	-	-	-	15.157	3.000	20.198	N/A	-	-	-	-
Goven	81.544	N/A	10.088	-	32.541	-	32.567	-	-	-	15.157	1.000	20.703	N/A	-	-	-	-
Govercin	-	N/A	12.548	-	32.089	-	32.116	-	17.858	1.000	13.945	-	8.888	N/A	24.829	3.000	5.213	1.000
Hades	-	N/A	-	-	23.887	250	23.906	750	19.864	1.000	27.757	500	10.301	N/A	17.921	500	57.379	3.950
Hariz	-	N/A	2.008	-	25.070	-	25.090	-	13.042	-	11.520	-	3.030	N/A	5.006	-	-	-
Hamie	-	N/A	286.078	-	263.731	1.017	263.946	1.000	66.019	-	78.815	-	6.060	N/A	2.003	-	-	-
Hammer	-	N/A	-	-	-	-	-	-	11.337	3.000	23.178	-	15.351	N/A	1.402	400	8.627	-
Harika	605.625	N/A	1.031.887	-	998.064	-	998.880	7.000	533.213	19.001	338.905	-	426.985	N/A	457.771	7.500	481.846	7.600
Hassan	-	N/A	-	-	5.014	-	5.018	-	-	-	-	-	-	N/A	-	-	-	-
HeskKoop	501	N/A	-	-	-	-	-	-	3.010	-	-	-	-	N/A	-	-	-	-
Hetra	1.501	N/A	-	-	-	-	-	-	2.107	-	1.011	-	-	N/A	-	-	-	-
HedefPlak	-	N/A	-	-	5.014	-	5.018	-	20.085	-	16.673	-	-	N/A	-	-	-	-
Hisar	-	N/A	-	-	63.577	-	63.629	-	139.649	-	14.147	-	18.179	N/A	57.065	300	-	-
Hulya	117.363	N/A	162.814	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Huseyin	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Iber	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Icmal	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Idobay	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Ihtas	128.569	N/A	575.519	-	284.288	-	284.520	-	130.419	-	63.659	-	57.565	N/A	51.059	3.000	3.508	-
Ileri	344.685	N/A	140.429	-	149.815	-	149.938	1.000	62.200	1.000	-	-	-	N/A	27.031	2.000	54.529	-
Ilkan	93.050	N/A	10.038	-	-	-	-	-	-	-	-	-	-	N/A	12.014	-	16.068	-
IlmMurlugu	20.011	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	145.666	-	1.576.858	36.001
ILVI	5.003	N/A	4.016	-	-	-	-	-	-	-	-	-	-	N/A	-	-	25.139	15.000
Imal	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	6.017	-
Imece	-	N/A	15.057	-	35.599	-	35.628	15.001	67.016	5.000	49.512	7.000	19.482	N/A	200.228	30.001	20.097	26.000
Inan	91.049	N/A	28.108	-	39.109	-	39.141	-	16.052	-	15.561	-	61.099	N/A	22.726	5.800	65.638	7.000
Inciiley	-	N/A	-	-	-	-	-	-	3.512	500	-	-	-	N/A	20.023	-	25.947	-
Inkilab	29.416	N/A	23.549	-	32.290	-	32.316	-	1.004	-	-	-	-	N/A	5.006	1.000	-	-
InterMuzik	-	N/A	-	-	-	-	-	-	140.702	4.500	10.105	1.000	-	N/A	-	-	-	-
IpekYolu	14.008	N/A	53.803	-	118.328	-	118.425	-	16.560	-	13.136	-	15.149	N/A	11.063	-	-	-
Isiarnoglu	5.003	N/A	74.782	-	85.237	-	85.306	-	70.226	-	-	-	5.050	N/A	-	-	-	-
Istanbul	43.024	N/A	85.171	-	158.439	-	158.569	13.601	1.388.102	83.257	844.128	79.455	289.639	N/A	2.313.529	251.513	622.605	93.809
IstekOz.Eg.	-	N/A	-	-	4.012	-	4.015	-	-	-	-	-	-	N/A	-	-	-	-

FIRMA	1990		1991		1992		1993		1994		1995		1996		1997		1998		
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	
Izmir	-	N/A	-	-	11.031	-	11.040	-	18.259	-	23.845	-	26.662	N/A	42.389	-	133.142	-	
Jet	792.425	N/A	256.567	411	68.992	1.373	69.048	1.550	13.845	-	48.300	200	26.258	N/A	27.231	1.400	39.702	500	
Kadans	-	N/A	-	-	85.237	-	85.306	-	-	-	-	-	-	N/A	-	1.500	-	-	-
KadiKarakoc	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	-
Kar	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	-
Kalan	5.003	N/A	178.673	-	194.740	-	194.899	9.872	366.678	8.500	155.407	22.351	316.098	N/A	10.012	400	752.158	125.003	
Kallie	426.229	N/A	316.191	12.704	231.341	5.191	231.530	14.001	110.154	10.201	91.951	17.301	74.935	N/A	477.443	52.952	51.477	16.800	
Kamel	-	N/A	-	-	-	-	-	-	6.020	-	-	-	8.080	N/A	12.815	-	12.044	-	
Kanbay	-	N/A	5.019	-	31.087	-	31.112	-	19.082	-	25.262	-	32.317	N/A	5.006	-	2.004	-	
Kamenci	-	N/A	-	-	-	-	-	-	-	-	-	-	3.030	N/A	-	150	-	-	
Karacal	-	N/A	10.038	-	-	-	-	-	-	-	4.042	-	5.050	N/A	4.205	-	5.013	-	
Karaca	-	N/A	82.812	-	23.566	-	23.585	-	5.017	-	10.105	-	91.144	N/A	64.974	100	30.189	-	
Karadeniz	194.705	N/A	145.749	-	141.492	-	141.608	-	118.180	-	174.405	-	254.899	N/A	248.283	3.000	182.964	5.000	
Kardelen	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	10.012	-	-	-	
Karnaval	275.148	N/A	964.634	-	143.398	-	132.475	-	15.049	-	-	-	-	N/A	-	-	-	-	
Kartal	24.714	N/A	38.144	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	
Karut	-	N/A	-	-	-	-	-	-	1.139	-	1.006	1.375	-	N/A	-	-	-	-	
Kavala	-	N/A	-	-	-	-	-	-	116.374	-	3.032	-	25.248	N/A	70.581	1.000	-	-	
Kaya	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	
Kayabasi	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	25.139	-	-	
Kayran	-	N/A	-	776	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	
Kaynak	29.016	N/A	7.027	-	1.003	-	1.004	-	6.020	-	-	-	12.119	N/A	2.003	500	4.010	-	
Kazan	233.525	N/A	194.734	-	213.391	-	213.566	-	170.448	-	267.971	1.000	225.410	N/A	343.391	4.100	161.212	6.500	
Kekeva	2.048.097	N/A	2.865.794	122.233	3.553.842	21.775	3.556.748	22.601	1.309.205	21.502	156.620	26.502	343.366	N/A	161.194	10.250	40.817	11.700	
Kent	1.080.479	N/A	1.045.639	62.138	985.173	99.394	965.962	92.543	285.365	24.666	462.614	30.433	258.736	N/A	189.516	34.326	346.197	108.223	
Kervan	1.572.842	N/A	1.354.100	2.000	1.611.864	7.000	1.613.182	29.602	1.114.780	42.003	751.773	12.801	735.711	N/A	520.592	11.500	1.002	165.004	
Kilic	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	103.118	-	84.164	1.000	
KirmiziMuzik	-	N/A	-	-	-	-	-	-	11.036	-	-	-	-	N/A	-	-	-	-	
Kibsan	-	N/A	-	-	-	-	-	-	6.822	-	9.701	-	4.848	N/A	7.309	-	2.605	-	
Kilas	-	N/A	-	-	-	-	-	-	-	-	-	-	45.446	N/A	99.113	-	275.110	4.500	
Klip	-	N/A	3.564	-	-	-	-	-	31.602	-	440.606	6.250	445.870	N/A	855.973	36.502	647.225	38.701	
Kocaman	-	N/A	-	-	-	-	-	-	-	-	-	-	10.099	N/A	-	-	-	-	
Koc	-	N/A	-	-	-	-	-	-	5.017	-	18.189	-	5.060	N/A	12.014	-	7.523	-	
Kocak	-	N/A	-	-	-	-	-	-	1.004	-	-	-	2.020	N/A	5.006	-	-	-	
Kocper	-	N/A	-	-	-	-	-	-	18.058	-	14.147	-	24.238	N/A	60.069	-	53.512	-	
Koda	-	N/A	-	-	206.573	2.000	206.741	15.501	466.563	16.801	187.944	9.500	449.405	N/A	927.054	61.503	79.205	19.000	
Kom	-	N/A	50.190	-	-	-	-	-	-	-	-	-	1.010	N/A	106.121	7.800	141.043	25.500	
Komedi	-	N/A	-	-	175.486	-	175.630	3.500	317.119	19.001	139.442	10.000	90.891	N/A	397.452	32.001	598.695	72.502	
KoyuturkLtd	-	N/A	-	-	4.012	-	4.015	-	-	-	-	-	-	N/A	-	-	-	-	
Kok	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	
Kros	5.003	N/A	53.201	-	9.025	-	9.033	-	-	-	2.122	-	15.149	N/A	-	-	-	-	
Kubbealti	5.003	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	
Kucak	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	
Kule	-	N/A	-	-	10.028	-	10.036	-	10.033	-	-	-	-	N/A	1.002	-	5.415	-	
Kunuz	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	4.005	-	-	-	
Kuzey	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	16.772	3.000	
Lades	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	
laylaylorn	-	N/A	-	-	3.009	-	3.011	116	-	-	-	-	-	N/A	-	-	-	-	
Levent	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-	
Liberal	218.117	N/A	123.551	-	36.201	-	36.230	-	-	-	238.971	5.500	1.897.194	N/A	1.451.650	105.005	1.831.296	222.806	
Lidier	4.503	N/A	-	-	-	-	-	-	92.698	1.000	132.369	5.000	111.089	N/A	112.128	8.800	50.460	1.000	
Linelli	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	9.029	-	

FIRM	1990		1991		1992		1993		1994		1995		1996		1997		1998	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
Link	-	N/A	-	-	-	-	-	-	-	-	-	-	181.782	N/A	140.160	12.000	278.837	38.001
Longman	-	N/A	-	480	-	-	-	-	-	-	-	-	-	N/A	-	-	36.784	-
LotusElektronik	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
LozanKlip	17.775	N/A	1.054	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
M. Kaymakçı	1.001	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
M.U. İlahiyat	-	N/A	-	-	-	-	-	-	4.013	-	-	-	-	N/A	-	-	-	-
Mahsunikaset	3.002	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Major	202.609	N/A	61.231	-	504.798	1.000	505.211	5.000	433.994	5.000	90.941	1.000	68.674	N/A	281.871	13.000	148.345	5.800
MikroMuzik	-	N/A	-	-	-	-	-	-	250.806	5.000	-	-	-	N/A	-	-	-	-
Marmara	-	N/A	-	-	-	-	-	-	5.017	-	30.314	-	7.070	N/A	13.015	-	5.013	-
MaviDeniz	-	N/A	-	-	12.134	-	12.144	-	-	-	-	-	-	N/A	-	-	26.148	-
Maya	-	N/A	-	-	23.064	-	23.083	-	45.145	-	5.053	-	-	N/A	-	-	-	-
Mazlum	-	N/A	-	-	35.088	2.124	35.126	19.079	657.311	28.752	27.283	500	144.315	N/A	66.876	25.951	43.555	25.800
MedeniUçar	-	N/A	-	-	2.008	-	2.008	-	8.729	-	25.198	21.506	-	N/A	-	-	-	-
Mega	-	N/A	-	786	5.014	-	5.018	-	-	-	-	-	-	N/A	-	-	-	-
MemleFethi	-	N/A	20.076	-	-	-	-	-	-	-	-	-	-	N/A	-	-	1.002	1.250
Meis	-	N/A	-	-	5.014	-	5.018	-	-	-	12.126	-	28.278	N/A	4.556	400	2.305	2.000
Melki	-	N/A	-	-	5.014	-	5.018	-	-	-	-	-	3.030	N/A	22.026	-	27.158	2.000
Menekşe	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	3.004	-	-	-
Mer	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	1.000
Mercan	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Mert	-	N/A	8.031	-	-	-	-	-	148.477	3.800	279.894	7.800	232.277	N/A	422.480	19.701	81.087	-
MetroAlisveris	-	N/A	-	-	-	-	-	-	4.114	-	268	9.778	-	N/A	60.189	1.000	56.564	6.000
Metropol	-	N/A	-	-	-	-	-	-	37.621	-	50.523	-	-	N/A	-	-	-	-
Mezopotamya	-	N/A	-	-	-	-	-	-	211.680	1.500	-	-	-	N/A	-	-	-	-
Midas	341.183	N/A	65.848	500	105.282	-	105.378	-	3.917	-	-	-	-	N/A	-	-	-	-
Millilerarası	18.069	N/A	166.628	832	119.228	-	119.228	-	-	-	-	-	-	N/A	-	-	-	-
Minerva	40.022	N/A	-	-	48.535	-	48.575	-	-	-	-	-	-	N/A	-	-	-	-
Mitra	109.659	N/A	30.716	525	71.699	-	71.758	-	-	-	45.471	-	5.050	N/A	40.046	20.601	16.068	-
Modem	-	N/A	-	-	17.048	-	17.062	-	15.049	-	33.345	-	7.070	N/A	51.659	1.000	-	-
Motif	-	N/A	15.057	-	-	-	-	-	-	-	438	-	-	N/A	-	-	-	-
Muraz	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
MüjdeYayın	60.033	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
MünervaMuzik	10.006	N/A	132.500	-	96.969	550	97.048	-	24.078	-	10.105	-	17.371	N/A	28.233	1.000	-	-
MuzikMarket	-	N/A	3.514	1.000	15.042	-	15.054	4.100	130.419	1.500	-	-	5.050	N/A	50.057	8.000	44.772	5.300
Muzikotek	-	N/A	-	-	263.229	-	263.445	-	297.355	700	276.863	500	-	N/A	-	-	501	-
Muziksan	-	N/A	-	-	42.217	-	42.252	-	53.873	-	81.948	10.900	102.101	N/A	75.787	2.800	90.264	7.950
N. Kılıçsani	-	N/A	10.038	-	25.672	-	25.693	-	5.017	-	414.284	6.500	5.555	N/A	-	-	-	-
NaciErey	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
NazMuzik	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Nepa	245.232	N/A	466.257	-	36.100	-	36.130	325	187.603	9.800	63.052	1.000	96.749	N/A	42.048	3.100	116.115	5.500
Nef	102.055	N/A	46.174	-	-	-	-	-	-	-	-	-	-	N/A	401	-	-	-
Nihal	-	N/A	-	-	316.878	-	317.137	-	256.324	-	285.957	-	533.731	N/A	3.004	-	5.013	-
Nil	96.052	N/A	414.060	-	352.477	-	352.765	3.500	-	1.000	-	-	-	N/A	407.463	1.000	-	-
Nokta	-	N/A	344.297	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Numbe1	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Numray	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Nuray	-	N/A	60.227	-	23.084	-	23.083	-	-	-	-	-	10.099	N/A	-	-	158.280	-
Nuray	-	N/A	-	-	-	-	-	-	3.010	-	-	-	-	N/A	-	-	-	-
Nuans	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	8.010	-	3.007	-
Odeon	-	N/A	-	-	-	-	-	-	-	-	667	-	-	N/A	-	-	7.021	4.000
Ödvi	175.577	N/A	87.631	-	1.805	-	1.807	-	-	-	-	-	-	N/A	-	-	-	-
Okey	685.173	N/A	1.689.363	6.595	1.143.186	5.954	1.144.101	7.000	479.239	1.500	78.815	3.550	389.417	N/A	394.048	12.500	35.852	1.500

FİRMA	1990		1991		1992		1993		1994		1995		1996		1997		1998	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
OrtaDenYayın	-	N/A	-	-	-	-	3.011	-	-	-	-	-	-	-	-	-	-	-
Orta	190.102	N/A	155.586	-	3.009	-	62.224	700	54.174	-	3.032	-	10.089	-	-	-	-	-
Ortaçogu	-	N/A	-	-	62.173	-	190.684	-	15.049	-	48.471	300	19.189	-	23.027	-	11.039	-
Oskar	1.018.879	N/A	650.049	1.000	233.246	4.790	233.437	-	15.651	1.000	58.606	1.100	23.228	4.300	50.458	-	-	-
Osmanlı	235.627	N/A	38.144	-	68.691	-	68.747	-	7.276	-	-	-	12.523	-	13.816	-	-	-
Otantik	-	N/A	5.019	-	5.014	-	-	-	60.896	-	7.276	-	-	-	-	-	-	-
OxfordYayınçılık	-	N/A	8.031	-	24.067	6.121	24.087	-	78.051	-	496.332	17.001	40.396	7.000	353.402	7.000	99.074	4.500
Ozan	-	N/A	-	5.660	-	-	-	-	3.295	3.944	-	1.800	-	-	-	-	-	-
ÖmerUmar	-	N/A	-	-	-	-	-	-	9.330	-	-	-	-	-	-	-	-	-
Önel	-	N/A	3.012	-	6.017	-	6.022	-	10.033	-	5.356	-	18.179	-	10.012	-	20.087	-
Öncü	-	N/A	10.038	-	1.003	-	-	-	2.007	-	46.481	-	9.494	-	4.005	-	-	-
Öz	218.117	N/A	244.923	-	277.770	-	277.997	1.000	51.165	1.000	-	-	582.812	6.700	417.675	6.700	665.084	5.800
Özakar	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Özbaranİnsaat	-	N/A	9.035	-	15.042	-	15.054	-	76.245	-	3.032	-	-	-	-	-	-	-
Özbek	-	N/A	318.249	-	190.528	-	190.684	-	63.103	-	20.209	-	83.822	-	20.023	-	-	-
Özbir	488.712	N/A	142.537	-	121.637	-	122.740	-	563.102	3.300	24.251	-	115.937	-	20.023	-	66.762	1.500
ÖzcanPlak	-	N/A	6.023	-	-	-	-	-	83.418	5.000	128.327	-	-	-	99.914	-	-	-
Özdemir	268.544	N/A	275.940	-	294.817	1.020	295.058	6.193	83.418	5.000	454.449	2.000	462.937	2.000	391.846	2.000	378.167	8.400
ÖzdemirErdogan	177.095	N/A	63.741	-	13.037	1.025	13.047	5.750	-	-	14.955	3.100	86.448	7.000	36.442	7.000	4.010	3.100
Özdiyar	31.617	N/A	10.038	-	-	-	-	-	-	-	72.753	-	102.758	3.000	149.170	3.000	114.873	500
ÖzentiPlak	5.003	N/A	-	-	-	-	-	-	-	-	-	-	1.515	-	-	-	-	-
Özer	3.038.126	N/A	2.289.122	10.652	3.650.409	14.871	3.613.250	37.142	2.290.857	33.753	900.612	31.902	2.369.821	82.854	1.049.293	82.854	1.021.218	34.201
Özron	-	N/A	66.250	-	89.950	-	90.023	-	41.534	-	8.084	-	5.050	-	1.602	-	-	-
Özge	5.003	N/A	-	-	-	-	-	-	19.463	-	15.763	-	14.139	-	32.037	-	38.283	-
Özgül	55.030	N/A	-	-	6.017	-	6.022	-	11.036	-	18.694	-	5.656	-	17.120	-	10.034	-
ÖzgülMuzik	83.045	N/A	48.483	-	19.053	-	19.069	-	-	-	-	-	-	-	-	-	-	-
Özgür	-	N/A	-	-	37.103	-	37.134	-	24.981	-	-	-	-	-	-	-	-	-
Özguven	705.378	N/A	286.178	-	171.776	-	171.917	-	36.116	1.000	43.450	-	38.377	-	10.012	-	33.222	-
Özkan	1.231.159	N/A	278.650	-	164.656	-	164.791	1.000	-	-	-	-	-	-	-	-	-	-
Özlem	52.028	N/A	7.830	-	22.062	-	22.080	-	-	-	-	-	-	-	-	-	-	-
Özleyis	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Özoklar	2.002	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Özpinar	264.142	N/A	511.929	-	266.238	-	266.455	-	178.574	-	157.327	-	266.108	-	353.202	-	419.647	-
Özsah	-	N/A	61.170	-	61.170	-	61.220	-	-	-	7.074	-	-	-	-	-	-	-
Özlük	49.027	N/A	21.080	-	11.031	-	16.058	-	10.033	-	4.548	-	-	-	-	-	-	-
Öztaş	-	N/A	15.057	-	10.028	-	10.036	-	5.017	-	40.418	-	82.812	-	-	-	15.081	-
Öztaşın	5.003	N/A	60.227	-	18.050	-	18.065	3.000	63.605	-	5.053	-	5.050	-	-	-	-	-
Panorama	-	N/A	-	-	-	-	-	-	-	-	5.053	-	-	-	-	-	-	-
Pandora	-	N/A	-	-	-	-	-	-	-	-	5.053	-	-	-	-	-	-	-
Pegasus	-	N/A	-	-	-	-	-	-	-	-	-	-	10.059	-	-	-	-	-
Pektaş	-	N/A	211.798	-	185.514	1.500	185.666	18.377	788.332	26.702	597.175	31.132	422.138	75.004	2.403	950.080	201.962	7.500
Pentagram	-	N/A	20.076	-	8.023	-	8.029	-	-	-	-	-	-	-	-	-	-	-
PeriSanatProduksiyon	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Piccatura	3.002	N/A	-	-	2.608	-	2.610	-	19.062	1.000	41.429	3.500	19.189	-	-	-	-	-
Pinar	83.345	N/A	92.850	-	51.644	-	51.686	-	23.075	-	1.011	-	73.521	-	280.319	-	22.113	2.000
PiramitYap.	-	N/A	5.019	-	3.009	-	3.011	-	-	-	-	-	-	-	-	-	-	-
Piya	-	N/A	-	-	-	-	-	-	50.162	-	47.087	-	-	-	25.029	-	7.021	-
Plakcan	957.013	N/A	253.756	11.815	-	-	12.000	-	12.039	-	-	300	-	-	48.055	8.000	20.087	41.001
Platin	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	25.029	1.000	-	-

FIRM	1990		1991		1992		1993		1994		1995		1996		1997		1998	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
Polo	-	N/A	-	-	-	-	-	-	40,129	-	45,471	-	10,059	N/A	21,024	-	-	-
Posta	-	N/A	-	-	-	-	-	-	-	-	-	-	30,297	N/A	75,086	4,000	-	-
Pozitif	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	500	-	-
PrestijGroup	-	N/A	-	-	-	-	-	-	1,855,258	30,202	787,139	23,501	2,549,993	N/A	3,175,610	184,008	6,899,168	1,317,535
Promiks	-	N/A	-	-	1,003	-	1,004	-	-	-	51,533	-	149,869	N/A	144,665	1,000	173,492	4,000
Rahmet	-	N/A	-	-	21,059	-	21,076	-	5,017	-	10,847,797	542,516	11,287,624	N/A	7,485,821	721,835	14,665,067	979,724
RaksGroup	2,845,425	N/A	3,030,616	84,933	8,795,862	191,851	8,757,388	309,096	11,414,547	254,800	40,418	-	116,139	N/A	110,126	-	122,850	1,000
RealtNey	-	N/A	-	-	-	-	-	-	7,525	-	-	-	-	N/A	3,004	-	-	-
Reca	-	N/A	-	-	-	26,192	-	21,306	-	-	-	-	-	N/A	-	-	-	-
Remzikamman	-	N/A	-	-	16,045	-	16,058	-	25,081	-	-	-	-	N/A	-	-	-	-
Renk	-	N/A	-	-	9,527	-	9,535	-	22,071	-	5,558	-	10,604	N/A	15,018	-	-	-
Roiate	9,005	N/A	9,035	-	1,003	-	1,004	-	-	-	-	-	-	N/A	-	-	-	-
S.S.HalkAsik	-	N/A	-	-	210,082	-	210,254	-	55,479	-	-	-	-	N/A	-	-	-	-
Sebah	17,010	N/A	228,862	-	11,031	-	11,040	-	60,194	-	46,481	-	-	N/A	35,040	-	-	-
Sefa	30,017	N/A	21,080	-	-	-	-	-	-	-	-	-	-	N/A	3,004	-	2,004	-
Sagiroglu	-	N/A	-	-	-	-	-	-	-	-	-	-	2,020	N/A	-	-	-	-
Sagliam	-	N/A	-	-	-	-	-	-	-	-	-	-	30,297	N/A	-	-	-	-
Sekarya	8,005	N/A	7,027	-	43,120	-	43,155	-	43,641	-	13,642	-	23,228	N/A	19,022	-	-	-
Sekiryay	36,520	N/A	211,798	-	11,031	-	11,040	3,000	15,049	-	40,722	1,300	13,533	N/A	33,839	500	13,049	65,501
Selitik	753,904	N/A	233,932	1,084	101,281	1,017	101,364	-	5,017	-	-	-	-	N/A	-	-	-	-
Serp	68,037	N/A	116,439	-	24,087	-	24,087	-	-	-	-	-	7,070	N/A	-	-	-	-
Savas	-	N/A	-	-	-	-	-	-	903	-	-	-	-	N/A	-	-	-	-
SaxontPress	-	N/A	-	-	27,075	-	27,098	1,000	15,550	-	13,136	-	10,907	N/A	-	-	-	-
Sayan	44,674	N/A	31,720	-	-	-	-	-	-	-	10,105	-	-	N/A	-	-	-	-
SezimLuzik	-	N/A	-	-	67,888	-	67,944	-	84,171	-	26,070	-	3,232	N/A	2,403	-	59,009	-
Soda	29,516	N/A	137,017	-	60,769	1,300	60,818	6,309	8,929	2,130	18,088	8,200	37,165	N/A	138,868	23,301	74,736	27,000
Soder	174,094	N/A	139,325	500	43,120	-	43,155	-	30,097	-	-	-	43,426	N/A	-	-	-	-
Sofa	4,503	N/A	25,095	-	-	-	-	-	-	-	-	-	-	N/A	34,039	-	6,017	-
Sepeh	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	10,312	-	2,004	-
Selko	5,003	N/A	-	-	4,012	-	4,015	-	7,525	-	5,760	-	8,080	N/A	-	-	-	-
SelamGazetesi	-	N/A	-	-	-	-	-	-	-	-	10,105	-	-	N/A	313,356	5,500	1,249,951	73,202
Selguktu	-	N/A	-	-	12,034	-	12,044	-	229,136	-	307,177	3,000	272,673	N/A	-	-	-	-
SemaVideo	14,758	N/A	4,016	-	-	-	-	-	-	-	49,512	3,000	47,466	N/A	-	-	-	-
Sembol	711,481	N/A	762,874	5,571	122,339	9,860	122,439	-	134,633	3,000	88,213	-	105,030	N/A	103,568	-	86,011	-
Senseç	-	N/A	-	-	-	446	-	-	33,107	-	-	-	-	N/A	70,080	5,000	-	-
Sentez	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	12,014	-	86,217	7,000
Serdar	-	N/A	-	-	6,017	-	-	-	5,017	-	-	-	7,070	N/A	-	-	-	-
Serkanticaret	-	N/A	-	-	10,028	-	-	-	12,039	-	-	-	-	N/A	-	-	-	-
Sertac	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Servet	29,016	N/A	-	-	21,059	-	31,112	-	-	-	31,324	-	3,030	N/A	36,041	-	62,680	3,000
Ses	47,528	N/A	177,670	-	112,312	-	112,403	-	-	-	298,082	2,800	389,518	N/A	553,329	52,502	239,016	43,101
Sev	-	N/A	-	-	-	-	-	-	143,762	1,500	-	-	5,050	N/A	8,010	-	-	-
Sevilen	197,974	N/A	78,295	-	47,031	-	47,069	-	-	-	10,105	-	-	N/A	10,012	-	-	-
Sevkan	99,153	N/A	500,887	-	114,919	-	115,013	-	5,017	-	-	-	-	N/A	-	-	-	-
SevraPlak	-	N/A	-	-	-	-	-	-	13,042	-	12,126	-	-	N/A	-	-	-	-
SeyhanMuzik	-	N/A	-	-	-	-	-	-	3,010	-	-	-	-	N/A	-	-	-	-
SeyraPlak	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Sezgi	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Sila	-	N/A	-	-	-	-	-	-	-	-	104,077	-	-	N/A	-	-	-	-
Sivana	-	N/A	-	-	-	-	-	-	-	-	-	-	3,030	N/A	438,489	9,300	814,043	28,000
Simga	20,011	N/A	129,990	-	88,596	1,476	88,668	988	28,091	279	-	-	174,208	N/A	188,615	-	119,429	2,500
Sindoma	-	N/A	-	-	-	-	-	-	-	-	-	-	5,050	N/A	-	-	537,448	16,000

FIRM	1980		1981		1982		1983		1984		1985		1986		1987		1988	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
sinetel	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sitrhan	-	N/A	20.076	-	71.198	-	71.256	-	33.107	-	21.220	-	16.159	-	-	-	-	-
Solfej	6.004	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Soner	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sony	-	N/A	-	-	-	-	9.535	-	442.487	2.800	404.419	14.001	320.643	N/A	70.080	59.091	523.302	507.095
Söhrmez	-	N/A	37.642	-	9.527	-	-	-	-	-	-	-	-	-	-	-	-	-
Sözdemir	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sözlen	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sözler	-	N/A	-	-	-	-	15.054	-	-	-	-	-	-	-	-	-	-	-
SpotVideo	-	N/A	2.008	-	15.042	-	-	-	-	-	-	-	-	-	-	-	-	-
SpotVideo	-	N/A	15.057	-	16.045	-	-	-	-	-	-	-	-	-	-	-	-	-
StudyoBaskent	-	N/A	-	-	-	-	16.058	-	-	-	-	-	-	-	-	-	-	-
SunuReklam	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Surat	-	N/A	-	-	-	-	-	-	15.049	-	-	-	-	-	-	-	-	-
Sutak	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Sah	522.730	N/A	-	-	489.501	-	483.863	-	16.052	-	49.512	-	99.980	-	7.509	-	23.868	-
Şahin	34.019	N/A	76.890	-	97.872	-	138.095	2.000	110.365	-	93.770	-	212.584	-	157.179	1.000	153.571	-
Şahinler	40.022	N/A	-	-	-	-	-	-	9.330	-	8.084	-	1.010	-	174.198	-	5.013	-
Şan	5.003	N/A	377.422	1.535	212.188	511	218.383	1.212	15.049	-	6.063	1.000	-	-	-	-	-	-
Şenay	73.540	N/A	98.475	-	61.070	-	67.141	927	3.010	-	8.084	-	62.614	-	35.040	-	4.010	-
Şenol	-	N/A	3.012	-	20.557	-	20.574	-	10.735	-	1.819	-	4.040	-	50.057	-	37.474	-
Şölen	112.561	N/A	50.691	-	35.098	-	35.126	-	25.783	-	30.314	-	24.440	-	38.044	5.000	13.049	4.000
Şura	-	N/A	-	-	-	-	-	-	-	-	15.157	-	19.189	-	20.023	-	1.002	-
Şura	534.286	N/A	238.900	-	183.508	-	183.659	7.000	77.700	1.750	61.032	1.750	76.955	-	137.156	5.600	40.310	3.500
Tap	-	N/A	5.019	-	-	-	-	-	-	-	-	-	10.099	-	15.018	1.000	-	1.500
Tan	1.187.636	N/A	2.530	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tatlisus	-	N/A	-	-	-	-	-	-	14.046	-	-	-	-	-	7.008	-	40.310	-
Travaslı	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tavlan	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Teclair	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
teknatip	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tekfir	6.004	N/A	32.121	-	3.009	-	3.011	-	-	-	-	-	-	-	-	-	-	-
Teknik	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TEKspres	-	N/A	-	-	-	-	-	-	14.046	-	60.627	-	121.188	-	133.152	3.000	15.061	3.000
Tevhid	-	N/A	-	-	-	-	-	-	-	-	3.032	-	22.420	-	180.205	-	-	-
Times	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	16.019	-	-	-
Topalçığı	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Topkapı	702.476	N/A	642.591	42.205	246.182	8.134	246.384	10.671	10.880	-	303.034	13.651	323.370	-	628.114	107.505	75.667	5.000
ToprakMuzik	-	N/A	-	-	10.028	-	10.036	-	-	-	12.126	1.500	64.432	-	138.007	3.500	29.178	3.500
Trikonit	-	N/A	-	-	-	-	-	-	5.017	-	-	-	7.070	-	-	-	-	-
TRTGenelMüdürlüğü	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
TunakKitap	-	N/A	-	-	3.008	-	9.033	-	-	-	10.105	-	-	-	-	-	-	-
Tunçer	-	N/A	-	-	15.042	-	28.101	-	-	-	-	-	-	-	-	-	-	-
Tuncil	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Turttaş	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Turgay	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Turttaş	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tutku	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tutku	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Turner	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Tunçer	-	N/A	25.095	-	6.017	-	-	-	-	-	-	-	-	-	-	-	-	-
TürkDünyası	30.017	N/A	30.114	-	759.704	-	760.325	11.500	41.735	3.900	30.314	1.400	55.040	-	552.628	9.000	386.799	18.500
Türker	-	N/A	-	-	-	-	-	-	-	-	-	-	-	-	35.040	10.000	-	4.000
Türkmen	-	N/A	-	-	-	-	-	-	3.010	-	5.053	-	10.099	-	3.004	-	60.640	1.000

FİRM	1990		1991		1992		1993		1994		1995		1996		1997		1998	
	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD	AC	CD
Torkiada	172.393	N/A	21.080	6.558	400.510	6.374	400.837	4.950	162.322	4.000	43.450	8.250	55.040	N/A	48.557	10.000	69.622	7.700
Tortasineaat	62.034	N/A	87.329	-	13.037	-	-	-	-	-	-	1.000	-	N/A	-	-	-	-
TütünSanat	1.001	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Uğak	-	N/A	-	-	-	-	65.535	-	5.017	-	37.387	-	-	N/A	-	-	-	-
Uğar	-	N/A	7.027	-	59.465	-	502	-	156.001	-	269.790	1.700	2.020	N/A	11.013	-	11.039	-
Uğuk	-	N/A	-	-	502	-	25.582	-	9.732	-	7.074	-	154.515	N/A	20.023	-	-	10.000
Uğur	234.126	N/A	167.632	-	25.571	-	184.891	-	178.574	3.500	111.150	500	20.198	N/A	7.509	-	60.640	-
Ulus	79.043	N/A	39.148	-	184.757	-	-	-	201.648	5.200	972.051	26.002	1.426.076	N/A	1.439.636	93.455	3.348.044	103.002
UnnarProd.	-	N/A	-	-	-	-	-	-	-	-	506	500	-	N/A	-	-	-	-
Unman	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	19.089	-
Unrut	2.002	N/A	195.236	-	89.649	-	89.722	1.500	30.097	1.000	56.383	-	147.950	N/A	148.970	15.600	498.589	17.000
Uras	144.478	N/A	-	-	-	-	-	-	130.946	-	131.763	4.500	57.565	N/A	54.062	-	20.097	-
Uyar	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Uzelli	1.272.281	N/A	1.651.520	44.422	1.554.808	47.537	1.556.077	35.285	552.675	2.800	312.734	8.000	338.316	N/A	204.793	2.000	35.245	2.000
Uzunca	58.032	N/A	34.129	-	32.691	-	32.718	-	14.046	-	-	-	5.252	N/A	28.423	-	16.068	-
Uşak	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
UnittMuzik	8.005	N/A	3.012	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Unal	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
UnerMuzik	84.045	N/A	51.193	-	5.014	-	5.018	-	-	-	374	-	-	N/A	3.004	-	-	-
VakkoTekstil	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
VideoExport	10.006	N/A	205.775	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
VideoMarket	5.003	N/A	50.190	-	175.587	50	175.730	4.000	-	250	-	-	-	N/A	-	-	-	-
Vizyon	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Vural	237.428	N/A	6.023	-	6.017	-	6.022	-	56.161	-	71.237	-	30.297	N/A	295.336	-	20.097	500
Yalçın	-	N/A	227.869	-	171.977	-	172.117	-	13.042	-	20.209	-	81.802	N/A	120.137	-	68.294	-
Yanık	65.335	N/A	40.383	-	53.950	-	53.994	-	5.017	-	20.209	65.004	15.149	N/A	181.206	-	-	-
YapıKredi	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Yavuz	906.986	N/A	331.248	5.780	262.728	8.370	262.943	8.000	18.359	1.800	108.624	4.000	5.555	N/A	40.046	9.400	-	4.500
YavuzBurç	18.010	N/A	19.072	5.459	-	1.025	-	-	-	-	33.345	-	76.753	N/A	44.051	6.600	199.864	27.100
Yazgil	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Yelken	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
YeniAsya	40.322	N/A	32.423	-	12.535	-	12.545	-	7.525	-	24.756	-	26.258	N/A	10.012	-	16.068	-
YeniDunya	27.015	N/A	9.235	-	28.780	-	28.804	-	24.379	-	5.255	-	3.636	N/A	5.006	-	50.155	-
YeniStratejiler	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Yeşil	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Yıldırım	-	N/A	35.635	-	72.200	-	72.259	-	93.501	11.101	50.119	4.100	12.523	N/A	13.416	1.600	85.190	2.400
Yıldızlar	34.019	N/A	78.898	-	47.231	-	47.270	-	4.013	-	4.042	-	10.099	N/A	10.012	750	35.043	-
Yılmaz	-	N/A	-	-	-	-	-	-	78.151	-	20.760	2.000	5.050	N/A	-	-	-	-
Yonca	-	N/A	444.073	24.784	1.117.385	74.823	1.118.308	104.252	32.908	-	20.760	2.000	10.402	N/A	-	-	-	-
Yön Ticaret	-	N/A	-	-	5.014	-	5.018	-	-	-	-	-	-	N/A	-	-	-	-
Yüksel	286.554	N/A	81.307	-	20.056	-	20.072	-	-	-	-	-	-	N/A	-	-	14.055	-
Zafer	-	N/A	-	-	201	-	201	-	-	-	-	-	-	N/A	-	-	-	-
Zaman	183.088	N/A	122.462	-	81.225	-	81.282	-	61.699	-	24.251	-	35.347	N/A	-	-	-	-
Zihni	-	N/A	-	-	-	-	-	-	-	-	-	-	-	N/A	-	-	-	-
Zumrut	-	N/A	180.681	-	19.053	-	19.089	-	-	-	405	-	-	N/A	-	-	33.298	2.100

**APPENDIX D: FIRMS ENTERED AND LEFT THE MARKET BETWEEN
1990-1998**

Explanation: In the following pages, an alphabetical list of the firms, which entered and/or left the market is given. Then second column (Format) denotes the type of medium the firm is producing (AC for the firms producing only audiocassettes and BOTH for the ones producing both audiocassette and compact disk). In the third column (Time), the first part (Begin) is the time when the firm founded or began producing records. The second part (Stop/End) explains whether the firm has given up producing records (until 1998, since our data does not cover the sales for 1999) or bankrupted. Additionally, the sign (cont.) means still continuing to produce (of course our data is valid until 1998).

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
2000Müzik	AC	1994	1996
2019	AC	1995	1997
A.S.M.	BOTH	Before 1990	Cont.
Abalıoğlu	AC	Before 1990	Cont.
ABC	AC	Before 1990	Cont.
Ada	BOTH	Before 1990	Cont.
Adıgüzel	AC	1998	Cont.
Adım	AC	1994	Cont.
AFSYayıncılık	AC	Before 1990	1996
AhenkAjans	BOTH	1992	Cont.
AhmetŞenyüz	AC	1996	1998
Ahsen	AC	1997	Cont.
AjansA.Filim	AC	1997	1998
AjansÇehre	AC	1994	1995
Ajansmesnevi	AC	1996	1998
AkAjans	AC	1998	Cont.
Akalın	AC	Before 1990	1998
Akbaş	BOTH	1992	Cont.
Akbulut	AC	Before 1990	Cont.
Akdeniz	AC	Before 1990	1994
Akdoğan	AC	1996	1997
Akgün	AC	1994	Cont.
Akkaya	AC	1995	Cont.
Akkılıç	BOTH	1998	Cont.
Aklar	BOTH	1994	1996
Akser	BOTH	1997	Cont.
AksoyTunç	BOTH	1994	1997
AlfaKaset	AC	Before 1990	1994
AliAydın	BOTH	1997	Cont.
Alişan	AC	1997	Cont.
Alpdoğan	AC	Before 1990	Cont.
Altınboynuz	BOTH	1991	1994
Altınses	AC	Before 1990	1997
Altıntaş	BOTH	1996	Cont.
AltuğAltınay	AC	1991	1992
AmaçMüzik	BOTH	1991	1994
Anadolu	AC	Before 1990	Cont.
Anahtar	BOTH	1992	1996
AnasMüzik	AC	Before 1990	1994
AndMüzik	AC	1991	1992
Anılar	BOTH	Before 1990	Cont.
AnitkabirDerneği	AC	1995	1998
Ankara	AC	1995	Cont.
Ant	AC	1997	Cont.
Apeks	AC	1998	Cont.
APSYayıncılık	AC	Before 1990	1991
Aras	AC	1991	1998
Ar-can	BOTH	1995	1996
Argovan	AC	1997	1998
Arıca	AC	1996	1997
Arkalın	AC	1996	1997
Armoni	AC	Before 1990	Cont.
Arsel	BOTH	1997	Cont.
Arya	BOTH	1998	Cont.
Arzu	AC	Before 1990	Cont.
As	BOTH	Before 1990	Cont.

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
Asır	AC	Before 1990	Cont.
AskeriMüze	BOTH	Before 1990	1998
AsuPlak	BOTH	1992	1994
Asya	AC	1995	Cont.
Aşanlar	BOTH	1997	Cont.
Atakan	BOTH	Before 1990	Cont.
Ataman	AC	1991	1994
Atılım	AC	Before 1990	1992
Atlantis	AC	1996	Cont.
Ayans	BOTH	1998	Cont.
Ayço	AC	1992	Cont.
Aydın	BOTH	1992	Cont.
Aygün	BOTH	Before 1990	Cont.
Aykut	AC	1995	Cont.
Aysel	BOTH	1997	1998
AysunPlak	AC	Before 1990	1992
Aytaşı	AC	Before 1990	Cont.
Azim	AC	Before 1990	Cont.
Aziz	AC	Before 1990	Cont.
Bağlan	BOTH	1995	1996
Bahar	AC	Before 1990	Cont.
Balet	AC	Before 1990	Cont.
Banko	BOTH	1991	1998
Barış	BOTH	Before 1990	Cont.
Bastem	BOTH	1996	Cont.
Bay	AC	Before 1990	Cont.
Bayar	BOTH	Before 1990	Cont.
Bayer	BOTH	1992	Cont.
Bayram	BOTH	1996	Cont.
Baysu	AC	Before 1990	1996
Bebek	BOTH	1997	1998
Beğeni	AC	1997	Cont.
Bema	BOTH	1997	Cont.
Bengisu	AC	1993	1994
Berakat	AC	Before 1990	Cont.
Berkay	BOTH	1995	Cont.
Beste	BOTH	1992	1997
Beşler	AC	Before 1990	Cont.
Bey	AC	Before 1990	Cont.
Bıla	BOTH	1997	1998
BirlikSanat	AC	Before 1990	1994
BirNumara	AC	Before 1990	Cont.
BMG	BOTH	1995	Cont.
Boray	BOTH	1998	Cont.
borluk	AC	1996	1997
Boyut	AC	1995	Cont.
Bölük	BOTH	1995	Cont.
Budaklar	AC	1991	1992
Buket	AC	1994	Cont.
Buyurgan	AC	1992	1994
Bülbül	BOTH	Before 1990	1992
Can	AC	Before 1990	1998
Canan	AC	1991	Cont.
Canbay	BOTH	Before 1990	1992
Candost	AC	1994	Cont.
CazPlak	BOTH	1991	1997

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
CDVSTK	BOTH	1997	1998
Cem	AC	Before 1990	1995
Cemre	AC	1997	Cont.
CengizÇekiç	BOTH	1991	1994
Ceylan	AC	Before 1990	1992
Cihan	AC	1992	Cont.
Cinan	BOTH	Before 1990	Cont.
Coşkun	AC	Before 1990	Cont.
Çağan	BOTH	Before 1990	Cont.
Çağ	BOTH	Before 1990	Cont.
Çağdaş	BOTH	Before 1990	Cont.
Çağrı	BOTH	1995	Cont.
Çakır	AC	Before 1990	1998
Çapan	BOTH	1995	1996
Çetin	AC	Before 1990	1991
Çetiner	AC	Before 1990	Cont.
Çetinkaya	AC	Before 1990	Cont.
Çevre	BOTH	1998	Cont.
Çimen	AC	Before 1990	1998
Çınar	AC	1996	Cont.
ÇinçinPlak	BOTH	Before 1990	1991
Çizgi	AC	1997	1998
ÇizgiMüzik	AC	1995	1996
ÇocukVakfi	AC	1992	1996
Çokran	AC	Before 1990	Cont.
ÇokSesli	AC	Before 1990	1996
Çorluk	AC	1991	Cont.
Çözüm	AC	1998	Cont.
Damla	AC	Before 1990	Cont.
Dedeoglu	AC	Before 1990	1992
Deka	AC	1998	Cont.
Deksan	BOTH	1994	1995
Deniz	AC	Before 1990	1998
Dersim	BOTH	1997	Cont.
Destebaşilar	AC	1991	1997
Devsan	AC	1994	Cont.
Dia	BOTH	1996	1997
Diaganol	AC	1997	1998
Dilan	BOTH	1991	Cont.
Disco	AC	Before 1990	Cont.
Diskotür	AC	Before 1990	Cont.
Divan	BOTH	1997	Cont.
Diyanet	BOTH	Before 1990	1998
Diyar	AC	Before 1990	1998
DMS	AC	1998	Cont.
Doğu	BOTH	1994	1995
DomiProdüksiyon	AC	1994	1995
Doruk	BOTH	1994	1998
Dostlar	AC	1998	Cont.
Durubey	BOTH	1991	1998
Duygu	BOTH	Before 1990	Cont.
Düet	BOTH	1997	1998
Dünya	AC	1991	Cont.
Düzgüt	BOTH	Before 1990	1998
EgeMüzik	AC	Before 1990	1991
EgitimGelistirme	AC	Before 1990	1994

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
EkenMüzik	AC	1994	1996
Ekol	AC	1995	Cont.
Elenor	AC	Before 1990	Cont.
Elif	BOTH	Before 1990	Cont.
Elmas	AC	1991	1998
EltuTurizm	AC	1995	1996
Emir	AC	1998	Cont.
Emrah	BOTH	Before 1990	Cont.
Emre	BOTH	1991	Cont.
EmreGrafson	BOTH	Before 1990	Cont.
Enes	BOTH	Before 1990	Cont.
Engin	BOTH	Before 1990	Cont.
Enter	BOTH	1997	Cont.
Epik	BOTH	Before 1990	1998
Ercan	AC	Before 1990	Cont.
Erdal	BOTH	Before 1990	Cont.
Erkam	AC	1991	Cont.
Erkan	BOTH	Before 1990	1997
Erol	AC	1994	Cont.
Ertok	AC	Before 1990	1992
Esen	AC	Before 1990	1992
Esmâ	AC	1997	1998
EvrenPlak	BOTH	1992	1994
Ezgi	AC	1991	Cont.
FakirProdüksiyon	BOTH	1992	1994
Ferdifon	AC	Before 1990	Cont.
Ferhat	BOTH	1994	1997
Feza	AC	Before 1990	1998
Fidan	AC	1997	Cont.
Filiz	BOTH	1991	1997
Fırat	AC	1997	Cont.
Flaş	AC	Before 1990	1996
Fono	AC	Before 1990	Cont.
Garip	BOTH	1996	Cont.
Geçit	AC	1997	1998
Genç	BOTH	1997	Cont.
GiritMüzik	AC	1993	1995
Giz	BOTH	Before 1990	1998
Gold	AC	1991	1996
Gonca	BOTH	Before 1990	Cont.
Gökalp	AC	Before 1990	1996
Gökhan	BOTH	1994	1997
Göksel	AC	1992	1995
Göksoy	AC	Before 1990	Cont.
Gökyüzü	BOTH	1992	1994
Gölge	AC	1996	Cont.
GörmeÖzürü	AC	1997	1998
Görsev	AC	Before 1990	Cont.
Gözde	AC	Before 1990	1995
Gözlem	AC	Before 1990	1997
Gözyaşı	BOTH	1997	Cont.
GülerPlak	AC	Before 1990	1991
Gülüm	AC	1992	1997
Gün	BOTH	1991	1994
Günalp	AC	Before 1990	Cont.
Güner	BOTH	Before 1990	Cont.

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
Güneş	AC	Before 1990	Cont.
Güney	BOTH	Before 1990	1997
Güniz	AC	1995	1997
Gürdil	BOTH	1995	1997
Güven	BOTH	Before 1990	1994
Güvercin	AC	1991	Cont.
Hades	BOTH	1992	Cont.
Hafiz	BOTH	1991	1998
Hamle	AC	1991	1998
Hammer	BOTH	1994	Cont.
Harika	BOTH	Before 1990	Cont.
Hasan	BOTH	1992	1994
HasKoop	AC	Before 1990	1995
Hatıra	AC	Before 1990	1991
HedefPlak	AC	1992	1998
Hisar	BOTH	1994	1998
Hülya	AC	Before 1990	1996
Hüseyin	AC	1998	Cont.
İber	AC	1997	Cont.
İcmal	BOTH	1997	Cont.
İdobay	BOTH	1997	Cont.
İhlas	BOTH	Before 1990	Cont.
İleri	BOTH	Before 1990	Cont.
İlkan	BOTH	Before 1990	1992
İMüftülüğü	AC	Before 1990	1991
İLVI	AC	Before 1990	1992
İmaj	AC	1997	Cont.
İmece	BOTH	1991	Cont.
İnan	BOTH	Before 1990	Cont.
İncilay	AC	1994	1998
İnkilab	BOTH	Before 1990	1995
İnterMüzik	AC	1994	1996
İpekYolu	BOTH	Before 1990	1998
İslamoğlu	AC	Before 1990	1997
İstanbul	AC	Before 1990	Cont.
İstekÖz.Eg.	BOTH	1992	1994
İzmir	AC	1992	Cont.
Jet	AC	Before 1990	Cont.
Kadans	BOTH	1997	1998
KadirKarakoç	BOTH	1992	1994
Kaf	AC	1997	1998
Kaian	BOTH	Before 1990	Cont.
Kalite	BOTH	Before 1990	Cont.
Kamel	BOTH	1994	Cont.
Kanbay	AC	1991	Cont.
Kanneci	AC	1996	1998
Karaal	BOTH	1991	Cont.
Karaca	AC	1991	Cont.
Karadeniz	BOTH	Before 1990	Cont.
Kardelen	BOTH	1997	Cont.
Karnaval	AC	Before 1990	1995
Kartal	AC	Before 1990	1992
Karun	AC	1994	1996
Kavala	BOTH	1997	1998
Kaya	BOTH	1994	1998
Kayabaş	AC	1998	Cont.

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
Kayıran	AC	1991	1992
Kaynak	BOTH	Before 1990	Cont.
Kazan	BOTH	Before 1990	Cont.
Kekeva	BOTH	Before 1990	Cont.
Kent	BOTH	Before 1990	Cont.
Kervan	BOTH	Before 1990	Cont.
Kılıç	BOTH	1997	Cont.
KırmızıMüzik	BOTH	1994	1995
Kitsan	AC	1994	Cont.
Klas	AC	1996	Cont.
Klip	BOTH	1991	Cont.
Kocaman	BOTH	1996	1997
Koç	AC	1994	Cont.
Koçak	AC	1994	1998
Koçer	AC	1994	Cont.
Koda	AC	1991	Cont.
Korn	BOTH	1996	Cont.
Kornedi	BOTH	1992	Cont.
KoyutürkLtd.	BOTH	1992	1994
Kök	AC	Before 1990	1991
Kros	AC	1996	1997
Kubbealtı	BOTH	Before 1990	1996
Kucak	AC	1998	Cont.
Kule	AC	1997	1998
Kunuz	AC	1992	1998
Kuzey	AC	1998	Cont.
Lades	AC	1992	1994
laylaylom	BOTH	1996	1997
Levent	BOTH	1995	Cont.
Liberal	AC	1996	Cont.
Lider	BOTH	Before 1990	Cont.
Linelli	AC	Before 1990	1991
Lirik	BOTH	1996	Cont.
Longman	AC	1998	Cont.
LotusElektronik	BOTH	1991	1992
LozanKitap	AC	Before 1990	1992
M.Kaynakçı	BOTH	Before 1990	1991
M.Ü.İlahiyat	AC	1994	1995
Mahsunikaset	AC	Before 1990	1991
Major	BOTH	Before 1990	Cont.
MakroMüzik	AC	1994	1995
Marmara	AC	1994	Cont.
MaviDeniz	BOTH	1992	1994
Maya	BOTH	1998	Cont.
Mazlum	AC	1992	1996
MedeniUçar	BOTH	1994	1996
Mega	BOTH	1991	Cont.
MehmetFethi	AC	1992	1994
Meis	AC	1991	Cont.
Melki	AC	1992	Cont.
Menekşe	BOTH	1995	Cont.
Mer	BOTH	1996	1998
Mercan	AC	1998	Cont.
Mert	AC	1991	Cont.
MetroAlisveris	BOTH	1994	1996
Metropol	BOTH	1994	Cont.

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
Mezopotamya	AC	1992	1994
Midas	BOTH	Before 1990	1995
Milletlerarası	BOTH	1991	1995
Minerva	BOTH	Before 1990	1994
Mitra	BOTH	1996	1997
Modem	AC	Before 1990	Cont.
Motif	BOTH	1994	Cont.
Murat	BOTH	1991	1997
MünervaMüzik	BOTH	Before 1990	1991
MüzikMarket	AC	Before 1990	1998
Müzikotek	AC	1991	Cont.
Müziksan	BOTH	1992	Cont.
N.Kılıçkını	BOTH	1992	Cont.
NaciEray	AC	1991	1997
NazMüzik	AC	1995	1996
Nepa	AC	Before 1990	1998
Net	BOTH	Before 1990	Cont.
Nihal	BOTH	1997	Cont.
Nil	BOTH	Before 1990	1998
Nokta	BOTH	1991	1995
Number1	AC	1998	Cont.
nuray	BOTH	1996	1997
Nurtaç	AC	1991	1995
Nüans	BOTH	1997	Cont.
Odeon	BOTH	1995	Cont.
Odvi	AC	Before 1990	1994
Okey	BOTH	Before 1990	Cont.
OraDeriYayın	BOTH	1992	1994
Orfa	AC	1995	1997
Orhan	AC	Before 1990	Cont.
Ortadogu	AC	1994	1998
Oskar	AC	Before 1990	1994
Osmanlı	BOTH	Before 1990	1998
Otantik	AC	1991	1993
OxfordYayıncılık,	BOTH	1994	1996
Ozan	AC	1991	Cont.
ÖmerUmar	AC	1991	1998
Önal	BOTH	1994	Cont.
Öncü	BOTH	1991	1998
Öz	BOTH	1991	Cont.
Özaklar	BOTH	Before 1990	1995
ÖzbaranInsaat	AC	1995	1996
Özbek	AC	1991	1998
Özbir	AC	Before 1990	1998
Özbulut	BOTH	1991	Cont.
ÖzcanPlak	BOTH	1991	1992
Özdemir	AC	Before 1990	Cont.
ÖzdemirErdogan	AC	Before 1990	Cont.
Özderya	BOTH	Before 1990	1992
Özdiyar	BOTH	1995	Cont.
ÖzenPlak	AC	Before 1990	1997
Özer	AC	Before 1990	Cont.
Özfon	BOTH	1991	1998
Özge	BOTH	Before 1990	1991
Özgüler	AC	1994	Cont.
ÖzgüMüzik	BOTH	Before 1990	1994

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
Özgür	BOTH	Before 1990	Cont.
Özgüven	AC	1992	1994
Özkan	BOTH	Before 1990	1995
Özlem	AC	Before 1990	Cont.
Özleyis	BOTH	Before 1990	1994
Özoklar	AC	Before 1990	1991
Özpınar	AC	Before 1990	Cont.
Özsah	AC	1992	1996
Öztürk	AC	Before 1990	1996
Özyalçın	AC	1992	Cont.
PakZarf	AC	Before 1990	1997
Panaroma	AC	1991	1996
Pandora	BOTH	1995	1997
Pegasus	AC	1996	1998
Peker	AC	1991	Cont.
Pentagram	AC	1992	1994
PeriSanatProdüksiyon	AC	1991	1992
Piccatura	AC	Before 1990	1997
Pınar	AC	Before 1990	Cont.
PiramitYap.	AC	1991	1994
Piya	BOTH	1994	Cont.
Plaksan	AC	Before 1990	Cont.
Platin	AC	1997	1998
Polo	BOTH	1994	1998
Posta	AC	1996	1998
Pozitif	AC	1997	Cont.
PrestijGroup	BOTH	1994	Cont.
Promiks	BOTH	1992	Cont.
Rahmet	AC	1991	1995
RaksGroup	AC	Before 1990	Cont.
RastNey	BOTH	1995	Cont.
Reca	BOTH	1994	1998
RemziKamman	BOTH	1991	1994
Renk	AC	1992	1995
Roleks	BOTH	Before 1990	1998
S.S.HalkAsik.	BOTH	1992	1994
Sabah	BOTH	Before 1990	1995
Safa	BOTH	Before 1990	1998
Sağıroğlu	AC	1996	Cont.
Sağlam	BOTH	1996	1997
Sakarya	BOTH	Before 1990	1998
Saltuk	AC	Before 1990	Cont.
Sarp	BOTH	Before 1990	1995
Savaş	AC	Before 1990	1997
SaxonPress	AC	1994	1996
Sayan	AC	Before 1990	1997
SeçimMüzik	AC	1995	1996
Seda	AC	Before 1990	Cont.
Sedef	AC	Before 1990	Cont.
Sefa	AC	Before 1990	1997
Segah	AC	1997	Cont.
Seiko	BOTH	Before 1990	Cont.
SelamGazetesi	BOTH	1995	1996
Selçuklu	AC	1991	Cont.
SemaVideo	AC	Before 1990	1991
Sembol	BOTH	Before 1990	1997

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
Senseç	AC	1992	Cont.
Sentez	AC	1997	1998
Sera	BOTH	1992	Cont.
serdar	AC	1996	1997
SerkanTicaret	AC	1992	1995
Sertaç	AC	1998	Cont.
Servet	AC	Before 1990	Cont.
Ses	BOTH	Before 1990	Cont.
SeslikKitaplar	AC	1996	1998
Sevilen	BOTH	Before 1990	1998
Sevkan	BOTH	Before 1990	1995
SevraPlak	BOTH	1994	1995
SeyhanMüzik	BOTH	1995	1997
SeyraPlak	AC	1994	1995
sezgi	AC	1996	1997
Sıla	BOTH	1995	Cont.
Silvana	AC	1996	Cont.
Simge	BOTH	Before 1990	1995
Sindoma	AC	1996	Cont.
sinetel	AC	1996	1997
Sitran	AC	1991	1996
Solfej	AC	Before 1990	1991
Soner	AC	1996	Cont.
Sony	AC	1994	Cont.
Sönmez	AC	1991	1994
Sözdemir	BOTH	1995	1997
Sözen	BOTH	1998	Cont.
Sözler	BOTH	1991	1998
Spotek	BOTH	1996	Cont.
SpotVideo	AC	1991	1992
StüdyoBaskent	AC	1992	1994
SunuReklam	BOTH	1994	1995
Surat	AC	1997	Cont.
Şafak	AC	1994	Cont.
Şah	BOTH	Before 1990	Cont.
Şahin	AC	Before 1990	1997
Şahinler	AC	Before 1990	Cont.
Şan	BOTH	Before 1990	1996
Şenay	AC	Before 1990	Cont.
Şenol	BOTH	1991	Cont.
Şölen	AC	Before 1990	Cont.
Şura	AC	1995	Cont.
Taç	AC	Before 1990	Cont.
Tan	AC	1991	Cont.
Tatlises	BOTH	Before 1990	1992
Tavaslı	AC	1994	1998
Taylan	BOTH	1998	Cont.
tekbir	AC	1996	1997
tekinalp	BOTH	1996	1997
Teklif	BOTH	Before 1990	1994
Teknik	AC	1994	1998
TEkspres	BOTH	1997	Cont.
Tevhid	AC	1995	1998
Timas	BOTH	1998	Cont.
Topaloğlu	BOTH	1998	Cont.
Topkapı	BOTH	Before 1990	Cont.

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
ToprakMüzik	AC	1992	1994
Trikont	AC	1995	Cont.
TRTGenelMüdürlüğü	AC	1994	1995
TunaKitap	AC	1995	1997
Tuncer	AC	1992	1994
Tuncil	AC	1997	Cont.
Turfaş	BOTH	1992	1994
Turgay	BOTH	1998	Cont.
Turtas	AC	1995	1996
Tutku	AC	1996	Cont.
Tümer	AC	1997	Cont.
Tüncer	BOTH	1992	1993
TürkDünyası	AC	Before 1990	1992
Türker	BOTH	1991	Cont.
Türkmen	AC	1994	Cont.
Türküola	AC	Before 1990	Cont.
Türtasİnsaat	AC	Before 1990	1996
TütünSanat	AC	Before 1990	1991
Uçak	AC	1994	Cont.
Uçar	BOTH	Before 1990	Cont.
Ufuk	AC	1992	1998
Uğur	BOTH	Before 1990	Cont.
Ulus	BOTH	Before 1990	Cont.
UmarProd.	AC	1995	1996
Umman	AC	1998	Cont.
Umut	BOTH	Before 1990	Cont.
Uras	AC	Before 1990	Cont.
Uyar	AC	1998	Cont.
Uzelli	BOTH	Before 1990	Cont.
Uzunca	BOTH	Before 1990	Cont.
Üçel	AC	1996	Cont.
ÜmitMüzik	AC	Before 1990	1992
Ünal	BOTH	1997	1998
ÜnerMüzik	AC	Before 1990	1994
VakkoTekstil	BOTH	1992	1993
VideoExport	BOTH	Before 1990	1995
VideoMarket	BOTH	Before 1990	1992
Vizyon	AC	1996	1998
Vural	BOTH	1991	Cont.
Yalçın	BOTH	Before 1990	Cont.
Yankı	BOTH	Before 1990	1997
YapıKredi	BOTH	1993	1998
Yavuz	AC	Before 1990	Cont.
YavuzBurç	AC	Before 1990	Cont.
Yazgil	AC	1997	1998
Yelken	AC	1997	1998
YeniAsya	AC	Before 1990	Cont.
YeniDünya	BOTH	Before 1990	Cont.
YeniStratejiler	BOTH	1996	1998
Yeşil	AC	1998	Cont.
Yıldırım	AC	1991	Cont.
Yıldızlar	BOTH	Before 1990	1998
Yılmaz	AC	1994	1997
Yonca	AC	1991	1998
YönTicaret	BOTH	1992	1994
Yüksel	BOTH	Before 1990	Cont.

FIRMS ENTERED AND LEFT THE MARKET BETWEEN 1990-1998

FIRM	FORMAT	TIME	
		Begin	Stop/End
Zaman	BOTH	Before 1990	1997
Zihni	AC	1998	Cont.
Zümrüt	AC	1991	1996



**APPENDIX E: NUMBER OF FIRMS CLASSIFIED ACCORDING TO MUSIC
MEDIUM THEY PRODUCE**

Explanation: In the following table the change in the number of firms producing
Audiocassette (AC), Compact Disk (CD) or both, according to years is given.



	1990	1991	1992	1993	1994	1995	1996	1997	1998
# of Firms	217	254	273	265	273	277	279	307	273
Only CD	0	8	6	5	1	7	9*	11	2
Only AC	217	206	224	188	193	171	112	164	132
Both	0	40	43	72	79	99	158*	132	139

* estimation

APPENDIX F: IFPI MEMBER COUNTRIES AND THEIR SHARES IN THE
WORLD MARKET IN 1999



	Country	Retail Value (\$ in millions)		Country	Retail Value (\$ in millions)
1	USA	14251,4	39	Egypt	55,1
2	Japan	6436,6	40	Israel	54,8
3	UK	2908,9	41	Venezuela	52,9
4	Germany	2832,5	42	Malaysia	52,8
5	France	1983,4	43	Czech Republic	51,1
6	Canada	883,6	44	Saudi Arabia	50,4
7	Brazil	668,4	45	Philippines	47,5
8	Australia	656,3	46	Singapore	46,4
9	Spain	639,5	47	Central America	44,6
10	Mexico	626,0	48	UAE	39,1
11	Italy	607,3	49	Slovenia	20,3
12	Netherlands	522,1	50	Cyprus	17,8
13	Sweden	356,6	51	Iceland	17,8
14	Belgium	342,3	52	Ukraine	15,1
15	Austria	322,9	53	Peru	14,8
16	Taiwan	306,8	54	Lebanon	12,9
17	Switzerland	277,1	55	Croatia	12,9
18	Argentina	270,4	56	Slovakia	12,7
19	Denmark	263,9	57	Zimbabwe	12,4
20	Norway	260,9	58	Uruguay	12,0
21	South Korea	233,1	59	Romania	11,9
22	South Africa	181,4	60	Kuwait	9,2
23	Portugal	176,8	61	Pakistan	7,9
24	India	174,8	62	Estonia	6,5
25	Poland	154,9	63	Ecuador	5,6
26	Russia	153,1	64	Jamaica	5,4
27	Finland	128,6	65	Bolivia	4,6
28	Turkey	127,0	66	Paraguay	4,6
29	Indonesia	126,7	67	Latvia	4,2
30	Thailand	125,5	68	Bahrain	3,5
31	Ireland	113,3	69	Bulgaria	3,4
32	Columbia	109,9	70	Qatar	3,0
33	New Zealand	99,4	71	Lithuania	2,9
34	Hong Kong	98,9	72	Oman	2,7
35	Greece	98,8			
36	China	94,0			
37	Chile	76,2			
38	Hungary	58,7			

Source: IFPI (2000)

**APPENDIX G: CHANGES IN CONCENTRATION RATIOS IN THE WORLD
MUSIC MARKET BETWEEN 1947-1990**



YEARS	TOP 4 FIRM	TOP 8 FIRM
1947 - 1948	81	95
1949 - 1950	82,5	98,5
1951 - 1952	79,5	52,5
1953 - 1954	72	93,5
1955 - 1956	70	83,5
1957 - 1958	38	62,5
1959 - 1960	31	55
1961 - 1962	26	47
1963 - 1964	30	53
1965 - 1966	37,5	61
1967 - 1968	41	60,5
1969 - 1970	46,5	66
1971 - 1972	47,5	72,5
1973 - 1974	57	82
1975 - 1976	56,5	82,5
1977 - 1978	65,5	85,5
1979 - 1980	74,5	95
1981 - 1982	74	95,5
1983 - 1984	84,5	97,5
1985 - 1986	80	96,5
1987 - 1988	84,5	97,5
1989 - 1990	81	97

Source: Compiled from Lopes (1992) and Peterson and Berger (1975)

APPENDIX H: CHANGES IN TOP EIGHT FIRMS IN TURKISH MUSIC MARKET ACCORDING TO YEARS



	1990	1991	1992	1993	1994	1995	1996	1997	1998
1	EmreGrafsön 6,71%	RaksGroup 5,45%	RaksGroup 16,59%	RaksGroup 16,60%	RaksGroup 24,68%	RaksGroup 28,88%	RaksGroup 24,20%	RaksGroup 15,23%	RaksGroup 25,54%
2	Özer 5,24%	Kekeva 5,24%	Özer 6,77%	Özer 6,68%	Özer 4,92%	Ulus 2,53%	PrestijGroup 5,47%	PrestijGroup 6,23%	PrestijGroup 13,41%
3	RaksGroup 4,91%	Özer 4,01%	Kekeva 6,61%	Kekeva 6,53%	PrestijGroup 4,09%	Özer 2,36%	Özer 5,13%	İstanbul 4,75%	Ulus 5,63%
4	Kekeva 3,54%	EmreGrafsön 3,91%	EmreGrafsön 3,31%	EmreGrafsön 4,45%	İstanbul 3,11%	İstanbul 2,34%	Levent 4,07%	Levent 2,88%	Levent 3,35%
5	Fono 3,34%	Bayar 3,24%	Kervan 2,99%	Kervan 3,01%	Kekeva 2,81%	EmreGrafsön 2,29%	Ulus 3,06%	Ulus 2,84%	Emrah 2,88%
6	Göksöy 2,80%	Coşkun 3,18%	Uzelli 2,96%	Uzelli 2,91%	Ferdifon 2,80%	PrestijGroup 2,17%	Akbaş 1,64%	Bay 2,45%	İdobay 2,64%
7	Kervan 2,72%	Uzelli 2,97%	Güneş 2,50%	Güneş 2,48%	Fono 2,57%	Elenor 2,04%	Elenor 1,63%	Akbaş 2,17%	Selçuklu 2,16%
8	Uzelli 2,20%	Okey 2,96%	Ferdifon 2,40%	Ferdifon 2,37%	Kervan 2,45%	Kervan 1,94%	Kervan 1,58%	Özer 2,10%	Özer 1,72%

APPENDIX I: CHANGES IN THE CONSUMPTION OF CD, LP AND
AUDIOCASSETTE THROUGH YEARS IN FOUR SELECTED COUNTRIES



Changes In the Consumption of Music According to Different Media (1983-1999)

Year	Germany			Japan			UK			US							
	Unit Sales	An. Growth	LP	Unit Sales	An. Growth	LP	Unit Sales	An. Growth	LP	Unit Sales	An. Growth	LP					
1983	800	-	76800	45700	-	45700	1500	-	55239	78185	-	300	54300	35800	800	209600	243400
1984	3000	233,33%	71100	-7,42%	43300	-5,25%	5092	239,47%	53366	66313	-15,18%	900	200,00%	45300	5800	625,00%	337900
1985	6800	126,67%	74000	4,08%	49400	14,09%	16510	224,23%	46446	59616	-10,10%	3100	244,44%	55400	22600	289,66%	342600
1986	13300	95,59%	68800	-7,03%	50600	2,43%	36096	118,63%	34200	55697	-6,57%	8400	170,97%	69600	53000	134,51%	346200
1987	22800	71,43%	66500	-3,34%	58200	15,02%	51994	44,04%	20797	59854	7,46%	18200	116,67%	74400	102000	92,45%	415100
1988	39200	71,93%	57600	-13,38%	59900	2,92%	71984	38,45%	8748	63922	6,80%	29200	60,44%	80900	149700	46,76%	450100
1989	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
1990	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

(continued in next page)

Changes in the Consumption of Music According to Different Media (1983-1999) (continued)

Year	Germany			Japan			UK			US														
	CD	LP	MC	CD	LP	MC	CD	LP	MC	CD	LP	MC												
	Unit Sales	An. Growth	Unit Sales	An. Growth	Unit Sales	An. Growth	Unit Sales	An. Growth	Unit Sales	An. Growth	Unit Sales	An. Growth												
1991	112200	186,22%	25600	55,56%	83300	39,07%	171800	138,66%	4700	-46,27%	19400	-89,65%	62800	115,07%	12900	74,30%	66800	-17,43%	333300	122,65%	4800	-93,37%	360100	-20,00%
1992	138400	23,35%	5400	-78,91%	61100	-26,65%	181800	5,82%	5200	10,64%	16200	-16,49%	70500	12,26%	6700	-48,06%	56400	-15,57%	407500	22,26%	2300	-52,08%	366400	1,75%
1993	169800	22,69%	1800	-66,67%	52400	-14,24%	191800	5,50%	4100	-21,15%	14000	-13,58%	92900	31,77%	5000	-25,37%	55700	-1,24%	495400	21,57%	1200	-47,83%	339500	-7,34%
1994	184700	8,78%	800	-55,56%	42400	-19,08%	227500	18,61%	5000	21,95%	11000	-21,43%	116400	25,30%	4500	-10,00%	56000	0,54%	662100	33,65%	1900	58,33%	345400	1,74%
1995	198800	7,63%	400	-50,00%	35300	-16,75%	259200	13,93%	85000	160,00%	9000	-18,18%	139200	19,59%	3600	-20,00%	53400	-4,64%	722900	9,18%	2200	15,79%	272600	-21,08%
1996	202600	1,91%	400	0,00%	33100	-6,23%	265900	2,58%	7600	-91,06%	7400	-17,78%	159700	14,73%	2400	-33,33%	46200	-13,48%	778900	7,75%	2900	31,82%	225300	-17,35%
1997	209500	3,41%	400	0,00%	28600	-13,60%	289300	8,80%	8800	15,79%	7700	4,05%	158800	-0,56%	2500	4,17%	36600	-20,78%	752900	-3,34%	2700	-6,90%	171900	-23,70%
1998	206800	-1,29%	600	50,00%	26300	-8,04%	291900	0,90%	14100	60,23%	10300	33,77%	175700	10,64%	2200	-12,00%	32200	-12,02%	846100	12,38%	3400	25,93%	158700	-7,68%
1999	210600	1,84%	600	0,00%	21500	-18,25%	264900	-9,25%	8200	-41,84%	6600	-35,92%	176900	0,68%	2300	4,55%	18400	-42,86%	933800	10,37%	2900	-14,71%	122900	-22,56%

¹Indicates a growth rate for two years.

²Source: Compiled from IFPI World Record Sales 1969-1990; IFPI 1998; IFPI 1999; IFPI 2000.

APPENDIX J: EUROPEAN MUSIC MARKET



In European music industry, there are over 3000 record companies and each year over 25000 different recordings are issued. However, considering the number of new releases as a measure determining the size of the market would be misleading since smaller companies are responsible for the majority of the titles issued. For example, while traditional music (issued by small companies) accounts for less than 10% of total sales in Netherlands, about 30% of total album releases in 1995 contained traditional music (EMO Music Statistics of 1996). Similarly, according to a survey on the US soundcarrier market in 1996, the biggest six corporations issued only one-third of the new titles although they had acquired more than 80% of all recorded music sales in the same year (Billboard, 1996). However, as it is discussed in Chapter 3, although this is an indicator of high rates of market concentration, it would be misleading to argue that other "independent" small record companies are economically unimportant for the music industry.

Table presents the general condition of European music market including the number of record companies as compared to new album releases in selected countries.

Table 6.7: European Music Market*

	(# of)				Retailing (# of)		
	Record Companies	Album Releases	CD Factories	Employees	Specialists	Supermarkets	Other
Austria	70	N/A	3	1000	150	N/A	N/A
France	400	N/A	9	8000	500 42.00%	3000 53.00%	N/A 5.00%
Germany	1000	15000	21	11000	1000 39.00%	N/A 38.00%	N/A 23.00%
Greece	120	2350	2	700	400 60.00%	N/A N/A	N/A N/A
Italy	128	N/A	7	3000	600 55.00%	2500 25.00%	N/A 25.00%
Netherlands	170	10100	10	2600	1348 55.00%	70 19.00%	N/A 26.00%
Spain	70	N/A	5	1600	600 35.00%	230 60.00%	N/A 5.00%
United Kingdom	1000	13500	16	12000	1735 48.00%	2418 38.00%	N/A 14.00%

*Source: Compiled from EMO (1996); BPI (1999); Dane (1996), Financial Times Music and Copyright (1996)

* According to EMO statistics of 1996, there are over 80 plants manufacturing CDs and other optical disk products in Europe. Most of the major plants are owned by multinational entertainment corporations. The rest generally serve for independent record companies. It is known that the demand for cassette tapes are continuously falling, however, for the initial capital investment is still very low for cassette manufacturing, there are hundreds of cassette duplication plants in European and US markets. Although I was unable to find the exact numbers of plants in US and Japan music market, with the exception of audiocassette manufacturing in Japan which is probably very low as compared to European and US markets (since the album releases in CD format, excluding the singles, exceeds 97% of total album releases) the general condition and function of these plants should have been similar to Europe in US and Japan markets.

APPENDIX K: DEFINITIONS OF CONCENTRATION RATIO AND
HERFINDAHL-HIRSCHMAN INDEX



Concentration Ratio (CR)

Concentration ratios are one of the most common tools used to examine an industry's structure and, consequently, the ability of a group of companies to exercise some control over a market. Concentration Ratio is the percentage of total market sales accounted for by a given number of leading firms.

Concentration Ratio is shown with the symbol CR_n where n is the given number of leading firms. For example, for a market consisting of 7 firms with shares of 30%, 20%, 15%, 15%, 10%, 5%, 5% then four-firm concentration ratio (CR4) is 80 (30+20+15+15=80).

In other words, Concentration Ratio can also be expressed as follows;

If,

$\sum_{i=1}^m p_i = 1$; Where m is total number of firms in the sector, p_i is the share of the i^{th} firm. Then concentration ratio is,

$CR_n = \sum_{i=1}^n p_i$ ($n < m$) ;where n is the given number of leading firms. For example,

CR4 (four-firm concentration ratio) is the total market share of the four firms with the largest market shares.

The Herfindahl-Hirschman Index (HHI)

Herfindahl-Hirschman Index (HHI), is another commonly accepted measure of market concentration. The HHI takes into account the relative size and distribution of the firms in a market and approaches zero when a market consists of a large number of firms of relatively equal size. The HHI increases both as the number of firms in the market decreases and as the disparity in size between those firms increases. It is calculated by squaring the market share of each firm competing in the market and then summing the resulting numbers. For example, for a market consisting of 5 firms with shares of 30%, 20%, 20%, 15%, 15% then HHI is 2150 ($30^2 + 20^2 + 20^2 + 15^2 + 15^2 = 2150$).

In other words HHI can also be expressed as follows;

$$HHI = \sum_{i=1}^m s_i^2 ; \text{where } S_i \text{ is the share of the } i^{\text{th}} \text{ firm and } m \text{ is the total number of firms.}$$

HHI takes a value between zero and 10000. If there is a monopoly (one firm with all sales), the HHI is 10000. If there is perfect competition, the HHI approximates zero. A HHI below 1000 is not considered a concentrated market. Markets in which the HHI is between 1000 and 1800 points are considered to be moderately concentrated, and those in which the HHI is in excess of 1800 points are considered to be concentrated.



APPENDIX I: SUMMARY IN TURKISH



Günümüzde insanların müzikle ilişkilerini çeşitli biçimlerde tanımlamak mümkündür. Müzik kimisi için bir boş zaman değerlendirme etkinliği iken kimisi için ciddi bir hobi olabiliyor. Bazıları içinse müzik gerek iş yaparken gerekse çalışırken arka planda boşluğu dolduran bir fon işlevini görüyor. Ancak müziğin işlevi nasıl tanımlanırsa tanımlansın, tüm dünyada insanlar müzik dükkanlarından yılda ortalama kişi başına 3 albüm satın alıyorlar. Bu sayı müzik pazarının gelişmiş olduğu ülkelerde çok daha yüksektir.

Bugün insanların bireysel yaşamlarında müzik vazgeçilmez bir ihtiyaç olarak yerini almış durumda. Öte yandan buna koşut olarak müzik üretimi, endüstriyel bir üretim olarak da diğer sektörler içinde yaratılan değer olarak çok önemli bir yere sahip. Örneğin İngiltere'de müzik sektörünün parasal olarak hacmi demir çelik endüstrisinin önüne geçmiş durumda.

Günümüzde daha çok eğlence sektörü içinde tanımlanan müzik etkinliğinin boyutlarının incelenmesi, ve özellikle de Türkiye'de bu sektörün durumu bu çalışmada eleştirel ekonomi politiğin yöntemleriyle ele alındı.

Müzik üretimi ve tüketimi, salt bir iktisadi etkinlik alanıyla sınırlandırılmayacak kadar geniş ve çok boyutlu bir konudur. Müzik üretimi, bugün bir endüstriyel üretim örgütlenmesi içinde gerçekleşse de, bir diğer açıdan sanatsal bir üretimdir. Bu yönüyle kültürel bir üretim etkinliğidir. Ama günümüz kapitalizmi içinde artık bu alanlar birbiri içine iyice girmiş ve hemen her türlü üretim faaliyeti sermayenin

hareketliliğine göre örgütlenmeye başlamıştır. Bu da ekonomik alanla kültürel alan arasında özgül eklemlenmelerin olduğuna, bu alanların birbirinden bağımsız özerk alanlar olarak çözümlenemeyeceği gerçeğine işaret etmektedir. Bu çalışma da bu çerçevede örgütlenmiştir.

Türkiye’de popüler müzik ve üretimi üzerine yapılmış çalışmalar son derece sınırlıdır. Varolan birkaç örnek de özellikle popüler müzik konusunu (salt) “ideolojik bir üretim” olarak kavramlaştırıp bu yönde çözümlenmeler sunmaktadır.

Elbette ki bu konu çok önemlidir. Ancak bu çalışmanın ilgi odağı bundan farklı olarak daha çok “ideoloji süreçleri ne için işler” sorusudur. Diğer bir deyişle, kültürel meta üretimi olarak müzik üretimi üzerinden sermaye birikiminin nasıl sağlandığı, bu sürecin (yine sermayenin dolaşımının sağlanması adına ve sermayenin uluslararasılaşması sürecinde) örneğin kültürel alanla ekonomik alan arasında nasıl eklemlenmelere yol açtığı ve özellikle Türkiye’de bu sürecin nasıl işlediği (Türkiye’de kültürel üretimin endüstrileşmesi sürecinde bir örnek olarak) bu çalışmanın temel soruları olmuştur. Bu yönüyle de, bu çalışmanın, müzik endüstrisinin Türkiye’deki boyutlarının araştırılması açısından Türkiye’de daha önce çok fazla üstünde durulmamış bir alana el attığı düşünülmektedir.

Bu tezin ikili bir yapısı var. Son bölümde Türkiye’deki müzik endüstrisinin bugünü incelenmektedir. Ancak böyle bir incelemenin anlamlı olabilmesi için önce Türkiye’de müzik

endüstrisinin gelişiminin anlaşılması gerekmektedir. Aslında çok detaylı bir araştırma yapmadan bile Türkiye’de müzik üretimi, ve pazarın boyutlarının gelişmiş kapitalist toplumlardan daha farklı olduğunu söylemek mümkündür. Gerçekten de, bu konunun daha detaylı bir araştırması farklılıkları sayılarla da açık bir biçimde ortaya koymaktadır. Bir genelleme olarak endüstrileşme ile müzik üretiminin endüstrileşmesi arasında bir koşutluk olduğu söylenebilir. Bu Türkiye ile gelişmiş kapitalist toplumların müzik pazarlarındaki ve müzik üretiminin endüstrileşmesindeki farklılıkları bir dereceye kadar açıklayabilir.

Ancak, müzik üretimi (aynı zamanda da bir kültürel üretim olarak), konvansiyonel sektörlerden farklılıklar göstermektedir. Aynı şekilde, gerek kullanım değeri açısından, gerek bunun yaratılması açısından gerekse de metalaşmayı açıklayan kullanım değerinin değişim değerine dönüşme süreci açısından, kültürel bir meta olarak müzik diğer (konvansiyonel) metalden daha farklıdır. Bu çerçevede, genel olarak endüstrileşmeyle, müziksel üretimin endüstrileşmesi arasında bir koşutluk olsa da, bu ilişki basit bir neden-sonuç ilişkisine indirgenemez. Örneğin, Türkiye’de bir müzik pazarının oluşması, gramofonun girmesi, plakların üretilip yaygın bir biçimde kullanılmaya başlaması geç Osmanlı döneminde ve Batıyla hemen hemen eş zamanlı oluşmuştur. Ancak, bu erken gelişme, Türkiye’de müziğin sanayileşmesini getirmemiştir. Ayrıca, müzik üretimi sanayileşme hareketleriyle birlikte başlayan bir olgu da değildir. Tam

tersine, denebilir ki mzik ve mziksel retim ondan ok daha nce de vardı. Hatta, belki de mzik (bir ifade aracı olarak) dil kadar eskidir. Bir ifade aracı olarak da mzik gnlk yařam pratikleri iinde (ayrılmaz) bir ge olarak yer almıřtır. Endstrileřmeye kořut olarak geliřen mziėin endstriyel retimi ise [o zaman] daha da genel bir dnřmn (kltrn metalařması) sonucudur. Denebilir ki, mziėin metalařması sreci endstrileřmeden nce ve ona bir nkořul olarak geliřmiřtir. Osmanlı/Trkiye pratiėi ile Batı arasındaki fark bu srelerdeki farklılıklardan kaynaklanmakta ve birindeki endstrileřme ve diėerindeki endstrileřememe belli bir tarihsel geliřimin bir sonucu olarak ortaya ıkmaktadır. Ancak bu tarihsel geliřimin nasıl olduėunun anlařılması son blmde sergilediėimiz arařtırmanın bulgularını anlamlı kılacaktır. Bu yzden, konunun anlařılması iin tarihsel bir yntem izlenmiřtir.

Bu da Osmanlı/Trk pratikleri ile Batı arasındaki geliřim farklılıklarına bir bařka dzeyden (mzik pratiėi zerinden) yaklařma fırsatını doėurdu. Bu alıřma, bu ynyle de (bir mzikoloji tezi deėil ama) bir mzik zerinden "kuramsallařtırma" denemesi sayılabilir.

Bu iki yapı (Trkiye-Batı) arasındaki farkları/benzerlikleri ortaya ıkarabilmek iin bazı kavramsal aralara ihtiya vardı. Bylece bu kavramsal aralarla ortak bir payda zerinden hareket edilebilir ve genellemelere varılabilir. Ancak daha da nemlisi, aıklanması daha g

olan kimi noktalarda "biz bize benzerizci" bir tarih anlayışının kolaycılığundan da uzak durulabilir ve bunun altında yatan nedenlere de ulaşılabilirdi. Bu çerçevede bir başlangıç noktası olarak "musica practica" kavramını ödünç aldık. Ortak zemini (Osmanlı/Batı) bu kavram üzerinden kurmaya çalıştık. Bu kavramın işaret ettiği gerçeklikteki değişim/dönüşümleri inceleyerek farkları tarihsel olarak ortaya koymaya çalıştık.

Bütün bunları yapmamızdaki amaç Türkiye'deki müzik endüstrisinin bugününü anlayabilmektir.

Ulaştığımız ilk sonuç olarak, Batı müzik pratiği içinde, kapitalist ilişkilerin egemen hale gelmesinden çok daha önce müziğin metalaşması sürecinin başladığı, ve kapitalist üretim ilişkilerinin sosyal formasyon içinde egemen hale gelmesiyle de kolaylıkla müziğin endüstriyel üretimi için bir zeminin (daha önceden) yaratılmış olması ve kültür endüstrilerinin (müzik üretimi bağlamında) bu temelde yükselmiş olduğu; ama Osmanlı/Türk müzik pratiğine baktığımızda, müziğin toplumsal işlevinin dönüşüme uğramadan kaldığı, müzik üretiminin metalaşma sürecine doğru evrilmediği ve sonuçta geç dönemlere kadar "arkaik" olarak nitelendirilebilecek bir yapıda kaldığını görüyoruz. Bunun sonucunda geç Osmanlı ve erken Cumhuriyet yıllarında, gramofon plaklarının yaygınlaşmasına karşın müzik üretimi sanayi sermayesi yerine ticari bir mantık tarafından manipüle edilmiştir denebilir. Dahası, daha geç dönemlerde "musiki reformu" çerçevesinde gelişen mücadele

(temel olarak devletin kültür politikalarıyla pazarın müziği - ya da halkın talep ettiği, para vererek satın almaya razı olduğu müzik arasında) bu yapının korunmasını sağlamış, endüstrileşme yolunda bir ilerlemeye bir engel oluşturmuştur. Dahası, özellikle 1960lardan sonra yerli üreticilerin piyasaya hakim olmaya başlaması, ama devletin politikalarıyla bunların ürettiği müzik (talep edilen müzik) arasındaki uçurumun sürmesi, zaten çok gönüllü olmayan çok uluslu firmaların tekelinin kırılması (ki korsanın payı çok büyüktür) gibi oluşumlar sonucunda biriktirdiği sermayeyi yeniden yatırıma dönüştürerek sanayileşme yolunda yürümektense, ticari mantığı ön planda tutan, aşırı rekabetin gözleendiği, karın düşük olduğu bir sektör oluşmuştur.

Çok uzun bir süre boyunca Türkiye'de müzik sektörünün temel sorunu bir talep yönetiminin eksikliğidir. Bu hem endüstrileşememenin bir sonucudur hem de daha geç dönemlerde endüstrileşmeyi engelleyen bir faktördür.

Gelişmiş kapitalist toplumlarda kültürel üretim (aynı zamanda da bir meta üretimi olarak) varolan talebi kontrol edip, yönlendirip, ve en önemlisi yeni anlamlar ve beğeniler yaratacak şekilde örgütlenirken (bu anlamda yeni dinleyiciler yaratırken) Türkiye'de müzik üretimi varolan talebi karşılayacak şekilde örgütlenmektedir. Bu endüstrileşememenin en önemli göstergelerinden biridir. Ayrıca, müzik endüstrisinin gerçek motor gücünün gençlik olduğu unutulmamalıdır. Genç dinleyicilerin artmaması (ya da

arttırılamaması) da Türk müzik sektörü için önemli bir yapısal sorundur. Müzik tüketimi, genel olarak kapsayıcı bir şekilde tanımlanması gereken (ve kültür endüstrilerince yaratılan) tüketim kalıplarının bir parçasıdır. Bu tüketim kalıpları dönemsel olarak değişen bazı tarzlara (yaşam biçimlerine) işaret eder. Müzik bunların ifadesinin bir aracıdır ve bu yaşam tarzları aslında birer tüketim kalıbıdır (modadan müziğe, alışverişten gece yaşamına tüm yaşamı kapsar) -örneğin punk, rock, funk, underground vs. Bu yaratılan kalıplar hep gençlikle ilişkilidir ve çok çeşitlidir. Örneğin, Amerika'da 1950lerde esen Rock'n'Roll fırtınası. Rock'n'Roll'un böyle bir kalıp haline gelmesi müzik endüstrisi ile doğrudan ilişkilidir ve büyük boyutlu yatırımların sonucunda oluşmuştur. Zaten kültür endüstrilerinin işlevi de bu noktada tanımlanabilir: Ekonomi-dışı faktörlerle de olsa ortaya çıkan (yaratıcı-kültürel bir etkinliğin/ya da ifadenin) büyük kitleleri kapsayacak biçimde örgütlenmesi sürecini faal olarak denetimi altına alıp buradan büyük birikimler elde etmek. 1950'lerde ortaya çıkan Rock'n'Roll akımı buna bir nasıl bir örnek teşkil ediyorsa, hemen hemen aynı zamanlarda (yaklaşık 10 yıl sonra) Türkiye'de belirmeye başlayan arabesk de bu sürecin Türkiye'de işlemediğine dair tam zıt bir örnek teşkil etmektedir. Bu sürecin işlememesinin bir nedeni de müzik sektöründeki hakim sermaye ile devletin arasındaki (tarihsel olarak tanımlanabilecek) çelişkidir.

Böylece küçük üreticilerin denetiminde kalan müzik sektörü (satışları birçok ülkeden yüksek olsa bile) içinde sermaye

birikimi sağlanamamış ve endüstriyel bir üretim modeli gerçekleşmemiştir. Dahası bugün bile hegemonik bir güç durumunda olan medya (basın ve TV), henüz müzik sektörü ile doğrudan bir bağ kurmamıştır (müzik sektöründeki mülkiyet yapısını değiştirecek biçimde, bu sektörü de kapsayacak bir [yatay-dikey] bütünleşme sağlanmamıştır).

Sonuçta, Türkiye'deki müzik üretiminin motor gücü olan (en çok tüketilen) popüler türler (arabesk-fantezi-folk) arkaik bir üretim modeli çerçevesinde örgütlenmektedir.

Kentlerdeki yeni gençliği kapsayacak ve endüstriyel bir üretimin koşullarını yerine getirmeye yakın bir üretim örgütlenmesi de özellikle 1993lerden sonra gözlenmektedir. Elbette ki bunun en canlı örneği bugün Tarkan projesidir. Son zamanlarda özellikle Televizyon kanallarının hemen tümünde, gazetelerde ve magazin dergilerinde bu projenin çeşitli safhalarını gözlemlemek mümkündür. Müzik endüstrisi ile medyanın birlikteliğinin kullanım değerinin yaratılma sürecindeki etkisini bu örneklerle görmek mümkündür. Ancak bu tip projelerin çoğalması müziğin Türkiye'de varolan üretim örgütlenmesi içinde (küçük üreticilerle) (en azından bugün için) mümkün değildir.

Yukarıda genel hatlarıyla özetlenen çalışmamızın temel argümanları aşağıdaki şema çerçevesinde sunulmuştur:

[A]

Musica practica'nın çözülüşü hem Avrupa feodalizmi içinde hem de Osmanlı içinde iç dinamiklere bağlı bir tarihsel gelişmenin

ürünüdür. Batı Avrupa feodalizmi içinde kapitalizm egemen üretim tarzı olarak doğarken, Osmanlı'da kapitalizm gelişmemiştir. Böylece çözümlenme, kültürel bir üretim olarak müzik üretiminin aldığı biçim açısından Avrupa'da ve Osmanlı'da farklı sonuçlar doğurmuştur.

[A1]

[A1-i] Müziğin Pazar için üretiminin bir ön koşulu, müzik eserinin insan emeğinin ürünü olarak yabancılaşmasıdır. Bu *musica practica* nın çözümlenmesinin bir biçimidir. Yani, müzik eseri emeğin ürünü olarak insandan bağımsız somut bir varlık kazanmıştır. Müzik-yabancılaşma ilişkisi bu çerçevede Avrupa Feodalizmi içinde 14-15. yüzyıllardan itibaren kurulmuştur. Böylece müzik pazarında bir mübadele ilişkisinin gelişmesinden önce kültürel iktidarın tahakkümünün hegemonik bir aracı olabilmıştır.

[A1-ii] Müziğin Pazar için üretimi kapitalizme özgü bir gelişmedir ve Batı Avrupa'da kapitalist üretim tarzının egemen hale gelmesine koşul olarak 18. yüzyılda başlamıştır. Böylece (A1-i)de belirtilen yapının üzerine müziğin pazar için üretilmesi eklenmiştir.

[A1-iii] Kapitalizmin kendiliğinden geliştiği ülkelerde kapitalist bir kültür endüstrisi bu temeller üzerine kurulmuştur. Toplumsal formasyon içinde kapitalist üretim ilişkilerinin örgün bir biçim almasıyla kültürel üretim arasındaki ilişki böylece kapitalist üretim

ilişkilerinin kültürel üretime sızması ve sonuçta kültürel üretimin bir meta üretimi olarak yapı içindeki yerini almasıyla kurumsallaşmıştır. Bu haliyle kültürel meta üretimi sermaye birikiminin kültürel alanda da sağlanmasına ve somut olarak sermayenin kendisini yeniden üretmesine hizmet eder.

[A2]

[A2-i] Osmanlı pratiğinde müzik kolektif aksiyonun bir yansıması olarak bir ifade biçimidir (*musica practica*).

[A2-ii] A1-i'de belirtilen müzik yabancılaşma ilişkisi Osmanlı toplumsal pratiği içinde kurulmamıştır. Bunun nedeni Osmanlının toprak üretim temeline dayanan mülkiyet yapısının üzerinde yükselen toplumsal örgütlenme modelidir. Böylece A1-i'deki gelişmeye karşın A2-i süreklilik kazanmıştır.

[A2-iii] *Musica practica* Osmanlı'da toplumsal örgütlenmenin çözülmesine koşut olarak çözülmüştür. Avrupa'daki oluşuma karşılık Osmanlı'da bu çözülme yıkıcı olmuştur.

[A2-iv] A2-ii ve iii'ye referansla daha sonraki dönemlerde Batı Müziğinin Osmanlıya girmesi sonucu oluştuğu söylenen (tür olarak kantoyla başlayan, fantezi ile devam eden ve 1960 başlarına kadarki) müzik oluşumları devletin ideolojik çıkarları ve sermaye arasındaki çelişkinin gölgesinde gelişmiştir.

[A2-v] A2-iv'e referansla Türk müzik sektöründe, Pazar için üretim çok sorunlu olarak gelişmiştir. Pazar için yapılan şarkılar dahi pazara özgü bir forma sahip olmaktansa pazara en uygun forma sahiptirler (mesela 1950lerde bile Hacı Arif Beyin şarkı formundaki eserleri piyasaya sürülüyor en çok işi bunlar yapıyordu). Bu çerçevede, 1900-1960 arası uygun bir pazardan söz edilebilse bile bir sanayi üretiminden bahsetmek oldukça güçtür.

[B]

Türkiye'de müzik sektörünün gelişmesinde üçlü bir dönemleme yapmak mümkündür. 1900-1960; 1960-1990; 1990 ve sonrası:

Birinci dönem çokuluslu sermayenin müzik piyasasına hakim olduğu ve sermaye birikiminin dışarıya aktığı bir dönemi tanımlamaktadır. İkinci dönem bu hakimiyetin yıkılmaya başladığı ve çok uluslu sermayenin sektörü terk ettiği yerel ve bağımsız firmaların sektörü ele geçirdiği bir dönemi tanımlar. Üçüncü dönem ise çok ulusluların tekrar pazarı ele geçirmek üzere hamle yaptığı ve bugüne de süren dönemdir.

[B1]

[B1-i] 1900lerden itibaren bir müzik pazarının oluşmuş olması ve bu oluşumun plak endüstrisi bağlamında gelişmiş kapitalist ülkelerle eş zamanlı kurulması olgusal bir veridir. Bu oluşumun gerçekleşebilmesindeki temel neden Osmanlıdan başlayan ve TC'nin de ilk yıllarında (1929'a kadar) devam eden iktisattaki açık

kapı siyasetidir. Böylece yabancı sermaye yatırımları ekonominin diğer alanlarıyla birlikte müzik sektöründe de gerçekleşebilmiştir. Ancak belirtmek gerekir ki Plak sektöründeki hakim yapı (diğer sektörlerde de olduğu gibi) ticaret sermayesinin artığı yabancı sermayeye aktarmasından ibarettir. Ancak bu süreç içinde gerçekleşen birikim bir takım sanayi yatırımlarına da dönmüştür (1912'de bağımsız bir plak fabrikasının kurulması gibi). Ama sonuç itibarıyla egemen olan yapı ticaret sermayesi olarak kalmıştır. Gerçekleştirilen sanayi yatırımları da yabancı sermayenin buna el koymasıyla tıkanmıştır. Pazarın genişleme ihtimalinin kuvvetli olması (yüzbinleri bulan plak satışlarının gerçekleşmesi) yabancı sermayeyi ülke içinde yatırım yapmaya itmıştır. Bu yatırımdan sonra yabancı sermaye birleşmiş ve sektörü hakimiyeti altına almıştır.

[B1-ii] Türk müzik pazarında tarihinin hiç bir döneminde yabancı müzikler pazara hakim olamamışlardır. Bu yüzden artık yabancı sermayenin cebine de gitse üretimin kontrolünü hiç bir zaman ele geçirememişlerdir. Müzik üretimi açısından yerli unsurlara bağlı kalmışlardır. Pazarın kontrolü yabancı sermayenin hakimiyetinde kalsa bile A2'de belirtilen özgül koşullar / bir meta formunun gelişmemesi buna bağlı olarak tüketim kalıplarının oluşturulamaması ve kolay maniple edilememesi pazarın istikrarsız yapısını doğurmuştur. Türkiye'de hangi müziğin ne zaman nasıl ve niçin çok sattığı bugün bile

formüle edilemez. Kar maksimizasyonunun koşulları belirlenememiştir. Oysa ki batı pazarı için durum çok daha farklıdır.

[B1-iii] Türk müzik pazarı açısından üretim süreci ve biçimi batıya göre çok farklıdır. 1960'lara kadar belli istisnalar dışında tam anlamıyla Pazar için üretimden söz edilemez (taşındığı medium'a göre belirlenmiş ve yapısı ona göre oluşturulmuş müziğe pazar için müzik diyoruz). Bunun nedenlerini de A2'de çizdiğimiz çerçeveye açıklamak mümkündür.

[B1-iv] Cumhuriyetin kuruluşundan itibaren devletin resmi olarak çizdiği kültür politikasıyla (biz bu çalışmada çerçeveyi yalnızca Musiki İnkılabı ile sınırladık) müzik sektörü arasındaki ilişki de gerek müzik üretimini gerekse de tüketimini önemli bir ölçüde etkilemiştir.

[B2]

[B2-i] Yabancı sermayenin hakimiyeti derecesine göre yaptığımız dönemleme, Türkiye'de müzik kalıplarının değişimi ile de hemen hemen örtüşür. Pazar için üretim özellikle 1950'lerden sonra gelişir. İki kol vardır: Türk Sanat Müziği (TSM) ve batıdan gelen Rock'n Roll. Türk Halk Müziğindeki (THM) yapı değişikliği ise 1960'larla beraber Rock formu ve türkü formunun birleştirilmesiyle ortaya çıkacak Anadolu Pop akımında doğacaktır. Bir ikinci kol ise TSM+THM den çıkan ama

kaynağını 1920 ve 1930lu yılların fantezi türünde bulabileceğimiz Arabesktir.

[B2-ii] Bu formların işaret ettiği şeyler:

- a) Pazar için üretim başlamıştır
- b) Yapılan müzikler, özellikle 1960lardan itibaren yaygınlaşan 45'lik plak formatına uygun hale gelmiştir.
- c) Özellikle 1950'lerden sonra değişen iktisat politikalarının uzantısında ve ikinci dünya savaşı sonrası Amerikanın yeni hegemonik güç olarak belirmesinin etkilerini bu dönemin müzik türlerinde görüyoruz. Bu önemli bir olgudur. Çünkü iktisadi anlamda 1830'lardan beri başlayan batıyla ilişkiler ve 1890'lardan itibaren uygulanan ve 'açık kapı' olarak nitelenebilecek iktisat politikaları 1950'lere kadar Türkiye'de müzik türlerinde bir dönüşüm başlatamamıştır (Bu tezimizi yalnızca müzik alanıyla sınırlayarak ileri sürüyoruz, yoksa toptan bir kültürel iktidar mücadelesini kastetmiyoruz). Bu da kültürel bir kurum olarak müzikle sermaye arasındaki ilişkinin ancak 1950'lerden sonra hegemonik bir hal aldığını, A1(iii)'de çizdiğimiz çerçevenin, yine de bir takım önemli farklarla, bu sıralar oluşmaya başladığı izlenimini doğuruyor. Yani orta sınıf burjuva kültürünün ve bunun yaşam tarzlarının yeniden üretilmesine hizmet eder bir amaca yönelik müzik üretiminin 1950'lerle birlikte yaygınlaşmaya başladığını söyleyebiliriz. Müzik sermaye

ilişkinin hegemonik bir hal almasının belki daha önemli bir açılımı sınıf çizgilerine göre örgütlenmiş toplumun yaşam pratiklerinin ifadesi olarak müziğin hem bir meşrulaştırma aracı hem de meta formu dolayısıyla kurulan bir sermaye birikim aracı haline gelmesidir. Erol Büyükburç'la ve dönemin orkestralarıyla başlayan Rock'n Roll akımını, daha sonraları gelişen aranjmanları olduğu kadar Arabesk, Anadolu Pop, ve 1965-1975 arası yaygın olmasa da önemli bir yer tutan Rock tarzlarını da bu tanımın içinde değerlendiriyoruz.

[B2-iii] Plak sektörü açısından oluşan en önemli gelişmeler 45'lik ve 33'lük formatların yaygınlaşması, daha sonra gelen kaset devri ve tabii bunlara bağlı olarak gelişen, ve yabancı sermayeyi iflas ettiren korsandır. Bunun yanında 1980'lerden itibaren başlayan telif hakları kavgaları da dikkate alınmalıdır. Ancak telif haklarına karşı Unkapanı piyasası istikrarlı bir biçimde direnmesini sürdürmektedir. Telif haklarının yaygınlaşmaması müzik sektöründeki sermaye birikimini engelleyen, ve hala ticaret sermayesinin egemenliğini gösteren başat unsurlardan biridir. Bunun yanında kar maksimizasyonunun 'şansa' bağlı kalması, korsanın var olan şansı da ortadan kaldırması, eğlence sektörünün genel olarak refah düzeyine koşut gelişmesi karşısında pazarın büyümemesi, yüksek düzeydeki belirsizlik gibi etkenlerin tümü sektör içindeki yabancı sermayenin iflasını hazırlamıştır.

[B2-iv] Başından beri devam eden belirgin özellik piyasasının kontrolünün (neyin üretileceği, talebin nasıl manipule edileceği bağlamında) sağlanamamasıdır. Ancak bu dönemin özelliği bu yolda gelişmelerin olmasıdır. Piyasa için yaratılan türlere rastlıyoruz; örneğin 1980'lerdeki taverna müzikleri gibi. Ayrıca yine 1980'lerdeki Arabesk müzik (1970'lerle hiç bir ortak yanı bulunmayan bir türden bahsediyoruz) değişen tüketim kalıplarına koşut olarak bir tür müziğin farklı yapılara eklenerek kendisini nasıl yeniden ürettiğini / içeriğinin farklılaştığını (yeni bir kullanım değerine sahip olduğunu) göstermesi açısından da bir ilk örnek olarak karşımıza çıkmaktadır.

[B3]

[B3-i] 1990'lara geldiğimizde iki önemli oluşum görüyoruz. Bunlardan birincisi sermaye birikimini başka bir sektörde sağlayıp müzik sektörüne kanalize ederek faaliyete başlayan Raks Müzik Yapım ve birikimini sektör içinde sağlayıp büyüyen Prestij Müzik Yapım. İkincisi, çok ulusluların piyasaya girmesi. Birinci oluşum sonuçları açısından dramatiktir. Her iki şirket de iflasın eşiğine gelmiştir. Raks bunu görüp şirketi Universal Music'e devretmiştir. Prestij ise hala üretimdedir ama iflas etmek üzeredir. Bu iki şirketi diğerlerinden ayıran ortak özellik yüksek miktarlarda sermaye yatırımı yapmış olmalarıdır. Ancak Türkiye'de

müzik piyasasında karlılık hala albüm satışlarına dayandığı için bu iki şirket gerçekleştirdiği sermaye yatırımlarını çıkaramamıştır. Prestij bir müzik TV kanalı kurmasına rağmen durumunu düzeltememektedir. İkinci gelişme ise (çok ulusluların pazara girmesi) sonuçları şu an belli olmayan bir gelişmedir. Ancak 1999 yılı itibarı ile piyasadaki payları ihmal edilecek düzeydedir.

[B3-ii] Diğer yandan geleneksel yapı diyebileceğimiz Unkapanı piyasası hala büyük payı elinde tutmaktadır.

[B3-iii] Müzik sektörünün sanayileşmesindeki en önemli kriterlerden bir tanesi donanım/yazılım oranıdır. Türk müzik sektöründe yazılımın oranı gittikçe yükselmektedir. Bu gidişin yönü hakkında bir fikir verebilir. Ancak yazılımın oranının yükselmesi ve bunun katlısının anlaşılması telif haklarının ekonomi politiğinde saklıdır. Örneğin Raks, donanımdan elde ettiği karlarla yazılımı sübvans etmek zorunda kaldığı için müzik yapım bölümünü kapatmış/devretmiştir. Oysa ki donanım, Türkiye gibi ülkelerde karın maksimize edilebileceği bir alan değildir. Çünkü piyasanın hacmi bellidir, ve bu hacim ancak uzun vadede artabilir. Çok uluslu şirketlerin kaderi de burada gizlidir ve şu an için hiçbir sermaye yatırımı yap(a)mamaktadır.

Sonuç:

Türkiye'de müzik endüstrisinin şu anki yapısı

(i) Üretim Süreci

(ii) Üretim İlişkileri

(iii) Pazarın Yapısı

çerçevesinde değerlendirilmiştir. Bu yapı yeri geldikçe karşılaştırmalı olarak çözümlenmiştir.

Sonuç itibarıyla Türk müzik sektörü bu güne kadar dünya pazarıyla entegre olabilecek bir yapıya girmemiştir. Piyasa (meta üretimi açısından) başından beri dışarıya kapalı olarak gelişmiştir. A2'deki argümanlarımız ışığında oluşan bu gelişme pazarın biraz da kendine özgü oluşumunu doğurmuştur. Bu kapalı yapı piyasa için üretimin başlamasından sonra da (çeşitli çabalara karşın) kırılmamıştır. Müzik üretiminde yapısal dönüşüm onun dünya pazarına eklenilebileceği bir yönde olmamıştır. Durumun değişmesi için yeni bir yapısal dönüşüm gereklidir ve kısa vadede bunun olabileceği yönünde bir işaret de yoktur. Kapitalist bir pazar vardır ama bu pazar için gerçekleşen üretim sanayiden çok ticari sermayenin egemenliği altındadır. Bu yüzden sermaye birikiminin yapısı gelişmiş kapitalist ülkelerden farklıdır. Bu yapısı içinde, bugün çok uluslu sermaye de müzik üretiminin denetimini ve sermaye akışının kendisine doğru olmasını sağlayamamaktadır.

CURRICULUM VITAE

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