



# **Market Analysis of Early Childhood Education and Care Sector in Turkey**

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## **ABSTRACT**

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The Finnish education export industry has been evolving in recent years, and the expectations towards industry income are pretty high. The Turkish education market is tremendous, and the demand from the Finnish education export industry is relatively high and optimistic, which can turn into huge profits for Finland. Products and services can be delivered to municipalities, governmental organizations, private schools, universities, kindergartens, and foundations from all levels of education.

Turkey as a country is strategically important between the East and the West. Turkish entrepreneurs and officials are actively involved in the Middle East area in almost every profitable industry, whether as a direct supply or representation of European and American companies. Their network and connections can make the Finnish providers' market entries easier and with less paperwork.

The Turkish education system differs significantly from the Finnish education system. A significant cultural difference is evident in the education sector as in other businesses.

The method selected for this study was semi-structured theme interviews with professionals from the ECEC sector in Turkey conducted online in 2021. The theme interviews aimed to identify the perspectives of different players who have a crucial role in the education field and determine the critical approaches in the target country.

The thesis was completed by first building a theoretical framework of the market analysis. Then, the ECEC ecosystem was explained with the most crucial elements as the Ministry of Education, governmental organizations, private school owners, universities, and the most active publicly known people working on developing the ECEC system in Turkey.

Based on the research results, the Finnish education export players were found to have good opportunities to succeed in the Turkish ECEC market. The brand of Finnish education was also found to be remarkably valued and respected in Turkey, which makes the market more accessible. Different cultures and practices create the biggest challenges in the country, but with the right partners and networks, solutions are feasible.

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Keywords: marketing analysis, education export, early childhood, Turkey

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**ABBREVIATIONS**

ECEC	Early childhood education and care
MoNE	Ministry of National Education
YÖK	Council of Higher Education
PISA	Programme for International Student Assessment
TÜİK	Turkish Statistical Institute
SME	Small and Medium-Sized Enterprises
TTKB	Board of Education and Discipline
ÖSYM	Assessment, Selection and Placement Center
TYT	Basic Proficiency Test
YKS	Higher Education Institutions Exam
YDT	Foreign Language Test
AYT	Field Proficiency Test
HEI	Higher Education Institution

## 1 INTRODUCTION

### 1.1 Background

Finland has a reputation as a top-quality education provider globally. After the perfect PISA results from 2000, which took the attention worldwide, countries immediately wanted to know about this success story. Despite Finland not being in the top 5 countries in PISA results in 2009, 2012, and 2015, the education brand stayed strong. (Shatz, 2016). However, considering the publicity of Finnish education in world media and the attention it gets globally, the education export industry of Finland has still not been able to get its export numbers to exploit.

Turkey is a country with a lot of economic and political challenges. Turkey has a growing population, especially the ages 0-4. In 2020, the share of the age group to the population was 7,32%, with 6 121 707 kids. (Adrese Dayalı Nüfus Kayıt Sistemi Sonuçları, 2021) There are various ECEC institutions in Turkey, such as preschools, practice classrooms, and nursery classrooms, but most children are still cared for by their families. In all three main PISA disciplines, smaller-than-average shares of students met the baseline in proficiency in 2018. (Education Policy Outlook Turkey, 2020)

When we examine the prosperous countries in PISA, we can see that these countries invest in early childhood education heavily compared to other levels of education. These countries also work hard to develop better teacher training and increase teacher qualifications. Turkey has an outdated and old curriculum for ECEC with no pedagogic formation demand for teacher education. As a result, the demand for ECEC teachers is higher than the number of employed ECEC teachers. According to the Ministry of National Education Turkey (MoNE), the number of children for ECEC was 1.6 million, and the number of teachers was fifty-six thousand.

The ECEC sector is highly privatized in Turkey. The institutionalization of the sector is quite late and does not meet the needs. This situation affects children's

development and education. In addition, childcare at home is a gender role in Turkish culture. Therefore, this also affects women's lives as much as children's. Many women cannot participate in social and employment life because they are entirely involved with childcare.

The Government of Turkey provides aid for ECEC to eligible families: children that are in government custody, children that are in prison with their mothers, children of veterans, families with fragile economic conditions, children with disabled parents, and children who have lost at least one of the parents. (Kres ve Anaokulu Ucretleri 2021-2022 Dönemi, n.d.)

Kindergartens by Municipalities, also known as "free public kindergartens" by people, give services to children between the ages of 0-2. These kindergartens are supported by the Ministry of Family and Social Services, and the fees are usually between 100-250 units in local currency per month for each child. The fee taken from parents is used only for the expenses not directly covered by the state for municipalities. (Kres ve Anaokulu Ucretleri 2021-2022 Dönemi, n.d.)

State Preschools and Nurseries provide a full day and a half daycare. Half daycare is between 8 am-1 pm or 1 pm-5 pm. Full-day service is considered from 8 am to 4 pm during the weekdays. Fees are determined by the Fee Determination Commission of Preschool Education Institutions. The fee is calculated based on the duration of the care and whether the nutrition is included or not.

The private sector charges for ECEC ten times more than public schools based on the prices from different private kindergartens and publicly available information. Therefore, early childhood education is not distributed equally and is not reachable by every child. As a result, this creates an unfair environment for children's development and education in the future.

The main challenges for Finnish ECEC export companies and institutions are Turkey's political, economic, legal, and cultural factors and creating a trustworthy functioning local network for business purposes.

This thesis came from the author's interest in Finnish education export. The author has been in the education sector for some years now in Finland by representing Finnish education exporters and making trips to Turkey to meet relevant companies and higher education institutions' representatives, Therefore, the author has an extensive network of education industry players in Turkey. Also, the interest in Finnish education in Turkey is at maximum levels even though the people often do not know Finland's model or concept. Social media and traditional media play a massive role in the publicity of the Finnish education model in Turkey. Therefore, the author decides that before focusing on any other level of education in Turkey, export should focus mainly on the ECEC, bringing demand for the upper levels later on. However, the Finnish education model is still a mystery for the majority in Turkey.

## **1.2 The Commissioner: Aeonian Solutions Ltd.**

Aeonian Solutions is one of the SMEs in education consulting and exporting and an official member of the Education Finland organization. Aeonian helps Finnish and international partners and customers from education institutions, municipalities, and companies to develop their education services and products. Aeonian operates on all levels of education, from ECEC to higher education and even non-formal education.

Aeonian ECEC services help daycare centers to adopt working models that positively support the development of children and pedagogically plan, execute and evaluate learning activities that promote learning.

In addition to this, Aeonian has plans to establish a branch in Turkey with a trusted local partner and has a strong network in the education sector. By establishing this bridge between Turkey and Finland, Aeonian will provide a better and easier market entrance for Finnish education export parties. Furthermore, Aeonian will manage the model by representing them directly in sales, participating in public tenders, and providing necessary tools for digitally delivering product services to the right clients.



## **1.3 Core concepts**

### **1.3.1 Early childhood education and care**

Early childhood education and care has descriptions in many ways. For example, a form of child development, early intervention with a purpose, or it can also be services and models to support a child's development in the first years.

Turkish definition of the subject is; all the things to be done regarding the child's survival, growth, development, and care. (Berkman & Gürlesei, 2005)

Early childhood education and care takes place in young children's different living environments as an educational interaction and aims to promote their balanced growth, development, and learning according to the National Curriculum Guidelines on ECEC Finland. (Välimäki, Heikkilä, & Ihalainen, 2004)

### **1.3.2 Education export**

The education export concept is not an easy practice to define. It has not been around for many years and probably educators do not agree with each other on the definition. Teacher training, certificate courses, paid degree programs, tuition fees, etc. can all be a product of an education export practice. The internalization of an educational product and/or service is another term for education export. (Sidhu & Dall'Alba, 2012)

The definition in this research comes from the Finnish Ministry of Education and Culture. In the report (Ministry of Education, 2009) that education export refers to all export-related education, including education as a service produced in Finland for international customers. The ministerial report defines export as a business where the service does not have to take place outside Finland. The ministerial reports usually do not follow an academic principle, but the definition is accepted in this research.

### **1.3.3 Customer**

Frain (1999) and Blythe (2008) argue the term customer that is used in sales and refers to the recipient of services or products from suppliers.

Education export customer definition is not as simple as the customer term itself. Most of the time the end-user is not the one who pays for it to the Finnish education exporters. Customer and consumer terms are in this context quite separated. Both terms are used to define the customer term most of the time. We can say that customer is the one who pays for the services and the consumer is who uses them in the education export. If a private Turkish company or a governmental body places an education export product or service order from ECEC Finland, consumers are probably the parents, kids, or teachers.

### **1.3.4 Stakeholder**

Freeman (1983, pp. 88-106) can be called the creator of the stakeholder concept. The concept is used also in administrative sciences and management. According to Freeman, corporate stakeholders can affect the actions of the corporation as well as can be affected by them too.

The stakeholder term has become a common term recently and in the field of management is used. According to Bourne (2009), a stakeholder is a person or an organization that has a real interest in a specific project, group, or organization. In our day, the stakeholder concept covers everyone with an interest.

In this research, stakeholders are Finnish education exporters, teachers in Finland and Turkey, private kindergarten owners in Turkey, municipal authorities in Turkey, governmental bodies for ECEC in Turkey, and Turkish parents. Stakeholders have something at stake and here defined stakeholders have all their interests in ECEC operations from between Finland and Turkey.

### **1.3.5 Partnership**

The term partnership is very commonly used in business and education to describe contracts between private individuals, also private entities, and public bodies.

Yescombe (2007) defines the term public-private partnership as a long-term contract between a public-sector party and a private-sector party for the design, construction, financing, and operation of public infrastructure by the private-sector party with payments over the life of the contract to the private-sector party for the use of the facility either by the public-sector party or by the general public as users of the facility and with the facility remaining in public-sector ownership, or reverting to public-sector ownership at the end of the contract.

In this research, partnership refers to the informal or formal arrangements between the commissioner and Finnish ECEC exporters who have an interest in the Turkish market, and also between the commissioner and Turkish ECEC clients who are also the stakeholders.

### **1.4 Purpose of the research**

The main question this research aims to answer is “What kind of services and products does the case-study country’s ECEC sector seek from Finland, and why?”

The reason why the author chose the ECEC level for the research and education export industry is that the author believes that the change and the development should start from the bottom level of education in the country. For instance, if a Finnish education export entity is aiming to deliver K-12 education products and services to Turkey, there will be a more complicated process and most of the products will have to be modified since the ECEC was not based on the Finnish model. If the kindergarten level would be updated and prepared enough with the Finnish model, there will be more future business opportunities for different levels of education in Turkey for Finnish exporters. The author does not see a market

with good potential if the ECEC level is skipped and the focus is on the other levels of education. Higher education is excluded from the opinion.

Knowledge is power. Knowledge comes with data as a result of research. In this case, case-study country market research is essential for Finnish education exporters. Nowadays social media channels have changed how people get their information, believe in information, and communicate with each other. Finnish educators need to know Turkish market behavior, how to reach them, and then engage with them.

This research will point out the most crucial factors for a Finnish education export company or an institution to consider while going forward with their products and services for Turkish clients. There are many critical steps to be taken after defining the client. Most of the time, the actual client will not be the one to contact directly. The correct department of the governmental organization will seem utterly irrelevant on the education topic. Teacher training is highly needed and wanted, but one cannot provide it from Finland without local authorities. As a foreign provider, one will not be able to generate any deals with governmental organizations without having local partners involved with their local companies as the primarily responsible entity in the eyes of the government.

The early childhood education system does not get enough attention and effort from decision-makers to be developed. However, there is much demand for development, and both the public and private sector is interested in Finnish early childhood education and care. Also, Turkish media makes news about Finnish education from time to time, but the knowledge about the Finnish education concept and model is poor.

The thesis aims to help the commissioner Aeonian Solutions Ltd. and other Finnish education export companies and institutions export ECEC products and services to Turkey and find the right clients and the best solutions to offer in the Turkish market. In addition, the author will provide information about the education system and economic, social, and political situations directly affecting the education sector.

## **1.5 Research materials and methods**

Semi-structured interviews were conducted with seven elite informants that are in different positions in the education field in Turkey. However, research interviews were not the only source of information used. Ministerial official reports, governmental statistics, written and online sources, and similar thesis were benefited as sources to make sure that the research and the findings are valid.

According to Cohen and Manion (2000), it is an attempt to map out or explain more fully, the richness and complexity of human behavior by studying it from more than one standpoint. In other words, triangulation is the use of two or more methods of data collection in the study of some aspect of human behavior. (Cohen, Manion, & Morrison, 2000)

### **1.5.1 Written and online research material**

To learn more about the relationship between knowledge of Finnish education and demand from the Finnish education model, it is important to understand the expectations the case country has. The research is focused on the perspective of the elite informants of the case country and does not cover the side of the governmental opinion as well as the families' view.

The written material used in this research was first about the history of the education system in Turkey to make readers understand how it is affected now by the existing government as they are pro-Ottoman Empire and for the last twenty years, they have been working on changing the whole system backward with the additional religious studies. Then some covid19 news was explained together with other relevant sources to show what is the reality now in public schools to make readers understand how Turkish teachers suffer from a lack of resources.

The interviews allowed the researcher to control the order of the questions during the interview based on the background and the role of the interviewee in the early

childhood education and care system. Interviews were interactive and within the comfort zone of the interviewees so that they did not have the feeling of being interrogated.

Based on the brief dialogues with a few Deans of the Faculty of Education from different universities in Turkey, the decision was made to go forward with the interviews as a top-down approach. For instance, instead of going through with data collection from hundreds of ECEC teachers, an interview was done with a representative from the network of ECEC teachers. It is technically challenging to create accurate sample data even within the same city.

For instance, Kadiköy is a district in Istanbul with 481 000 and 2,47 persons per family, 20 000 with no reading and writing ability, and 47% of the population has a higher education degree. On the other hand, another district Bagcilar in Istanbul, with a population of 737 000, 3,94 persons per family, 15 000 with no ability of reading and writing, an additional 70 000 people with no education but knows how to read and write, and only 11% of the population has a higher education degree. (Istanbul, 2021)

The researcher created one frame for the theme interview (Appendix 1). The interview aimed to survey the existing early childhood education system in Turkey from a different point of view by using the same frame for different early childhood education system players. The seven elite informants were formed from academics from the faculty of education, early childhood education unions, influencers from the teachers' network in Turkey, private schools, and non-profit organizations in the early childhood education field as focus groups created a complete data set about the early childhood education ecosystem.

Questions were divided into the education system and law, teacher education, and business. The author did not ask every single question for each interviewee because the purpose was to give freedom for the researcher to choose the best questions according to the interviewee's background and the flow of the interview.

### 1.5.2 The interviews

The length of the interviews was based on the interviewee's role, schedule, motivation, wish to have enough say on the topic, and experience. The shortest interview was completed in an hour and the longest one took around two hours.

Interview questions were divided into four categories. First comes the introduction part where the researcher asks the interviewees to introduce themselves. Then, the researcher asks about the interviewee's knowledge of Finland and the Finnish education system.

The second part focuses on the ECEC Turkey. Mainly on the problems and challenges of the existing curriculum and differences between public and private schools, and finally, asked about the priority of areas that need development. The aim was to figure out the key differences between the public and private institutions from the people involved in them and also the ones who collaborate with them. Pointing out the areas needed development is in a key role in the planning and designing the educational products and services for exporting to Turkey. Of course, the author keeps in mind the fact that interviewees have different backgrounds, education, experience, political view, and wealth which are shaping their opinions naturally.

The third part focuses on teachers. Because of the work culture in the education field, especially the difference between the public and private sectors, teachers have different roles, different resources, and decision-making capabilities. Then, the author asks about teacher education issues. Learning the challenges and problems with teacher education will help also in planning the teacher training programs as well as the existing teachers' continuous learning and development programs.

The last part focuses is on the business in general for the education export. After hearing the challenges, resources in use, and demands, deeper conversations were made about the curriculum and then the right teacher training that supports the curriculum, and different physical learning environments models.

Recorded interviews were translated and transcribed into text. The transcription part was handled by writing material from the theme interview in text word-to-word so that the manual handling of the interviews was easy.

Analyzing the information is the most important phase of the research because the researcher needs to know how to use and benefit from the data to reach their own goals and objectives defined for the research. (Clow & James, 2014)



## **2 INTRODUCING FINNISH EDUCATION**

### **2.1 The education system and the ECEC in Finland**

Finland is a country with a welfare state. Finnish actors in different fields have been working hard for their brand image and trying to keep Finland well-known by building more visibility and awareness for the country and its offerings.

The principle is to have good quality education for free, inclusive, and comprehensive. The same educational services are available for everybody in the country. The system is very flexible and aims for lifelong learning. People can always continue their studies to upper levels irrespective of their ages. Teachers are highly trained, and all have obligatory master's degrees. They are also very independent in their teaching methods and materials.

The main objective is to provide all citizens with equal opportunities. Every child has a subjective right to attend early childhood education and care. The learning environment is placed at kindergartens or smaller family daycare groups in private homes. The fees are moderate and are based on parental income.

The goal of ECEC is to promote children's development, health, and well-being and improve children's opportunities for learning. Local authorities and municipalities are responsible for providing ECEC for children under school age. The National Curriculum Guidelines on ECEC in Finland, approved by the Finnish National Agency for Education, guide the planning and implementation of the contents of ECEC and function as the basis for drawing up the local ECEC curricula. (Finnish Education in a Nutshell, 2017)

### **2.2 Values and demand in Finnish ECEC**

The education system is equal and respectively prosperous compared to many other countries. The author believes that Finland has understood the importance of education at all levels for the welfare state at the right time. There are books and studies worldwide about the Finnish education system and the model. This

already shows demand and potential to become the world leader in education export. On the other hand, the Turkish market is enormous, and they need development in their education system.

ECEC in Finland is based on the core values defined in the National Core Curriculum for ECEC, and then cities have their curriculums and values that they can combine and create their own. In short, the focus is on honesty, openness, equal treatment, and fairness.

### **2.3 Goals and objectives of Finnish ECEC**

The mission of ECEC is to promote children's growth, development, and learning in collaboration with their guardians. Learning by playing is the priority. Therefore, understanding the importance and pedagogical possibilities of play for the child in promoting well-being and learning is essential. (Finnish Education in a Nutshell, 2017)

Intellectual development aims to create the love of learning; physical development focuses on physical skills, body awareness, and motor skills; social development works on social skills for kindergarten and beyond; and finally, the emotional development goal is to create self-respect.

### **3 THE CASE COUNTRY TURKEY**

#### **3.1 Introduction**

The Turkish author, who had primary and secondary education in Turkey, has become an education enthusiast since moving to Finland and starting a higher education degree. However, the author could spot the differences between the two countries. The author has been actively involved in the Finnish education export industry, and as a result, this research was very topical and timely.

Finland as a country is in the active interest of the Turkish people, but their knowledge is minimal. There are new tales about Finland and the Finnish education system in traditional and social media. Most of the products and services are needed and wished for in Turkey.

Since its establishment, the commissioner has focused on the Turkish Finnish education products and services market. A vast network of the commissioner will make it easier for Finnish providers once the necessary products and services are defined.

#### **3.2 A brief history of early childhood education in Turkey**

The author briefly explains the history of education in Turkey. Because even today, we can see the effects of different timelines on the education models. The transition from the Ottoman Empire to the Republic of Turkey, including the adaptation of the Latin alphabet and equality for men and women, have their roles.

##### **3.2.1 Ottoman Empire era**

The Ottoman Empire was an Islamic state, therefore the philosophy of its educational system was based on Islamic principles and Turkish tradition. It was influenced by Islamic scholars and institutions. (Kocer, 1987)

The central educational institutions in the Ottoman State were Sibyan Mektepleri (Primary Schools), Medreseler (Muslim Theological Schools), Enderun Mektebi (Palace School), and Sehzadegan Mektepleri (Son of the Sultan Schools). From the beginning of the foundation of the Ottoman Empire, girls, and boys aged 5-6 were called Sabi (little children) in primary schools that existed almost in every village and neighborhood and constituted the first steps of primary education. These little children learned the Quran, prayers, and minimal writing. (TÜRK, 2011)

If we look at the "kindergarten" and "preschool" concepts today, those Sibyan (Primary) Schools cannot be counted as early childhood education and care institutions. The existing system found its place in Turkey in the 20<sup>th</sup> century. Until 1913, only foreigners had institutions called mother schools with non-Turkish elements.

During the decline of the Empire, which started at the end of the 16<sup>th</sup> century, some efforts were made to reform and westernize the Ottoman Empire and its educational institutions. (Kocer, 1987)

The opening and spreading of institutions similar to today's kindergarten in Ottoman State coincide with the II. Constitutional Monarchy period. It is known that private kindergartens were opened in some provinces before July 23, 1908, and after in Istanbul. (TÜRK, 2011)

In the end, the Empire was not as great as how it used to be. In 1792, the new sultan took advice from the elite Ottoman on how to meet the European challenge and save the empire. Some of these elites suggested reforms, thus ushering in the period of westernization and modernization which paved the way for the ultimate transformation of the Ottoman Islamic state into the modern Turkish Republic. (Kazamias, 1966)

### 3.2.2 The Republic of Turkey era

The Republic of Turkey was founded in October 1923. The National Education Basic Law of 1973 defined preschool education as "the optional education of children who have not reached the age of compulsory primary education." It specified the aims and duties of this education under the general aims and basic principles of national education, such as ensuring children's physical, mental and emotional development and good habits, preparing them for primary education, and creating a shared growing environment for children from disadvantaged areas and families. (Akyüz, 2008, p. 347)

The new republic era and its leadership saw education "as the most important foundation" of the transformation from the Ottoman Islamic state into the new Republic of Turkey. (Kazamias, 1966)

During the end of the Ottoman Empire, in the 1913-1914 academic year, a teacher class was first opened in Istanbul in Darümuallimat (Girls' Teacher School) to train teachers for kindergartens. There were 23 Muslim female students in the first class, and 15 of these were boarding students; the rest were externs. This school's education period was one year and was shut down due to the particular situation in the country during 1919. The school was open for three years and had 370 kindergarten teacher graduates. (Akyüz, 2008, p. 268)

In the 1960s, due to the increasing demands for preschool education institutions, the teacher training business started with primary school teachers completing intensive courses. Later on, this training was organized by Girls' Vocational Schools' Child Education Departments. The foundation of this concept was the Girls Art and Teacher Schools in the cities Ankara and Konya. (Oktay, 1983)

Those schools were renamed Vocational Technical Education Faculties with the Higher Education Law. Department of Kindergarten Teaching was opened at Ankara Gazi University in the 1978-1979 academic year and at Konya Selcuk University in 1980-1981 with a two-year associate degree. Thus, the task of educating kindergarten teachers was included in higher education. (Başal, 2005)

Beginning with the academic year 1991-1992, institutions that trained teachers for all levels of education and training in Turkey had turned into institutions that provide four-year bachelor programs. Preschool Education Teacher Departments started to take place in the Education Faculties of some universities. (Başal, 2005)

According to the data of the MoNE, there are 31 813 (public and private) institutions in early childhood education and care in Turkey. 10 669 are preschools in Istanbul, Ankara, and Izmir cities. The preschool teacher profession requires a degree from a four-year Pre-school Teaching or Kindergarten Teaching department of the university. With the arrangements made in the past years, those who graduate from Home Economics and Child Development Departments can also work as kindergarten teachers. After graduation, the second stage is to take the Public Personnel Selection Exam to get employed by the state schools. Around two-thousand kindergarten teachers get appointed each year, which still do not meet the needs.

### **3.2.3 Teacher training in the Republic of Turkey era**

One of the most critical educational problems was teacher training (still a challenging subject), which needed quick solutions. However, first, the country needed to train many qualified teachers. Therefore, the first administration of the Republic made a legal effort to turn teaching into a profession.

Educational reforms have a relationship with social, political, and economic life. Hogan (1996), believes that economic transformation has an extraordinary impact on the “opportunity structure”. He further explains that “Opportunity structures are shaped by a variety of influences-economic arrangements, ideologies, collective action, and state power” (Hogan, 1996, p. 246)

Two prominent educators of the time, John Dewey (1924) and Alfred Kühne (1925) invited and consulted by the Ministry of Education. Dewey’s visit coincided with the biggest transformation in the country; social, cultural, and political revisions after the establishment of the republic.

In their reports, they both suggested that the country should focus on training teachers who can work in rural areas effectively. (Directorate General for Teacher Training and Development, 2017) The idea here was to get recommendations and then reconstruct the existing education system in Turkey.

The proposal was taken into action by the local educators and caused the establishment of Village Teacher Training Schools. Later on, these were transformed into “Village Institutes” by law. Until they were shut down in 1954, these institutes took a crucial role in training village teachers.

“Higher education obligation were imposed on the teachers with the Basic Law 1739 of National Education passed in 1973, and the eligible Primary Teacher Schools were transformed into Educational Institutes in 1974. When all higher education institutions were gathered under the roof of the Higher Education Council (YÖK) with the Higher Education Law 2547 passed in 1981, academies were transformed into universities and educational institutes were transferred into educational faculties. In accordance with the Decree-Law No.41 entered into force on July 20, 1982, all the institutions that educate teachers were taken from the MoNE and given to universities.” (Directorate General for Teacher Training and Development, 2017, p. 9)

As of 2005, there were 33 universities with Preschool Teaching Undergraduate programs in Turkey. One of them is an open university. While MoNE appointed five hundred permanent preschool teachers in 2005, additional ten-thousand unskilled masters were appointed with no permanent contract. This was a solution for the shortage of teachers by less expensive trainers rather than teachers with a university degree.

### **3.3 Country information**

Turkey is strategically one of the most critical countries between Europe and Asia. The population at the moment is more than 85 million. Turkey has a fascinating history, including the Ottoman Empire era and culture. It attracts millions of tourists every year, both in winter and summer. The most populated city is Istanbul,

and the capital city is Ankara. Turkish is the official language, Kurds speak Kurdish, and Turkish Arabs use Arabic.

Turkey has been a republic since 1923. According to Article 2 of the constitution, Turkey is a democratic, secular and social constitutional state. The majority popular vote directly elects the current president. After the referendum in 2017, the parliamentary government system turned into a presidential system, and the president is now both chief of state and head of government. There has been no Prime Minister position since 2017.

### **3.4 The economic situation of Turkey**

Turkey has always been a constitutionally secular republic, but the President's Justice and Development Party (AKP) pursued an Islamist agenda, and democracy has been suffering ever since. Turkey has a large and free-market driven by industrial and service sectors. Agriculture has a significant role in employment, with a 25% share.

According to the CIA World Factbook, political stability and economic dynamism have created domestic uncertainty and security concerns generating financial market volatility and weighing on Turkey's economic outlook. (Turkey, n.d.)

The resources allocated to education by the Turkish government have only increased in numbers. However, there has been no budget increase regarding direct investments in education services. The budget of MoNE in 2020 was 125.4 billion Turkish Liras (15.6 billion Euros average in 2020 rates) and then increased to 147 billion Turkish Liras (10 billion euros average in 2021 Q4 rates). The share of MoNE in the government budget in 2020 was 11.45%, and in 2021 it decreased to 10.69%. So, there is no significant increase in the ratio of the MoNE budget to the national budget. The difference is a result of currency fluctuation.



### **3.5 The Turkish national education system**

The main principle of the education system is that educational institutions are open to everyone, regardless of language, race, gender, or religion. No privilege can be given to any person, family, group, or class in education. The author believes that this statement does not apply in real life. A country where the private sector is heavily involved in education generates privileges for some people, groups, or families.

Secularism is essential in Turkish national education. Therefore, religious culture and moral education are compulsory courses taught in primary, high, and equivalent schools. In addition, in December 2021, religious education was added to the ECEC curriculum.

### **3.6 The governance and administration of the education**

The Minister of National Education is the top authority for the education system in Turkey.

The Board of Education carries out national Education Council work established within the TTKB. They are the Ministry's highest advisory and decision-making body, established in 1933 to improve the quality of Turkish National Education. The council meetings are attended by representatives from all segments of the society with different opinions within the framework of democratic criteria. The last meeting was the 20<sup>th</sup> meeting and was held in December 2021.

In the last meeting, the Board of Education focused on the dissemination of pre-school education. There should be more resources such as necessary physical, personnel, and financial means to increase the 5-year-old schooling rate to 100% in the short term. Additionally, the Board would like to increase the efforts to provide access to early childhood education and care services with a holistic, inclusive, and integrated approach at earlier ages as 0-3.

Another decision was about ECEC teachers. From now on, kindergarten teachers with a bachelor's degree in early childhood education and care should be employed in ECEC institutions.

### 3.7 Early childhood education and care in Turkey

ECEC is not compulsory in Turkey, and services vary as institution-based, home-based and multi-purpose centers. However, today's curriculum in use for ECEC in Turkey was prepared in 2013.

The curriculum is child-centered, easily adaptable, and editable based on the changing character of the child, the physical learning environment, and the families. Although game-based learning is one of the program's main goals, subject themes are a means but not a purpose. In addition, the curriculum includes adaptations for children with special needs.

According to MoNE statistics, the number of children who received education in early childhood education institutions in 2020 increased by 65 thousand compared to the previous year. As a result, it was announced as 1 million 630 thousand.

TABLE 1 ECEC statistics 2020 Turkey (National Education Statistics, 2020)

<b>School type</b>	<b>Number of schools</b>	<b>Number of classes</b>	<b>Number of children</b>	<b>Number of teachers</b>
<b>Kindergarten (public + private)</b>	11 485	50 831	766 223	56 218
<b>Nursery (public + private)</b>	21 069	34 697	863 497	42 607
<b>Total ECEC (public + private)</b>	32 554	85 528	1 629 720	98 825

### **3.7.1 The objectives of ECEC Turkey**

According to the National Education Basic Law, ECEC is optional and includes children who have not reached the age of compulsory primary education (48-66 months) in the age group 0-5,5.

Ensuring children's physical, mental and emotional developments and supporting them to gain good manners are the main objectives of the ECEC Turkey. They also focus on preparing children for primary education, creating a standard growing environment for all the children with no exception, and ensuring that children speak the Turkish language well and correctly.

### **3.7.2 ECEC institutions in Turkey**

Early childhood education services are carried out through various institutions. Based on the Preschool Education Programs put into effect by the MoNE in 1994, there are two types of ECEC institutions; by service and age groups. The second type is establishment purposes.

Kreş for the ages of 0-3 was designed to provide services for working mothers. Yuva is responsible for the care and education of children between the ages of 2-and 4, and the name means "home" in Turkish. Anaokulu is an early childhood education institution that children 37-60 months old attend, calling them kindergartens. Anasınıfı are institutions covering the education of children 61-72 months old (Age 6). These one-year term classes are the same as the Finnish preschool classes, except these are not mandatory in Turkey.

Other ECEC institutions categorized by the establishment purposes are opened under various names by public and private organizations with various laws and regulations. These institutions are supervised by the relevant departments of the MoNE and Social Services Child Protection Agency.

MoNE provides 90% of ECEC services, and the General Directorate of Child Services provides the rest together with institutions established under Article 191 of

the Civil Servants Law No. 657. These can be independent kindergartens, nurseries, and daycares.

The locations and the priorities of the ECEC institutions are regulated and prepared by the MoNE before establishment. For example, kindergartens and daycare centers can be established under the General Directorate of Social Services and Child Protection Agency.

Public and private sector enterprises can establish preschool education institutions such as nurseries, child nests, childcare centers, and daycare centers in coordination and cooperation with MoNE without being affiliated with the Ministry.

### **3.7.3 Personnel in Turkish ECEC institutions**

Kindergarten Director's role is to increase the effectiveness of teaching at school. According to ECEC and Primary Education Institutions Regulations Turkey, Article 17, the director and other employees manage the institution. The institution is a democratic education teaching environment, and the director is authorized to regulate, execute and supervise all the works of the school following the laws, regulations, directives, programs, and orders.

Deputy Director is responsible to the director for the school's operation and the regular conduct of the works.

Article 43 of the Basic Law of National Education No.1739 defines the teacher as a specialty profession that takes over the state's education, training, and related management duties.

Within the scope of the Teacher Education component of the Basic Education Support Program in Turkey, teacher qualifications were determined. As a result of the meetings held for this study, The General Competence Draft for Teacher Profession was created by the General Directorate of Teacher Training and Education of the MoNE. These competencies are development, communication with

families, family participation-education-evaluation, creativity, aesthetics, collaboration with school, and professional development.

The Directorate of Basic Education believes that the teacher should always keep in mind that each child has different developmental and individual characteristics and competencies.

#### **3.7.4 Fundamental problems of ECEC in Turkey**

Turkey began to pay more attention to ECEC policies after 2005 and worked on increasing schooling rates. MoNE decided that preschool education should be compulsory for children in the 60-72 month age group in 2006. (Ministry of National Education Turkey, 2016) According to this decision, MoNE provided compulsory preschool education to 5-year-old children in 32 pilot provinces from 2009 to 2010.

The vision is to develop common quality standards and implement them in early childhood education institutions under the authorization of the MoNE. Ministry seeks alternative education models with flexible timing arrangements for rural and low-populated areas. Nutrition support will be provided for families. Also, depending on the need and requests, summer school programs plan to implement game-based development activities, starting with pilot schools during the summer months. (2023 Eğitim Vizyonu, 2018)



PICTURE 1 A classroom from a public school in Istanbul, October 2018 (Shortage of Teachers, 2021)

We can categorize the main problems as physical deficiencies, economic insufficiencies, and other issues impacting early childhood education programs. Due to physical conditions, they cannot establish enough learning environments and classroom sizes are not enough for all the activities. There is a need for additional resources which is not provided, and teachers do not have all the necessary materials, tools, and hardware for educational purposes. Because of the physical challenges, different age groups are taken care of in the same classroom, limiting learning for all groups, and MoNE does not invest enough in early childhood education. The challenges and problems are explained more in the interviews' analysis section.



PICTURE 2 teachers were renovating the public school in Samsun in October 2020. (Çokluk, 2020)

### 3.7.5 The situation during the covid-19 pandemic

Preschool education was interrupted due to the pandemic in Turkey at the beginning of 2020. Most of the schools could not adapt to the new situation, and it was better to close the facilities, and others tried to survive by looking for different solutions.

In the 2019-2020 academic year, 41.78% of those ages 3-5, 52.41% of ages 4-5, and 71.22% of age 5 participated in early childhood education. (National Education Statistics, 2020)

Marmara University Faculty of Education Preschool Division head Prof. Ozana Ural states that children were interaction, active playing, and parental support deprived in addition to distance education due to the COVID-19 outbreak. Children went back to kindergartens at the beginning of June 2020 after a long break, and including teachers, nobody could adapt to education due to uncertainty. Spring term education programs were not fully implemented. Also, technological

support such as a tablet, computer, and stable internet connection was not provided to provide online education to the child staying at home. Another issue was the confusion about institutions implementing early childhood education in Turkey. The terms nursery, daycare center, kindergarten, and nursery class have the same meanings. Preschool education institution focuses on science education programs for the development of children. This training is provided by teachers who are graduates of four-year preschool education in the education faculties of universities where teachers in all other fields are trained in Turkey. (Ural, 2021)



PICTURE 3 Teachers were renovating a public school in Samsun in October 2020. (Çokluk, 2020)

### 3.7.6 Education vision of Turkey 2023

Istanbul, previously known as Constantinople, was conquered in 1453 by the young Ottoman Empire Sultan Mehmed II, later called Mehmed the Conquerer. As the interim government is pro-Ottoman, their visions and plans are related to these specific years and dates. So the year 2023 will be the 570th anniversary of ending the Byzantine Empire and conquering the city and the 100th anniversary of the Republic of Turkey, established on October 29, 1923.



According to Vision 2023, the starting point in an educational institution is to help individuals know themselves. When children, parents, and teachers know themselves and their environment, a shared improvement occurs. The teacher is the key actor in this shared journey. Therefore, the essential learning interaction occurs when a teacher shows care to a child.

When actions do not meet the intentions, plans stay as a theory. The efforts for teacher training by the government and MoNE are not enough. There are universities, foundations, non-profit organizations, private institutions, and academics using resources on this matter within their limits and abilities. It is impossible to restructure the education system without the support of the state in a country. There are regulations, laws, licenses, funds, and other relevant resources needed. It is impossible to perform most of these necessary elements for educational reform without government support.

Age 5 will be made compulsory for early childhood education. Common quality standards should be developed and implemented as soon as possible. Because of the income differences, alternative models are needed in rural and low-populated areas. In addition, there are families with poor conditions, and they need support for educational materials and nutrition. Pilot schools will be chosen to implement game-based development activities. An interactive environment should be generated between the family, school, and the child's close circle. The education right of all the children will be secured. Community-based early childhood education strategies will be created. For this, mobile bus classrooms, workshops, and centers will be commissioned. Child development and psychology training sessions will be organized for parents. A brand new curriculum must be developed for schools attended by children of migrants and foreigners under temporary protection. Pilot projects will be launched to deliver necessary teacher training programs. (2023 Eđitim Vizyonu, 2018)

Turkey's Education Vision 2023 focuses on developing and improving early childhood education only in theory based on the summary of the section from the book Turkey's Education Vision 2023. However, the most crucial step of the whole education system in a country is early childhood education. Therefore, instead of

focusing on solving the existing problems and preventing the potential future issues of early childhood education, Turkey uses the resources and investments in the latter stages of the education system.

### **3.8 Becoming a teacher in Turkey**

The author will explain how hard it is to acquire the teacher profession in Turkey to give the reader an idea about Turkish teachers' career history. Furthermore, the process should enlighten the readers about the products and services needed. Also, it will help to use ideal approaches.

Around 2 million students participate in the university general entrance exam organized nationwide yearly in Turkey. The Council of Higher Education changed the structure of the examination in 2018. Higher Education Institutions Exam (YKS) now has two stages. The first stage is Basic Proficiency Test (TYT), and the second stage is Field Proficiency Test (AYT) with the Foreign Language Test (YDT). Assessment, Selection, and Placement Center (ÖSYM) arranges the examinations under the Council of Higher Education (YÖK).

Candidates participate in two separate tests. The first session consists of the Turkish language (40 questions) and basic mathematics (40 questions). The second session consists of Turkish language & literature, geography, social sciences, mathematics, and science (physics, chemistry, biology) held on the same day as the first session after the lunch break. The language exam is held on the same weekend the next day, and the number of questions is 80. The first session is compulsory for all candidates, and the questions are formed from the standard curriculum of the MoNE. Candidates entering the first session can choose from the associate degree departments, and the minimum demanded points is 150 for this preference. Candidates who score more than 180 points in the first session can choose from undergraduate departments. Two hundred points from the TYT have a 2-year validity. Candidates can use their exam results in the following years if they wish as long as they have not made a study choice in the last exam they participated in. (Examinations, 2021)

The second session of the examination consists of Turkish Language & Literature – Geography (40), Social Sciences (40), Mathematics (40), and Science (40) questions. Therefore, while calculating the undergraduate degree placement score, the weight of the TYT is 40%, and the weight of the second session is 60%. (Examinations, 2021)

The YKS is highly complicated, and candidates must know all these subjects even if they are irrelevant to their planned study programs. However, the basic levels of the subjects are understandable. Moreover, compared to Finland, where students have different entrance exams for each school, a program with questions from relevant subjects is a much better solution.

So, a candidate must go through the examination process, then score within the top 10%. After that, the compulsory 4-year study program begins. After graduation, a candidate has to participate in the Public Personnel Selection Exam (KPSS) organized by ÖSYM for those appointed to public positions for the first time. The minimum necessary point to score is 80 and above to get the right to be employed in the public sector. (KPSS, 2021)

After these examinations, a candidate should pass the interview held by MoNE. Then comes the standard procedure of security investigations and background checks by the state, police, and national intelligence agency (MIT). Coming out clean from those steps depends on the political view of the interim government of that period. Successful candidates get a temporary contract at the beginning, renewed every year. This model has to be accepted by a teacher candidate to work in public schools. The moment a candidate gets appointed, a contract must be signed that the candidate will not move anywhere else than the place of appointment for 6-year time for any reason, including marital status. (Türkiye'de Öğretmen Olmak, 2018)

This exhausting process gives candidates their dream profession with the lowest salary in almost all OECD countries and the lowest salary category in Turkish civil servants. Therefore, we can say that Turkish teachers deserve more respect from the state, children, and parents in Turkey, and they deserve a better salary.

The Performance Evaluation System by the MoNE evaluates teachers subjectively at the end of the academic year as "good teachers" or "bad teachers." The evaluations are carried out by those who do not know the characteristics of the profession at all.

This situation destroys the teachers' collaboration, knowledge sharing, development, and learning. No teacher would like to end the academic year with a "bad teacher." The model seems more like the private sector; the best performers get bonuses. Education should not be associated with business, especially in public schools. There is no logical explanation for evaluators who do not know the field but are licensed to evaluate teachers.

Also, parents who never visit school have no idea about lessons, methods, models, assessments, and evaluations and dare to evaluate teachers. There is a common saying among the Turks about teachers, "the state backs the teachers at all times; even during the three-month summer period, they still get paid for having a holiday."

Everyone in Turkey knows the difficulties in the education system. The people are either students, parents, or teachers in a way. Everyone is involved in the education ecosystem. Schools are incomplete and incompetent, grants and funds are not being shared fairly, classrooms have a lot to improve, and the curriculum is old and needs reforming. Nevertheless, people pretend that teachers are responsible for all these shortcomings. Whether it is a cultural issue or effortless and fast to reach teachers personally, teachers are treated as the primary cause and the solution for every problem in the education system. Teachers are accountable is the most accessible explanation.

Conditions in the East of Turkey are not as good as they are in the rest of the country. For example, class teachers in many villages teach to different age groups in the same classroom as the school has only one classroom. There are 40-50 students in classrooms in more populated areas, and one teacher has to control the whole class and make sure each of these kids learns.



PICTURE 4 Teachers and parents are repairing the public school in city Van, April 2020. (Karaca, 2020)

One of Turkey's most challenging and underestimated professions is being a teacher. If a teacher candidate can pass all these processes and become one, then there should be other skills too such as painter, carpenter, welder, psychologist and so on to survive in career. However, it is also crystal clear that no Turkish person becomes a teacher for the salary and other perks.

## 4 THEORETICAL FRAMEWORK

### 4.1 Turkish ECEC industry analysis

The five forces framework explains the industry's average prices and costs, and therefore the average industry profitability you are trying to beat. (Magretta, 2012)

#### 4.1.1 Porter's Five Forces

Porter's Five Forces Framework is a tool for analyzing the competition of a business and answers the key question which is the current situation of the industry of choice. Many things are happening at the same time within the education industry but which ones matter for the competition is essential to figure out. The attractiveness of the industry is also relevant to its profitability.

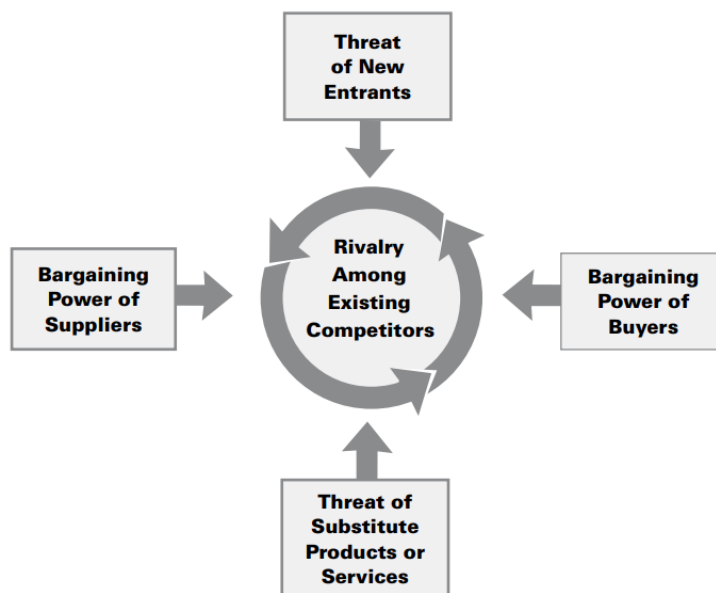


Figure 1. Porter's Five Forces Model (Porter, The Five Competitive Forces That Shape Strategy, 2008)

### **Threat of new entrants**

Porter (2008) describes the threat of new entrants as a possibility for new capacity and a desire to gain market share that puts pressure on prices, costs, and the rate of investment necessary to compete.

The education sector in Turkey is a profitable market for Finnish exporters at the moment. Profitable high-return industries attract new businesses. New entrants will weaken the profitability of existing companies in the market. If the commissioner can become an incumbent and sign the best possible partnerships from the Finnish education industry network, can also make it more difficult for new entrants to enter the Turkish education market.

Martinez and Wolverton (2009) suggested four factors that can affect the potential for entry of a new competitor. The first one is economies of scale which refers to a company's ability to increase productivity or decrease its average cost of production by more efficiently employing resources over time. The second one is the capital requirement that will reduce the threat of new entrants to the industry. The third one is the competitor reaction. The competitors often react negatively to new or potential entrants and these reactions can create barriers. The last one is buyer resistance and this one is the most visible barrier for Finnish ECEC exporters in Turkey as this refers to a failure to accept the new goods and services, also not willing to deal with the cost of change.

According to Porter (2008), supply-side economies of scale arise when companies that produce at larger volumes enjoy lower costs per sale because they can spread fixed costs over more deals. The commissioner is aiming to be an incumbent in the market and this barrier will most likely be faced after a few important deals are executed and the commissioner had publicity campaigns. A major Turkish company from any given industry would probably approach Finnish education exporters. After having multiple representation contracts for the Turkish education market, considering their work power, resources, and other advantages in the country, the commissioner would face a barrier in this case.

### **Threat of substitutes**

According to Porter (2008), a substitute performs the same or a similar function by different means. If the threat of a substitute is high, industry profitability will suffer. Ronquillo (2012) stated that the overall industry is improved when business entities offer similar products at possibly the same quality but at a lesser cost.

The replacement product uses a different method, tools, or approach to solve the same need. The substitute of Finnish education products and services will be also from a Finnish market but different providers and this is linked to the threat of new entrants directly. No entity can produce Finnish ECEC products and services within the market without the real Finnish higher education institutions and private companies.

### **Bargaining power of buyers**

In ECEC, the buyers are still the parents even if the deals are made business-to-business or business-to-government.

Porter (2008) describes the bargaining power of buyers so that powerful customers can capture more value by forcing prices down, demanding better quality or more service, and generally playing industry participants off against one another, all at the expense of industry profitability.

The Turkish ECEC market is quite big but the customer group does not have negotiation leverage as there is no visible competition between the Finnish education exporters and their representatives. ECEC industry's products cannot be standardized because each time the customer is analyzed and after that products are custom-tailored based on their specific needs. Therefore, the buyers do not have the chance to find an equivalent product and service. Buyers' power is high when buyers have many alternatives. In this case, it is low as they have only a few choices.

### **Bargaining power of suppliers**



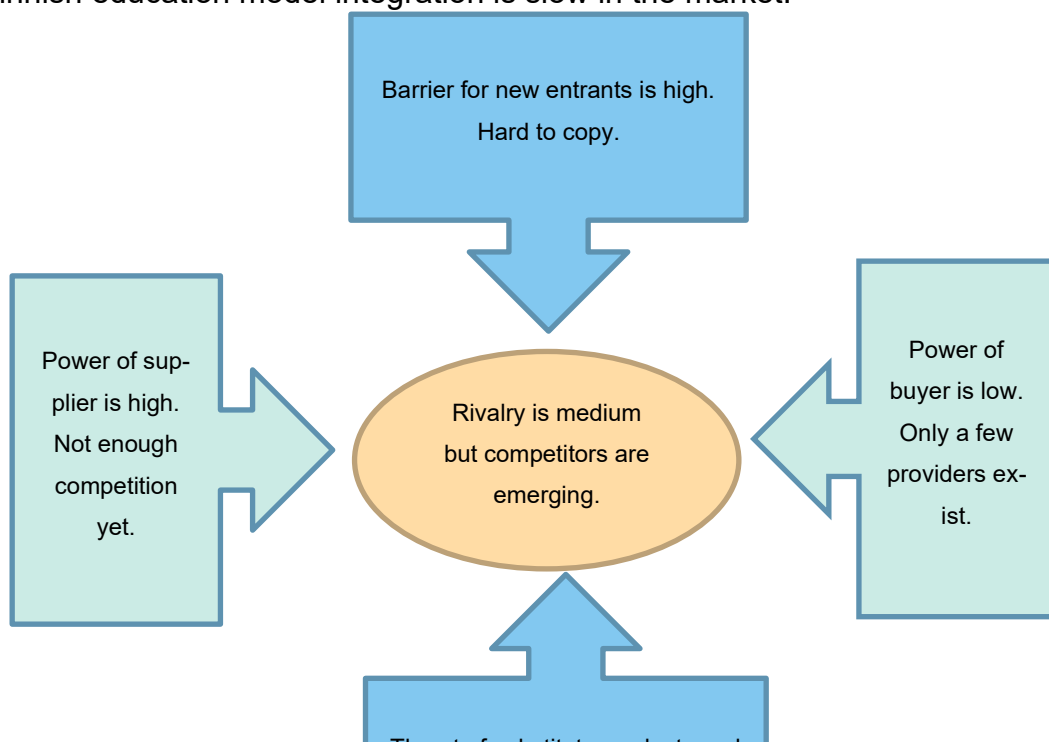
Market input is the bargaining power of suppliers. When there are few alternatives in the Turkish ECEC market, the commissioner can be a source of power. If a client in the Turkish ECEC market would like to upgrade their products and services with a Finnish model integration, they will not have multiple sources to ask for price offers and make them compete with each other.

### Industry rivalry

According to Porter (2008), rivalry among existing competitors takes many familiar forms, including price discounting, new product introductions, advertising campaigns, and service improvements.

Pringle and Huisman (2011) argued that rivalry is a powerful force that can lead to tighter profit margins. This is most likely to happen in Turkish business culture when the local companies have done the math for the profitability in the ECEC industry for Finnish products and services. There can be even cases where the local company can kill the competitors by paying themselves more and not making any profits as their prestige is more important than profit.

The intensity of rivalry is great in the Turkish ECEC industry. A few competitors exist and they are about the same size companies. Industry growth is fast but the Finnish education model integration is slow in the market.



#### **4.1.2 TOWS analysis**

SWOT analysis is a strategic planning method. It is used for evaluating the strengths, weaknesses, opportunities, and threats involved in a project or a business. Strengths and weaknesses can be identified as the internal factors within the organization, and opportunities and threats are the external factors.

Moniz and Bishop (2016) credit the technique to Albert Humphrey, an American management consultant, who led a convention at Stanford University in the 1960s and 1970s using data from Fortune 500 companies. They believe, that the identification of SWOTs is essential because the process of planning for the achievement of the selected objective may be derived from the SWOTs.

According to Wheelen and Hunger (2012), the TOWS Matrix (another way of saying SWOT) illustrates how the external opportunities and threats facing a particular corporation can be matched with the company's internal strengths and weaknesses to result in four sets of possible strategic alternatives. It can help to generate business strategies.

TABLE 2 TOWS Strategic Matrix (Wheelen &amp; Hunger, 2012)

	<b>External Opportunities</b>	<b>External Threats</b>
<b>Internal Strengths</b>	SO Generating strategies to take advantage of opportunities.	WO Generating strategies to take advantage of opportunities by overcoming weaknesses.
<b>Internal Weaknesses</b>	ST Generating strategies that use strength to avoid threats.	WT Generating strategies that minimize the weaknesses and avoid threats.

The author implements the TOWS analysis tool with the SWOT and answers the following questions.

- SO – how the commissioner’s strength could maximize the opportunity?
- WO – how do the commissioner’s opportunities can overcome our weaknesses?
- ST – how can the commissioner avoid our strength to avoid threats?
- WT – how can the commissioner minimize the weakness and avoid threats?

TABLE 3 TOWS Analysis

	<b>Strengths</b>	<b>Weaknesses</b>
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<p style="text-align: center;"><b>TOWS</b></p>	<ul style="list-style-type: none"> <li>• Pioneering the early childhood education and care model</li> <li>• Wide range of potential clients</li> <li>• A big network of education exporters from Finland</li> <li>• Cultural and language knowledge of the market</li> </ul>	<ul style="list-style-type: none"> <li>• Unknown to the education export community in Finland</li> <li>• Need extra time to be widely known and sign strong partnerships &amp; representation contracts with Finnish education exporters</li> </ul>
<p><b>Opportunities</b></p>	<p><b>SO Strategy</b></p>	<p><b>WO Strategy</b></p>
<ul style="list-style-type: none"> <li>• Demand for the ECEC development in Turkey</li> <li>• Post-covid period situation (private schools looking for innovative models to attract more clients)</li> <li>• Increased media awareness for Finnish education models</li> </ul>	<ul style="list-style-type: none"> <li>• Maximize the media awareness with the right partners to launch the products and services in the market</li> <li>• Target the private schools</li> <li>• Offer practical solutions and a prominent learning experience</li> <li>• Introduce the Finnish education exporters' wide-range products and services that are available via the commissioner</li> </ul>	<ul style="list-style-type: none"> <li>• Set a clear mission statement</li> <li>• Keep expanding the network within the Finnish education exporters</li> <li>• Sign more exclusive contracts for the strategic products and services from Finnish providers to the Turkish ECEC market</li> </ul>

<ul style="list-style-type: none"> <li>• More Turkish parents appreciate the Finnish model</li> </ul>		
<b>Threats</b>	<b>ST Strategy</b>	<b>WT Strategy</b>
<ul style="list-style-type: none"> <li>• Competition is high in the market because of other well-known international ECEC models</li> <li>• These models are known in the Turkish market better than the Finnish model</li> <li>• International transactions and international laws</li> <li>• Internal leakage to benefit the competitors</li> </ul>	<ul style="list-style-type: none"> <li>• Keep innovating</li> <li>• Create customer loyalty strategies for the private schools and also the public kindergartens based on market and country conditions</li> <li>• More campaigns with the key players in the Turkish ECEC sector</li> <li>• Prepare binding contracts with the local partners for both legal issues and money transactions between Turkish end clients and the commissioner that takes care of the Finnish side of the transactions</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare a smart exit strategy at the right timing after the boom in the market or prepare the second phase with top-up products and services for the existing ones</li> <li>• Stay in alignment with the market development, economic changes, new trends, and the demand</li> </ul>

## **5 MARKET ANALYSIS OF THE TURKISH ECEC SECTOR**

This chapter focuses on analyzing the Turkish early childhood education and care market. The analysis consists of five sections: operative environment, industry analysis, customer analysis, competitor analysis, and difficulties entering the market. The analysis is based on online interviews and the information collected from different online sources.

### **5.1 Operative environment analysis**

The operative environment consists of economy, politics, social, technological, cultural, and physical factors, and demography research. This section focuses on the operative environment in the education industry.

#### **5.1.1 Political**

Education policies in Turkey affect individual lives directly. In addition, political groups significantly impact individual lives and outcomes. Social life is affected by education policies too. Since there is no independent governmental organization for education in Turkey as MoNE used to be in the past and not being orchestrated by the acting president, the society organizes its educational activities according to the characteristics of its political system. When politics change, the education system will most likely change as well.

In a democratic regime, as a requirement of the equality principle of democracy, every member of society benefits equally from educational opportunities. After the proclamation of the Republic during the Ottoman Empire, political power had an impact on educational institutions. In this period, the state created a new education system to train the skilled people required by the Republican regime. Like other states, the Republic of Turkey has organized its educational activities according to its political regime's ideology. Aimed to raise individuals who adopt and protect the characteristics of the Republic, Atatürk's principles and reforms.

With the Law of Education Unification enacted on March 3, 1924, education was gathered under one roof, and primary education was made compulsory for all citizens without exceptions.

According to Global Corruption Barometer, corruption rank in Turkey averaged 61.5 from 1995 until 2020, reaching an all-time high of 91 in 2019. However, the corruption rank decreased to 86 in 2020. (Corruption Perception Index 2020, 2021) In 2021, the corruption rank has increased to 96 with a score of 38/100.

Distrust in governmental policies and politics is evident in the interviews. Private ECEC institution owners, faculty deans, and heads of umbrella organizations for early childhood education mentioned that wealthier people enroll their children in private institutions. Because they believe these institutions are independent (not being affected by the interim government) and children get enough attention as classrooms are not very populated. These parents also think private schools are better than public ones, even if that is not the case.

Politicians talk to the media, promise innovative models, and give the impression of implementing the Finnish model to please the media and voters. However, most media is pro-government, so it is not easy to get the facts straight for most people.

There are working groups on developing early childhood education nationwide, and they collaborate with other groups from European countries. However, these academicians plan and present their innovative projects to the relevant ministries, but they often get rejected for not being pro-government. Then others openly tell the world that they are pro-government, and no matter how bad is their project, they will get acceptance and needed funds.

### **5.1.2 Socio-economic**

The distribution of income and living standards directly affect whether the child will get early childhood education or not. The distance between income levels

and living standard inequalities becomes more significant daily than in other OECD countries in Turkey.

Almost every interviewee mentions the price difference in private early childhood education institutions around their hometowns. Sometimes the price depends on where the school is located, sometimes, it depends on what educational model the school has adopted, and the publicity of owners is one factor in the price.

A private kindergarten can easily cost as much as a private university in Turkey. So naturally, the East of Turkey has the poorest regions, but the difference is visible even within the same cities in the West. This fact is crucial for the commissioner and other education export companies.

A private kindergarten can cost up to 60 000 Turkish Liras per year. By 2021, this sum will make 4 000 Euros due to currency fluctuations. This sum was 8 000 Euros in January 2021. The author points out the prices in euros to give the reader an idea, but the author states that the Turkish currency is the Turkish Lira, and people do not earn their income in Euros. Therefore, for a healthy comparison, the salary data needed and converted into Euros or numbers should be spoken on unit prices without currency. So the reader can imagine the scenario for Finland where a private kindergarten can cost up to 60 000 Euros per year and make assumptions about the income levels of the parents enrolling their children in these schools.

The 0-2 age group demands extra attention and focus in kindergartens, and therefore the price for this age group is naturally higher. Therefore, the price for this age group can quickly go up to 5 000 units price in local currency.

Municipalities and the Ministry offer kindergarten services at reasonable prices for lower-income parents. The average price would be 100 – 250 units price per month.

Government offers public kindergarten aids for children with specific criteria and conditions. For example, children under state custody, children with veteran parents, parents who lost their lives on duty, children who stay with their mothers in



prison, children with no parents, children with disabled parents, and destitute families get these aids.

One interviewee mentioned another reason parents choose private kindergartens is because they believe the quality of education given and materials are much better than public ones. Partly this is correct, but not because of the teachers. All teachers have the same background in education, but in private institutions, they have 10-20 children, and then in public schools, there is double the number of children in the same classroom. So naturally, transmitting knowledge in more populated schools is not as strong as in private schools.

Economic income conditions define the area where people live and children study. Also, those children are used to different conditions based on their growing environment. For example, children from poor areas are more familiar with foul language and probably violence than children from wealthy areas. In addition, the children's social backgrounds affect the way they behave at school. For example, these children can behave aggressively, talk a lot and not listen to what the teacher says. Then in private schools, children are more civilized, aware of norms, and have better social skills; therefore, the teacher can work better with these students.

### **5.1.3 Culture**

The cultural analysis includes religion, language, and business life. According to the Constitution Article 3, the official language of Turkey is Turkish. (Türkiye Cumhuriyeti Anayasası, 1982) To do business in Turkey, the Turkish language skills are crucial. The level of English skill is low especially on higher level positions in public sector among senior people, and that affects a lot on making business and exporting education to Turkey. Most of the time, older people in decision-making positions would like to get briefed in Turkish. Admitting a translator during the process is not very helpful. The company planning to export to Turkey should use local partners or skilled Turkish people living in Finland. The situation is different in the private sector. They are more active in international collaborations, and English communication is entirely welcome.

Education First company surveyed EPI Index in 2021. Turkey scored 478, which means low proficiency and position in Europe as 34 of 35, compared to Finland with 618, which means high proficiency and position 8 of 35. (Turkey, 2021)

Interviewees were all fluent in English, but they pointed out also the problems in English language teaching. For example, students start learning English in 4<sup>th</sup> grade in public schools. On the other hand, private kindergartens teach English very early to kids, and then there are schools with fully English education. Moreover, due to economic challenges, children start their education unfairly. For example, suppose parents want more English courses for their children. In that case, they will have to take extra English classes, which are usually very expensive for the middle or low class, and there again, we see an unfair situation because of the income level.

Turkey is defined as a secular state in the constitution, and the freedom of faith is protected. (Türkiye Cumhuriyeti Anayasası, 1982, Chapter 1) The Presidency of Religious Affairs serves as an organization affiliated to the Presidency and during the last years, this governmental body has been entitled to more budgets than MoNE as a result of the interim government's views. A great majority of the nation were Muslims, more than 98% for years. Every Turkish citizen is denominated as Turk, regardless of religious or ethnic origin, which has caused conflicts for decades. Various communities have different religious beliefs as Christians, Jews, Yezidis, and others.

The interviewees mention that the interim government is not a fan of secularism. However, they try the limits of the system and the nation's patience by bringing religion into every subject. The government offers more budget for religious projects; more Imam Hatip Schools are being established. They deploy more new teachers and imams to the relevant positions. However, interviewees also mention that these students from Imam Hatip Schools do not get very successful results in the university exams compared to other schools on the same level of education. Therefore, the quality of the education system is going backward.

Business culture is essential to understand and adapt the culture while on the field to do successful business in Turkey. Turkish people value personal communication, personal contacts, and relationships a lot. Interviewees mention that hierarchy and creating a safe relationship are crucial, so there is probably no deal reached in the first meetings. An ideal boss is the role of a father within the organization. Power is centralized; everybody follows and obeys the orders from levels above them. Communication is indirect, and information is not shared with everyone. Personal relationships are built on long-lasting loyalties. Therefore, corruption is possible in the business world. People try to avoid conflicts in their lives and reach an agreement at the end of conflicts. Turkish people need laws and rules at all times in their lives. People use religious terms during their daily lives and activities even though they might not be religious. Most people worry about their future in Turkey because it is economically imbalanced. That makes most people short-term oriented. The quick earn and leave model is in use most of the time. Highly educated people are long-term-oriented because they can see the bigger picture and value business cases. They are not interested in quick profits, and they prefer steady long-term income out of the deal.

Turkish people love technology and using all kinds of devices, but they value face-to-face meetings. Therefore, it is beneficial not to talk about historical and cultural conflicts without knowing the person and establishing a relationship.

Interviewees pointed out that, just like in other sectors, low prices mean low-quality service in the culture in the education field. Parents have different expectations from early childhood education institutions.

#### **5.1.4 Jurisprudence**

Different laws and jurisdictions affect the early childhood education business in Turkey. In interviews, every interviewee mentioned the effects of various authorities, as the author defined earlier. The operation of the ECEC institution depends on the powers affiliated with it. Decision-making mechanisms, teachers, curriculum design, clientele, and pricing differ based on the governing organization.

ECEC institutions are directly affiliated with MoNE or Social Services and Child Protection Agency. There are also ECEC institutions affiliated with Universities, the Ministry of Employment, Foundations, Associations, and Cooperatives. These institutions are still supervised by the MoNE or Social Services and Child Protection Agency. Because of these classifications, there are differences in terms of management and establishment purposes and programs and venue equipment within the institutions.

Interviewees recommended finding a local partner for Finnish education exporters to get the necessary help with the local law in Turkey. For instance, a foreign company cannot legally participate in public tenders most of the time. Therefore, the Finnish education exporter should make specific partnership agreements with the local companies and define who the responsible party is in different situations.

Interviewees mentioned the national base for curriculum in ECEC that every school must follow. However, individual institutions can modify it within the laws and regulations and create their curriculum. The existing curriculum is from 2013 for ECEC, and there has not been a consensus to revise it nationwide since then.

A flexible curriculum for ECEC in Turkey is advantageous for Finnish education exporters. These companies can create various curriculum models and integrate them into the Turkish ECEC curriculum.

#### **5.1.5 Physical aspects**

Physical aspects focus on technological challenges and physical conditions of the learning environments. Turkish culture is in love with technology. Sometimes this is an advantage, but on the other side, this can bring more challenges when the quality is measured with the usage of technology within the ECEC institutions.

Interviewees agree on the benefits of technology in a child's development and education. However, they also mentioned that parents do not know how to use technological devices and engage children. In this respect, interviewees believe

that; easy access to computers or tablets prevents children from being determined, learning, social adaptation, and learning to overcome different challenges or difficult situations. Therefore, they believe education should be supported by technology, not based on technology.

The country's economic difference is evident. Wealthier people can arrange the necessary safety precautions for their children compared to less fortunate people. Nevertheless, all of the interviewees mentioned the importance of safety for parents when choosing ECEC institutions. Even the walking distance from a car or a bus to the premises concerns parents. The location of the premises is crucial whether it is in the middle of the city center or outside. In big cities such as Istanbul, people travel long times in traffic jams, even short distances. Wrong timing in traffic can cause 2 hours of traveling for a 20km trip. Since parents decide whether an ECEC institution is high-quality or not based on different aspects, once they believe a school is expensive and high-quality, they will still enroll their children in those schools even if they are far from home.

## **5.2 Analysis of industry**

The author includes an analysis of different business models in Turkey for the ECEC sector and informs about the image of Finnish education in Turkey. The population, diversity, size, and a hungry market for Finnish education products and services create an advantageous situation for Finnish education export companies. However, competition in the sector within the market is brutal. Therefore, making a mistake when choosing a local partner can be crucial and a decision-maker for the future of the business in Turkey. Another critical matter is that instead of planning and proposing expensive and comprehensive projects, Finnish companies should focus on more minor, specifically targeted products and services. By this, revenue can be generated from volume sales.

### **5.2.1 Business possibilities in the ECEC sector in Turkey**

There are many possibilities to do business in the ECEC sector in Turkey. However, the market is divided into public and private sectors. All interviewees suggested that the target market should be the private sector. However, the author and the interviewees both believe that the public sector would be a better focus area business-wise. Nevertheless, selling to the public sector is more complicated, tiring, and prolonged, which might end the Finnish export companies and institutions with no deal. Deals with the public sector are usually applied nationwide and bring more profits than deals with clients from the private sector. There are some collaborations in different levels of the education sector between the Finnish and Turkish players, but it could be better. If the purpose is to make pure business and money, then the focus should be on the private sector clients. On the other hand, if the social impacts and more significant picture are more important than the business, the focus should be on the public sector.

The private sector would get different packages, including teacher training, curriculum design and support, and learning environment consultation. These are all connected when applying a Finnish model in a Turkish kindergarten. For example, a company or an institution in Finland cannot just sell teacher training to a private school. Then there is neither curriculum nor learning space design support to apply the learned skills and methods. Since the volume is too high for the public sector, the products should be compact and intensive. For example, if a product is teacher training, the course should have a specific theme and a topic instead of a general informative course.

### **5.2.2 Image of the Finnish education in Turkey**

Finland's educational brand is powerful in Turkey. Often some social media posts are going viral in Turkey about Finland. These posts are usually a combination of a photo of a political character or a landmark, then some exciting text content about it that is far from reality. For instance, most parents think that no homework is given to the students in Finland.

Based on the interviews, people in Turkey do not know about the Finnish education system and model. However, some schools and kindergartens in Turkey claim to be Finnish educational institutions. These private schools use this claim as a marketing strategy.

The Finnish education model does not need branding. The brand is already well-known and wanted. The education system is one of the first things that come to mind in Turkey when speaking with people about Finland. However, not knowing how Finnish education works can cause challenges for Finnish education exporters.

Differences between the two cultures are another challenge for the education export. Parents have different expectations from the kindergartens and demand more different and extra services when the price is higher for the kindergarten. Therefore, the system is more standardized and highly competitive.

### **5.3 Customer analysis**

There are many different possibilities for Finnish companies to do business in the ECEC sector in Turkey. The customer group consists of the public and private sectors. However, all interviewees suggest that the focus should be on the private sector in Turkey for doing business in the ECEC market.

#### **5.3.1 Public sector**

First, it is executable to the public sector. Then, however, it becomes a much more complex process than in the private sector. The process is likely much longer, and it needs more understanding of the regulations. The Finnish company must fulfill all the requirements and criteria defined by the public body and have a local trustable partner.

Another way of doing business would be using a local representative. The local Turkish partner would do their marketing and negotiations with the end clients.

Then, based on the project, they can get proposals from the Finnish partner and bill the end clients themselves. In this method, transactions would be healthier and safer for the Finnish company. The local representative would pay and then take care of the process with the end client independently. Most public tenders demand depositing a guarantee to the bank from the applicants, and it is usually 10-30% of the offer given. This guarantee is locked until the delivery of the products and services in the case of tender is won. This method can probably not be accepted by Finnish companies in most cases. Public bodies such as ministries and municipalities cannot make direct purchases when the prices are above the defined sums by regulations. If the offer is below the limits for direct purchase, another issue comes into the picture. Public bodies would like to pay after delivering the services, not in advance.

The country's municipalities are the most accessible public body to do business with. There are 81 provincial municipalities and 911 county municipalities under those cities in Turkey. All of them have kindergartens under their authority. The main products would be creating customized learning space designs, curriculum upgrades, teaching methods, and teacher training programs.

### **5.3.2 Private sector**

Since Turkey is not an official member of the European Union, applicable laws and regulations may cause trouble for significant deals. In addition, private companies can cause challenges for the payment processes. Since there is no official data available online about the client's credibility, delivering the ordered products and services without any payment in advance can make the duration longer for getting paid.

Finnish education exporters should target private kindergartens with more than one branch and possibly in different regions. Business-wise, approaching these schools would be more innovative as the scope of the projects would be more extensive. Besides, these schools are well-known in Turkey with a respected reputation. Therefore there would be no challenges in billing them and getting paid. Moreover, projects can start with one branch and then spread to the others. Also,



having a reference school like this pictured one as a customer in Turkey opens more doors to new possibilities in the whole region.

### **5.3.3 Associations**

Selling educational products and services to associations can be considered a third market. These educational associations are also potential collaboration partners for Finnish education exporters. This is because they have a vast network in the sector and can help with marketing too. Below are the most popular and active associations mentioned during the interviews.

Association for Child Education (Cocuk Egitim Dernegi) was established in 2008 in Istanbul to support and provide preschool education for children (ages 0-10) with impaired hearing. This education extends to their parents. Different special education products could be marketed via this association.

Education Reform Initiative (Egitim Reformu Girisimi) is an independent and non-profit initiative that contributes to the structural transformation in education for the development of the child and society by creating quality data, constructive dialogue, and common sense from different views, and since 2003 and supported by Turkey's leading foundations.

The Turkish Education Association (Turk Egitim Dernegi) is the first civil society organization in education in Turkey and was established by the nation's great leader Mustafa Kemal Atatürk in 1928. The association has schools all over Turkey. First, foundation schools are opened mainly based on social responsibility, schools by private entrepreneurs, and then schools by association entrepreneurs.

Mother-Child Foundation (Anne Cocuk Vakfi) works to make sure children have a safe, healthy, and happy growing environment. Evidence-based educational programs are used for children, parents, and young women in need.

## 6 CONCLUSIONS

This chapter consists of the author's suggestions and conclusions based on the study, research, and interviews.

Based on this study, the Turkish National Education system is nowhere close to the principles of the Finnish education system. There is an ongoing competition between the education personnel instead of strong collaboration for joint development. There is no equality in the country. In Finland, we can see the children of wealthy families and less fortunate families in the same kindergarten or/and school. On the other side, in Turkey, we cannot see an example of the same situation. The difference between the income and living conditions between people is extremely high.

The lack of quality education in the public sector has created the private sector for education and a highly competitive market. However, the quality of teaching differs even in the same neighborhood. The quality of teaching depends on the school, the teacher's motivation, the tools and possibilities of the school, and the management. The teachers do not get appreciated enough, and the support for the teachers differs a lot between the private and public schools.

The demand for teacher education is high. However, high demand does not mean that teachers are not competent enough. On the contrary, they are highly skilled people, the young and freshly started their teaching careers are very motivated to adopt new methods and innovative models.

### 6.1 Market entry

The first thing for the Finnish education exporter must get to know the target country, city, neighborhood, and school. The second thing is the product and services. The study has defined different products for exporting to the Turkish early childhood education and care sector: Curriculum improvements, teacher training, and physical learning environment consultations.

The target market does not demand any efforts for marketing. The brand of the Finnish education system is already perfect in Turkey. Therefore, potential partners and clients will be easy to find, but the right partner is not easy to be found.

Based on the interviews, there is a need for educational development at all Turkish National Education system levels. However, the development and changes must be started from early childhood education's roots. Both private and public sectors need the offered products, but the private sector should be the number one priority for doing business. There will be a bureaucracy to follow in public schools, and the process will take so long, and the Finnish company cannot waste that long time for a potential deal unless the deal is nationwide. On the other hand, the Finnish company will negotiate with one or two people and probably a board of executives of the private school.

The perfect product that would make it into the TV and news will be establishing an utterly Finnish kindergarten in Turkey. This concept would have teachers trained partly in Finland and certified by Finnish educators. Then the physical learning environment will be designed by Finnish architects who have experience in planning kindergartens in Finland. Finally, Finnish educators decide on all the equipment, toys, and tools based on the school and education model, including cultural differences and nutrition plans.

Active collaboration in person is essential for the Finnish actors while exporting education to Turkey. In other words, to establish good relationships and collaboration for the future, traveling to Turkey is non-negotiable. There is already some collaboration between the Finnish and the Turkish players in the industry, but finding a new space in the market will not be hard. The volume of the education business between the two countries is not remarkable yet.

## **6.2 Challenges**

The competition in the private sector is high. Different country-themed kindergartens are already on the market, such as English and French kindergartens. They target mainly the wealthy regions of the major cities. There are some well-known

curriculum combinations in private kindergartens. It is possible to mix the two curriculums to be accepted for application.

Having a different education system, habits of students, culture, teachers' backgrounds, and parents' opinions are the main challenges for change. Even if it has been done before, mixing the two curriculums will be another significant challenge.

Finding the best fitting local partner to overcome most of these challenges is crucial. Jurisprudence, language, and politics are challenges that a Finnish education exporter might not overcome without local help. Jurisprudence has become a subjective matter in the country because of the political pressure from the government, and very complicated to estimate possible consequences. Politics affect the education sector's public deals as much as other sectors'. Corruption and nepotism rates are incredibly high.

Distrust in government can be seen everywhere in the public sector. Therefore, opinions and decisions about educational changes are affected a lot. If the local partner is not a pro-ruling party, then the target public clients will be only the municipalities ruled by the opposition parties.

The English language is studied and taught in schools effectively, but people do not have the option to train their skills daily in the country. Therefore, language will become a barrier to relationship building. Therefore, the suggestion is that Finnish education exporters should use interpreters, not just translators.

### **6.3 Target group and location**

The author has established earlier that the target should be the private sector and wealthier families. These families are clients of mostly international schools and highly respected private Turkish schools. The price of these schools for a kindergarten or/and primary education can cost as much as a private university would cost.

The best choice of the city could be one of the most populated top five cities: Istanbul, Ankara, Izmir, Bursa, and Antalya. Everyone knows the potential of Istanbul, and it does not need more explanation. Ankara is the capital city of Turkey, and all the foreign governmental personnel lives there with their families. Therefore, a Finnish kindergarten with an English education would have many clients. Izmir is known for its tourism, just like Antalya. Therefore, both cities would have enough clients whether the project is a Finnish or Turkish kindergarten powered by Finnish education. Bursa is the most significant industrial city and has its major ports. Winter tourism and summer tourism both attract foreign and local tourists. Traveling from Bursa to other metropolitan cities is very easy. All these reasons cause wealthy people to live in Bursa. Some families travel to Istanbul back and forth daily by a ferry, which is 1 hour of travel.

The cities mentioned above are highly populated and are significant in terms of land. Therefore, wealthy families mostly live in the same regions, with some exceptions. Therefore, the target region of the existing kindergarten or/and a planned brand new kindergarten must be based on this fact.

#### **6.4 Partners**

Based on the analysis, the best options for finding the right partners in Turkey depend on the business plan. The Embassy of Finland has a section called Team Finland, and that division has different roles in it. There is personnel who has responsibility for the education industry. They can offer a free consultation for Finnish companies to some extent. If a company needs detailed market research, it will cost, but the company can apply for governmental funds. Team Finland will approach probably the most well-known and trustable local companies. This means a Finnish company can already approach these companies by finding their contact information online—no added value in this consultation.

Education Finland network has a variety of members with their international network. Aeonian Solutions is one of them. In addition, the company has a network in Turkey in both the private and public sectors. By having Turkish personnel in a company, the entrance and the approach to the market will be easier and less

expensive. Sometimes, the size of the local company can be irrelevant to the successful results. Business is all about relationships in the country. Even an independent individual contractor or a smaller consulting company can close bigger deals than a significant company.

Collaboration between Finnish education exporters and local consulting companies is essential. The safest and most inexpensive model is partnering up with the right local representatives and moving forward together for the business deals. For example, suppose the Finnish education exporter can have a personnel or project-based contract with a Turkish person who lives in Finland and has relevant knowledge. The direct approach to the local private schools will not cost anything extra in this model.

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## APPENDICES

### Appendix 1. Interview template

#### Introduction

- Can you tell me about yourself and your background in the education field?
- What could you say about Finland and Finnish education in general?

#### Early Childhood Education and Care Turkey

- What are your opinions about Turkey's current early childhood education and care system?
- Is there one core national curriculum for ECEC, or are different curriculums used? Are there other curriculums and education models recognized in Turkey? If yes, what are those? Who is responsible for designing the curriculum?
- What are the key differences between public and private ECEC institutions?
- What are the areas of development in early childhood education in Turkey?

#### Teachers

- What are the roles of the ECEC teachers in general? Can they decide on their teaching methods and the content? If not, then who decides for it?
- What are the challenges in Turkey for teacher education? How independent are teachers in ECEC? (Number of students applying become teachers in ECEC / economic problems/teacher training / organizational problems)
- What are the challenges for ECEC teachers? (Curriculum, parents, financial problems, administrative problems, physical environment, quality and quantity of personnel)
- Do teachers have any continuous learning and development programs? Is it mandatory by law or standards of MoNE?

#### Business

- What services and products do you see a need for in your field of expertise?
  - o Curriculum
  - o Teacher training
  - o Physical environment
- What do you estimate are the strengths of the Finnish ECEC industry looking from the Turkish market?
- Are there technological devices and digital solutions being used to support child's development and learning?
- What are the main reasons parents put their children into private ECEC institutions?
- How much does it cost in private ECEC institutions? Is it common for parents to use private institutions?

