

Facility Management Development Trends in South-eastern Europe: The Case of Turkey

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Abstract

In Turkey, facility management (FM) appears to be developing at high rate in last two decades. Unlike in Europe, this situation stems from the delays in the development of standards and the acceptance of FM as a profession in the field by private and public institutions. However, the current FM market in Turkey has been developing gradually with the significant increase in the share of employment. This study aims to gain a qualitative understanding of the complexities in the FM sector and developing a mature FM market across Turkey. Various data has been collected through in-depth, semi-structured interviews and official records from the relevant institutions. The research results represent the perceptions of various stakeholders employed in several businesses and research institutions, regarding its key challenges and opportunities of the business environment in FM organizations, FM supply market, professional bodies, FM education, and FM research. The main findings of the study revealed that institutionalization of FM business in both public and private sector should be developed as well as outsourcing of services, agreement design and determination performance indicators. The market analysis provides valuable information for decision makers and FM organizations.

Keywords: Facilities management, FM markets, practices and development trends, Turkey



1. Introduction

The increasing role of FM, the profession is defined in many different approaches. Almost every definition underlines the aspect of an integrating approach which covers a combination of people, processes, place, and technology is highlighted. However, the importance of the relationship between the supporting services and the core business functions is not always distinguished in FM literature (Smit, 2008). In the cause of incorporating the concept and the process of space-human relationship, the relationship between space-labour productivity, and the separation of jobs according to talents and competences, support services for subordinate jobs in enterprises had enabled the emergence of the FM profession (Erentürk, 2016). According to Noor and Pitt (2009), FM is a management of business that focuses on human-oriented services in residences, taking care of customer needs and aims at customer satisfaction, devotes on its time, energy and resources to these goals and purposes, produces customer-oriented solutions, and knowledges and applies to international and national regulations as well. Cotts and Lee (1992) define FM as the activity of the organization to coordinate between work, physical workplace, and employees. Kohnstamn and Regterschot (1994) defined FM as the integrated management (planning and control) of locations, services and tools that contributes to the organization operating in a variable environment to achieve its goals and to be effective, efficient, flexible, and creative (Remoy, 2010). Becker (1990), on the other hand, considers FM as the process of coordinating all the work related to the design, planning and management of buildings, systems, equipment, and furniture in order to achieve competitive success in a rapidly changing world. Currently, the Urban FM extends the role of FM towards improving health and well-being in the urban environment (Temeljotov Salaj and Lindkvist, 2021).

The global FM industry is growing rapidly in almost every country, and the FM market continues to grow in the public and private sectors. The swift growth in outsourcing of FM services in public and private institutions has enabled the establishment and implementation of international and professional standards of FM and over time had enabled the FM profession to be recognized as a preferred career. Reporting on trends and growth of the European FM sector was quite prominent some years ago where important studies have emerged to try and map the size and scope of the European industry, e.g. Redlein and Poglich (2010), Teichmann (2009), Tucker and Cannon (2017), Stopajnik and Redlein (2017), Tucker et al. (2018). The research on FM maturity level in Europe showed the differences among different parts of Europe, especially in South-East Europe (SEE) as being less developed (Tucker et al., 2017, Anonymous, 2020b). This has elevated the interest to compare the result with the trends to date

and to see what kind of disparities with other parts of Europe exists and how much COVID-19 situation stopped the progress.

An analysis of the development of the FM market in Turkey and making an assessment based on situation analysis will constitute and set an interesting example in the FM avenue. In this research, the development of the FM market in Turkey, its current situation, the opportunities offered by the market, and the difficulties and shortcomings were evaluated based on expert opinions. The results of the study include the development of FM practices in Turkey and the determination of the problems experienced in the process and the presentation of solutions for the future move based on these findings, which are considered important in terms of creating a model and setting best practices for developing countries which are facing similar scenarios and characteristics. In addition, it will be possible to discover the prevailing market situation in Turkey, provide general and useful information about the domestic market concerning FM; these information's can be relevant to companies and experts, operating at European and global level, on exploring the country market, setting standards and strategies for new companies' and growth for both domestic and foreign investors in Turkey's market, which can be among their target markets.

2. Methodology

The purpose of the research is to take an inductive, constructivist approach to gaining knowledge from currently general statistics, collected data through in-depth, semi-structured interviews and critically analysing the perceptions. It is emphasized that there are not enough field studies on the development process and current state and maturity concerning the FM field in Turkey (Tanrıvermiş et al., 2019). Under these circumstances, this study was carried out by evaluating the data obtained by making in-depth interviews with the participants and experts in the field, who have an important role in the field of FM education, training, and research, facility, and management companies in Turkey about the current situation, difficulties, and practices in the industry. By using interviews and the key informant, method, the different aspects of the FM sector in different areas, the development of FM organization, the FM supply market, the FM professional organizations, the development trends of FM training and research were discussed, and it should be noted that country markets have been evaluated using this approach in previous FM studies (Tucker et al., 2018). Care was taken to ensure that the interviewees were either practitioners or education/training experts in the field of FM, and the employees more than 10 years experiences in FM companies determined around 250 people

and 45 experts from different public and private institutions were involved and participate in the online interviews. Discussions with experts; interviews with experts were conducted as online meetings due to the pandemic conditions, and a general evaluation based on the results of these interviews was made in this study. In addition, the current situation and potentials of the Turkish FM market have been depicted through the evaluation of the administrative records regarding the facility and real estate market, as well.

With the examinations conducted at sectorial levels, answers were sought to the basic questions about what the factors that motivate FM in Turkey and the size of the development potential of the market. The experts interviewed describe the current situation and give the output and possible future forecasts. The main question of the study is to evaluate the historical development and current situation of FM in Turkey and defining legal and institutional problems and human resources inadequacy that constrain the development trends of the sector. In the FM sector, the analysis of the supply market and especially in determining the FM supply and demand activities in the country, explaining the current situation in the first place, and developing possibilities for the future predictions and scenarios are useful for decision-making bodies. In the education, research and professional organizations part of the study, outputs related to FM supply and demand activities in the country are provided. The development of education and research activities in the country in terms of FM education and FM research has been examined.

3. Analysis of The Current Situation of Real Estate and FM Requirement in Turkey

It is observed that Turkey's economic size, urbanization and industrialization levels are associated with the size and demographic characteristics of the population. Turkey is considered as a promising FM market in terms of its population and GDP size. The population of Turkey has reached to 83.61 million people according to the data of December 31, 2020; with 50.1% of the total population are men and 49.9% are women (Figure 1). On the other hand, 92% of the total population lives in cities and it has been observed that there is an increase in the population in cities. The annual population growth rate was 13.9 per thousand in 2019 and 5.5 per thousand in 2020 (TURKSTAT, 2021). The share of the 15-65 age group (63,119,163 people) in the total population was 75.49%, the share of the population group under 35 age group was 45.60%, and the share of the 65 years of age and over age group in the total population was 9.51 percent. The fact that most of the country's population consists of young people will cause a high demand for residential and commercial real estate and infrastructure

investments in the years to come. On the other hand, the increasing of life expectancy, changing traditions and the increase in the share of the elderly group in the total population will lead to an increase in the demand for the still limited elderly care facilities and, social real estate investments and management. The 75.49% share of the active population in total indicates that there is an acute need for business development and employment opportunities, and significant employment opportunities will be possible through the development of the FM market.

The gross domestic product per capita, which was generally around 10,000 USD in the 2010s in the country, declined to USD 9,215 in 2019 and to USD 8,599 in 2020 with the effect of devaluation and exchange rate regime. According to the World Bank rankings, Turkey had managed to maintain its status of being a middle-high income country. The share of agriculture in GDP in 2019 is 6.4%, the share of industry is 21.8% and the share of the services sector is 71.8%. In contrast to the industrial sector, the services sector takes the place of agricultural sector, which has contracted in the national economy. In the last decade, the share of construction in the national economy varied between 5.3% and 8.5%, and the share of the real estate sector, including FM services, varied between 6.5% and 10.4% (Tanrıvermiş et al. 2019). Despite the macroeconomic instabilities experienced in the last three years, the total added value of finance and insurance activities was increased by 21.4%; the information and communication activities was increased by 13.7%; the agricultural sector was increased by 4.8%; the public administration, education, human health and social work activities was increased by 2.8%; the real estate activities was increased by 2.6%; in other service activities was increased by 2.5%; and in industry was increased by 2.0% whereas it is observed a significant decrease of 5.2% in the professional, administrative and support services; the decrease of 4.3% in the services sector; and the decrease of 3.5% in the construction sector in 2020 (TURKSTAT, 2021).

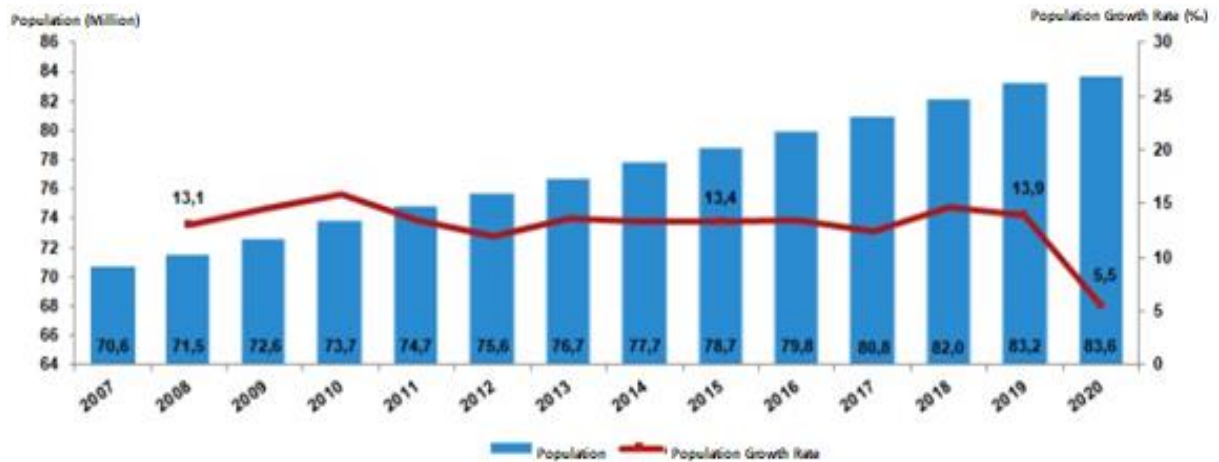


Fig. 1: Population and population growth rate in Turkey (TURKSTAT, 2021)

In terms of FM services, there is necessary to examine housing production and use, commercial real estate market and infrastructure investments. The total number of residences in Turkish cities reached 26 million by the end of 2020. It is observed that 7 million units of the total housing stock is in risky and it is necessary to carry out a major transformation in the cities. In the last two years, it is observed that due to macroeconomic instabilities, there has been a significant decrease in the number of new project development and construction permits as well as the number of buildings and residences that have received residence permits. While the number of construction permits remained between 1.0 and 1.4 million and the number of building occupancy permits was between 750 and 825 thousand in 2016-2017, there was a sharp decrease in the mentioned numbers in the period of 2018-2020 (Table 1). Vertical construction was preferred in cities due to the need for rapid transformation and the insufficient land stocks, and the number of high-rise residential and office buildings increased. The share of high-rise buildings (277,244 independent sections produced) in the housing assets rapidly increased to 23.12% in 2020, and the management of high-rise buildings has also become an important and potential field in the business arena.

It was observed that the number of building investments for lodging, office space, wholesale and retail trade, industry, education, hospital, and maintenance activities outside the housing market generally tends to increase until the 2019-2020 period (Table 2). Although there has been a significant increase in the investments made in office and luxurious residence buildings, industrial and storage/warehouse buildings, hospitals, and care facilities in the cities, it was observed that there is still a large gap in the aspect of management of these facilities. Due to the evolving urban life and developments in the service sector, the use of luxury residences has become widespread in recent years, and even the process of transforming some residential

buildings into commercial residences (Airbnb like) partially or completely into luxury residences and transitioning to short-term rental activities. The necessity of meeting the commercial and housing needs all together, especially in the central and business areas of cities, has led to an increase in the demand for luxurious residences. It is noteworthy that building licenses for lodging, office space, wholesale and retail trade, industry, education, health, and care have decreased significantly in the 2019-2020 period and new project development initiatives have weakened (Table 2).

Years	Building Permits			Occupancy Permits		
	Number of Buildings	Surface Area (m ²)	Number of House	Number of Buildings	Surface Area (m ²)	Number of House
2005	114,254	106,424,587	546,618	64,126	50,324,600	249,816
2010	141,371	178,776,701	916,504	82,407	85,535,260	431,271
2015	125,030	220,653,829	892,791	110,145	143,070,336	732,786
2016	134,099	206,971,538	1,006,650	111,382	151,395,780	754,174
2017	160,445	281,713,052	1,377,061	117,360	161,751,496	823,952
2018	101,510	143,819,838	643,125	123,776	169,943,417	870,501
2019	53,819	70,493,433	304,544	93,279	149,264,217	730,585
2020	58,865	72,454,226	357,807	53,986	86,198,564	423,733

Tab. 1: Number of buildings with building permits and occupancy permits in Turkey (TURKSTAT, 2021)

The geographical location and transport infrastructure connections of the country allow for new logistics center of investments and an increase in urban logistics. In addition to the projects developed by local and foreign real and private individuals and organizations, public institutions also focus on infrastructure investments such as city hospitals, airports, and toll roads, and in these projects, various project financing models (such as build-operate-transfer, build-operate, build-lease-operate-transfer) were observed to be more preferred.

Years	Lodging Buildings	Office Buildings	Wholesale and Retail Trade Buildings	Industrial Buildings and Warehouses	Schools, Universities and Education Buildings	Hospital and Care Institution Buildings
2005	1467	1101	5748	3378	830	251
2010	1593	2027	5421	4419	936	228
2015	824	3950	3238	3306	1136	300
2016	1042	2947	3257	4047	1243	266
2017	1376	3826	3684	4412	1510	338
2018	1442	1241	4648	4373	1800	394
2019	842	483	2526	2235	809	235
2020	821	922	3145	3665	502	292

Tab. 2: Lodging, commercial and industrial real estate investments in Turkey (TURKSTAT, 2021)

When the number and capacities of city hospitals, which are widespread in Turkey and considered as an important public-private cooperation project, are examined, it should be noted that there are a total number of 10 city hospitals operating in the country and that the city hospitals with the largest capacity are operating in Ankara. On the other hand, the number of city hospitals to be opened were 8 in 2020 and 2 in 2021. The total bed capacity of the 20 city hospitals, including those to be opened until 2025, has been planned to be 30,815, and it should be emphasized that the existing hospitals have brought about significant success in inpatient treatment and healthcare provision, especially during the pandemic period. City hospitals were built and put into operation with a public-private cooperation model, and in these facilities, 8 to 12 auxiliary services (such as food, cleaning, security, parking, outdoor, laundry, building and medical device maintenance-repair and renovation, waste and energy management) are provided by Special Purpose Vehicles (SPV) and city hospitals have been one of the good examples in which the operational responsibility is shared with SPV through Operations and Maintenance (O&M) contracts executed before the construction of the projects started. It is observed that especially in newly developed city hospital investments, they work with a FM consultant during the project phase and SPV's generally prefer establishing business companies or working with professional FM companies.

The number of airports in Turkey was 59 in total, and by the end of 2020, the number of domestic passengers was 49,740,303, the number of international passengers was 31,875,837 and the total number of passengers together with direct transit passengers was 81,703,685. The number of passengers in 2019 was 208,911,338 persons (Anonymous, 2021d), and the passenger capacity decreased by 61% compared to the previous period due to reasons such as full lockdowns, travel restrictions or prohibitions. A total number of 38 airports operates and offer services in international passenger and freight transportation, and the number of airports operating at the local level is 21. In addition, there are 18 military airports in total, thus, the total number of all airports is 77. The total number of airports will be 86, with 9 airports that are planned to be opened in the coming years and are currently in the project phase or under construction. It is seen that international airports were built and opened for operation with a public-private partnership model, and airport management is also carried out by FM companies.

Among the most important investment areas in the residential and commercial real estate sector in Turkey are shopping malls (SM's), high-rise office and luxurious residence buildings, condominium and qualified (branded) luxurious residential areas. The market segment dominated by the holistic approach in FM has been the investments in shopping malls,

especially in mixed projects. In this regard, shopping malls are followed by office, residence, and mixed real estate facilities. Although housing projects have an important share in the activities of FM companies in terms of scale, it is a segment where the penetration remains at a very low level considering the total housing stock and market potential. The total number of houses is 26 million and 12% of the total number of independent sections produced in 2000 and 23% of those produced in 2020 consists of buildings with 10 or more floors. According to the data of the Association of Shopping Centers and Investors (Council of Shopping Centers), the number of shopping malls was 454 in 2019, decreased to 447 at the end of 2020 with the reasons such as closure and transformation of some of them (Table 3). When the distribution of shopping mall investments by provinces is examined, Istanbul has the highest number of shopping malls with 147 SM's, followed by Ankara with 48 SM's and Izmir with 20 SM's (Anonymous, 2021b). It has been determined that the indoor and leasable area of the existing shopping center investments are growing rapidly, the amount of leasable area per 100 thousand persons continues to increase (Table 3), and the investments cannot be made in relation to the population size of the cities and the size of the leasable shopping center investments. It is envisaged that in the near future in Turkey, especially in big cities, the existing shopping malls will go through a transformation process, and in this framework, street retailing will gain importance and priority again in the post-pandemic period (Tanrıvermiş, 2020).

The FM sector in Turkey has begun to be recognized as an area that creates a lot of employment and is needed in almost all commercial, industrial, and lodging facilities. Considering the examples of developed countries and the development of FM in the world markets, it has been determined that FM in Turkey is at the beginning of the development process and institutionalization has not yet been achieved to a large extent. Instead of managing the FM services were separately under sub-headings such as cleaning, security, technical and landscape, it is accepted as the main goal of the developing sector to manage all these services in an integrated way and to offer combined benefits to customers (TRFMA, 2021).

Years	Number of SM's	Leasable SM Area (Thousand m ²)	Population	SM Leasable Area per One Hundred Thousand Persons (m ²)
2007	145	4,063	70,586,256	5,756
2008	189	5,093	71,517,100	7,121
2009	207	5,800	72,561,312	7,993
2010	232	6,533	73,722,988	8,862
2011	264	7,615	74,724,269	10,191
2012	296	8,229	75,627,384	10,881
2013	326	9,247	76,667,864	12,061
2014	346	10,023	77,695,904	12,900
2015	364	10,799	78,741,053	13,715
2016	390	11,359	79,814,871	14,232
2017	429	12,611	80,810,525	15,606
2018	453	13,453	82,003,882	16,405
2019	454	13,508	83,154,997	16,244
2020	447	13,591	83,614,362	16,254

Tab. 3: Shopping Mall (SM) investments and population relations in Turkey (TURKSTAT, 2021)

There are 40 – 50 national FM companies and many small family business service providers (cleaning, catering, security and IT) which are engaged in the FM sector in Turkey. However, there are also around 10 international companies such as JLL, ECE, ISS and so on. Although the data on the sector are not accurate, the number of employees of 29 companies that are members of TRFMA is around 110 thousand. It is accepted that approximately 9% of the employees in the FM sector are employed by TRFMA member companies. Most of the employees in these companies are paid minimum wage and the personnel expenses in the facilities are approximately 50% within the total FM expenses. Consequently, it is stated that approximately 1 million people are employed in the FM sector and the market volume is approximately 15 to 18 billion USD (TRFMA, 2021).

For assessing the domestic market general situation and future perspective, qualitative analysis realized with the selected experts employed in public and private institutions. The main objective of the interviews is outlined the descriptive side of the supply and ignored demand sides. The main issues emphasized by the interviewed 45 experts in relation to the current situation of the Turkish FM and the areas to be improved can be listed as follows:

i. The requirement to develop the facility management market in the public and private sectors: In public institutions, FM services are carried out by public employees, and it is considered that there is a significant gap in the public sector in terms of outsourcing and

provision of FM services. In both public and private institutions, the services and experiences of professionals specialized in FM and the strong FM institutions working in this field are needed to a great extent.

ii. Insufficient coverage of facility management and service contracts: It is observed that the scope of the service contracts used in many facilities is insufficient and their content is generally not compatible with international FM standards.

iii. High expectations of owners and users from facility management and structural problems and low-quality service of facility management companies: As the luxury housing constructions increased in the country, the expectations of consumers have also increased. An extra demand for comfortable living spaces has been added to the desire to have a safe living space, which is seen as the most important of the needs. Buildings equipped with the highest level of technological infrastructure, socialization areas, shopping centres located in the lower parts of the buildings have created areas of potential management need for FM firms, and the increase in service demand in this area has not gone unnoticed by foreign companies and investors.

iv. Post-pandemic situation and the increasing need for facility management services in retail trade and service sectors, especially in the post-COVID19 period: Retail trade, tourism, office spaces and related sectors were among the most affected ones in the COVID19 pandemic period. Travel restrictions resulted in a 61% decrease in the number of passengers transported by air in 2020 compared to the previous year, and occupancy in hotels, offices, and shopping centres remained low. On the other hand, tourism continues to be one of the hardest hit sectors by the COVID-19 pandemic, particularly for Turkey. Government in Turkey have taken measures to ease the economic shock to households and businesses, but longer-term the industry will need to adapt to a post-pandemic “new normal.”

v. Enforcing the requirement of urban facility management practices particularly in commercial business areas, condominiums and urban transformation project areas: In cities, the provision of local services at the district and neighbourhood levels, public transportation, street-alley management and the provision of services that affect the quality of life at the neighbourhood scale are still carried out by municipalities and public institutions, and there is a need for improvement of FM in this area. Especially in urban transformation projects, the application generally covers the transformation of slum areas and it is ignored that the right holders who previously resided in these areas had relatively more freedom-based lifestyles.

vi. Insufficiency of qualified human resources: The analysis of the administrative records and the results of the interviews show that the management of the facilities that require high costs and involve high risks can be long-lasting and successful if only they are carried out by experts and professional companies who have been trained in this field. With the increase in institutions that provide undergraduate, graduate and doctorate programs and certificate education in this field in Turkey, it will be possible to train qualified and specialized experts needed in the sector.

vii. Insufficient and dispersed facility management legislation and failure to identify the responsible and authorized public institution: Due to the widespread use of condominium properties such as multi-storey buildings, commercial and common areas and social facilities, such as sites and plazas, and as complex facilities such as shopping malls, ports, marinas, airports, logistics centres, licensed storage facilities, factories and industrial zones are dealt with in different legal regulations, it does not seem possible for such facilities to be managed effectively.

Institutions or organizations providing education and training on FM did not exist before 2000. It is observed that the number of scientific research and application projects directly related to facility and real estate management issues and the number of international articles and projects originating from Turkey are at a very limited level in Turkish Higher Education Institutions, and existing studies are limited to construction management rather than FM. As it has been established on February 2, 2007, Ankara University Department of Real Estate Development and Management has become the first academic institution to provide education and to plan and carry out research in the field of FM. Facility and Real Estate Management discipline is among of the basic science areas of the department, and many undergraduate and graduate students are currently taking courses and conducting research projects in the fields of FM, facility services market, standards and institutions, project finance, project and construction management, real estate and asset management. In addition to these, the department attaches importance to a combination of theory and practice in the field of FM, has sector professionals in its advisory boards, and shares the developments in the field of FM with the sector employees through regular conferences and workshops every year and contributes to the increasing awareness on the subject matter. The protocol executed between Ankara University Department of Real Estate Development and Management and TRFMA is very important in the cause of setting an example for cooperative activities between universities and other institutions. It stands out as an important step taken for the establishment of the concept of FM and for executing application

and research in coordination. Cooperation and accreditation negotiations are ongoing with the International Facility Management Association (IFMA) to ensure international recognition of the programs in facility and resource management, real estate, and asset management by 2021, and the Department has become a member of the European Facility Management Network (EuroFM).

4. Conclusions and Recommendations

It can be asserted that the current situation of the FM market in Turkey is insufficient, but that the FM market has had a faster growth trend in recent years. However, compared to European examples, Turkey FM market still has not made significant and sufficient progress in areas such as institutionalization of the FM market, professional development, establishment of standards, accreditation of professionals and institutions providing services, institutionalization of companies, preparation of FM legislation, design of business and service contracts, preparation and implementation of best practice guides although there are certain studies carried out by the Turkish Vocational Qualifications Authority and Turkish Standards Institution (TSE).

FM is gradually being accepted and considered as an independent profession and a professional field of work in the domestic market, and the requirements of professionalization of FM for commercial facilities and multi-storey and high-rise residences, office and residence buildings, mixed real estate, hospitals, airports, and many infrastructure investments is accepted by almost everyone. Institutionalization of FM companies, structuring of service delivery capacities according to investor and user expectations, harmonization of international standards and licensing of experts and companies in the domestic market is required and the service areas of established companies should be limited to FM services, and in addition, FM companies should only be allowed to provide FM consultancy and facilities services with the scope of specialization.

It is noteworthy that FM associations and integrated FM companies are rapidly established, and foreign companies show great interest in FM in Turkey. It is observed that by regulating the supply and demand sides of the FM market and extending the use of outsourcing in public institutions, it will be possible to ensure both the rapid growth of the market volume of the sector and imposing regulation-related works in a stronger and faster manner. Classification of management companies that integrate space-human-process with single service delivery, performance measurements and standards development, reorganization, and categorization of professional groups with those who provide individual services, those who supply and support

FM companies (such as security, catering, cleaning, software industry, technology companies) will contribute to improving the service delivery and quality assurance in the sector. In the field of FM, there is a requirement to establish a legal and institutional structure for the provision of services, making contracts, developing standards, determining the responsible/authorized public institution, and clearly regulating its duties. It is noteworthy that experts and companies operating in the field of FM are very keen on establishing associations and that associations are disconnected from each other and it is observed that a structure such as a FM council or federation must be established, and national FM policies must be established. It is envisaged that cooperation between the existing academic institutions and FM associations with institutions such as Euro FM, Global FM and IFMA, and especially, cooperation of academic institutions with European and US universities, can significantly contribute to the training of expert staff for the sector and to increase the research and training capacity of in the field of FM. The need for academic institutions and professional companies that will carry out education, research, and consultancy activities in the field of basic FM and advanced facilities, real estate and asset management is increasing day by day. It should be ensured that institutions that will provide FM consultancy are in cooperation with construction and real estate development companies and it should be made mandatory to incorporate FM consultancy services as a team in project development phase of a certain size. For the professional FM understanding to be established in the public and private sector and the sector to create more efficient and effective and more employment, it will be beneficial to licence all people who operate in the sector (real and legal persons) by an umbrella institution and the individuals to be employed in the sector are certified in the context of their authority. As an example of this process, the classification, certification and licensing models made in the field of Senior Level Manager (SLM), Mid-Level Manager (MLM) or SRC certifications in the transportation and logistics sectors can be shown.

Despite many difficulties and shortcomings, the FM profession and sector were identified to have a greater pace and rapidly developing in the country, and during the COVID19 pandemic, it was determined by many stakeholders that management of the built environment should be a professional business by many stakeholders, and significant progress has been made in this area. Individuals and institutions providing FM services in the construction and real estate sectors are expected to assume higher level of roles and provide specialized services in projects and facilities as “strategic partners” or “consultants”. Demand for the national FM market is increasing day by day and it seems possible to share FM experiences with neighbouring

countries. In cooperation with international professional organizations, it will be possible to develop professional standards, to train qualified human resources and to improve their knowledge level and competencies with their employment in the sector. It is also possible to expand the market by outreaching of FM companies operating at national level to other countries, improving networking and cooperation opportunities. There is no administrative and legal regulation related to FM in Turkey yet.

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