

**Istanbul Office Market: Determining tenants satisfaction**  
**with their office and environmental quality**

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**Abstract**

The effects of the social and spatial transformation caused by globalization can also be seen within the Istanbul metropolitan area. The growth of the service sector in Istanbul since the 1980s may be attributed to the expansion of foreign multinational corporations, transnational banks, growth in international relations, extension of foreign trade and enlargement of business size. Within this process, a need for qualified and user friendly office areas came into existence.

This study will investigate the satisfaction and expectations of office tenants in Istanbul office market. The data collected in this study were obtained through a survey of 330 office tenants in Istanbul. The survey was conducted by internet interviews during April 2010 (Sakar, 2010). The results of collected data were compared with the study, 'What Office Tenants Want', that prepared by ULI/BOMA in 1999.

The results of this research have particular policy and planning implications for Istanbul and may stimulate the creation of real estate development in developing user-satisfying and well-equipped office buildings for the city center that respond to the desires and needs of FIRE firms with respect to location and mechanical infrastructure necessitated by the new telecommunications systems.

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## **Introduction**

The Istanbul metropolitan area is an essential center of focus within the changing world balances in the region formed by the Balkans, the Middle East, and the Turkic Republics. There are also economical potentials in addition to the natural and geopolitical location of Istanbul. These are the advantages of being a large market, the presence of a qualified and cheap workforce, and a dynamic liberal economy.

The affects of the social and spatial changes caused by globalization experienced worldwide are also seen within the Istanbul metropolitan area. With this rapid transformation process, foreign capital companies are investing in Turkey, especially in Istanbul.

The increased number of foreign entrepreneurs in Turkish economy has also increased the formation of companies, which has led to the requirement for modern office buildings. In Istanbul, flats that were used as offices in previous years, and low-standard buildings in the Historical Peninsula fell short of meeting needs. The first attempt to solve this issue came with the newly constructed modern office buildings in 1990s. The construction of first high-rise office buildings started in Levent region, and in time, the central business axis has shifted to Esentepe-Levent-Maslak line, which still maintains its position as such to this day.

Once the first office buildings attracted great attention and soon reached 100% occupancy rate, constructing office buildings appeared as the new real estate investment model in Istanbul. As a result, a lot of office buildings have risen in various areas throughout Istanbul, primarily central business areas. The majority of these buildings have been constructed following improper investment decisions. Today, the situation has reached to such an emphatic level that users' convenience has been severely affected. Having been constructed without taking user preferences into account and lacking infrastructural facilities, these buildings occupy an important amount of urban space as idle assets in the market. This bad situation Istanbul office market finds itself in can only be saved by entrepreneurs and investors who explore international experience and who can adapt the circumstances to local markets. To this purpose, it is necessary to develop office building projects with proper

investment decisions, which have advanced technical facilities, efficient designs, appropriate commercial conditions, and an easily accessible fully developed social environment (Yıldız, 2003).

This study is focused on understanding the expectations of office users as the last users of such investments with big budgets considering the rapid growth of Istanbul office market and the important role of office projects in real estate investments. The data collected at the end of this study is assumed to provide guidance to investors and project developers about user expectations during the decision making process, as well as helping office users obtain the physical work conditions they need.

### **Spatial Transformation of Istanbul's CBD**

Istanbul's CBD had preserved its monocentric structure until the fundamental effect of the Bosphorus Bridge and highways on the city's spatial transformation; that is from the 19th century to the end of the 1970's. At that time, Istanbul's CBD deployed on a bi-structured monocentric core with the traditional market arrangement in the historical peninsula and the modern center of external trade concentrated in Galata-Beyoglu.

The concentration of office activities in Eminonu and Karakoy centers lasted until 1960's. In the 1970's, however, trade and other central activities accumulated between Ataturk and Galata Bridges in Eminonu, and in Beyoglu. In those years Eminonu district held 34%, and Beyoglu district 21% of service employment. In Beyoglu banking and insurance activities and in Eminonu retail and wholesale trade activities were in majority. Therefore in terms of both the number of employees and the employment density, Eminonu and Beyoglu centers together constituted the CBD (BINPBB, 1976). In Eminonu district the first foreign trade investment company was established in 1973. Prior to this, a hotel opened in 1966 in Beyoglu was the first foreign investment after the foundation of Turkish Republic.

After 1975, the CBD functions began to spread from the vast portion of Eminonu and a small part of Fatih district in the historical peninsula, and the center of Beyoglu district to Sisli, Zincirlikuyu, and Barbaros Boulevard. The developments pertaining to the Intermediate Zone central features have been observed in the regions such as Fatih, Kadikoy, Bakirkoy, Bayrampasa, and Gaziosmanpasa.

The opening of the first bridge on both sides of the Bosphorus Strait (1973), built in conjunction with a network of beltways, and the start of domestic automobile manufacture transformed the city into a city of cars (Kılınçaslan,1981). With the highways, and the opening of the Bosphorus Bridge in 1973, accessibility between the European and the Asian sides of the city was facilitated, allowing Kadıkoy to develop into a central zone. Another influence of highways on the urban transformation in Istanbul is the rapid increase in the number of offices opened along the main arteries in Sisli and Besiktas districts (Berkoz, 1984). The establishment of foreign capital investment firms in Sisli began in 1967. In this district, the first foreign investment bank was established in 1975.

Bosporus Bridges and ring roads of access have lead to spatial transformations in Istanbul, which resulted in the shift of the CBD of the city from Eminonu and Beyoglu towards Sisli and Besiktas, as well as the development of Kadıkoy on the Asian side and Bakirkoy on the European side as the first-tier sub-centers. With new highways, which followed the construction of the above mentioned roads, the borders of the metropolitan area have also extended towards north. In addition to these, low land prices in suburban districts and the increase in private vehicle ownership accelerated the process of decentralization in the city's structure (Dokmeci and Berkoz, 1994).

The first Bosphorus Bridge and its beltways were not part of the city plan but were approved in an extra-legal fashion as part of a localized plan that included highways. The bridge and road project totally change the morphology of the city and this resulted in decentralization in Istanbul. Both industry and services became decentralized and Istanbul's geographical centre developed in the northerly direction. Istanbul gained a triple spatial structure. This rapid transformation made the implementation of the city plan very difficult and localized efforts were made to control erratic settlements.

In 1984, the government identified its urban policies, one of which was to make Istanbul a center of international trade, culture and finance throughout the Middle East and Europe. By doing so, the government aimed to attract international capital to Istanbul (Keyder, 2000). The liberal policies adopted by the government in this period lead to an increase in the number of international banks and trade companies. Within the scope of new liberal policies, the government applied three basic spatial policies in order to attract international capital. First of all, Sisli – Maslak axis on the European side, and Altunizade – Kozyatagi on the Asian side became the new international centers of the city, which directly shaped urban planning

decisions in Istanbul. In these urban plans Sisli-Maslak central axis was demarcated for skyscrapers. There are several reasons why this axis was determined as the new business center in Istanbul, which include: the pressure by large capital groups, who are at the same time the landowners in the area, the demand for buildings well-equipped with advanced technology in accordance with the development of finance sector, the suitability of land sizes in this area for such development, the economic power of affluent capital groups, who are also the landowners, to meet the above-mentioned building demands, the need to gather dispersed headquarters in one area, and easy accessibility to different parts of the city (Oktem, 2005). During this period, many landowners on the central axis started to construct skyscrapers. While one aspect of the urban policies involved the accumulation of business centers around Sisli-Maslak and Altunizade-Kozyatagi axes, the other aspect of these policies were concerned with decisions to make Istanbul a tourism centre. This was reinforced by the Tourism Incentive Law forced in 1982, which aimed to reinforce tourism in the country. As a result, many five-star hotel constructions were initiated in Istanbul (Dokmeci, Balta, 1999). Finally, necessary decisions were taken to provide sufficient infrastructure in order to attract international capital to Istanbul. To this purpose, the infrastructure projects such as the construction of the highways and the 2nd Bosphorus Bridge, as well as the extension of narrow roads were carried out (Kocabas, 2006). These basic policies triggered substantial changes in the profile of the city centre. Many large shopping centers were opened as new venues of consumption. Industrial facilities, which had been located within the city centre until the 1980s, dispersed to the peripheral districts due to the increased prices in the city centre (Erkip, 2000).

With the second Bosphorus Bridge in 1988, the gradual increase in access connections on both sides of Istanbul also increased the mobility of high-income groups, who had the highest level of private car ownership in the metropolitan area. Thus, the housing area choices of these groups shifted to prestigious areas in Kadikoy district. Besides, the increase in accessibility between the two sides of the city led to the mobility of not only high-income groups but also low-income groups.

The predominance of services sector in Istanbul also brought about changes about employment, for the development of finance sector generated a rich social segment. In order to meet the needs of this segment, luxurious community housings were constructed on the outskirts of the city.

The 1980s were marked by companies assuming an international structure, which generated the requirement for modern office buildings that the historical center failed to address. Since the historical central business area in Istanbul was under protection, renovation or reconstruction of the existing buildings was restricted. The traditional office areas had not been constructed with the technical infrastructure necessary for new communication systems, nor were spacious floors available suitable for office use. Besides, the urban structure that the modern central business area needed could not possibly be provided within the old center (due to its narrow streets and small lots). The companies that did not want to be in this urban pattern and that lacked strong bonds with the city center shifted towards other areas of the city; the ones displaying a tendency to stay in the center were bank headquarters, law offices, real estate firms, and tourism companies (Dokmeci, et.al., 1993).

In nine years between 1981 and 1990, various decrees and plans were put into realization so as to make Istanbul a center of culture and finance so that the city could attract international capital. During this period, the Turkish government and the administration of Istanbul Municipality belonged to the same political party, which played an important role in the realization of these decisions. The decisions increased the appeal of central districts in Istanbul for FDI investors. The statistics regarding the distribution of the number of FDI firms in each district per year support this suggestion. In 1954-1980, 74% of foreign capital firms in Istanbul had been situated in the central districts and 26% in the peripheral districts, while these figures became 82% and 18% respectively in the period between 1981 and 1990 (Berkoz, Turk, 2008).

The decentralization trend, which started in the 1980s, continued in the 1991-2000 period. While the traditional central business district (Beyoglu, Eminonu and Fatih) underwent a population loss, the other central and peripheral districts witnessed an increase in population between 1990 and 2000 (Berkoz and Turk; 2009 and 2010). Similarly, workforce also revealed changes. During the same period between 1990 and 2000, the density of workforce population shifted from the traditional central business districts (CBD) (Beyoglu, Eminonu and Fatih) to the other districts of Istanbul. Especially, the rise in the workforce population in peripheral districts is relatively higher than that in central districts. When the sectoral distribution of workforce is considered, central districts witnessed an increase in services sector, and a decrease in industrial sector. The sectoral distribution of workforce in peripheral districts yielded a different transformation from that in central districts. In peripheral districts the shares of services and industrial sectors are fairly close to each other. The Istanbul

Metropolitan Area Master Plan in 1995 initiated the decentralization of industrial sector from central districts towards peripheral districts. However, this plan was not implemented by the central government in Turkey. In the absence of an approved plan, the city continued to develop on the basis of informal local investment plans, a process that 'guided' the development of the new commercial districts (Kocabas, 2006). In this process that spanned between 1991 and 2000, 76% of foreign capital firms were situated in the central districts and 24% in the peripheral districts (Berkoz and Turk, 2008).

With legal arrangements to encourage the investment of foreign capital in Turkey, the number of foreign investments especially in Istanbul has increased since the 1990's (Berkoz, 2005). The political and economical instabilities at national level between 1991 and 2000 called off the implementation of spatial policies regarding FDIs in Istanbul. Moreover, even the idea of making Istanbul an international city was also suppressed. As a result, the development of transportation and telecommunication infrastructures was given any priority although these facilities were essential to international capital (Keyder, 2000).

Following the 1990s, Istanbul's claim to become a global city has accelerated the process toward becoming a center of finance that attracts global capital, and entailed that the city maintains its development in the service sector. In the arena of companies that went through some kind of restructuring, the number of computer, marketing, advertising, and research firms has soared throughout this process. As a consequence of the rigid dependence among these firms, new sub-centers started to develop, and the construction of modern office buildings, which could address the needs of new firms or international companies, became more widespread. Big firms constructed high office buildings in these regions in order to display their capital and promote themselves. As a result, the new and modern centers in Istanbul have taken their place in the city's silhouette (Sonmez, 2000).

Retail trade facilities of Istanbul are facing a rapid transformation due to tremendous population increase, incomes and car ownership growth, restructuring of urban structure, changes from central to free market economy, global forces and changing life styles. In consequence, population decentralization, the rapid growth of peripheral zone with modern housing projects, construction of highways and bridges between Asia and Europe and globalization have been the chief forces changing the nature of the retail market.

Thus, central business area has come to have relatively homogeneous central business area parts articulated to one another, each corresponding to a radical moment of social transformation or historical period. These centers include:

- Historical / traditional centers: Kapalıcarsı-Sirkeci-Eminonu-Galata
- Centers of the constitutional monarchy period: Karakoy-Beyoglu
- Centers of the Republic era: Fatih-Aksaray and Taksim-Nisantasi-Sisli
- Centers affiliated with international businesses after the 1980s: Levent-Maslak, and on the Asian side, Altunizade and Kozyatagi (Bademli, 2000).

### **Central Business Area (CBD) Today**

Within the framework of international standards, office regions are classified in researches as within Central Business District (CBD) and outside Central Business District. Central Business District comprises the office regions with densely constructed office buildings and highest demand rates.

The average rates of rent and occupancy in Istanbul vary between the regions within and outside CBD. Although rate and occupancy rates are different within CBD, all sub-regions represent similar averages. The most important factor identifying the concept of Central Business District is accessibility. New transportation projects bring about new dwelling areas. The Central Business District in Istanbul, which has been an important city of trade throughout history, has constantly changed in time depending on the new roads. For instance, in 1846, the Historical Peninsula and Beyoglu were connected with Galata Bridge, which shifted areas of commerce from Halic, Sarachane and Aksaray to Beyoglu. After the 1950s, functions such as trade and manufacture accumulated around Galata and Eminonu. In the 1970s, however, Eminonu and Beyoglu were the Central Business Area with intensive centers of commerce. The construction of the Bosphorus Bridge in 1973 was the most effective factor to shape today's CBD. The highways connecting to the Bosphorus Bridge rapidly increased the number of office buildings in Sisli and Besiktas, and Esentepe became the heart of Central Business Area. With the second Bosphorus Bridge (Fatih Sultan Mehmet) constructed in 1988, the CBD assumed its current structure with its center shifted towards Levent (Ersöz, 2007).



When A class office stock is examined in Istanbul office sector, it is seen that the stock is accumulated in 9 regions throughout Istanbul. The office stock is centered on Maslak, Levent, Sisli-Mecidiyekoy, Besiktas, and the airport areas in the European side, while Kozyatagi, Altunizade, Kavacik, and Umraniye districts comprise the central office regions in the Anatolian side.

A close examination of office areas will display that accessibility to transportation facilities is the most important factor in becoming a CBD, as it has already been stated above. The map shows that E5 and TEM highways, as the most important two transportation axes in Istanbul, along with the junctions and regions close to the bridge play a significant role in area choices for office projects.

According to the latest findings, major office regions hosting approximately 50% of the total stock of offices in Istanbul are situated on the European side. Among 9 office regions in the CBA, 4 are situated on the Anatolian side and 5 on the European side. In other words, with 961,928 m<sup>2</sup>, 34% of the total office stock is in the Anatolian side, and 66% in the European side with 1,902,667 m<sup>2</sup>. Stock and vacancy rates and average rent costs pertaining to April 2010 are given in the following table.

Table 1. Analysis of Office Area in the major office regions (Kuzeybatı, 2010)

	Total Office Area (m2)	Stock of offices (%)	Vacant Office area (m2)	Office rent (USD/m2/ay)
<b>Maslak</b>	418.261	11,08%	46.328	21,25
<b>Levent</b>	518.608	2,30%	11.917	30,79
<b>Sisli-Mecidiyeköy</b>	269.018	1,73%	4.650	20,54
<b>Beşiktaş</b>	119.154	26,27%	31.304	27,00
<b>Güneşli-Havaalanı Bölgesi</b>	510.908	19,45%	99.391	11,97
<b>Kozyatağı</b>	278.301	5,35%	14.898	19,54
<b>Altunizade</b>	182.627	2,69%	4.910	22,43
<b>Kavacık</b>	194.985	8,50%	16.569	17,38
<b>Ümraniye</b>	306.015	9,36%	28.650	20,83
<b>TOTAL</b>	<b>2.797.877</b>	<b>9,24%</b>	<b>258.617</b>	<b>21,30</b>

Levent, Maslak, Sisli-Zincirlikuyu, Besiktas, and Günesli-airport axis are the dwelling areas which comprise the main business areas of the European side, identified as the major office regions of Istanbul. Connecting Sisli-Zincirlikuyu, Levent and Maslak regions, Buyukdere axis is a region with the highest density of office buildings, mostly preferred by firms.

When the situation in the Anatolian side is considered, the reason why office stock rate is lower compared to the European side is because the Anatolian side is predominately preferred as the dwelling (housing area) region. Although Kozyatagi district in the Anatolian side seems to have the highest level of supply, rapidly growing Umraniye will double its stock and become the biggest office area in the Anatolian side once the constructions and planned projects are completed. With respect to other regions, vacancy rate in Umraniye is at higher levels since the process of development still continues.

### **Data and Methodology**

The data collected in this study have been obtained from a survey conducted among 580 office users actively working in offices in Istanbul. 330 of the participants answered all the questions in the survey. Office users' satisfaction and expectations were determined based on a survey published online on 1-15 April, 2010 (Sakar, 2010).

The questionnaire form was sent to 10,000 office users randomly selected around Istanbul. The survey gathered data from company owners, senior executives, department heads, and administrative authorities, as well as several other firm authorities working at various positions.

While the survey questions were prepared, the researchers utilized a study called "What Do Office Users Want?" conducted in the USA and Canada by Urban Land Institute (ULI) and Building Owners and Managers Association (BOMA) International in 1999. 1,829 office users participated in this study.

The questionnaire consists of 25 questions and 4 parts.

The first set of questions in the questionnaire (questions 1-7) aimed to identify the type of operation of the firms the office users were working in, and to determine the characteristic features pertaining to the firm's structure and work force. The answers were arranged in way to present options.

In the second set of questions (questions 8-15), participants were asked to assess the level of their satisfaction in the spatial characteristics of their current office, the overall building features, overall features of the office space and building management based on a five-graded scale (1=Not important at all, and 5= Very important).

In the third set of questions (questions 16-21), the participants were asked to state what building features and services were necessary in an ideal office building, to what extent the stated features of smart building were important, three features lacking in their building even though they were required, whether or not they would increase the rent if these three features were provided, and finally whether they would be willing to increase the rent they paid and move to an A class office building equipped with smart building features at the end of their contract if they were users of B or C class office buildings.

The majority of the questions were optional, with the exception of the 17<sup>th</sup> question, for which the participants were asked to make an evaluation based on a five-graded scale (“1=I am not satisfied at all / It is not important at all” and “5=I am very satisfied / It is very important”).

In the final set of questions, the office users responding to this survey were asked to fill in their personal information, their position at work and comments.

Survey Monkey ([www.surveymonkey.com](http://www.surveymonkey.com)) was utilized while the survey was conducted. Survey Monkey provides service to prepare online surveys, distribute the survey to participants, collect the responses, and assess the collected responses to present them in the desired format.

## **Conclusion and Overall Evaluation**

A survey was conducted to identify the operation types of the companies office users work for and to determine the characteristics related to structure and work force. The findings of this survey are summarized below:

When the office users responding to the survey are examined according to their sectors, real estate, construction, and finance sectors are found to be the biggest three sectors in Istanbul.

When the relationship between the current and the ideal situations related to spatial features of offices are examined based on the answers from office users, it is seen that the users expect

betterment in the following features respectively: proximity to the area they work, convenient accessibility, proximity to supplementary sectors, and proximity to public transport. On the other hand, proximity to clients, proximity to the central business area, and proximity to service-retail sector have been determined to be the available features that are close to the ideal situation

A parallelism has been detected between this survey and the study by BOMA and ULI inquiring the satisfaction levels and expectations of Canadian office users. Finance, real estate, and architecture/planning firms displayed the highest rate of participation in the survey.

When the dwelling and work regions are compared, 51% of the participants are found to work and live in the European side, while 35% are found to work in the European side and live in the Anatolian side.

When the capital structure of the company the participants work for is examined, it is seen that 63.5% of the companies do not have a foreign affiliation in the company capital. This rate reveals that local firms, as the main office users in Istanbul office market, have predominately affected the findings obtained in this survey.

The data related to current office regions provided from the group responding to the survey lead to the following generalizations: users generally prefer rented offices in Istanbul office market; rental contracts are made on 3-5 year basis, and the number of employees varies between 1 and 25.

The study by BOMA and ULI inquiring the satisfaction level and expectations of Canadian office users indicate that the average number of employees in companies is 10 and below. The rental contracts are usually made on 1-3 year basis.

Considering the volume of business pertaining to the companies that the survey participants work for, it has been found out that in three years' time half the users do not anticipate any change in their office region, 46.2% anticipate growth and 3.6% shrinkage.

The study by BOMA and ULI inquiring the satisfaction level and expectations of Canadian office users display a perfect correspondence with the answers above.

Based on participants' responses to the questions inquiring the level of satisfaction with the overall building and office regions features of current offices, and the level of importance of these features for an ideal office building, the following findings have been gathered:

- Office users have stated their satisfaction with convenient accessibility, proximity to the central business area, and proximity to public transport. As for the features they have ranked high on the list for an ideal office building, primarily convenient accessibility, proximity to public transport, and proximity to the central business area have been determined to be the most significant spatial features.
- Assessing the overall building features of the current office, office users are mostly satisfied with the building appearance, building image and prestige, and the security services provided. On the other hand the features that users were least satisfied with respectively include the lack of smart building features, the lack of landscape planning in open areas, and the lack of extra parking lots that users could rent. When it comes to the building features in an ideal office, rent cost had been expected to have the top priority; however, it was ranked fourth on the list. The first three aspects office users really give importance to respectively include the adequacy of parking lots, security services, and the building's image and prestige.

Considering the relationship between the current and ideal situations related to office users' expectations about the overall building features, it has been found out that office users expect betterment in the adequacy of parking lots, smart building features, landscape planning of open areas, renting opportunities for extra parking lots, the lobby design and choice of region, the architectural design of the building, parking lot fee, and security services. Users have been found to be satisfied with the features such as the appearance of the building, the mixture of users in the building, rent cost, fee cost, and the image and prestige of the building respectively.

The study by BOMA and ULI inquiring the satisfaction level and expectations of Canadian office users reveal the following findings for the same question: according to degree of importance, the most important features respectively include rent cost, fee cost, parking lots, parking fees, the image and prestige of the building, and smart building features.

- Regarding user satisfaction in the current office area features, participants seem to be satisfied with the following features according to the degree of importance respectively: making use of day light, building entrance with security check, and

spatial size. On the other hand the biggest cause of dissatisfaction has been stated to be the windows that cannot be opened. The most important expectations from an ideal office area respectively include the quality of ventilation / clean air in the office, making use of day light, and the facility to control the temperature in the office. Other expectations following the ones stated above include good noise insulation, appropriate temperature, spatial size, and entrance with security check.

- Considering the relationship between the current and ideal situations related to office users' expectations about the overall office area features, it has been found out that office users expect betterment in the following features respectively: clean air / ventilation in the office, the facility to control temperature by users, appropriate temperature, windows that can be opened, and office entrance with security check. The features of the current office area that are close to the ideal situation, and thus that users are satisfied with include spatial size of the office, making use of day light, energy capacity provided per floor, heating-cooling costs outside working hours, and proximity to areas for common use.
- Office users appear to be satisfied with building management services at an acceptable level, though not highly satisfied. They have also suggested that in an ideal office building such services, especially common area cleanliness and the quality of personnel services should be provided in a much better way.

Considering the relationship between the current and ideal situations related to office users' expectations about building management services, it has been found out that office users expect betterment in the quality of maintenance-repair services, the adequacy of management services, and the cleanliness of common areas. In the current situation, personnel standards, the service level of the personnel and the adequacy of the personnel, respectively, have been determined to be the features closer to the ideal conditions.

When the office users participating in this survey were asked to describe the ideal office building, the following findings were obtained based on their responses:

Office users have stated that an ideal office building should provide the following services according to the degree of importance: consultancy service, assembly hall, and restaurant / cafeteria. These services are followed by Bank/ATM, seminar room, video-conference

services, tele-conference services, gym, hair dresser, dry cleaning, baby nursery and VIP restaurant.

According to the study by BOMA and ULI inquiring the satisfaction level and expectations of Canadian office users, restaurant/cafeteria and bank/ATM seem to be the two services that users believe an ideal office building should provide. Contrary to Istanbul office users, Canadian office users believe that tele-conference, video-conference, common meeting rooms, baby nursery, and gym were “not important at all.”

It has been detected that among smart building features, the availability of Internet infrastructure, 100% supported generator, as well as the availability of LAN and WAN connections have been determined to be the top three features that an ideal office building should have. These features are followed by the availability of channels for power/data/voice cabling, the availability of HVAC system with high technology energy conservation, and the availability of fiber optic infrastructure.

The findings related to the office areas and the rent costs that participant users have paid or will pay are stated below:

- The findings reveal that office users do not want to pay an extra amount of money if the lacking services that they need are provided. The reason for this might be related to the current conditions in the market and users’ belief that such services should already have been provided in an office building.
- According to the findings, more than half the users participating in the survey work in an A class office building, while the ones working in B and C class office buildings are willing to increase their rent and move to an A class building when their rent contract expires.

When it comes to users’ comments, they state that from time to time they have gone through unhappy times because such a research has not been conducted before, nor the issue has received the attention it should have even though users spend most of their time in offices.

Users also emphasize their hope that the findings of this study will be taken into consideration by the developer firms in the private sector, clearly stating they will definitely want to work in ideal office buildings described in the survey.

Another interesting finding is related to environmentally friendly buildings. According to users' comments, users closely follow smart office buildings, as well as environmentally friendly green buildings. They support buildings constructed with environmentally friendly systems; and they are ready to increase their current rent cost to a certain extent to move to such office buildings.

Besides, a different opinion disclosed that office regions today do not bear the importance they used to have, that the address of the building represents the prestige of the firm rather than the office building itself, and for this reason increasing the rent and moving to an A class building would be pointless.

The findings of this research cannot be generalized to other cities and do not allow an overall evaluation of the situation throughout Turkey. Yet still, being a sample field research in the Istanbul Metropolitan Area, this study will definitely contribute to finding solutions to the problems of office buildings and office users during the process of development that service sector is going through in Turkey.

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