

# Globalization, *M*iddle-class *F*ormation, and ‘*Q*uality’ *E*ducation: *H*yper-competition in *I*stanbul, *T*urkey

HENRY J. RUTZ and EROL M. BALKAN

The social world is accumulated history ... one must reintroduce into it the notion of capital and with it, accumulation and all its effects. Pierre Bourdieu<sup>1</sup>

When British Prime Minister Tony Blair was asked at a recent press conference about the value of education in today’s global economy, he responded gamely, “the more you learn, the more you earn.” Middle-class families, especially in globalizing cities around the world, from London to Bombay and New York to Istanbul, have awakened to the belief that the latest round of world capitalist accumulation, termed *globalization*,<sup>2</sup> constitutes a fundamental shift in their ability to provide their children with a comfortable life.

The new knowledge-based industries, along with the general commodification of culture and the increased growth in cultural products and cultural industries, have placed a premium on accumulation of social and cultural capital.<sup>3</sup> Chief among the forms of cultural capital is quality education. This paper identifies the problem of middle-class reproduction in terms of the competition for quality education.<sup>4</sup> It is about competition within the middle class and increasing differentiation between a fraction known as the New Middle Class and the older core middle class of industrial corporate and public administrative managers and other professionals. Rapid increase in the demand for quality education has created hyper-competition over access to the *best* schools among families within and between these fractions.

While there would appear to be a global trend in economic, social, and cultural differentiation within the middle class, accompanied everywhere by a crisis of access to quality education, the dynamics of middle-class formation can only be understood within local contexts where the contingencies of economic and cultural history can be taken into account.<sup>5</sup> This paper focuses on within-class competition among families in the globalizing city of Istanbul, Turkey.

## Economic Liberalization and a Crisis of Quality Education

Between 1950 and 1980, an aim of Turkish state economic development policies was protection of

---

<sup>1</sup> Pierre Bourdieu, “The Forms of Capital,” in *Education: Culture, Economy, and Society*, edited by A.H. Halsey, Hugh Lauder, Phillip Brown, and Amy Stuart Wells. New York: Oxford University Press, 1997. 46.

<sup>2</sup> Thomas C. Lewellen, *The Anthropology of Globalization*, Westport, CT: Bergin & Garvey, 2002. 7-8. Lewellen’s definition of globalization is “the increasing flow of trade, finance, culture, ideas, and people brought about by the sophisticated technology of communications and travel and by the worldwide spread of neo-liberal capitalism, and it is the local and regional adaptations to and resistances against these flows.”

<sup>3</sup> Pierre Bourdieu, 46-48.

<sup>4</sup> Dennis Gilbert, *The American Class Structure*, United States, Thomson-Wadsworth, 2003. 8, refers to class as “groupings of people according to their economic position.” A *social* class “becomes a group of people who share the same economically shaped life chances.” The economic position of the middle class in a class structure refers to an economic position based *primarily* on expert knowledge and higher education credentials as opposed to possession of capital or manual labor.

<sup>5</sup> Regardless of whether diversity is defined in terms of human capital that focuses on individual embodied capacity or communal social or cultural capital, the meanings and mechanisms of diversity are shaped through class competition and/or conflict.

fledgling domestic manufacturing industries. By the end of the 1970s, there was a recognizable mass middle class that provided professional, managerial and technical services for the first generation of a national industrial bourgeoisie.<sup>6</sup> Economic policy had shifted away from protectionism to global integration in ways that were sudden and dramatic. After 1980, the state abandoned protectionist policies and ushered in policies that deregulated financial and export markets, initiated privatization of some industries and institutions, and put large numbers of middle-class families at risk by diminishing the role of government in providing public health and education benefits for middle-class families. The new development strategy mainly emphasized production for export. Export-oriented production received special government credits while anti-labor policies kept costs low, allowing export companies to increase their competitiveness in world markets.<sup>7</sup> Lower wages also contributed to the objective of reducing internal consumption to create a surplus of goods for export.

Turkey's liberalization episode, as its experience with economic integration has been called,<sup>8</sup> resulted in profound changes in middle-class welfare and social consciousness. What actually happened? By the end of the first decade of liberalization, and continuing throughout the 1990s, there were clear indications of worsening economic conditions for most of the old or core middle-class fraction, made up primarily of public servants or corporate middle-level managers. This fraction found itself in a serious crisis of falling real income, inflated prices, shaky investments, and added tax burdens.<sup>9</sup> In contrast, a combination of old professional, managerial, and business families along with new economy entrepreneurs were situated to take advantage of income and wealth-generating opportunities. Some were able to enrich themselves, moving into the capitalist class. Opportunities were especially good in newly emerging sectors such as financial services and investment banking, insurance, media and entertainment, and tourism and advertising. People who had the right education and social connections could find their way into those industries that were most closely associated with Turkey's integration in the emerging global economy.

The process of economic global integration was generating new demand for credentials, especially a degree from one of a handful of Turkey's prestigious universities and/or a degree from a prestigious foreign university. Speaking a foreign language, especially English, became a New Middle Class *necessity* in the 1980s. The Istanbul Republican upper and upper-middle class had absorbed a cosmopolitan culture partly inherited from its blending of late Ottoman and nineteenth century European elements. Education was a major vehicle for institutionalizing this culture. But global economic integration after 1980 internationalized and valorised domestically the foreignness of Turkish elites to a degree that was previously unknown. Large numbers of new aspirants to elite schools that instructed in foreign language underwrote the cultural capital of middle-class families to a point where this education became a part of the consciousness of belonging to a transformed upper middle-class fraction.<sup>10</sup> The vast majority of the older core middle class families desired to emulate this New Middle Class but possessed neither the social capital nor knowledge or credentials to compete for the best jobs being created in the most dynamic sectors of the new

---

<sup>6</sup> See Ayse Bugra, "Late Coming Tycoons in Turkey," *Journal of Economics and Administrative Studies* 1, 1987. Bugra examines the interplay among state, corporation, and family in the rise of a Turkish bourgeoisie.

<sup>7</sup> Erol Balkan and Erinc Yeldan, "Turkey," in *Financial Reform in Developing Countries*, edited by Jose Fanelli and Rohinton Medhora, New York: St. Martin's Press, 1995. 129-55.

<sup>8</sup> Yilmaz Akyuz, "Financial Liberalization: The Key Issues," in *Finance and the Real Economy: Issues and Case Studies*, edited by Y. Akyuz and G. Held, Santiago de Chile: United Nations/WIDER/ECLA, 1995. Tosun Aricanli and Dani Rodrik, *The Political Economy of Turkey*, London and New York: McMillan, 1990. Tevfik Nas and Mehmet Odekun, *Liberalization and the Turkish Economy*, New York: Greenwood, 1988.

<sup>9</sup> Balkan and Yeldan, see footnote 6.

<sup>10</sup> Leslie Sklair, *The Transnational Capitalist Class*, Oxford: Blackwell Publishers, 2001. Deniz Kandiyotti and Ayse Saktanber, editors, *Fragments of Culture: The Everyday of Modern Turkey*, New Brunswick: Rutgers University Press, 2002. "The Emerging Middle Class," *Business Week*, Special Issue, 21<sup>st</sup> Century Capitalism, November 18, 1994. 176-192.

economy. These families were losing more than their standard of living. They were becoming *déclassé* and in danger of losing a hegemon of national culture that was part of the most cherished Republican ideals of equity, national unity, and service demanded of cultural elites since the Founding of the Republic in 1923.

The Turkish Republic's national cultural tradition had viewed public education as the bedrock of reformism and egalitarianism underlying its unification. Education policies of the liberalization period departed from previous policies in three important ways that helped to change middle-class families' aspirations, harden social fault lines among middle-class fractions, and lead to ferocious hyper-competition for quality education that would place their children in the best schools.<sup>11</sup>

First, the state reduced education expenditures. In keeping with the neo-liberal ideology of reducing all social expenditures, there was a reduction over the period 1980-94. Overcrowding, poor teacher training, fewer teachers attracted to the profession, and inadequacy of textbooks are some of the concrete shortcomings that appeared when the reduction of expenditures became cumulative.

Second, the liberalization policy promoted private investment in education at all levels.<sup>12</sup> As the public system crumbled, middle-class households increasingly came to the realization that private education represented their only viable alternative. The result was an increase in the demand for private education. Paradoxically, state policies subsidized new private schools, creating incentives for education entrepreneurs. Private investment flowed into education at all levels.<sup>13</sup> Deregulating and subsidizing the development of privatized education was welcomed by upper middle-class families, who could afford to shoulder the financial burden of providing quality education. It was received with less enthusiasm by middle-class families who aspired to quality education but found the price prohibitive.

Third, and most importantly for the subject of this paper, the state co-opted the existing school-centered system of selection for places in the best schools by replacing it with selection solely by score on a standardized national test that was controlled and regulated by the state. In effect, the state social engineered, at least in part, the size of the new middle class that was coming into being. Because elite education is the major path to the best jobs and hence to material comfort and social status in Turkish society, it also is constitutive of what it means to be *middle class*.<sup>14</sup>

## Test Engineers and Test Machines

The education policies of the liberalization episode not only put onto the shoulders of middle-class families a greater financial burden, they also demanded a greater investment of time and effort in the accumulation of human capital. In Turkey, the pivotal point of the system for determining future success was at the end of primary school and the beginning of middle school, when the national tests for selective middle schools, public and private, were given to primary children between the ages of eleven and twelve.<sup>15</sup> Hyper-competition was in large part an artefact of the

---

<sup>11</sup> Most of the best schools, especially in primary and secondary education, were in Istanbul.

<sup>12</sup> Yakup Kepenek and Nurhan Yenturk, *Türkiye Ekonomisi*, Istanbul: Remzi Publishers, 1996. 349-350

<sup>13</sup> Kepenek and Yenturk, 349-350. By 1994, nearly a quarter of total education investment in the GDP was private, up from 4% a decade earlier.

<sup>14</sup> Out of a cohort of primary age children totalling about 3,000,000, only 300,000 registered for the national test in 1996. Approximately 1,000,000 high school students take the annual university entrance examination. Of these, only 100,000 gain entrance to university. These figures for success must be tempered by knowledge that Istanbul families would consider only a fraction of these places "quality education."

<sup>15</sup> The presumption of parents is that being educated in the best middle schools increases the later probability of winning a place in the best universities. Based on the 1996 national university entrance examinations results for the top fifteen schools in each type of middle school, Istanbul *public* middle school entrants comprised 76% (42,239 of 55,277) of the total entrants yet placed less than 5% in universities. In contrast,

way in which the State chose to engineer its selective middle school national tests as a selection-out system (rather than a selection-in system) and how families internalized that system rationality by turning children into test machines during their preparation for what they referred to as *the race*.

There were two separate but similar tests, each with its own student preference and school selection system. One was for public foreign language instruction (Anadolu) schools, the other for private foreign language instruction schools. The State limited the number of school choices for each school type by requiring guardians to register short preference lists. It regulated selection by requiring every private school to establish minimum base points on the test entrance scores and minimum-maximum ranges for every public school. Schools that had the highest minimum base or range points *ipso facto* became known universally as the 'best' schools. Both student scores and school base or range points that reflect student scores were published in national newspapers. Families already know how many places there were in each school they preferred, the minimum or range of scores for each school, their own child's score. From these *objektif* facts they could extrapolate where their child ranked relative to others and the probability of getting into particular schools. It took several months over the summer for the state-regulated 'market' for middle school places to work itself out by the beginning of the next school year.

Families could register a child in one or both tests. In the 1996 national tests, about 300,000 students registered for the national public middle schools test, 30,000 for the private middle schools test. The difference reflected affordability. Almost without exception, Istanbul families preferred selective private foreign schools over all other types, yet the total number of places in these schools, all but one located in Istanbul, were about 1,400, or a probability of 1 in 25. Public selective middle schools had about 30,000 places, or a probability of 1 in 10. The quality of these schools, while preferable to any non-selective public schools, were known to vary widely. There was high agreement on the belief that there were only 5,000 good places in less than 50 schools, lowering the probability of selection to 1 in 100. Because families could register their children for one or both tests, an advantage accrued to middle-class families who could afford private schools, using the best public schools as a safety valve.

State-regulated system rationality was aimed at selection out. The difficulty of State-designed national tests had become well-known to the public and their preparations had become routinized. By 1996 middle-class families had internalized the system rationality of the State. Guardians who registered for the tests considered them *necessary* while at the same time despised them as a system that imposed financial, emotional, and social hardships not only on the test-taker but on every family member, especially the mother.<sup>16</sup> As the number of entrants increased annually, competition intensified. The response to intensification was to move the period for test preparation from the fifth grade back to the fourth grade and, for a growing number of families, to begin preparation in third grade. Most symptomatic, a market emerged for test services that within a few years mushroomed into a test industry of tutors, lesson schools, and counselling services which ranged from anxiety management through preference/selection advice to information and management. The high costs of these services relative to average middle-middle class incomes placed core middle-class families at a further disadvantage.

Families were caught between State test engineers and private market entrepreneurs as they became enmeshed in a totalizing standardized system in which children's numerical scores to the third decimal point were converted into a symbolic currency for the reputations of schools,

---

*foreign private* middle school entrants had the highest success rate by placing 80% of their entrants in universities. The top *Anadolu public* schools were also competitive, placing 69% of their students in universities. This performance was followed by that of the top *Turk private* middle schools *instructing in a foreign language*, which placed 63% of their entrants in universities. Since the examinations are given in the Turkish language, the poor performance of public high schools is even more glaring.

<sup>16</sup> The source for all references to family attitudes, dispositions, and strategies comes from recorded interviews with 26 families, hundreds of informal interviews, and newspaper accounts of this common topic in daily conversation.

principals, teachers, tutors, and lesson schools—each of which fit into ranked numerical orders of excellence.

The result was that families turned their eleven-year-old children into test machines. *Exam-obsessed mothers* quit their employment or sought leaves of absence to become managers of weekly schedules and routines as mother and child travelled from one education service provider to another. Children became quiet and removed from their playtime and friends to study long hours that included every weekend. Mothers routinely commented that they “took the exam with their child,” meaning that they were coerced by teachers, tutors, and lesson teachers to learn all the child’s lessons. The engineer and the test machine became one. Families routinely shut their doors to friends, and even to close family members, in violation of all social norms of hospitality, commensality, and sociability. *Winning the test* organized whole families around a single numerical outcome that dominated their daily discourse and social lives.

The whole technology of making a child into a test machine became known as “doping,” a pejorative term for rote memorization and the application of technique. Educators and clinical psychologists generally viewed the national tests as a national disaster for child development. The dominant discourse that controlled all conversations of participating agents was an oppositional discourse that pitted the idea of *the test* against the idea of *education*, the former based on technique and memorization, the latter on pedagogy and conceptualization. The contradiction was that all the agents—families, teachers, school administrators, school owners, lesson school teachers, and tutors—came to accept the test as a *fact* and *necessity* even as they embraced the principles of child development and ideals of humane education. The *industry* for producing and managing the test was in the capital of Ankara, separated from the *education* taking place in the schools, but one was very much inside the other. Many poorly paid state school teachers became tutors. Parents extolled the education of the classroom curriculum but paid teachers to favour their child over others and attend to their exam preparation. Status-conscious families worried about other families’ preparations, creating an exaggerated importance to market services.

Many families saw the test as a way to maintain or improve class position. Owners of Turk private schools lamented the tests but benefited from them because they were not required to select by the test and could therefore provide a haven for mediocre students from well-off families who could receive special attention or even avoid the tests altogether. These families could acquire the cultural veneer of the upper-middle class that matched their wealth. Tutors preyed on parental anxieties by making exaggerated promises in return for large sums of money when it was not clear who contributed most to the child’s preparation.

Modern education has always communicated undercurrents of *improvement* and progressive beliefs as positive values that perform the function of marking individuals and families as morally *worthy*. The education hierarchy in this way reinforced a social hierarchy that gave the middle class its privileged place in the class structure of industrialized society. As one dissenting parent with a negative view of the whole process observed, “This race is blown out of proportion, it certainly is not aiming to add anything to a child’s education; it is about the competition between husband and wife and one family and another. Children do not keep track of each other’s test scores, mothers do, with fathers looking over their shoulder.”

## Conclusion

By 1995, the education crisis of the middle class, among the proximate causes of which economic policies of the liberalization episode figured prominently, had become interiorized as an *examination hell* inside the intimate lives of many Istanbul middle-class families. The examination system, in all its dimensions, had become an objective instrument of struggle between fractions within the middle class, an instrument for drawing increasingly distinct boundaries between a *loser* core middle class and a *winner* new upper middle class. Increasing inequality within the middle-

class is only one aspect of cultural conflict in an era of globalization. Issues of social justice and cultural rights generally need to be framed by an awareness of class dynamics.