

KARELIA UNIVERSITY OF APPLIED SCIENCES
Degree Programme in International Business

Antti Muhonen

MARKET ENTRY TO THE DUCTH CHILDREN FURNITURE MARKET:
CASE KUOPION WOODI OY

Thesis
Spring 2017



THESIS
Spring 2017
Degree Programme in International Business
Karjalankatu 3
80200 JOENSUU
FINLAND
Tel. 358-13-260 6800

Author
Antti Muhonen

Title
Market Entry to the Dutch Children Furniture Market: Case Kuopion Woodi Oy

Commissioned by
Kuopion Woodi Oy

Kindergartens and elementary schools are facing a change in the Netherlands. The decrease of children and demographic movements affect these educational institutes. New schools are emerging from merges of existing smaller facilities, which opens a potential demand gap for furniture companies.

Despite these changes, Kuopion Woodi Oy is planning to start operating in the Netherlands, more specifically the Friesland Region. A market research has been conducted to solve whether the Dutch children furniture market is feasible. Information on the target market is gathered and utilized to create a market entry method.

This thesis applies interviews with kindergartens, elementary schools and people relevant to the case. Secondary data is gathered from different data banks. PEST and SWOT analyses are utilized for further understanding of the Dutch market and options for Woodi.

The most feasible market entry method for Woodi is through trade fairs. By promoting its products' outstanding quality and services, the case company can differentiate from the competitors to its advantage. Additionally, trade fairs bring potential partners that can help with the distribution and service provision of their products. Based on the information and data gathered the author sees potential in the Dutch market for Kuopion Woodi Oy's products. The situation might be challenging, but with great quality and correct promotion market entry will be possible.

Language
English

Pages 27
Appendices 3
Pages of Appendices 5

Keywords
Market research, market entry strategy, the Netherlands, Friesland, furniture, trade fairs

CONTENTS

1	INTRODUCTION	4
1.1	Background.....	4
1.2	Aim of the thesis	4
1.3	Methods.....	5
1.4	Outline	6
2	MARKET OF CHILDREN’S FURNITURE IN DUTCH PUBLIC SECTOR	7
2.1	Market situation	7
2.2	PEST analysis	8
2.3	Education system in the Netherlands	9
2.4	Statistics of schools and kindergartens in Friesland	10
2.5	Buying decision progress in schools and kindergartens	11
2.6	Daily routines of kindergartens and schools	13
2.7	Competitors	14
2.7.1	B.C.I.....	15
2.7.2	EromesMakro	16
2.7.3	Schilte.....	17
2.7.4	Castilo.....	18
3	DESIGN OF MARKET ENTRY STRATEGY	20
3.1	Previous entry’s to foreign markets.....	20
3.2	Market entry for the Netherlands	20
3.3	Relevant trade fairs and events	21
4	CONCLUSIONS	23
	REFERENCES	25

APPENDICES

Appendix 1 Pictures of the current state of furniture in De Speelweide

Appendix 2 Kuopion Woodi Oy’s products

Appendix 3 Semi-structured interview outline

1 INTRODUCTION

1.1 Background

Kuopion Woodi Oy (Woodi) is a company that produces wooden furniture. The products are aimed for children's and the elderly's furniture for public and private sectors. The products can be described as functional, durable and well-crafted work. Woodi was founded in 1994, and its headquarters are located in Kuopio, Finland. In 2015 Woodi had a total revenue of 5.4 million euros with a profit of 258,000 euros. The smallish profit is due to heavy investment in production machinery. The number of employees in the company is around 45. (Finder 2016.) Now, Woodi is operating in Finland, Norway, Germany, France, Great Britain, Japan and the Netherlands. The company is planning to expand their operations in the Netherlands. (Kuopion Woodi Oy 2016.)

1.2 Aim of the thesis

The aim of the thesis is to explore the market potential in the Netherlands for Woodi. The prime target segment consists of kindergartens and elementary school furniture for children up to the age of eight. This age limit of children from two to eight is due to Woodi's product range. Nearly all kindergartens and elementary schools are publicly owned; the thesis is based on a business-to-business concept. The solution made was to include both kindergarten and elementary school's first few grades into the target segment.

Kindergartens were the primary segment of the thesis. Initial research discovered that kindergartens are not compulsory in the Netherlands, which led the research to include elementary schools. In addition, elementary schools' first three grades, including kids aged 5 to 8, are closer to the target customers of Woodi's furniture.

The target segment is narrowed to focus on one region of the Netherlands, namely Friesland. It was chosen due to the writer's personal connections to the province. Additionally, covering the whole Netherlands would not be as informative as choosing only one province. Nearly all of the conclusions can be implied for the rest of the Netherlands. If the Dutch market is found to have potential, then a market entry method should also be designed.

The thesis aims to answer the following questions about the Dutch market:

- The demand for children's furniture in the Dutch market
- The purchasing decision making process in the public sector
- Competitors in the Dutch market
- Relevant market entry method.

Woodi's major interest is to know if its products can compete in the Dutch children's furniture market. The company is eager to know how its products could help and have an effect on the target end-users. This includes finding out the daily routines of the education facilities. The desired outcome is to know how the furniture can be of greater benefit to end-users on a daily basis compared to the competitors' products.

1.3 Methods

This thesis applies primary and secondary data. The primary data was gained through interviews done in November 2016 and January 2017. The interviewees were a partner of Woodi and a marketing manager of a Dutch furniture company. Other interviewees were a teacher from an elementary school, two kindergarten employees and one head of the kindergarten. The interviews were made to access a better understanding of the market and the current situation of school furniture. The secondary data was collected from different databanks. It includes statistics of the Dutch furniture market, educational statistics in the Netherlands

and Friesland. Utilizing the marketing mix helps to analyze and further explain the conclusions.

1.4 Outline

Firstly, the thesis describes the system of kindergartens and elementary schools of the Netherlands, more specifically in Friesland. In addition, the current situation and primary competitors are analyzed to achieve a better understanding of Woodi's furniture ranking.

Secondly, the purchasing making process of kindergartens and elementary schools is explained with the help of interviews. The current furniture of elementary schools is shown with pictures and a time table of their daily routines.

Third, the relevant market entry strategy will be discussed. The new strategy is made with the help of observing Woodi's previous strategies to foreign markets. The prime events and trade fairs of this market are discovered. Finally, conclusions will be made.

2 MARKET OF CHILDREN'S FURNITURE IN THE DUTCH PUBLIC SECTOR

2.1 Market situation

Kindergartens and elementary schools are facing a challenge. Because of the decline in birthrate, schools and kindergartens have to differentiate from each other and improve their quality and necessity to parents. One way to differentiate in the market is with premium furniture. By increasing the quality of facilities, furniture comes into play. (Rabobank 2016.)

The demand for kindergartens in the Netherlands has decreased in recent years. Increasing costs of child care, rising unemployment and demographic changes are reasons behind this change. This challenge tests kindergartens' ability to change. They have to adapt to the new environment and start to compete in fields such as quality and flexibility. (Rabobank 2016.)

According to the Sectorbestuur Onderwijsarbeidsmarkt (SBO), this decline of fertility is a critical issue especially in the Friesland province. This decrease has an immediate effect on the number of pupils going to kindergartens and primary schools. The number of children going to school evidently creates a need for change in the school and kindergarten sector. (Rompen 2010.)

SBO has forecasted that from 2007 to 2025, the amount of children aged 4 to 12 is to decrease by 23 percent. Figure 1, shows the areas in which the decrease in birth rates is already in place. This change influences the environment in which the kindergartens and schools are functioning. Additionally, if the number of pupils decreases it will affect the number of schools that could potentially be furnished. (Rompen 2010.)



Figure 1. Decreasing number of children in the Netherlands (Source: CNV Onderwijs 2016).

The long-term vision for the educational sector includes the integration of kindergartens and elementary schools. For this to happen, new facilities are most certainly to be built or current buildings expanded. New buildings need to be furnished. Considering the demand to compete in quality, premium furniture companies have a slight edge. Moreover, future the government's impact on kindergartens' and schools is yet an unknown factor. This could lead to development in the demand of kindergartens and provide for new investments. (Rabobank 2016.)

2.2 PEST analysis

A PEST analysis is a tool utilized for analyzing the business environment. It includes political, economic, socio-cultural and technological points of view. This chapter includes these views besides the technological ones. The technological one is not included because of its current low impact on the children's furniture market. (Pestanalysis 2017.)

The political environment in the Netherlands is one of the most stable in the European Union. Now, after the recession in Europe, the country is slowly turning

towards a booming economy. The Dutch market is one of the most free in the world. Belonging in the European Union secures the markets from new laws and taxation. Furthermore, the Netherlands are known for being the pioneers of environmental health and supporters of CSR (corporate social responsibility). (StanderTrade 2016.)

The economic state of the Netherlands is stable and slightly growing. The Netherlands is ranked as the seventh best country in Europe and 16th in the world for businesses (Heritage 2016). According to StanderTrade, the inflation rate in 2016 was 0.1 percent but is forecasted to increase to 0.9 percent in 2017. Imports are rising faster than exports, but domestic purchases are high.

The socio-cultural environment is the most fluctuating sector of this analysis. As mentioned in the previous chapter, the “kimpregio” effect is happening in the Netherlands. Demographically the population is decreasing in the outskirts regions and centering around the main regions shown in Figure 1. In addition, the fertility rate is decreasing, which leads to less children for kindergartens and schools (Figure 3). Due to decrease in children, the educational facilities are facing a change.

2.3 Education system in the Netherlands

The education system in the Netherlands differs from most countries. The system starts from the age of two, when the children have a chance to start their early childhood education, kindergarten (Figure 2). Kindergarten is not compulsory, and the usual age to be in kindergarten is from two to four.



Figure 2. The Netherlands education system under 18 years old (Source: EduGatorSense 2013).

At the age of five, mandatory elementary school starts and lasts eight years. Although the official starting age is five, roughly 98% of the Dutch children attend the primary school already at the age of four (van Leeuwen, Thijs & Zandbergen 2009).

2.4 Statistics of schools and kindergartens in Friesland

Friesland is a province located in the northwest part of the Netherlands. It is the sixth largest economy in the Netherlands and has a population of 650,000, which is 3.8% of the total population of the Netherlands. Its capital is Leeuwarden which has a population of around 100,000. The major economic sectors are health and welfare (18%), trade and mineral (16%) and industry and mineral (12%). (European Commission 2016.)

The population of The Netherlands is 16.9 million in January 2016 (Eurostat 2016). In 2015 roughly 930,000 (5.5%) fall in the age group of 5 to 9 years old, and 888,000 (5.2%) are less than five (Eurostat 2015). There were 643,000 children in day care in the Netherlands in 2016 (Kinderopvang 2016).

In recent years, the birthrate in the entire Netherlands has started to decrease (Figure 3). This phenomenon is common throughout Europe. While the average fertility is 1.58 children per woman, the Netherlands has rate of 1.71. Although the rate is higher than the European average, it has a significant effect on rural areas. (Eurostat 2016.)

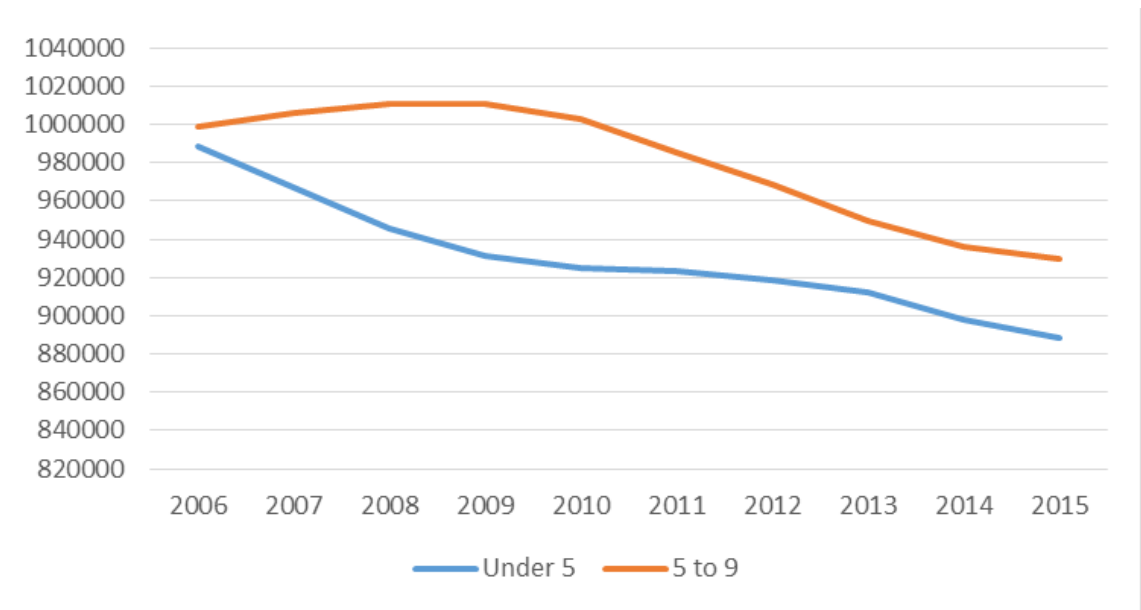


Figure 3. Number of children in the Netherlands (Source: Eurostat 2016).

Table 1 lists the number of education facilities and pupils in the Netherlands and Friesland. The number of children who are 5 to 9 years old is 36,689 (5.6%) and under five years old around 33,000 (5.1%) (Eurostat 2015). The total number of elementary schools in the Netherlands is 6,511, out of which 414 are located in Friesland (Ministry of Education, Culture & Science 2016). The number of kindergartens in the Netherlands is 6,431 (in 2016) while in Friesland the number is 316 (beste-kindergartenverblijf 2016).

Table 1. Education facilities and amount of pupils in the Netherlands (Source: Eurostat 2016).

2.5 Buying decision progress in schools and kindergartens

This chapter describes the buying process of children's furniture and shows how the purchasing decision happens in the public sector.

Interviews with three kindergartens in Friesland were conducted to gain information of their buying decision processes and investment budgets. The contacted kindergartens were small to medium sized with 23 – 40 pupils each. Interviewees claimed their purchasing process to be straightforward. Small amounts

or single products are bought to repair broken ones. For larger quantities, the head of the kindergarten decides what to purchase. (Interviewee A, B & C 2017.)

Decision makers of the kindergartens are the location managers and the board of the main organizations. These personnel are the key for closing the deals. Considering furniture, the biggest influencers for decision makers are the parents of children and the kindergarten employees. (Burgers 2016.)

Safety is the prime factor of products. The products have to have the certification of safety that passes the inspections kindergartens have yearly. These inspections are executed by an external company. In Friesland it is the GGD (GGD Fryslan, 2017). The inspector files a report for the kindergarten if some parts of their furniture are not up to the quality of safety. These products have to be replaced within a given time limit, after which a follow-up inspection is made. Since the time limit given is usually short, managers do not have much time to compare products and tend to end up purchasing the easiest and fastest solution. If the kindergarten notices their lack of specific product safety or need to purchase new furniture, the common channel to the company is by internet and online purchasing. According to the interviews, price is not a determining factor as long as the products are of good quality and safe. (Interviewee A, B & C 2017.)

Kindergartens that were interviewed claimed to purchase small furniture, such as chairs, every five years. Larger products such as beds or lockers are purchased every seven to ten years. All interviewees said that the quality in larger products is important and the price usually high because they tend to last longer. In addition, if the products from one company are good, the interviewees are brand loyal and will purchase from the same company again in the future.

Budgets of investments for the kindergartens are flexible. None of the interviewees had a fixed budget for investments. If something breaks a new replacement will be purchased. For larger orders, the head manager who takes care of the kindergarten's finances decides when they can want new furniture or when they can afford new ones. (Interviewee A, B & C 2017.)

For elementary schools, the decision makers are the directors of the school and the boards of the organisation. Influencers for elementary schools are mainly the school teams. Contrary to kindergartens, elementary schools look at the trends in the markets: colors, looks, what would fit best in the school's vision. Schools also follow their school marketing plans, which can often be found on their website. Finding a school that is looking to refurbishing its facilities and fulfilling their plan is a notable advantage. (Burgers 2016.)

Kindergartens and elementary schools in the public sector have to follow the European Union's Purchase Law §26. The law states that all public sector purchases over the amount of €135,000 have to be made public and competitive. A one-time furniture deal in the Netherlands that exceeds the limit of €135,000 is unlikely. Most schools and kindergartens tend to furnish one area or room at a time. Exceptions to this behavior are mergers and new buildings that need furnishing. (Hilma 2016.)

2.6 Daily routines of kindergartens and schools

This chapter describes the daily routines of kindergartens and schools in the Netherlands. This knowledge narrows Woodi's potential export products in the Dutch market.

Table 2 shows the daily routine of children from age groups 1 – 4 in an elementary school De Zwaluw. The pupils of group 1 and 2 are aged under 7, which can be seen in their activity and day length. Pupils in groups 3 and 4 are seven to eight year olds.

Table 2. Example of a Monday in elementary school De Zwaluw.

Groups 1-4	
08.30-09.00	Circle talk, religion class, talking about the weekend.
09.00-10.20	Groups 1-2: working on motoric skills > Afterwards free time to play with the provided toys. Groups 3-4: Grammar/reading/writing/math
10.20-10.30	Lunch break in class
10.30-10.45	Recess
10.45-11.45	Groups 1-2: playing outside Groups 3-4: finishing class from before the recess.
11.45-12.00	Talk about the morning, students can go home to eat. Only few stay at school to eat.

The example daily schedule of these groups seems similar to compared to the Finnish schools. The biggest difference is that pupils of both groups do not eat lunch at school. Those who decide to stay at school enjoy their lunch in the classroom instead of a dining room or kitchen. (Interviewee D 2016.)

2.7 Competitors

This chapter illustrates competitors and the state of school furniture and an estimation of the size of the market. Competitors of the children's school furniture market in the Netherlands are BCI, EromesMakro, Castilo and Schilte. This chapter involves pictures of rival products for the both kindergarten and elementary school sectors. This helps to clarify the current state of competition in the market inside the Netherlands. Appendix 2 includes Woodi's versions of all the competitor's products.

The current state of kindergarten and school furniture is generally out of date and simple. The materials used are primarily wood and metal. The furniture is replaced within a range of 5 to 15 years, depending on the standards and needs

and the quantity of products. Inspections are made on a yearly basis to evaluate the condition of the furniture. The safety and quality is supervised by an external agency, and purchasing needs decided upon. (Interviewee A, B & C 2017.)

According to SBO, the size of the children's furniture market is decreasing due to fewer pupils; merges and new acquisitions may in fact increase the demand for furniture. In addition, the size of the Dutch children's furniture market is uncertain. Burgers (2016) has estimated that the yearly elementary school furniture market is around 30 million euros.

Appendix 1 presents a few pictures of the current furniture of kindergarten De Speelweide and the elementary school De Zwaluw.

2.7.1 B.C.I.

B.C.I. is a manufacturer of school furniture, and their headquarters is located in Neede. They are also partners of a few international brands, which widens their product range and diversity. B.C.I. offers full designs of school and kindergarten environments. Pictures 1 and 2 are from the B.C.I. catalog to demonstrate the company's products. (B.C.I. 2016.)



Picture 1. Flexio kastmodule 2-71 (Source: B.C.I. 2016).



Picture 2. Stripkapstok Tertio HA (wall rack) (Source: B.C.I. 2016).

2.7.2 EromesMakro

EromesMakro is located in Wijchen and Hoogeveen. It is a new company merged from two furniture manufacturers, Eromes and Makro. They design and manufacture products and interiors for all stages of education. Moreover, they cooperate with architects, consultants and co-suppliers. Examples of cooperation partners are Rolf Group and Pretty Villa. Pictures 3 and 4 are examples of the company's products. (EromesMakro 2016.)



Picture 3. Stex cabinet (Source: EromesMakro 2016).



Picture 4. Gripz (wood) four-legged PE (Source: EromesMakro 2016).

2.7.3 Schilte

Founded in 1858, Schilte is a family company that manufactures childcare, primary and secondary education products. The company's services offer project consultation, designs, installations and product maintenance. In addition, Schilte cooperates with other suppliers. It promotes sustainability in that all of their products can be made from wood. Schilte has also developed a sister company called Dapper, which is more focused on children's furniture. Pictures 5 and 6 illustrate a few of the company's products. (Schilte 2016.)



Picture 5. Cabinets (Source: Schilte 2016).



Picture 6. Stool and table (Source: Schilte 2016).

2.7.4 Castilo

Castilo is a wooden furniture and toy manufacturer for kindergartens. The principles of Castilo designs are safety, comfort and longevity. The customization and uniqueness of the company's products are the keys of its success. Castilo is located in Opmeer and claims to be well recognized in the kindergarten sector. Picture 7 is a fine example of Castilo's design. (Castilo 2016.)



Picture 7. Wardrobe (Source: Castilo 2016).

These pictures demonstrate the current products of competitors in the Dutch furniture market. As shown, most of them are made from wood and focus on simplicity and objectivity. How Woodi can differentiate from these competitors is in its product quality and services. It is notable that nearly all of the mentioned competitors offer customization of their products but do not provide maintenance or other services. Furthermore, in the author's opinion Woodi's product designs are significantly superior to the competitors.

3 DESIGN OF MARKET ENTRY STRATEGY

This chapter explains previous Woodi's export strategies which can be used for the Dutch market. Previous entries of Woodi are examined and used to design a relevant method for Woodi. The leading trade fairs of the children's furniture market are explored. Other essential elements of a relevant strategy are price and promotion. Furthermore, other influential factors are into consideration.

3.1 Previous entry's to foreign markets

Woodi's previous foreign operations have started out participating in trade fairs. Woodi has been present at a regional trade fair and gained new connections and made strategies with new partners. Since the buyers of this type of furniture are mostly from the public sector, local retailers have insight of how to find and target the buyers.

Recently, Woodi has made a contract with Presikhaaf meubelen, a Dutch furniture retailer. The deal is to export some of Woodi's furniture to a new market, the Netherlands. Woodi only supplies Presikhaaf meubelen demand corresponding to furniture and aids in marketing and specific furniture knowledge. (Suvala 2016.)

3.2 Market entry for the Netherlands

Developing a market entry for Woodi to the Netherlands should focus on trade fairs. The way to enter is to gain contacts and promotion for their products. As a successful example of this, Presikhaaf meubelen partnership was established at a trade fair. Trade fairs in the Netherlands are excellent opportunities. In addition, all of the competitors are present, and this brings the possibility to get information on rivals. There is a major education event "Kinderopvang Totaal" and the largest education furniture market trade fair in the Netherlands "KindVak".

Related to the marketing mix, Woodi's method would be to enhance the product and promotion. Both of these factors are presented in the best way at trade fairs. It has a successful product on the Dutch market. Trade fairs also attract possible partners or then direct customers of children's furniture.

Potential advantages of Woodi are the products and services. According to Suvala 2016, Woodi stands out from its competitors by product and service quality. The functionality of the products and follow up service are Woodi's keystones for competing. Additionally, Woodi's service involves a local installation location, which also takes care of product follow-up maintenance.

Correct promotion strategy is in place to convince buyers to pay a remotely higher price for the quality and products Woodi offers. Moreover, Woodi has a high brand credibility among its existing customers. The brand reliability is to be promoted at trade fairs to reach the target customers. The most feasible market entry method for Woodi is to visit the upcoming events and trade fairs. This can be achieved by correct promotion of the products and gaining access to potential partners inside the Netherlands, as they have started with Presikhaaf meubeleen.

3.3 Relevant trade fairs and events

Kinderopvang Totaal is an organization that hosts events regarding education. The majority of the events are for educational personnel, but also include events for facilities and interiors. Different events are hosted frequently, and for Woodi these events would be more focused on networking with school officials and managers. (Kinderopvang Totaal 2016.)

KindVak is the biggest education furniture trade fair organized in the Netherlands. Its primary focus is on every aspect in education of children under 16 years old, and the next time it is held in January 2018. The trade fair focuses on kindergarten and primary school furniture. All of the biggest rivals in this field are attending and it is recommended for Woodi to join. (KindVak 2016.)

Another mentionable event organizer for networking with the education field's management and decision makers is the Kinderopvang Congressen. This consists of two events, one in mid-February 2017, which focuses on the infrastructure and possibilities of youth and preschool education. Another event is in late May 2017. The later event involves topics such as management, childcare playgrounds and quality. The key concept of the event is to bring entrepreneurs and management together with networking and partnerships. (Kinderopvang Congressen 2016.)

4 CONCLUSIONS

Discovering the decline of fertility in Friesland has a direct impact on the number of kindergartens and elementary schools. SBO's forecast of the "kimpregio" effect is centered in the Frisian and northeastern parts of the Netherlands. The outcome of this trend is not yet fully known but it seems that it will cause a decrease in the number of educational facilities, merges of facilities and increase rivalry among institutions.

The decision to purchase children's furniture in the public sector slightly differs between kindergartens and elementary schools. Generally, the director and the board of the main organizations make the decision. Kindergartens also have location managers who determine what to purchase. External influencers on the decision making process are the pupils' parents, school teams and employees.

Information gained from the interviews with the kindergartens shows the budgets of education facilities to be flexible. The decision-making process of larger quantity purchases is the responsibility of the heads of the kindergartens. The safety, quality and simplicity of the products affects the purchasing decision. According to the interviews, price does not play a part in the purchasing process, as long as the products are of good quality and safe. In addition, the products need to have the certification of safety to pass the inspections.

Competition in this field seems quite high and all the mentioned rivals have equivalent products. The research mentions four comparable competitors for Woodi. According to Suvala (2016), Woodi can differentiate from these competitors with the quality of its products and the maintenance and follow-up services provided for the products.

The preferred market entry for Woodi into the Dutch market would be at trade fairs and partners. Accessing trade fairs and gaining partners in the same field is the most feasible option. Deals with new partners have the advantage of involving a local company in the business, particularly since Woodi needs an installation warehouse to maintain the quality of service.

With the changes in the children's furniture market, different opportunities arise. For Woodi these opportunities in the Dutch market are around the merges of existing kindergartens and elementary schools. New buildings provide a demand for furnishing. Kindergarten and elementary school merges tend to bring a new look for the facility, which involves new furniture. Especially, with competition for pupils the furniture might play one of the key roles.

Threats are centered around competition and costs. Rivalry is increasing, and more competitors are arising that can especially compete with the price. Suvala mentioned that Woodi's pricing is higher than the competitors but still highly competitive. Price difference may be a factor if it becomes too great. In addition, the Frisians tend to favor domestic over foreign products.

All in all, The Dutch and Frisian children's furniture market has potential. Even though the pupil number is decreasing and the shift of movement is to larger cities, the need for new furniture will be essential. The author suggests entering the market and exploiting forthcoming merges and new educational facilities' furnishing needs. The competitors in the Dutch furniture market offer customization services, but most lack in follow-up maintenance. Woodi's advantage in the market is follow-up service and maintenance. By promoting the quality and services provided Woodi has a great chance to establish the Netherlands as a new operating country.

REFERENCES

- B.C.I. 2016. Kinderopvang.
http://www.bci.nu/index.php?dispatch=categories.view&category_id=566
 22.12.2016
- B.C.I. 2016. Primair Onderwijs.
http://www.bci.nu/index.php?dispatch=categories.view&category_id=551
 22.12.2016
- Beste-kinderdagverblijf. 2016. Kinderdagverblijven in Friesland.
<http://www.beste-kinderdagverblijf.nl/kinderdagverblijven-provincie-friesland/>
 24.1.2016
- Burgers, Ronald. Marketing manager. Presikhaaf Meubeleen.
 r.burgers@schoolmeubelen.com. 28.11. – 7.12.2016
- Castilo. 2016. Homepage.
<http://www.castilo.nl/> 22.12.2016
- Coface. 2016. Economic studies and country risks. Netherlands.
<http://www.coface.com/Economic-Studies-and-Country-Risks/Netherlands>
- CNV Onderwijs. 2016. Krimpregio's
<https://www.cnvo.nl/actueel/actuele-themas/krimpregios.html> 22.12.2016
- EduGatorSense. 2013. The Netherlands' Education System.
<https://edugatorsense.wordpress.com/2013/05/22/the-netherlands-education-al-system/> 11.11.2016
- EP-Nuffic. 2015. Education system The Netherlands.
<https://www.epnuffic.nl/en/publications/find-a-publication/education-system-the-netherlands.pdf> 11.11.2016
- EromesMakro. 2016. Products.
<https://eromesmarko.nl/en/products/> 22.12.2016
- European Agency. 2016. Netherlands – General information. The organization, structure and management of the education system.
<https://www.european-agency.org/country-information/netherlands/general-information> 7.11.2016
- European Commission. 2016. Province of Friesland.
<https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/base-profile/province-friesland> 29.11.2016
- Eurostat. 2016. Fertility statistics.
http://ec.europa.eu/eurostat/statistics-explained/index.php/Fertility_statistics
 29.11.2016
- Eurostat. 2016. Population. Regional data.
<http://ec.europa.eu/eurostat/web/population-demography-migration-projections/population-data/database> 7.11.2016
- Eurostat. 2016. Population and population change statistics.
http://ec.europa.eu/eurostat/statistics-explained/index.php/Population_and_population_change_statistics 29.11.2016
- Eurostat. 2016. Population on 1 January.
<http://ec.europa.eu/eurostat/tgm/table.do?tab=table&init=1&language=en&code=tps00001&plugin=1> 7.11.2016
- Eurostat. 2016. Population on 1 January by five year age group, sex and NUTS 3 region.
http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=demo_r_pjangrp3&lang=en 7.11.2016
- EveryCulture. 2016. Frisians – Economy.

- <http://www.everyculture.com/Europe/Frisians-Economy.html> 29.11.2016
- Finder. 2016. Kuopion Woodi Oy.
<https://www.finder.fi/Huonekaluja+julkiset+tilat/Kuopion+Woodi+Oy/Kuopio/yhteystiedot/150025?what=Kuopion%20Woodi%20Oy> 1.11.2016
- GGD Fryslan. 2017.
<https://www.ggdfryslan.nl/> 24.1.2017
- Heritage. 2016. The Netherlands.
<http://www.heritage.org/index/country/netherlands> 15.1.2017
- Hilma. 2016. Kynnysarvot.
<https://www.hankintailmoitukset.fi/fi/docs/kynnysarvot/> 1.12.2016
- Interviewee A. Anonymous. Head of Kindergarten. Kinderopvang Aurora. 24.1.2017
- Interviewee B. Anonymous. Employee. Greunshiem KDV. 24.1.2017
- Interviewee C. Anonymous. Employee. De Kleine Johannes. 24.1.2017
- Interviewee D. Anonymous. Teacher. De Zwaluw. 7.12.2016
- Kinderopvang. 2016. Feiten en Cijfers.
<http://www.kinderopvang.nl/standpunten/feiten-en-cijfers/> 22.12.2016
- Kinderopvang Congressen. 2016. Homepage.
<http://www.kinderopvangcongressen.nl/> 22.12.2016
- Kinderopvang Friesland. 2016. De Speelweide.
<http://www.kinderopvangfriesland.nl/despeelweide/Fotoalbum/> 30.11.2016
- Kinderopvang Friesland. 2016. Organisatie.
<http://www.kinderopvangfriesland.nl/index.php?a=71&opvangID=6> 29.11.2016
- Kinderopvang Totaal. 2016. Agenda
<https://www.kinderopvangtotaal.nl/home/agenda/> 22.12.2016
- KindVak. 2016. Homepage.
<http://www.kindvak.nl/> 22.12.2016
- Kuopion Woodi Oy. 2016. Products.
<http://www.woodi.fi/en/products> 22.12.2016
- Kuopion Woodi Oy. 2016. Woodi Oy Homepage.
<http://www.woodi.fi/en/home> 1.11.2016
- Ministry of Education, Culture & Science. 2016. Adressen van alle schoolvestigingen in het basisonderwijs.
https://duo.nl/open_onderwijsdata/databestanden/po/adressen/adressen-po-3.jsp 11.11.2016
- PestleAnalysis. 2017. What is PESTLE analysis? A Tool for Business Analysis.
<http://pestleanalysis.com/what-is-pestle-analysis/> 15.1.2017
- Rabobank. 2016. Kinderopvang.
<https://www.rabobankcijfersentrends.nl/index.cfm?action=branche&branche=Kinderopvang> 29.11.2016
- Rompen, T. 2010. Krimpregio's in Nederland, de gevolgen voor het onderwijs. SBO.
<http://www.kennisplatformbewoners.nl/fileskpb/Notitie%20krimp%20in%20het%20onderwijs.pdf> 29.11.2016
- Schilte. 2016. Homepage.
<http://www.schilte.nl/> 22.12.2016
- Stander Trade. 2016. Netherlands: Economical and political outline.
<https://en.portal.santandertrade.com/analyse-markets/netherlands/economic-political-outline> 15.1.2017
- Suvala, Jukka-Pekka. Partner of Kuopion Woodi Oy. Woodi Oy. 1.11.2016

Van Leeuwen, B. Thijs, A. & Zandbergen, M. 2009. Inclusive education in the Netherlands. SLO.
https://www.european-agency.org/sites/default/files/Inclusive_Education_Netherlands-webversie.pdf 11.11.2016

Pictures of the current state of furniture in De Speelweide



Picture 8. Common area of "De Speelweide". (Source: Kinderopvangfriesland 2016.)



Picture 9. Furniture of "De Speelweide" (Source: Kinderopvangfriesland 2016).



Picture 10. Furniture of a room for groups 1 – 2 in De Zwaluw (Source: Teacher 2016).



Picture 11. Teacher's desk in De Zwaluw (Source: Teacher 2016).

Kuopion Woodi Oy's products



Picture 12. Onni cabinet (Kuopion Woodi Oy 2016).



Picture 13. Wall rack (Kuopion Woodi Oy 2016).



Picture 14. Student chairs and tables (Kuopion Woodi Oy 2016).



Picture 15. Wardrobe (Kuopion Woodi Oy 2016).

Semi-structured interview outline

Background information:

1. Is your kindergarten in the private or public sector?
2. How many pupils does your kindergarten have?

Purchasing process:

3. How is the process of purchasing furniture?
 - 3.1 And who decides what to purchase?

Criteria:

4. What are the most important factors when deciding to purchase new furniture?
 - 4.1 Are there new trends or specific interests you are looking for?
5. Is there a difference with domestic products and export products? If so, what?

Investment:

6. How often do you purchase new furniture?
 - 6.1 What would you estimate your budget to be?