

**EVALUATION OF CREATIVE INDUSTRY
CLUSTERS THROUGH THE ECOSYSTEM
APPROACH: INVESTIGATION OF WEDDING
WEAR SECTOR IN IZMIR**

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**by
Onur MENGİ**

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We approve the thesis of **Onur MENĐİ**

Examining Committee Members:

Asst. Prof. Dr. Koray VELİBEYOĐLU

Department of City and Regional Planning, İzmir Institute of Technology

Assoc. Prof. Dr. Semahat ÖZDEMİR

Department of City and Regional Planning, İzmir Institute of Technology

Assoc. Prof. Dr. Şölen KİPÖZ MANAFLI

Department of Fashion and Textile Design, İzmir University of Economics

Assoc. Prof. Dr. Deniz GÜNER

Department of Architecture, Dokuz Eylül University

Asst. Prof. Dr. S. Bahar DURMAZ DRINKWATER

Department of Architecture, İzmir University of Economics

2 July 2015

Asst. Prof. Dr. Koray VELİBEYOĐLU

Supervisor, Department of City and Regional Planning

İzmir Institute of Technology

Assoc. Prof. Dr. Adile ARSLAN AVAR

Head of the Department of City and
Regional Planning

Prof. Dr. Bilge KARAÇALI

Dean of the Graduate School of
Engineering and Sciences

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ABSTRACT

EVALUATION OF CREATIVE INDUSTRY CLUSTERS THROUGH THE ECOSYSTEM APPROACH: INVESTIGATION OF WEDDING WEAR SECTOR IN IZMIR

The emergence of new economy has brought the creative industries onto the urban research agenda. Despite the extensive literature on the subject, there is need of a more in-depth approach to investigation the unique formations of creative industry clusters. The aim of this dissertation is to explore the particular organizational and spatial structures of creative industry clusters from the ecosystem perspective.

This present study recognizes the fashion industry as a creative industry and the wedding wear sector as its subset. Then, it investigates how the cluster of wedding wear sector operates as an ecosystem in terms of the diversity, interaction, competition and evolution in the case of Mimar Kemalettin Fashion District.

The methodology consists of the literature review, preliminary field studies, development of the DICE model which explores the diversity, interaction, competition and evolution of ecosystems in a particular space, pilot study for testing the model, data collection via site visits, DICE survey and additional interviews on site, data processing through descriptive analyses and regression analyses, and conclusions.

The findings reveal that the existing cluster is young and emerging. This ecosystem currently self-operates with shortage of diversity in a concentrated spatial structure. The role of geographical proximity and the existing local buzz are substantial on excessive internal interactions. The existing competitive atmosphere is portrayed as a win-lose situation and there is a considerable disinterest towards to collaborations. For evolution, the ecosystem mutually co-evolve with mutation occurred inside the firms. Also, the crossover is found primarily a localized phenomenon.

ÖZET

YARATICI ENDÜSTRİ KÜMELERİNİN EKOSİSTEM YAKLAŞIMI İLE DEĞERLENDİRİLMESİ: İZMİRDEKİ GELİNLİK SEKTÖRÜNÜN ARAŞTIRILMASI

Yeni Ekonomi'nin ortaya çıkışı, yaratıcı endüstrileri kentsel araştırmalar gündemine taşımıştır. Bu konudaki geniş literatüre rağmen, yaratıcı endüstri kümelerinin özgün yapılanmaların araştırılmasında daha derinlemesine bir yaklaşıma ihtiyaç duyulmaktadır. Bu doktora tezinin amacı, yaratıcı endüstri kümelerinin belirli organizasyonel ve mekânsal yapılarını, ekosistem perspektifinden incelemektir.

Bu çalışma, moda endüstrisini bir yaratıcı endüstri ve gelinlik sektörünü onun bir altkümesi olarak kabul etmektedir. Böylece bu çalışma, gelinlik sektörü kümesinin, çeşitlilik gösterme, etkileşim, rekabet ve evrilme ölçütlerine göre bir ekosistem olarak nasıl çalıştığını Mimar Kemalettin Moda Merkezi örnek olayı üzerinden araştırmaktadır.

Araştırma yöntemi, literatür taraması, öncü arazi çalışmaları, belirli bir mekandaki ekosistemin çeşitlilik gösterme, etkileşim, rekabet ve evrilmesini araştıran DICE modelinin geliştirilmesi, modelin test edilmesi ve iyileştirilmesi için pilot çalışma, alanda yürütülen arazi gezileri, DICE anketi ve ek röportajlar ile verilerin toplanması, betimleyici analizler ve regresyon analizi ile verilerin işlenmesi ve sonuçların elde edilmesi süreçlerinden oluşmaktadır.

Çalışma bulguları, mevcut kümenin genç ve gelişmekte olduğunu ortaya koymaktadır. Bu küme, çeşitlilik eksikliği içinde, yoğunlaştırılmış bir alanda hâlihazırda kendi kendine çalışmaktadır. Coğrafi yakınlık ve mevcut yerel yoğun birlikteliğin rolü, içsel etkileşim üzerinde etkilidir. Mevcut rekabet atmosferi kazan-kaybet durumu olarak tanımlanmakta ve işbirliklerine karşı belirgin bir ilgisizlik gözlenmektedir. Evrilme açısından, bu ekosistem, firmaların içerisinde gerçekleşen mutasyon ile tümden ve birbirilerine bağlı bir gelişme göstermektedir. Diğer taraftan, genetik değişim ise daha çok yerele bağlı bir olay olarak karşımıza çıkmaktadır.

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CHAPTER 1

INTRODUCTION

1.1. Problem Definition

The emergence and diffusion of new economy and inevitable process of urban restructuring at the very late of the twentieth century, has brought new focuses for urban research on the creative industries and creative industry clusters.

The first decade of the twenty-first century was associated with increasing attention in the relationship between creativity and cities, and with the rise of new economy (named also as creative economy or/and knowledge economy) (Landry & Bianchini, 1995; Scott, 1997; Begg, 1999; Leadbeater, 2000; Hall, 2000; Florida, 2002; Uzun, 2003; Hutton, 2004). At the heart of the new economy, there are new urban developments came along with emergence of the creative industries. Urban restructuring has been a process involving decline of manufacturing and rise of service sector specifically in cities. For urban restructuring, Brenner (1998), Soja (2000), Sassen (2001) and Scott et al. (2004) underline the emergence of service sector in 1970s and the shift in 1980s, and centrality of cities in new economy with urban structuring that has brought about the revival of inner city. In this respect, creative industries and related businesses have become increasingly important in powering city, national, and world economies today (Caves 2000; Florida 2002; Markusen & King 2003; Markusen et al. 2004). Creative industries have been receiving considerable attention in the scientific realm for the last few years. Policy-makers and scholars around the world have started to employ creative industries as favorable tools for local and regional development and as a source of competitive positioning in the global competition of cities and even countries. On the other hand, the term has been criticized, due to the changing economic structure of, and the urban policy implications in the city, as being only the re-branding of cultural industries and further evaluated in terms of economic returns and benefits that indeed not corresponding the role of the cultural industries. Regarding, creative industries are highlighted as being attached to notions of the new economy and reductionist where cultural production becomes significant when only

provides economic contribution. Under the external environment to focus of this study, new forms of work, new relations to place and space, new forms of consumption, extensive social networking new kinds of social relations and networks and mixing of creativity-based business objectives have all suggested a new kind of relationship between urban environment and economics are indicated in the creative industries.

Such restructuring process has also enabled clustering of creative industries, and accumulation of financial and service sectors in city centers. The production of creative content is today increasingly concentrated in a series of localized agglomerations and networks, often in inner city districts. Such agglomerations of specialized industries, or their related sectors, are often described as creative clusters which refer to certain proximity of firms to each other within a particular value chain. Multiple other concepts have been developed that describe proximity of economic activity concentration differing by the degree of spatial and non-spatial proximities. For spatial clustering, the theories of agglomeration economies seems the most powerful framework of spatial concentration of design industries (see. the California School and Classic Economic Approach; Storper, 2000; Storper & Scott, 1988; Scott, 1988b; Gordon & McCann, 2000; Feldman, 1999; Iammarino & McCann, 2006). Complementary to those merely spatial clustering discussions, some of the scholars have also developed non-spatial theoretical approaches for the clustering economic activities (see. Storper & Venables, 2002; Owen-Smith & Powell, 2002; Grabher, 2002; Bathelt et al., 2004; Boschma, 2005; Torre & Rallet, 2005; Asheim & Gertler, 2006; Maggioni et al., 2007; Gertler, 2008; Storper, 2009; Shearmur, 2011; Mattes, 2012).

In practice, there is a considerable body of practice that illustrates clustering of creative industries in different geographies in different scales, particularly fashion and related industries (e.g. Central Milan and Quadrilatero d'Oro in Italy; Central London, the City Fringe and Nottingham Lace Market in UK; New York Fashion District and Los Angeles Fashion District in USA; Istanbul Fashion Industry Quarters in Turkey;, Toronto Fashion Design Cluster in Canada; Johannesburg Fashion District in South Africa; Auckland's Fashion Districts and Incubators in New Zealand; Seoul Dongdaemun Fashion Cluster in South Korea; Antwerp Fashion Cluster and Amsterdam World Fashion Centre in the Netherlands). Therefore, such external environment which has considerably influenced the creative industry cluster formations is needed to be comprehended for conducting such urban research and construct its focus.

Rather than investigating the clusters of creative industries through economic and/or political economic perspectives excessively already engaged in the international literature, there is a need for an in-depth research with focus on their particularly internal dynamics and their very nature. Despite the availability of diverse literature on creative industries, creative cities, and creative class, the forces that drive the development of the organizational and spatial structure of creative industries are little known. Our understanding of the nature of creative industries as clusters is in need of a more in-depth approach to its unique structure in relation to urban environment.

Creative clusters are generally portrayed through an economic or political economic perspective, with only limited acknowledgement of connections to the broader creative and knowledge individuals in which they reside. Creative clusters are also described as a package of activities occurring in a physical environment that reflect the tensions between the planned and the organic, top-down or bottom-up, creator-led or creative coalition-led project designs. However, the question of how the inner dynamics and systems of creative industry clusters operate and respond to the given physical environment has little been touched upon. Also, how creativity and knowledge flow and exchange are generated within the creative industry framework, more importantly their operational structure has been disregarded. Districts as agglomerations of their unique structure of creative industry are considered as sites of ecosystems in where different components in different levels stimulate the business and physical environment. The ecosystem metaphor widely focused in many previous creative ecology, business ecosystem and ecosystem management literature (see. Moore, 1993; Pirot et al., 2000; Argote et al., 2003; Dvir & Pasher, 2004; Shorthose, 2004; Iansiti & Levien, 2004a; 2004b; Teece, 2007; Hearn et al., 2007; Duxbury & Murray, 2010; Chen et al., 2010; Chan, 2012; Winden et al., 2012; Kannangara & Ugucioni, 2013) has not been reconsidered from the planning field nor yet employed to describe creative environment and creative industry clusters.

Comparing to the international literature on the same subject, creative industries is relatively new to Turkey in terms of practice and research. Despite the growing interest on the subject in the international context, there is a need for adding to the limited number of research on creative industries and creative industry clusters in Turkey. From the creative industries perspective, the latest developments in creative industries are noteworthy in Turkey. However, available information has been disintegrated and benchmarking studies with other countries and creative cities have not

adequately been developed (e.g. Aksoy & Enlil, 2011; Guran & Secilmis, 2013; Lazzeretti et al., 2014). Besides, previously conducted researches on different localities in Turkey are relatively new that date back to 2008. More importantly, there have been only a limited number of research studies and theses which focus on the city and sectoral/industrial levels in Turkey (e.g. Gulcan and Akgungor, 2008; Durmaz et al., 2008; Ozkan, 2009; Ozturk, 2009; Durmaz et al., 2010; Uckan, 2011; Dogan, 2011; Enlil et al., 2011; Evren, 2011; Cetindamar and Gonsel, 2012; Incekara et al., 2013; Lazzeretti et al., 2014).

The spatiality of creative industries has been growing interest among the scholar in Turkey for a decade. However, many of the conducted studies and organizations have concentrated in the case of Istanbul. There has been a considerable place for Istanbul among the prime cities with a potential for the development of the fashion industry in Turkey. Regarding its central position in commercial and economical activities and its global reputation, Istanbul can be described as a center of Turkish fashion where creative activities are located, various related fairs, activities and fashion shows take place, where the initial attempts have been made and where many institutions of education have been situated. On the other hand, along with the growing educational opportunities, recent design city attempts in city through the creative industry promotion, the historical path and the spatial agglomerations of the production and retail sites of wedding wear firms as well as the established, well-known fairs, Izmir appears as a secondary center. There is a need for a comprehensive research to explore and evaluate the spatialities and structure of the emerging wedding wear cluster as sub-sector of fashion industry in Izmir due to its current major role as a sectoral driver of Turkey and its place in the global trade market. For the wedding wear sector within the fashion production of the country, Izmir dominates the Turkish market. The conditions of the wedding wear sector specific to Izmir have been studied in the recent research reports (IZKA, 2009; 2010; 2013; IEU, 2013). However, these studies are rather conventional, restricted to economic sphere of analysis and organizational structure and particular locational distribution of the sector cluster are still unexplored.

Consequently, there is a growing concern to acknowledge these needs and obstacles with a research taking the currently emerging creatively potential sectors into consideration under the creative industry theoretical framework and understanding their internal dynamics and unique structure through particular and more sensitive approaches.

1.2. Aim of the Study

The aim of the study is to evaluate organizational and spatial structure of the wedding wear cluster through the ecosystem approach. This study underlines the ecosystem approach, focusing on the internal dynamics of creative industry clusters in a particular space.

This rather broad aim could be further broken down into a more specific research question which also evolved during the course of this study. By taking the wedding wear sector as a sub-sector of fashion industry and approaching to creative industry clusters from the ecosystem perspective, the research of this study is seeking answers to the question of how the cluster of wedding wear sector operate as an ecosystem in terms of the diversity, interaction, competition and evolution measures.

Initially, the present work constructs the ‘ecosystem approach’ also for the chapter flow through the structure this dissertation. It starts exploration from the individuals, creative industries, cluster resources, external environment and reaches to its own unique ecosystem for analyzing and contextualizing the interrelationship and dynamics of the wedding wear sector and with the surrounding environments. Here, various theoretical concepts and previous researches as well as recent creative industry practices are investigated. Secondly, ecosystem approach is grounded through the necessary tools and definitions predominantly derived from the creative ecology, business ecosystem and ecosystem management fields in order to build the model and survey. Following, wedding wear sector clustered in Mimar Kemalettin Fashion District, Izmir, Turkey is analyzed through the proposed DICE model indicating the measures of ecosystem characteristics as diversity, interaction, competition and evolution.

1.3. Methodology

The thesis is specifically seeking an answer to its research question of how the wedding wear cluster operate as an ecosystem, through a case study. The case study analyzes the wedding wear sector, as a sub-sector of the fashion industry, clustered in Mimar Kemalettin Fashion District in Izmir, Turkey in terms of the ecosystem

measures; diversity, interaction, competition and evolution. Then, it evaluates and relates its measure to each other and the given spatial conditions concerning the particular characteristics of clustering. The below sub-questions have been answered in line with the following four chapters;

- What is a creative industry? What is the role of creativity in creative industries, specifically in the fashion industry? What are the different stages of creative production? How has the fashion industry evolved as a creative industry? What are the intermediaries, related businesses and sectors associated with the fashion industry?

- What is the concept of clustering? How are the spatial environment and proximity evaluated in clusters? What are the different types of creative clusters available in urban environment? What kind of different characteristics and formations do the existing clusters of fashion industry and/or its sub-sectors have?

- What is the framework of the external environment for emergence of creative industries and creative industry clusters? What are the conditions of creative industries in Turkey in terms of research and practice? How has the fashion industry developed in Turkey and what is the role of wedding wear sector in Izmir?

- What does the creative ecology mean as a metaphor? How have the ecosystem approaches been employed in different scientific fields researches? What are the key concepts in such ecosystem researches? How can the ecosystem approach be constructed and employed for an urban research on creative industries, particularly the fashion?

The methodology used for this dissertation and its evolution can be broken down into the following stages of data collection: continuous literature review, preliminary studies for constructing the focus, establishment of the research approach with a set of measures of the proposed model, pilot study for testing and enhancing the system of the model, and lastly the case study to employ the model through proposed variables, analyses and extraction of conclusions. The empirical work was based on the collection of literature, formal meetings with the related NGOs, site visits, direct observations and field surveys and additional interviews.

I. Literature Review

Library research: The libraries of Izmir Institute of Technology, Dokuz Eylul University and Izmir University of Economics have been used to access related

literature as the books, theses and magazines as well as the research papers in the recent publications.

Online research: For the e-journals, reports, recent research and design projects; the digital library of Izmir University of Economics and Izmir Institute of Technology as well as the standard and academic search tools have been utilized to reach the literature concerning the subjects similar to the content of this study. Additionally the recent theses completed within last 20 years in Turkey have been searched on the web archive of National Thesis Center of Council of Higher Education. The theses search has been limited to the related fields as city planning and architecture.

The research with the review of previous studies has led us specifically to gain the knowledge of the measures as well as of how to integrate them, which should be taken into account in a research coping with the internal dynamics of creative industries. Hence, the case study has been based on the investigation of those measures. In addition, through the constructed DICE model with major components (diversity, interaction, competition, evolution) - so-called measures, this study has illustrated the correlation between those measures as well while presenting the ways how the insights from creative industry ecosystems are transferable to urban planning decisions. The literature review has also helped us with defining the problems in relation to the subject of this study.

II. Preliminary Study

Following the emergence of the research idea on creative industries, a more specific set of goals and research questions related to the creative industries (and also to the case) has been evolved exclusively to the organizational and physical distribution of the fashion industry. Fashion industry has been chosen as a particular focus of research to be carried out in Izmir. How the fashion industry operates in Izmir has initially been investigated from December 2011 to August 2012. The preliminary research has been carried out through the snowball sampling method. This qualitative research has aimed at drawing its business network and locational organization as well as bringing out the problems and suggestions. The data for business network has been processed using components involved in the network and considering some actors with their major and minor roles, and their connections in creating such business network and the data for its locational characteristics have been analyzed. The details of the preliminary study are given in Chapter 6 prior to the case study. After having investigated the role of

networks and physical allocations of the fashion industry, the concentration of this study has moved to the wedding wear sector. Since the overall finding has shown that there is hardly a formed and absolute fashion district in Izmir and Izmir rather consists of wedding wear sectoral firms and their concentration in the inner city, as well as outsourcing and manufacturing based organized zones, wedding wear sector then has become the focus for the present dissertation.

The reason for shifting the concentration to the wedding industry has also been due to the Izmir Development Agency (IZKA) 2012 funding became available for project application. Upon project application to the funding, the focus has again been discussed and refined considering the opinions of the project coordinator, project group and extended members from Izmir Development Agency, Aegean Exporters' Unions (EIB), and Aegean Clothing Manufacturers' Association (EGSD). However, due to some reasons, the proposed project focusing on the cluster of wedding wear sector could not be commenced. Yet, an immediate need for such research has been realized throughout the application process with regard to the preliminary interviews with policy makers and organizations as well as with the chambers during the fourth-month project application period.

III. Research Approach and the DICE Model

After these investigations including interviews began the process of changing the overall research objectives and the methodology. In particular, the research began to move away from a focus on index based research towards an engagement with the ecosystem dimension of the creative industry clusters. The ecosystem approaches to the creative industries have brought a method which intends to examine certain components. The approach in such subject is based on the application of appropriate scientific methodologies focused on levels of workers and firms that indicated very specific internal and external processes and interactions among each other and their physical space. Ecosystem approach may be pertinent to researchers who are interested in studying dynamic process in creative clusters. For the concern of the present study, the ecosystem of creative industry clusters contains spatial creative-based activities of creative industries. It suggests that the creative activities include socialization, externalization, combination, and internalization and many concepts to be mentioned in Chapter 5 in details.

Regarding the ecological approaches, the ecosystem of a cluster, as well as the general structural flow of this dissertation, is composed of four sub-segments: individuals, creative industries, cluster resources, external environment. Different types of creativity and creative knowledge have been taken granted within the ecosystem of creative industry clusters since the conception of the creative industries are claimed indicating creativity and intense knowledge. Individuals with creativity merge core component of the cluster. They have a central in the system for creativity. Individuals can influence where, when, and how creativity is generated. On the other hand, individuals are free from the industry boundaries in the search for creativity; and they can compete with each-others and even with companies for creativity and knowledge extraction at multiple points of exchange. The products designed, processed or produced by the creative individuals in firms form the structure of creative clusters. Cluster conceptually also indicates these firms, their value chain, culture, and intermediaries as well as the spatial and non-spatialities of their concentration which all together are considered as the ecosystem resources. On top of the cluster resources, there are the external environment that among others mainly contains new economy formation, shifting urban and sectoral policies according to continuously growing urban environment. These maintain a balance with the external and internal environment of a cluster to maximize their interests through the four ecological measures: diversity, competition, and evolution. The following figure (Figure 1.1) illustrates their relationships;

Ecosystem approach addresses many factors that produce today's dynamism, rapidly changing structure, especially the way how creative industries operate. Before start, it should be mentioned that the 'creativity' is the nucleus of the model for the success of creative habitats. It is the core entity of creative industry conception. The role of creativity in relation to creative industries, fashion industries in particular and the classification of creative sectors in different models are discussed at Chapter 2. Since the urban environment is seen as a prerequisite condition and the basis for the physical, social and economic contacts between different measures of ecosystem, the role of space for the creative industry clusters is discussed in Chapter 3. Ultimately, each four components of analysis will be quantified and qualified with regard to the given urban environment based on the data collected through the empirical work and related investigations carried out on the site (Figure 1.2).

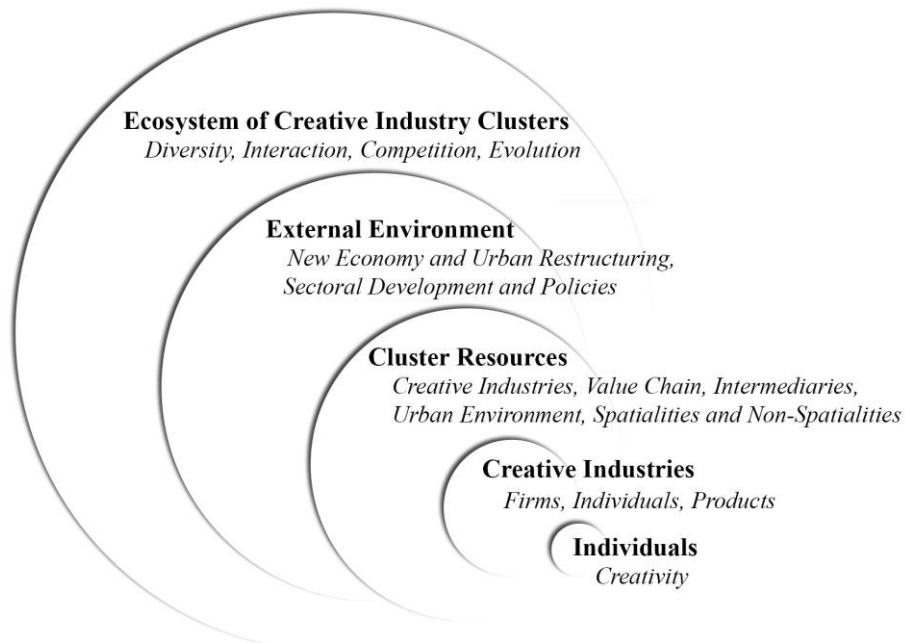


Figure 1.1. Conceptual Illustration of the Ecosystem of Creative Industry Clusters

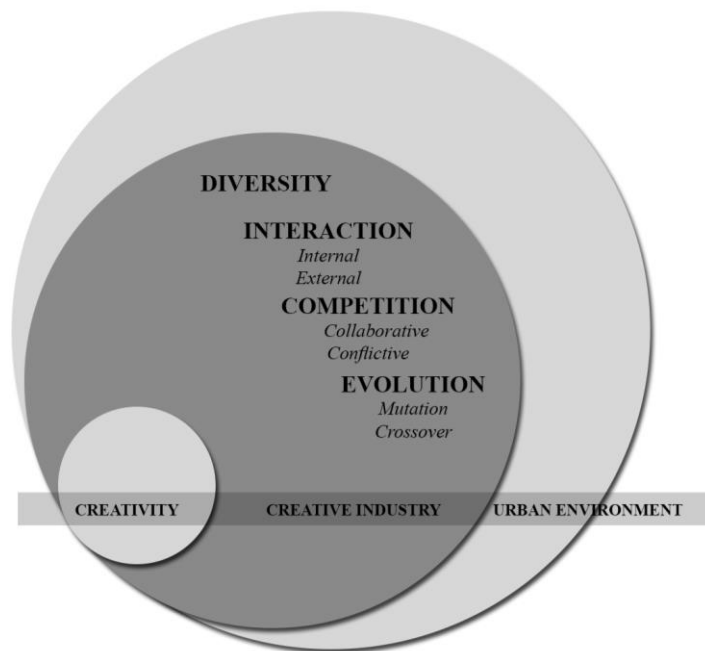


Figure 1.2. Conceptual Illustration of the DICE Model

Along with the review of previous studies employing the ecosystem approach in different fields, the key ecological concepts and how those concepts are examined under the significant factors and added into the development phase of the DICE model (for details see Chapter 5). Development of four key measures of the DICE model; namely, diversity, interaction (external-internal), competition (competitive-cooperative), and

evolution (mutation-crossover) in terms of their general definitions and their crucial uses in the model are described and each measure are considered and specified with the fashion industry perspective in Chapter 5 in details.

IV. Pilot Study

This pilot study intends to partially apply the method of the proposed dissertation on a case study to see the possible outcomes as well as to notice likely problems and needs in order to improve the quality of the work. Pilot study covers questionnaires and interviews only with 12 firms (either with the experienced employee or employers) regardless their scales. The research has indicated semi-structured interviews with the firm representatives located in the wedding wear cluster, Mimar Kemalettin Fashion District Izmir, and the data processing and evaluation stages via the DICE model measures. The data collected through an intense and detailed-questionnaire has been conducted from December 2012 to June 2013. The questionnaire has been carried out with 12 large scale wedding wear firms located along the main boulevard in the Mimar Kemalettin Fashion District where hundreds of firms in various scales are clustered in the entire district. Locationally, main boulevard, as a very vivid core of the cluster, has been taken under focus since the firms are found here behaving more professionally in the sector. In addition to that, relatively larger size firms have been selected randomly and each owner of the firms has been questioned for 30 minutes with regard to the preliminary DICE survey. Some of the questions have been left open-ended in purpose and their responses have been interpreted within the ecosystem approach. The questionnaire containing 30 questions have enabled the formation and development of the core analysis model of present study.

Such pilot study has provided a new perspective to the understanding of wedding wear sector. More importantly, it has considerably contributed to the methodology testing and development and has constructed series of queries to investigate the DICE measures in the context of wedding wear sector as a sub-sector of fashion industry. The pilot study was, all in all, a base for revising the DICE Model as a method and DICE survey as a questionnaire.

V. Case Study

Rationale of the Case Study Selection: There is a need for generating adequate information based on understanding of the ecosystem of emerging wedding wear under

the fashion industry in Izmir for planning decisions in order to achieve a possible role for the city within the conditions of new economy and urban restructuring.

The role of fashion in identity-formation has created a situation where fashion can be taken seriously in city planning. For cities, fashion can be a powerful marker to lead and shift the consumer culture. Throughout the past years, the city of Izmir fell behind in the global inter-urban competition and began to lose its appeal among the other Mediterranean cities. Consequently, Izmir Metropolitan Municipality collaborating with the representative from different sectors, non-government organizations, and universities has intended to gain its previous reputation and envisioned a creativity-based development to overcome this deficit. Paving a new path for its future development is now seen urgent by the city managerial. Fashion industry is thus found in the core of such intention for Izmir, regarding the creative potential. With the recent developments, Izmir has started to see the fashion industry as creative potential, increased profits and opportunities for exclusively on wedding wear sector as a sub-sector. That brings the existing wedding wear sector and its ecosystem to a vital point for development. For the last three years, it has been observed that the wedding wear sector has been evolved into a developing cluster (see IZKA, 2009; 2010; 2013). Previous research based on the statistical data and conducted with the key actors in the region by the Izmir Development Agency (IZKA, 2010) has presented three major clusters for the Izmir metropolitan area; mature clusters, developing clusters and potential clusters (IZKA, 2010).

The data has been collected from the records of Ministry of Finance, The Union of Chambers and Commodity Exchanges of Turkey, TOBB, Aegean Exporters Union, Aegean Region Chamber Of Industry, Izmir Chamber of Commerce, Turkish Patent Institute and Turkish Republic Social Security Institution in 2008. The strength of such metropolitan cluster in an industrial category has been appraised through a three-star methodology based on the size where the number of employment within the same cluster is greater than 6% of all the same sectoral employment of Turkey received a star; the focus where the number of employment within the same cluster is greater than 1% of all Izmir's total employment received a star; and the specialization where the employment ratio of the same cluster to the Izmir's total is greater than 1% of the employment ratio of the same sector to the total employment in Turkey received a star. According to the findings wedding sector has been evaluated as a promising one and included in the potential cluster categorization (Table 1.1).

Table 1.1. Izmir Clustering Categories with Sectors
(Source: IZKA, 2010)

	Mature Clusters		Developing Clusters		Potential Clusters	
Sector	Cooling, Industrial Ventilation and Air Conditioning	Canned Food	On-Car Equipment	Chemistry (used in ceramic, leather, glass sectors)	<i>Wedding Wear</i>	Logistic
Place	Çiğli Bornova Konak	Kemalpaşa Torbalı	Çiğli Bornova	Konak Bornova	<i>Konak</i>	Konak Bornova

Therefore, wedding wear sector is now under focus for the future development. Very recently, Mimar Kemalettin Fashion District has become a focus regarding various design-related intentions of the city in the progress of constructing a new role for its future. One of these intentions involves promoting the district as a wedding wear capital spatially and organizationally. This aspiration brings the existing sector and its ecosystem in attention, and wedding wear sector and Mimar Kemalettin Fashion District has been chosen as a case study area.

The case study area of this study covers the wedding wear firms located around the Mimar Kemalettin Fashion District and adjacent area. The district is located in Konak Cankaya District surrounded by Cumhuriyet Boulevard in the west, Fevzi Pasa Boulevard in the south and Gazi Boulevard in the north, and positions along the west-east axis.

Rationale of the Sub-area Selection at the Case Study Area: If the ultimate goal here is to investigate the components of ecosystem, the sample space should not be limited to a certain criteria. However, since the general characteristics of the ecosystem here are basically composed of the wedding wear manufactures, they have been selected as the target of the present case study. That is heavily based on the assumption that there is a significant role of the so-called ecosystem of the wedding wear sector in Mimar Kemalettin Fashion District and the existing manufacturers are the founders and primary, structural, functional, and biological units of this ecosystem.

Unlike the previous creative industry cluster researches in the field of city planning focusing on merely on the creativity, creative class or either physical dimensions, the present study takes its roots from the ecosystem approach. Rather, the ecosystem, here, should be investigated through all its units in order to achieve the facts about the current situation in Mimar Kemalettin Fashion District and to eliminate the

possible obstacles likely to be made on the sample space selection criteria with the existing constraints. Therefore, all 266 wedding wear firms located in Mimar Kemalettin Fashion District have been reached in the data collection process. Particular locational distribution of the investigated firms and the firms surveyed with are given in Chapter 6.

Field study - Data collection: The field study has been conducted in two different periods. The first field study was conducted between 10 - 27 May 2014. In total 331 wedding wear firms including wedding dresses, wedding suits and evening gowns, and 31 suppliers of buttons, yarns, fabrics, laces, beads which associated with the sector was recognized. The findings of the site analysis have been updated through a second field study where the previously investigation findings have been updated and further observations for the site analysis were conducted. More importantly, the final version of the DICE survey has been carried out on the site. The time period for the second field study was carried out 2 February - 12 March 2015. In general, through these stages, data collection process consists of three major stages of site analysis, the DICE survey and additional interviews.

▪ Site Analysis: In terms of the site analysis of the wedding wear cluster in Mimar Kemalettin Fashion District, the following items have been investigated through the field study and also through the literature review;

➤ **Development of the District:** The history of the district has been presented to give insights for its development as an inner city trade center through years and its evolution into a fashion district with the recent planning and design intentions. The findings that derived from the additional interviews, concerning the management issues around the area and the role of the association have also been investigated.

➤ **Spatial Structure of the District:** Location of the site and the Implementation Plan, Conservation Plan, Land-use Plan and Building Heights has been retrieved from the existing Mimar Kemalettin Implementation Plan in use. These data has been employed to explore the general understanding of urban settings and structure of the district. That is complimented and visualized by the pictures taken during the conducted several field studies.

➤ **Cluster of the Wedding Wear Firms:** Several mappings and use of the illustrative methods and following figures in this section show how locationally the wedding wear sector is distributed and clustered in Mimar Kemalettin Fashion District. Initially, the number of wedding wear firms per urban block has been analyzed around the case area.

That gives an overall view of the cluster in terms of density. Following, distribution of wedding wear firms have been analyzed according to their positions as ground floors, first floors, second floors and third floors and up within the buildings separately. In addition to the firms, the locations of the suppliers which have very close ties with the sector have been mapped.

- The DICE Survey (Questionnaire): The DICE survey has been designed as a very detailed questionnaire for the case study of this dissertation. The measures of the DICE model; diversity, interaction (external-internal), competition (competitive-cooperative), and evolution (mutation-crossover) have been researched through particular inquiries on the DICE survey. For each inquiry, five ordered response levels (Likert-type scale) are employed for design of the DICE Survey (see. Appendix A).

Each research queries proposed to investigate the details of each DICE model measures have been complemented with insights from the fashion industry context (see Chapter 5). All the proposed queries derived from the pilot study and literature review, and reviewed by the committee members have been lastly tested with chosen firms which are relatively mature several times on the site in 20 - 23 January 2015 just before the second field study in order to make sure the DICE survey at the questionnaire was applicable and assessable. All the tested inquires have been re-evaluated and re-designed prior to conducting the final version of the questionnaire in the second field study. The finalized research queries are given at the end of the description of each measure in tables in Chapter 5.

With the start of the second field study, it has been observed that 65 of the previously investigated firms had already been closed. For the data collection through the DICE survey, thus, each of remaining 266 firms located in different spots in Mimar Kemalettin Fashion District have been contacted and asked for being a respondent to the prepared questionnaire from 2 February to 12 March 2015. All the respondents were either the owner or manager of each firm. In case of owner or manager could not be reach on the site or for those who have workplace in somewhere else other than the firm, questionnaires have been sent to them by responsables of firms. Thus, all the questionnaires have been filled with owner or manager of each firm. Majority of the owners were men while almost all of the responsables working in the firm was women. Among those 266 wedding wear firms, 28 of them are only engaged in wedding wear retailing and have been excluded from the DICE survey due to the sample space

selection rationale. With the intention of reaching all the manufacturing firms, several requests have been made in different time periods to those firms which refused to participate (maximum seven times in different times or weeks). Eventually, there have been 132 manufacturers as respondents that accepted to participate to the questionnaire (approx. 55% rate of return). The reasons of why the other 106 manufacturers refused to take part and other field study issues will be discussed at the following section of limitations and shortcoming of the methodology.

- Additional Interviews: For further investigations on the cluster developments around the case study area, a series of interviews have been carried out by the representatives of Mimar Kemalettin Fashion District Association and by relatively more mature wedding wear firms. The interviews have been conducted individually. Not only for the physical cluster in terms of its history and development, but also earlier and more recent relations among the firms situated at the area has been interviewed and explained at the section of Development of the District. These data have been employed complementary to the literature review on the development of the district and sector given in the beginning of Chapter 6.

Data Analysis and Evaluations: As a starting point of analysis of the wedding wear cluster, distribution map of the all manufacturer firms, retailers that have been excluded and finally the survey respondents in the case study area have first been mapped. The exact locations of the firms participated to the DICE survey has been identified. The findings collected via the DICE survey for each those firms have been processed through detailed analyses to show the role of the diversity interaction, competition, evolution measures of the DICE model within the wedding wear ecosystem in Mimar Kemalettin Fashion District.

Taking into consideration these four measures and space within the ecosystem, the study specifically presents the data sets as presented at the following tables Table 1.2 and Table 1.3 (see. the Appendix B for full list of variables, definitions and unit of measures).

Table 1.2. Data for Descriptive Analysis of Ecosystem

Data Name	Indication	Nr. Of Questions
Data Set 1	DICE Model Measures	Diversity 5 variables
		Interaction 62 variables
		Competition 11 variables
		Evolution 38 variables
Data Set 2	Advantages of Sectoral Cluster:	12 variables
Data Set 3	Advantages of Spatial Clustering	12 variables
Data Set 4	Locational Distribution of Manufacturing and Retailing	4 variables
Data Set 5	Occupational Distribution	16 variables
Data Set 6	Services Outsourced by Firms	9 variables
Data Set 7	Environmental Obstacles	11 variables
Data Set 8	Firm Characteristics	7 variables
Data Set 9	Planning of the Spatial Environment	4 variables
Total		191 variables

Table 1.3. Regression Analysis for the Relations of the DICE Components

Dependent Variables	Definition	Unit of Measure
Int_1	Internal interaction	Likert scale 1 to 5
Int_2	External interaction	Likert scale 1 to 5
Comp_1	Collaborative competition	Likert scale 1 to 5
Comp_8	Conflictive competition	Likert scale 1 to 5
(Evol_11 ... Evol_17) Average	Mutation	Likert scale 1 to 5
(Evol_18 ... Evol_23) Average	Cross-over from the cluster	Likert scale 1 to 5
(Evol_24 ... Evol_29) Average	Cross-over from outside the cluster	Likert scale 1 to 5
Independent Variables		
Designer Employment Outsourced Design Consultancy	The role of design	Likert scale 1 to 5
Org_3 Org_4	Firm characteristics	1-0
Org_1 Org_5 Org_6		Nr.
Int_1 Int_3 Int_4 Int_5		Scales of interaction
Int_6	Geographical proximity	Likert scale 1 to 5
Int_32 Int_33	Mediums of interaction	Likert scale 1 to 5
Comp_1 Comp_3 Comp_4	Scales of collaboration for competition	Likert scale 1 to 5
(Evol_1 ... Evol_10) Total	Attempts for evolution	1-0
Cluster_1 Cluster_2 Cluster_3 Cluster_5 Cluster_6 Cluster_7 Cluster_8	Benefits of sectoral clustering	Likert scale 1 to 5
MK_1	Spatial clustering for proximity	Likert scale 1 to 5

All these methodological steps have enabled us to evaluate how wedding wear cluster operate as an ecosystem in a given space, regarding the diversity, interaction, competition and evolution measures. In addition, from the urban planning perspective, this study contributes to how creative industry clusters can be approached, understood and intervened in order to realize a more concrete plan on a creative urban development. For the wedding wear sector, understanding of its structure evaluated regarding its ecosystem will therefore be very significant to the planning field for delivering a creative future as well.

VI. Limitations and Shortcomings

Refinement of the Preliminary Research Objectives: The first set of limitation started with a possible problem of data collection for what has been proposed in the preliminary research objectives based on a more index-based research to creative industries in Izmir. A more specific set of goals and research questions related to the creative industries have then been evolved exclusively to the organizational and physical distribution of the fashion industry. The preliminary research (Mengi & Velibeyoğlu, 2012) has been carried out with the snowball sampling method. Fashion industry has been chosen from the given creative industries for this study. After having investigated the role of networks and physical allocations of the fashion industry preliminary investigated, the concentration has moved to the wedding wear sector. After these investigations including interviews has begun changing the overall research objectives and the methodology. The invitation as consultant from the academy and involved in the research on the same subject have been made by the research group in the Aegean Exporters Union. The scheduled meetings were conducted between June and July in 2013. Such meetings with an external research group in this non-governmental organization have allowed different issues to emerge and have pushed the research questions into different directions. In particular, the research has begun to move away from a focus on index based research towards an engagement with the ecosystem dimension of the creative industries.

Locational Mapping: The locational distribution of the existing wedding wear firms have had to be generated via convenient mapping techniques collected from different stages of field studies due to the lack of information their positions both vertically and horizontally on the site. Many of the firms have currently no sign of existence at the street level. All the buildings have been visited and firms in upper floors

have been investigated to generate such data. The only information for the case study selection has been the findings for the sector in the previous research projects (IZKA, 2009; 2010; 2013; IEU, 2014) as well as observable agglomerations of the wedding wear firms. There were not such locational data before this study started.

Wedding Wear Firms and Registrations: Complimentary to the identified wedding wear firms' locations in the field studies, the data for the manufacturing firms registered in the wedding wear sector or segment have been tried to be reached. However, it has been observed that each firms located in the Mimar Kemalettin Fashion District is registered in different institutions, namely, Aegean Export Association, Izmir Chamber of Commerce, Aegean Clothing Manufacturers Association, Izmir Union of Chambers of Artists and Artisans and under several different codes and sectors. For instance, on the official web page of Izmir Chamber of Commerce, there was a research tool to find the commercial registers based on their businesses activities within the NACE codes. Yet, the results were so confounding that the firms shown in the results were hardly identifiable since it was unrealizable to detect the exact business profile as well as location of firms based out of this information. According to this data, any given location other than the Mimar Kemalettin Fashion District might be involved in the research, and also any given firms on the web page might be dealing with some other business other than the wedding wear.

Previous Data Retrieval: Some refined data concerning the firms (export volume, firm-scales, employee number and some similar quantitative data) located on the site has been tried to be contacted through previous researches in order to make a sample selection for the case study. Firstly, regarding the previous research conducted by Aegean Export Association on the competitiveness of this sector (unpublished), their collected data and/or some little information about the firms that how they chose as a sample group have tried to be retrieved. Unfortunately, Aegean Export Association did not agree to share their data and their selection method. The only information they have shared is that the interviews have been conducted with only 25 firms located on the site and the firms were selected randomly among the registered ones to the Mimar Kemalettin Fashion District Association. The findings of this research are also yet available and unpublished. Secondly, Izmir University of Economics in collaboration with Izmir Chamber of Commerce and Ministry of Economic has also conducted a research project investigating the clustering the wedding wear sector in Izmir (IEU, 2014). Project group members have been accessed via e-mails to retrieve some

information about the firms regardless the localities of firms, any data available in numbers have been requested. However, they have disagreed on sharing or exchanging any information out of the project. After the publication process was completed, the research report has been obtained. Yet, the methodological issues unfortunately have not mentioned in details at the publication.

Data Collection via the DICE Survey: Before the survey, all the members of the Mimar Kemalettin Fashion District Association and Aegean Clothing Manufacturers Association were contacted via e-mail and informed about the survey. Yet, only few appointments have been taken from these firms. Therefore, many firms could only be requested for the questionnaire instantly on the site and in person. The study was not conducted weekdays and weekend mornings due to the work schedule of firms on the site, and there have been some few cancellations and off-days due to the weather conditions as well.

Data collection process for the DICE survey was carried out with the partial help of two external assistants in order to time-manage on the site as in the need of collecting the surveys from different spots at the same time. These external assistants have only been involved in the collection of the questionnaires already distributed, given or appointed in advance by the researcher.

For the data collection process through the DICE survey indicating a detailed questionnaire, any ready-made online survey has not been adopted considering the intention of the overall research and rationality of the DICE Model that focuses on the internal dynamics of clusters. On the other hand, the online communication skills have not also been selected due to the trust issue and not involved in the data collection. While the intention was to investigate the very nature of the existing cluster through manufacturing firms with face-to-face relations, the DICE survey has been carried out in person by the researcher. That also has enabled observations and to gain experience about the sector on the site. Therefore, face-to-face communications have helped to convince respondents to acknowledge that they were the primary source of the data, and the importance of clustering on the site. Even that short-term interaction between the respondents and the researcher has created a very basic understanding on firms about clustering and the value of the sector for urban research and city planning. Yet, such awareness was not enough to be able to get returns from all of the firms questioned on the site. By the time spent on the site, almost all of the firms, in general, had an idea of this ongoing research however still was not willing to cooperate or participate.

Out of 238 manufacturer firms, the reasons of why 106 of them did not take part for several reasons. The overall reason has been that the firms located on the site do not trust external bodies and are unwilling to get involved in such research. Even though different institution names and intentions have been mentioned in order to convince them, they have not changed their minds. Secondly, it has been observed that there has been a series of excuses raised by firms to not to participate to the survey at each visit (max. seven visits has been done for one firm). The most common excuse has been the claim that the owner was out of country (in some cases some owners was located in other cities, and within the time period on the site, the survey has been sent to them and collected back by their employers who were comparatively more anticipated for contributing to such research). In some other cases, some owners or managers have been reached by a telephone call and they still refused to take part. Thirdly, great number of firms believes that the former research projects that they participate as interviewees or respondents have not worked out and have not been done any good to their current situations. Lastly, even though some of the firms have good relations with the Mimar Kemalettin Fashion District Association and despite that the researcher has been introduced to those firms in advance by the association, firms still refused to participate. On the other hand, there are also said some further firms unregistered, without any signs of existence in this cluster where they are located on the upper floor of the existing buildings and work as ateliers for some other firms and/or haute couture. They have been difficult to be explored and identified as an individual researcher.

The other challenge with the data collection process based on the observation and experience on the site has been the distribution of the DICE survey on the site. While the data collection from the firms located at the ground floors has been relatively easier comparing to the one at the upper floors. The upper floors at the buildings have been observed more private and hard to reach to the firms. However, surprisingly, the firms willing to participate to the DICE survey has been the ones located on the upper floors and relatively small manufacturing ateliers comparing to large scale firms with showrooms at the ground floor.

Another issue can be the relation of the DICE survey through a detailed questionnaire and additional interviews as a possible limitation in the process of data collection process. The design of the DICE survey has been proposed after having done the pilot study with the ecosystem approach indicating a preliminary questionnaire and open-ended interviews, intensified with the literature review of the fashion industry and

previous creative cluster researches, reconstructed and then again tested with several respondents from the firms, and eventually finalized for the data collection. The rationale of the survey has been kept in accordance with the DICE measures. On the other hand, additional interviews with different scales of manufacturing firms have been carried out. However, these two data has been kept separate. The additional interviews have only been used to present the development of the district and the current conditions of the physical environment and sector. The comments that possibly contribute to the understanding of the district, cluster and the sector are given at Chapter 6 to describe the development and the current conditions of the district prior to the data analysis through the DICE components.

Linguistic and Terminology: When conducting the prepared questionnaire in Turkish, some linguistic limitations have been encountered in terms of providing the conceptual links which was originally set out in English. Particularly, through the ecosystem literature, communicating with the DICE measures to the survey respondents has been challenging when conducting the interviews in Turkey.

1.4. Structure of the Study

After a brief introduction in chapter one, the second chapter defines the core components of the ecosystems of creative industry clusters; creativity, creative class and creative industries, and presents various creative industry classifications derived from previous approaches and models. The chapter focuses on the fashion industry as a creative industry, first, from, the economic and manufacturing perspectives; second, sociological perspective; and third, from the urban environment and then the chapter explores the structure of fashion through particular value chain and necessary intermediaries involved.

The third chapter argues the concept of the clustering of economic activities, specifically of creative industries, and investigates the role of space through several proximity concepts by multiple scholars and thought schools in terms of spatial and non-spatial. Different stages of clustering and their evolution processes are examined in this chapter. More importantly, previously emerged fashion industry clusters in the world and their spatial features as well as their unique developments are reviewed.

The fourth chapter gives an overview of the external environment in which this study is embedded. First, it discusses the conception of new economy that has driven multiple urban restructuring, specifically in the inner cities along with the creative industry formations. Second, the chapter explores the shift from the Fordism to the Post-Fordism in the developed countries where such debates, on one hand, correspond to the transition from the cultural industries to creative industries, and on the other hand, define new relations between culture, creativity and economy regarding the post-modernism, spectacles and consumerism. Third, the recent and current issues of creative industries both in theory and practice as well as related developments and organizations in Turkey are presented. Lastly, the fashion system in Turkey and recent developments in the wedding wear sector are described.

In the fifth chapter, the ecosystem approach is explained, discussed and presented through the review of the previous studies from the fields of business ecosystem, ecosystem management and creative ecology. Following, major ecological concepts are examined under the significant factors, and possible measures have been integrated into the DICE Model. Each measure of the model is reconsidered from the fashion industry perspective and specified to be employed in the DICE survey.

The sixth chapter, after having reviewed the overall fashion industry formation in the city, investigates the cluster of wedding wear sector in Mimar Kemalettin Fashion District in Izmir/Turkey from the ecosystem perspective, through the diversity, interaction, competition and evolution components of the DICE Model. The given analyses are realized via evaluations of the regression analysis and comparisons of the DICE model components. Those analyses are complimented and reconsidered through further evaluations through sectoral clustering and spatiality of the wedding wear sector in order to explore how the given sectoral cluster operates as an ecosystem in the given urban environment.

In conclusion, after reviewing all the findings derived of this study, particular outcomes and conclusions are presented regarding case study. Following, general recommendations are suggested for policy implications specific to its spatial and organization nature of creative industry clusters and their ecosystems. Lastly, the suggestions for future research are given in the last chapter. The following figure (Figure 1.3) summarizes the structure of this dissertation.

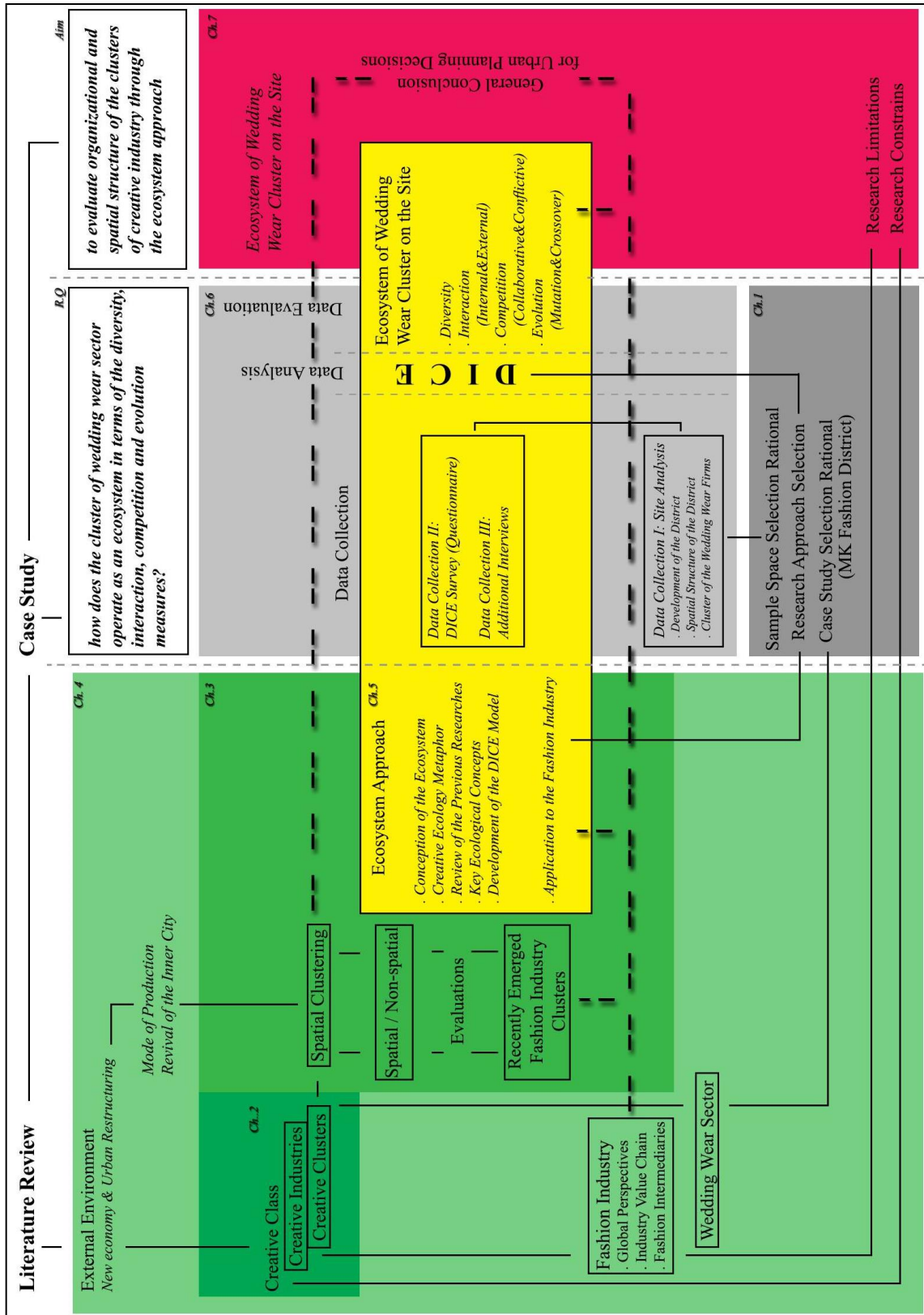


Figure 1.3. Structure of the Study

CHAPTER 2

CREATIVE INDUSTRIES AND FASHION INDUSTRY

This chapter aims to discuss the core components of the ecosystems of creative industry clusters; creativity and individuals, and creative industries and their structures and systems. Therefore, the chapter starts with necessary definitions of creativity, creative class and creative industries. For the purposes of this dissertation, the general definition of the creativity has been adopted into creative industries where value is primarily dependent upon it. Second, the chapter explores different definitions have been put forward to provide a comprehensive understanding to the creative industries through different approaches and models proposed in different reports, researches and other contexts over the recent years. Third, the value chain as a group of sequential activities to provide value to the end customer is investigated starting from the conventional to more specific to the creative industries. Additionally, the chapter emphasizes the creative venture associated with the fashion industry practices. Thus, the forth section highlights how fashion evolved as a creative industry, and how it expanded as a global system. That gives a brief global perspective on the fashion industry. Next, the structure of the fashion industry is discussed with regard to its particular value chain and many necessary intermediaries involved in the fashion system.

2.1. Creativity and Creative Industries

From the urban perspective, creativity is an integrated process including social, economic, political, cultural and environmental assets that together cover every aspect of urban living. Such studies are likely to focus on spatially and temporally defined political, economic and social environments and their impact on the processes of creativity (e.g. Hall, 1998). In the context of the creative industries, most of the existing claims make emphasis to the role of spatially concentrated clusters of creative workers (e.g. Rantisi, 2002a). For example in Scott's work (1999; 2000) the attributes of particular places have been explored and found that their ability to promote aesthetic creativity within clusters of creative economic activity (Drake, 2003). In the economic

context, creativity can be described as “formulation of new ideas and to the application of these ideas to produce original works of art and cultural products, functional creations, scientific inventions and technological innovations” (UNCTAD, 2010, p. 3).

For 30 years urban environment has been witnessing a growing understanding of the mutuality between creativity, culture and economics in urban environments Gospodini (2006). According to KEA (2006), creativity today refers to the production of new ideas and their application built unique works of art, design and cultural products, functional creations, scientific inventions and technological innovations (Figure 2.1).

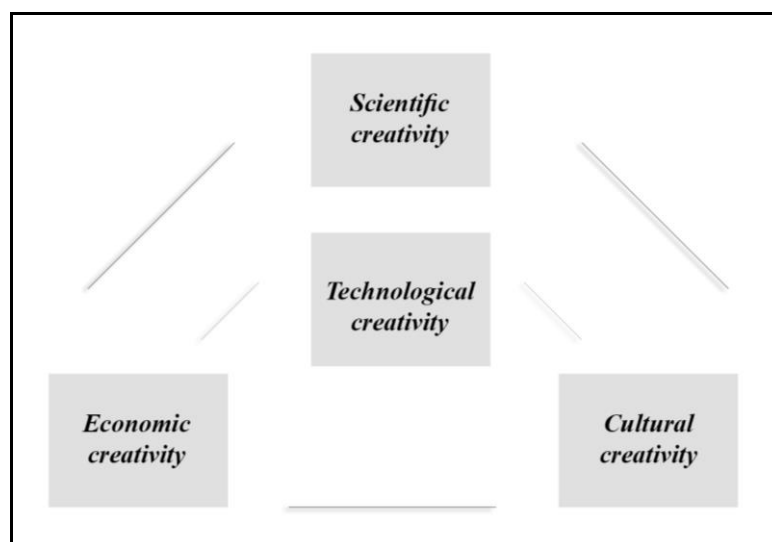


Figure 2.1. Creativity of Today
(Adapted from KEA, 2006)

Creativity

Landry (2000) has drawn attention to the significance of creativity in modern cities and regions, where he makes emphasis on the combination of hard infrastructure, or the network of building and institutions that constitute a city or a region, and soft infrastructure as “the system of associative structures and social networks, connections and human interactions, that underpins and encourages the flow of ideas between individuals and institutions” (p. 133). In addition, Kunzmann (2006) defines creativity as originality, capability to develop new projects, procedures or approaches, visionary power, willingness and readiness to experiment and to take risks, mental and cognitive flexibility and multi-dimensional thinking. Creativity is not solely about something new, but also involves opening ourselves out to the ideas, influences and resources that

are all around us. On the other hand, for Higgins and Morgan (2000), creativity in relation city and its planning, is not an end in itself, rather a means which can lead to development. Thus, creativity in relation to place is an integrated process including social, economic, political, cultural and environmental assets that together cover every aspect of creative place formation. On the other hand, for Higgins and Morgan (2000), creativity in relation city and its planning, is not an end in itself, rather a means to achieve economic development.

Creativity is regarded as mostly associated with the generation of products, services, processes, or ideas that are both novel and appropriate (Woodman et al., 1993; Amabile, 1988). Negus and Pickering (2000) suggest that creativity “is one of the most used, and abused, terms in the modern lexicon. It comes laden with a host of meanings, connotations and applications which are regularly imported into a range of varying discourses, institutions and settings” (p. 259). Landry and Bianchini (1995) claims that much of the literature makes use of the etymological base of creativity, seeing it as about bringing something into existence, generating, inventing, dealing imaginatively with problems. Landry (2000) defines the creativity in cities as “the system of associative structures and social networks, connections and human interactions that underpins and encourages the flow of ideas between individuals and institution” (p. 133). Creativity has been both the driver and the component of today’s new economy. Along with the new economic, the emergence of the creative industries has enabled entire creative sectors to develop products around creativity, and creativity for the management of business processes becomes critical (Hartley, 2005; Hesmondhalgh, 2002). However, in general, creativity does not simply reside in only certain industries, but is a central and increasingly major input into all sectors where design and content constitute a base for competitive advantage in global economic markets. The definition of sector here becomes confusing if creativity is given as a somewhat associated with the arts, and which does not involve other sectors of production such as science or technology. Rather, it should be approached in a macro-level where creativity is defined in a cross-sector and multidisciplinary way, mixing elements of ‘artistic creativity’, ‘economic innovation’ as well as ‘technological innovation’. KEA (2006) regards creativity, especially in the industry environments, as “a process of interactions and spill-over effects between different innovative processes” (p. 41).

No doubly, creativity is the main part of the system and structure of today. From the fashion perspective, it is widely agreed that fashion is a language, yet a very

ambiguous one since it as a system or structure changes and evolves very rapidly. Within its dynamism, a single garment for instance expresses different meanings at different times according to the wearer and the observer (Maramotti, 2000). However, changes in fashion correspond to macro-changes in societies and cultures. The capacity of culture that drives creativity cannot be underestimated. Culture leads fashion designers to wide range of possibilities from history to the ideal future life. Despite the fact that designers cannot make people to possess or acquire a particular product they can create appeal in the fashion market and stimulate possibly emerging or unnoticed desire. The stimulation for creative ideas in fashion has always been rooted in vast variety of sources. Specifically for the fashion system, popular culture, latest exhibitions, films, writers, geographical areas, traditional cultures and metropolitan phenomena have always been influential for creativity. Since the fashion product is considered as being at the core of a manufacturing company's culture, and all the related activities of idea generation, production, distribution, marketing and promotion planned accordingly and thus creativity becomes a positive interaction between different functions around it. The designer carrying a creative along the process can be linked to the entire organization because the firm itself cannot exist without such aspect (Maramotti, 2000). "The predictable and unpredictable churn of styles, and the fairly open and decentralized marketplace, enables talented and resourceful newcomers to enter the market and succeed. No style is ever fixed and consummated, once and forever; no market franchise lives forever. Creative design is always in flux." (Bollier & Racine, 2005, p. 9). Fashion is a vital, dynamic entity living in an open, always evolving environment. Therefore, it is no coincidence that fashion allows the appropriation of creativity and modification of other people's creative designs. For fashion, creativity is not only a matter of individual creativity, but also a process between individuals and larger communities and other creative people.

The main emphasis around the academics has shifted to creativity as a collective or social process directly led by the particular economic, social and political environments within which creative workers are operating. In this regard, Negus and Pickering (2000) argue that an "individual can no more realize the creation and exhibition of a movie than be able to manufacture and make function . . . a washing machine" (p. 271). Similarly, Bourdieu (1993) argues that creativity is not a natural gifts, rather it is a product of the social, economic and educational background or environment of the individual. From a somewhat different perspective, Florida (2002)

has been influential globally to diffuse the concept of creativity. The creative industries form creativity as a collective process, despite that there is some evidence that the creativity of individuals have a crucial role within this collective process; namely creative class.

Creative Class

Florida (2002) asserts that certain clusters where specific groups and industries accumulate are considered creative only when there is a high presence of the creative class is available. Additionally, the access to human capital and creative workers fosters creative industries to cluster (Glaeser, 2005). Also in the literature, the industries indicating creative essence are increasingly highlighted as an important contributor to the degree as much as they contain creative class.

The notions of human capital and creative class that regulate urban economic development have been studied by Richard Florida. His research was carried out in the broader context of the relationship between the creative class and regional economic growth and he has produced a curiosity through a growing body of literature on the creative class. Florida (2002) claims that the urban economy of the 21st century is driven by the location choices of creative people who prefer appealing place that is rich in cultural diversity. He emphasizes a social structure comprising new systems for technological creativity, innovation and entrepreneurship, and new models for producing goods and services. Florida (2002) suggests that the heterogeneity in cosmopolitan cities is the spine of creativity and innovations. He defines the creative class as those who creates new ideas, new technology, and new creative content. According to him, the workers who invent and create new products, who apply knowledge, who invent brands and designs associated with new life styles and commodities are integral part of the creative cities. These creative workers are called the creative class. This class is not necessarily highly educated but considerably engaged in creative, innovative jobs. The creative class does not only include writers, designers, musicians, painters and artists, but also scientists, managers and people in computer, engineering, education, healthcare, legal and financial occupations (Florida, 2002). Florida (2005) asserts that “creative people power urban and regional economic growth, and these people prefer places that are innovative, diverse and tolerant” (p. 34). Creative workers rely on the networks socially and certain locations and create clusters, spatially for market building as their nature.

However, this study does not measure the creativity, nor investigate the presence of creative class. Rather, within this dissertation creativity, and creative individuals (creative class) have been regarded as given and core components of creative industries.

Creative Industries

In general terms, the collective term creative industries is defined as “for those businesses in the economy which focus on creating and exploiting symbolic cultural products (such as the arts, films and interactive games), or on providing business-to-business symbolic or information services in areas such as architecture, advertising and marketing and design, as well as web, multimedia and software development (NESTA, 2008). Investigation of the creative industries has been carried out from different perspectives as mentioned in the introduction. Before start to define and explain the creative industry conception, it should be mentioned there is still some consensus found within academic research and policy implications on the meaning of the terms creative industries and cultural industries. In both grounds, the term is now widely used suggesting some areas of economic activity are perceived to be distinctive in some way. The use of cultural and creative industries considerably varies in practice. Thus, there is no authorized definition of the creative industries in use. Most countries adapt the concept to meet their own needs. It varies due to different researches in different contexts, and also many previous studies offer various approaches to the classifications of the creative industries. Previous available classifications will be discussed in the next section. While cultural industries was used to emphasize the dynamics of the cultural sector, originated on the symbolic or immaterial nature of its product in market, the term creative industries was an attempt to change the terms of the debate about the value of arts and culture. Since cultural industries were specific to nation-state they have been pressured by globally dispersed creative industries and by international trade rules over time (due to the new economy necessities), the policy usage of the term creative industries is a key that emphasized by an internationally operational definition in a global inter-urban competition. As Throsby (2008) suggests, we can read through a policy strategy explicitly aimed at the creative industries that the primary focus would likely be on the economic value produced by their industries. On the other hand, if the primary purpose of a policy was to pursue the government’s cultural provision then the cultural industries would be admitted. This is, for him, what makes the cultural industries different from the creative industries. Until the term creative industries was

started to be in use vastly, it was the cultural industries that owned similar properties. The cultural industries were commonly regarded as the first generation of creative industries utilized for economic and social development. The products manufactured within the cultural industries context are custom-made by masses, yet heads consumption action (Adorno, 1975).

The conceptual shift in terminology from cultural industry to creative industries was realized by the early 1980s had given rise to a more empirically based understanding of the complex structure and variable dynamics at work in the production of culture. It yielded the connections between technologies of production and distribution, the changes in business models, the connections between symbolic and informational goods, and between culture and communications systems. Such transition brought about a more clear understanding of the connections and contradictions between the production and circulation of culture and the wider ideological needs of the new economic structure. In 1998, the Creative Industry Task Force of the British Government's Department of Culture, Media and Sport (DCMS) introduced the term creative industries in the Creative Industries Mapping Document. Its approach differentiates 'the artist-centered' cultural industries from the creative industries with an emphasis on technological reproduction and mass accessibility. That approach underlines the difference between traditional, publicly funded cultural industries, and explicitly commercially oriented creative industries such as advertising, film and music. Recent revisions of the UK definition, and discussions in UNESCO (2008) and UNCTAD (2010), has motivated a new conception of the cultural industries. For the political reasons, the term 'creative industries' has passed into common usage (Pratt, 2005).

The term creative industry takes its roots from the DCMS (1998) conception, which was an extension (re-conceptualization) of the cultural industries definition. The shift of the terminology from cultural to creative was motivated by a specific political context in the UK back to the early 1980s. The term cultural industries were replaced with the creative industries by the New Labor in the early 1990s since the latter had more comprehensive and democratizing policy notion. Following, the contribution of the creative industries was recognized in the Creative Industries Task Force Mapping Document (CITF, 2001) in the UK. "For an essentially neo-liberal government such as the UK's New Labor who sought to continue the policy of competition as a watchword for economic strategy these new creative industries made a convenient bedfellow"

(Pratt, 2001, p. 15). The general idea was the transition from the state to the market under the Thatcher government. The Labor Party (renamed as New Labor) accelerated this shift. Two essentials were emphasized; predominantly those cultural industries that are outside the public funding system and operate commercially are considered important drivers of wealth and employment, and the great majority of the range of cultural products and services such as TV, film, radio, music, books, concerts that people consume is also produced outside the public funding system (O'Connor, 2007). As a new conception, creative industries are described by Drake (2003) as “activities which have their origin in individual creativity, skill and talent, and which have the potential for wealth and job creation through the generation and exploitation of intellectual property” (p. 512). Furthermore, Banks et al. (2000) describes creative industries as industries that produce goods and services whose primary value derives from its aesthetic attributes. Similarly, Scott defines creative industries as “all those sectors in modern capitalism that cater to consumer demands for amusement, ornamentation, self-affirmation, social display and so on. These sectors comprise various craft, fashion, media, entertainment and service industries with outputs like jewelry, perfume, clothing, films, recorded music or tourist services. Unlike the definition of the Creative Industries Task Force Mapping Document (CITF, 2001) of the British government, Banks et al. (2000) and Scott (1999) underline the importance of a high aesthetic, semiotic, sensory, or experimental content in creative outputs.

By its definition, creative industries merge art with commerce. In other words, it links what is publicly supported and what is commercial (Galloway & Dunlop, 2007). As Garnham (2005) argues, using the term of creative industries instead of cultural industries is rather a new policy making of the government through the economic value of culture. Regarding, Pratt et al. (2008) claims that “the term creative provides a positive feeling against to the variety interpretation of culture which carries with it suspicions of high culture and exclusion, as well as antipathy to business” (p. 15). In addition, Pratt (2001) claims that creative industries show more universal characteristics by its usage. It also amalgamates the “high” (art of the creative arts, sometimes regarded as elitist) and “low” culture (the mass market, popular cultural products of the cultural industries). Pratt (2008) asserts that the requirements of new markets and market share are believed to only be attained through the creative solutions and traditional (we can say cultural) tools may be reached their limits and creative ones can take over. For Cunningham (2002), while cultural industries are by definition nation-state specific and

policy based, creative industries are less national and more global and local/regional. According to his claims, it is now possible with creative industries to create culture through the commercialization of creative activity and intellectual property since the new world order within the new economy necessitates cities to do so. Besides, Roodhouse (2006) refers to Cunningham (2002) and claims that “creative industry is a term that suits the political, cultural and technological landscape of these times. It focuses on the twin truths that (i) the core of ‘culture’ is still creativity, but (ii) creativity is produced, deployed, consumed and enjoyed quite differently in post-industrialized societies” (p. 18). Cunningham (2004) distinguishes the creative industries from the cultural industries as delineated by the Frankfurt School. According to him, although there are obvious continuities between cultural and creative industries, the creative industries approach is considerably able to capture creativity further than the subsidized public arts and broadcast, and refers to the transition into a convergent and incremental environment; interactivity, convergence, customization, collaboration and networks are key. “Creative industries are less national and more global and local/regional, than is typical among public broadcasting systems, flagship arts companies and so on” (Cunningham, 2004, p. 6). Therefore, Cunningham (2005) makes the differentiation between the cultural industries and the creative industries as follows (Table 2.1);

Table 2.1. Cultural Industries Models vs. Creative Industries Model
(Source: Cunningham, 2005)

Cultural Industry Model	Creative Industry Model
Nation-state	Global/Local - Glocal
Analog	Digital
Neoclassic economies applied to the arts	New economy drivers (economics)
Rebadging large established popular industries as cultural	Small and medium enterprises
Established sectors	Emergent sectors, and inputs into wider service economy

The content of the cultural enables us to make a distinction between the outputs of the cultural industries and creative industries. While the cultural industries are derived from the technological advances of the early twentieth century the creative industries emerged as a product of the technological advances of the late twentieth and early twenty-first centuries within the knowledge society.

There also some reactions to the abandonment of the term cultural in the new economy context. From a theoretical perspective, Galloway and Dunlop (2006) question the use of the term creative industries. According to them, the term creative industry involves more than just the “re-branding” (Pratt, 2001) of cultural industries; it is more about the changing economic structure of, and the urban policy implications in the city. They discuss that their use and contribution of creative industries are necessarily evaluated in terms of economic returns and benefits. However, this is not always compatible with the role and goals of the cultural industries. For Galloway and Dunlop (2006; 2007), creative industries fails to concern the significance and distinctiveness of culture. The value of output in the creative industries depends on the creative production means of individuals and the sort of organizations that they are associated. Galloway and Dunlop (2007) discuss that “whereas originally the cultural industries - broadcasting, film, publishing, recorded music - were incorporated into cultural policy, in this new policy stance, culture has been subsumed within a creative industries agenda of economic policy, and in the process its distinctive aspects have been obscured” (p. 19). They further their discussions on the shift towards the creative industries. They argue that the creative industries are very attached to notions of the new (creative) economy and find it reductionist in a sense that the culture is evaluated in terms of its economic contribution.

2.2. Different Approaches to Creative Industries

Different approaches to the creative industry conception and formation of the creative industries content influences academic and policy circles all over the world. Many countries have so far given their definition of creative industry, and that has caused many disputes about their formations and makes very difficult to reach the consensus. This section reviews some definitions that have profound influence in the international. The purpose of studying and the history and the national condition is different. Each definition has its own reasoning and depends on certain rationales.

The available models contents vary regarding their objectives and intentions, yet they all are purposeful in their own contexts. They all are useful as a guide for researches and policy making for the collection of information, the analysis of data, trends and statistics, the conversation with key stakeholders as well as the identification

of recommendations and policy direction. The major approaches reviewed in the literature highlighted in following sections.

2.2.1. DCMS Model

Perhaps the best-known usage of the term creative industries derives from the Department of Culture, Media and Sport (DCMS) in the United Kingdom in the late 1990s. The DCMS is a department of the UK government. The role of the DCMS within the creative industries briefly is to support the creative industries to boost their profile and provide them help to explore their potential to achieve economic development in urban areas. The first document in the world to define the “creative industries as titled Mapping the Creative Industries was released by the DCMS in 1998. The 1998 report was restructured and renewed in 2001. The DCMS (2001) definition describes the creative industries as "those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property" (DCMS, 2001, p. 04). That document contains thirteen creative sectors; Advertising, Architecture, Arts and Antique Markets, Crafts, Design, Fashion, Film and Video, Software, Computer Games and Electronic Publishing, Music and the Visual and Performing Arts, Publishing, Television and Radio (DCMS, 2001).

It is widely accepted that the DCMS (2001) model offers a detailed classification to the creative industries presenting which activities belong to certain creative industries. The following table lists all the activities that are related to every sector from three aspects; core activities, related activities and related industries.

2.2.2. Symbolic Texts Model

This model is based on industries concerned with industrial production and dissemination of symbolic texts and presented by Hesmondhalgh (2002). The symbolic texts model has been emerged from the critical-cultural-studies in Europe and the UK and quite different from other definitions. Rather, it focuses on popular culture other than the arts as a concern of social and political circles. This sees the production process of creative industries through the industrial production, dissemination and consumption

of symbolic texts or messages which are conveyed by means of various media such as film, music and the publication (KEA, 2006). Their value comes from the viewer, audience, reader or consumers who decodes and figures out value within these meanings. Symbolic text as a term therefore is based on the user's perceptions where the original content and that value may or may not translate into economic profit (Bilton & Leary, 2002).

Hesmondhalgh (2002) investigates whether the shift in cultural production to creative industries has led diversity and quality in cultural texts, and from the economy approach he underlines the central relationship between symbolic artefacts and the financing and organization of their production (Hesmondhalgh, 2002). Hesmondhalgh and Pratt (2005) discuss the symbolic, cultural production and non-cultural types of production as "porous, provisional and relative, and to think about these boundaries in terms of the relationship between the utilitarian functions and non-utilitarian artistic/aesthetic/entertainment) functions of symbolic goods" (p. 6). According to Hesmondhalgh's (2002) classification, core cultural industries are occupied by advertising, film, internet, music, publishing, television and radio, video and computer games; Peripheral cultural industries are by particular creative arts; and Borderline cultural industries are covered by consumer electronics, fashion, software and sport.

2.2.3. Concentric Circles Model

The Concentric Circles Model proposes that creative ideas locate at the heart of the core creative arts and the model based is on origin and diffusion of creative ideas in sound, text and image from core creative arts radiating out through a series of layers or concentric circles presented by and best known is that of David Throsby (2001; 2008). The model underlines the character of cultural goods that makes the creative industries have the value (Throsby, 2001). Throsby (2001) explains the creative industries through circles in which the creative arts are at the core with two other layers expanding from it. The model divided all the activities of creative industries into four parts: the core cultural expression, other core creative industries, wider cultural industries and lastly related industries. First circle is core creative arts that contain literature, music, performing arts and visual arts. Second, other core creative industries cover the industries of film, museums, galleries, libraries and photography. Third, circle where

industries outputs accepted as cultural commodities other non-cultural products consist of heritage services, publishing and print media, television and radio, sound recording, video and computer games. Fourth, the related industries where the industries that operate outside the cultural area, yet output still contain some cultural content like advertising, architecture, design, fashion which design can be regarded not merely functional (Throsby, 2001).

This model has been updated by the Work Foundation in the United Kingdom and the notion of expressive value has been placed at the core (Figure 2.2). This more recent model of concentric circles indicate core creative arts in the first circle where commercial outputs possess a high degree of expressive value and invoke copyright-protection. At the second circle, there are cultural industries that contains the activities involve mass reproduction expressive outputs. Outputs are based on copyrights. The third circle is interpreted as creative industries and activities which the use of expressive value is essential to the performance of these sectors. Forth circle is the rest of the economy which manufacturing and services sectors benefit from and exploit the expressive outputs generated by the creative industries. This updated version of the model, essentially, makes a distinction between cultural and the creative industries, placing them both within the new economy (The Work Foundation, 2007).

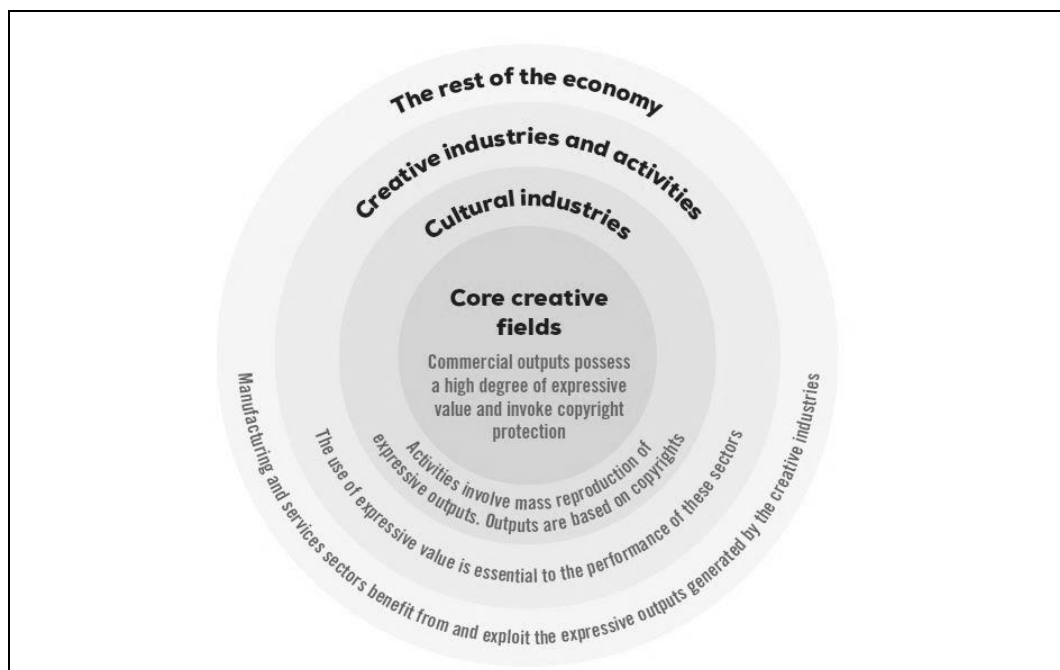


Figure 2.2. The Work Foundation's Concentric Circles Model
(Source: UNESCO, 2013)

2.2.4. WIPO Copyright Model

World Intellectual Property Organization (WIPO) Copyright Model involves directly or indirectly in the creation, manufacture, production, broadcast and distribution of copyrighted works (WIPO, 2003). In the WIPO Model, the creative industries which the product or service contains a substantial element of artistic or creative endeavor are described as the copyright based industry WIPO (2011). Creative industries are mainly related to the art, movie works, software, performance, music and so forth. According to the report (WIPO, 2011), the proposed method to retrieve the data related to the copyright and impact of the implement of the creative industries serve as important inputs to promoting growth and development of the creative industries in the country. There are three main aspects suggested here; first, the core copyright industries engaged in creation, production and manufacturing, performance, broadcast, communication and exhibition, or distribution and sales of works and other protected sectors as advertising, collecting societies, film and video, music, performing arts, publishing, software, television and radio, visual and graphic art. Second, the WIPO copyright model covers the interdependent copyright industries, which includes blank recording material, consumer electronics, musical instruments, paper, photocopiers, and photographic equipment. Third, there are partial copyright industries where main activities are not copyright but rather components of products and services as architecture, clothing, footwear, design, fashion, household goods, and toys (WIPO, 2011).

2.2.5. UNCTAD Model

The United Nations Conference on Trade and Development (UNCTAD) XI Ministerial Conference held in 2004 conceptualizes the creative industries as the cycles of creation, production and distribution of goods and services that use creativity and intellectual capital as primary inputs; a set of knowledge-based activities, focused on but not limited to arts, potentially generating revenues from trade and intellectual property rights; a whole of tangible products and intangible intellectual or artistic services with creative content, economic value and market objectives (UNCTAD, 2005). Therefore, the UNCTAD approach to the creative industries concentrates on the concept of creativity and thus claims that the creative industries have a strong

component to any economic activity producing symbolic products with a heavy reliance on intellectual property and for as wide a market as possible (UNCTAD, 2005). This approach recognizes four creative groups. They are: Art; heritage; media; functional creations. These groups include heritage, arts, media and functional creations and they are divided into nine domains. The model also presents the understanding to the interactions of different industries (Figure 2.3).

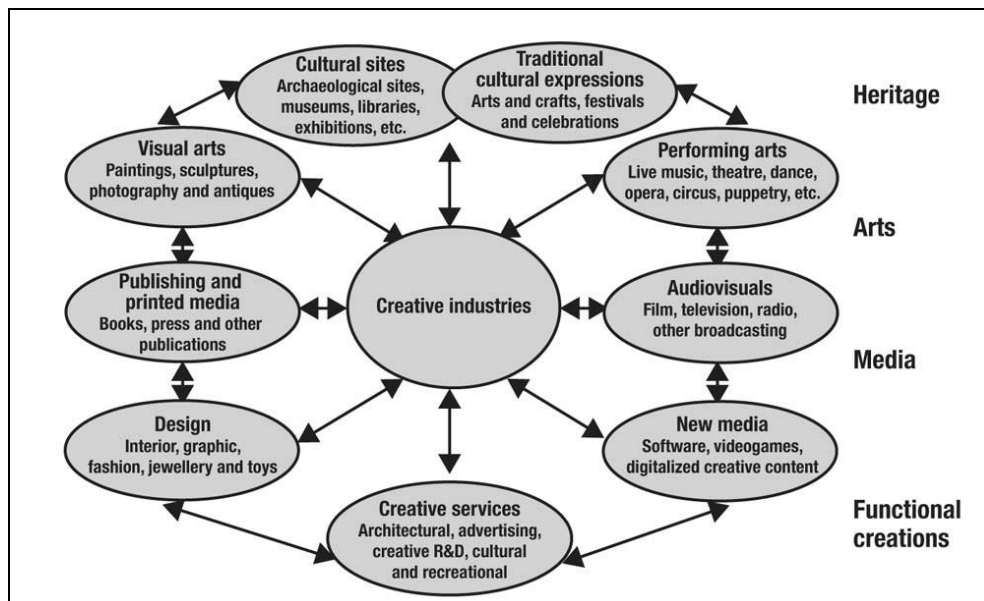


Figure 2.3. The UNCTAD Model for Creative Industries
(Source: UNCTAD, 2010)

Heritage is identified as the origin of all forms of arts and the soul of cultural and creative industries, and interpreted as traditional knowledge and cultural expressions. Therefore it is divided into two subgroups; traditional cultural expressions containing arts and crafts, festivals and celebrations; and cultural sites including archaeological sites, museums, libraries, exhibitions, and so forth. For the second group, creative industries are based purely on art and culture inspired by heritage, identity values and symbolic meaning. There are two subgroups; visual arts including painting, sculpture, photography and antiques; and performing arts as live music, theatre, dance, opera, circus, and puppetry. Media covers two subgroups where the purpose is to communicate with large audiences through, first, publishing and printed media as books, press and other publications; and second, audiovisuals as film, television, radio and other broadcasting industries. The group of functional creations comprises relatively demand-driven and services-oriented industries creating goods and services

with functional as design including interior, graphic, fashion, jeweler, toys; new media containing software, video games, and digitalized creative content; and the creative services where architectural, advertising, cultural and recreational, creative research and development, digital and other related creative services take part.

All in all, besides the most commonly used DCMS Model, there are Symbolic Texts Model, Concentric Circles Model, WIPO Copyright Model and UNCTAD Model. However, The DCMS model makes not much of a difference from the complimentary models except their core industries definitions (Table 2.2).

Table 2.2. Review of Major Approaches to the Creative Industries

DCMS Model	Symbolic Texts Model	Concentric Circles Model	WIPO Copyright Model	UNCTAD Model
Advertising Architecture Arts & Craft Design Fashion Film & Video Interactive Leisure Software Music Performing Arts Publishing Software & Computer Services Television & Radio	Core Cultural Industries Advertising Film Internet Music Publishing Television and radio Video and computer games Peripheral cultural industries Creative arts Borderline cultural industries Consumer electronics Fashion Software Sport	Core Creative Fields Literature Music Performing arts Visual arts Other core creative industries Film Museums Galleries Libraries Photography Wider cultural industries Heritage services Publishing Sound recording Television and radio Video and computer games Related industries Advertising Architecture Design Fashion	Core Copyright Industries Advertising Collecting societies Film and video Music Performing arts Publishing Software Television and radio Visual and graphic art Interdependent copyright industries Blank recording material Consumer electronics Musical instruments Paper Photocopiers, photographic equipment Partial copyright industries Architecture Clothing Footwear Design Fashion Household goods Toys	Heritage Traditional cultural expressions (arts and crafts, festivals and celebrations) Cultural sites (archaeological sites, museums, libraries, exhibitions) Creative Industries Visual arts (painting, sculpture, photography and antiques) Performing arts (live music, theatre, dance, opera, circus, and puppetry) Media Publishing and printed media (books, press and other publications) Audiovisuals (film, television, radio and other broadcasting industries) Functional Creations Design (interior, graphic, fashion, jeweler, toys) New media (software, video games, and digitalized creative content) Creative services (architectural, advertising, creative research and development, digital and other related creative services)

For the focus sector of the present research, the approach of the DCMS (2002) model becomes essential. It defines the fashion industry as a creative industry consisting of core activities, related activities and related industries (Table 2.3). Regarding such approach, wedding wear sector can be identified as clothing design where also manufacturing is made for particular fairs and events can be counted as one of the core activities of fashion.

Table 2.3. The Approach to the Fashion Industry

Sector	Core activities	Related activities	Related industries
Fashion	Clothing design; Manufacture of clothes for exhibition; Consultancy and diffusion lines;	Magazine publishing; Design education; Graphic design; Product design; Fashion photography; Hair care and cosmetics; Accessories design; Perfumes design; Modeling	Textiles Clothing; manufacture; High Street clothes retailing;

The fashion system and how its related industries and related activities operate within the system will be explained in the following sections. However, as complimentary to the taken assumption of this dissertation about the wedding wear sector, the research by the Danish Enterprise and Construction Authority, Division for Research and Analysis (Rosted et al., 2010) is valuable. In their research Rosted et al. (2010) argues the conception of creative industries in Greater Copenhagen in a broad perception of creative industry and its clusters; apparel, footwear, furniture, jewelry, leather products, equipment and textiles. In the industrial era it has been questioned whether sectors like wedding wear, textiles, footwear and jewelry should be part of the creative industry. Indeed, in today's creative economy, the main driver of these branches is counted as increasingly design of unique products for the fashion industry. Therefore, for the concern of this work and its case study, the wedding wear sector including wedding dresses, wedding suits and evening gowns can be included in the fashion creative industry as a core activity.

2.3. Creative Industries Value Chain

The conception of value chain is introduced to the industrial based approaches where each worker, firm and other related actors add value to the product. In a value chain, organizations are horizontally or vertically linked to each other and each delivers products or services to the next operator in the chain (Porter, 1985). Porter (1985) proposes the value chain from a global perspective to describe how the activities of a business contribute to its tasks of designing, producing, delivering, communicating and supporting its products to create value. In general, the the global value chain consists of the five primary activities of incoming logistics, operations, outgoing logistics, marketing and sales, and service, and the four support activities of procurement, technology development, human resources management, and firm infrastructure (Porter, 1985) (Figure 2.4).

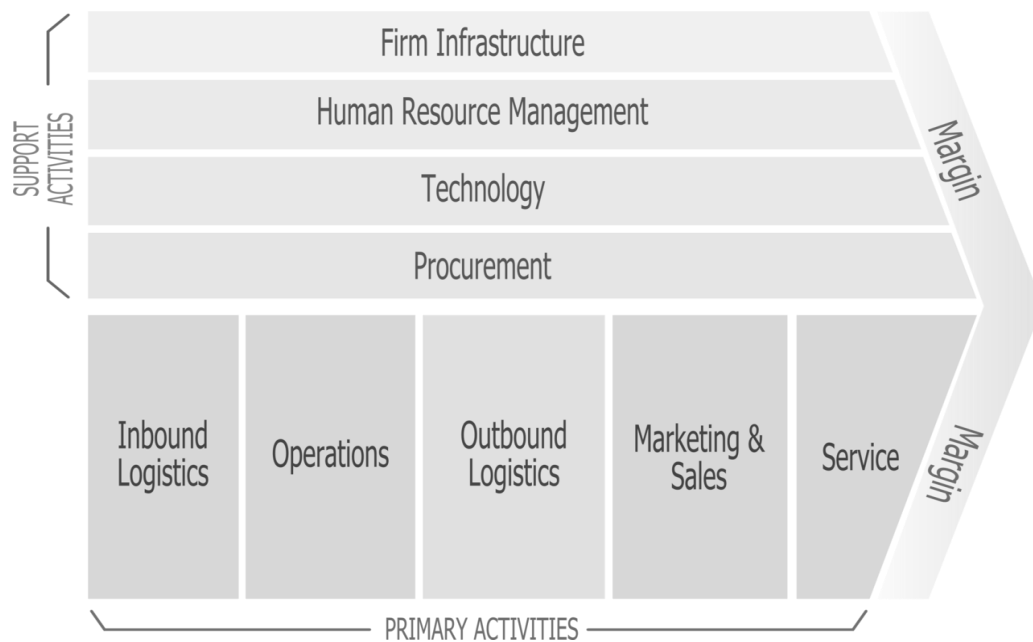


Figure 2.4. The Global Value Chain
(Source: Porter, 1985)

On the other hand, the creative industry value chain can be understood where the creator or artists begins with a creative idea and then this is combined with various other inputs to produce a creative good or service flowing through sequential steps in which value already added until the good or service reaches the consumer. More recent one has evolved conceptually from the conception of supply chain (Rainbird, 2004) that

describes the series of steps a product from the manufacturer to the consumer. Here, the word supply has been replaced by value to imply that each step in the creative production of industries add value rather conventionally move along the product (Hearn et al., 2007). Different from the global value chain of industries, creative industry value chain in terms of their commercial values, market structures, distribution mechanisms and consumption pattern, is more dependent on the distribution and consumption, and upon strategies to promote new cultural enterprises, better understand audiences, and better market and promote (Garnham, 2005). The value chain approach is also useful to reveal the relationship between the pure and the commercial or industrialised arts and culture through the stages of the process. Similarly, the distinction between art for art's sake and conventional inputs in the creative industries as described by Caves (2000) is that the art becomes the utility drawn by artists in performing creative work, whereas conventional inputs only provide ordinary economic incentives.

The DCMS (2002) has released UK DCMS Cultural Data Framework to address the need for consistency in certain the industry activities and occupations for each stage of a value chain for each; creation, making, dissemination, exhibition/reception, archiving/ preservation and education/understanding (DCMS, 2004 as cited in Cunningham et al., 2008). As a central characteristic to them, creative industries value chain is not evaluated only from the perspective of the creative inputs and making process, but also, and more importantly, activities related to the dissemination and exhibition of the end product (Figure 2.5). In other words, exploring the original production and making of cultural industry products is not enough, their actual production, reproduction and mass distribution, their exhibition and exchange should also be regarded. The representation of such chain raises the question of the creative value of the goods and how it develops. Goods are seen as having value when only consumed and approved by the individuals. In order to understand the value and meaning of creative commodities, it is essential to follow their forms and uses as well as their path through consumers and their geographies.

Besides, Gauteng's development strategy report (Gauteng Provincial Government, 2005) as an example of value chain analysis in creative industries that illustrates the range of role-players in the sector as well as the core functions as shown in the following figure below (Figure 2.6). Rather than a linear value chain, quite different from the Porter's, the creative industries value chain is rather incremental

whereby all elements are inseparably linked to certain actors, firms, organizations, other industries embedded in a wider creative fields and certain geographies.

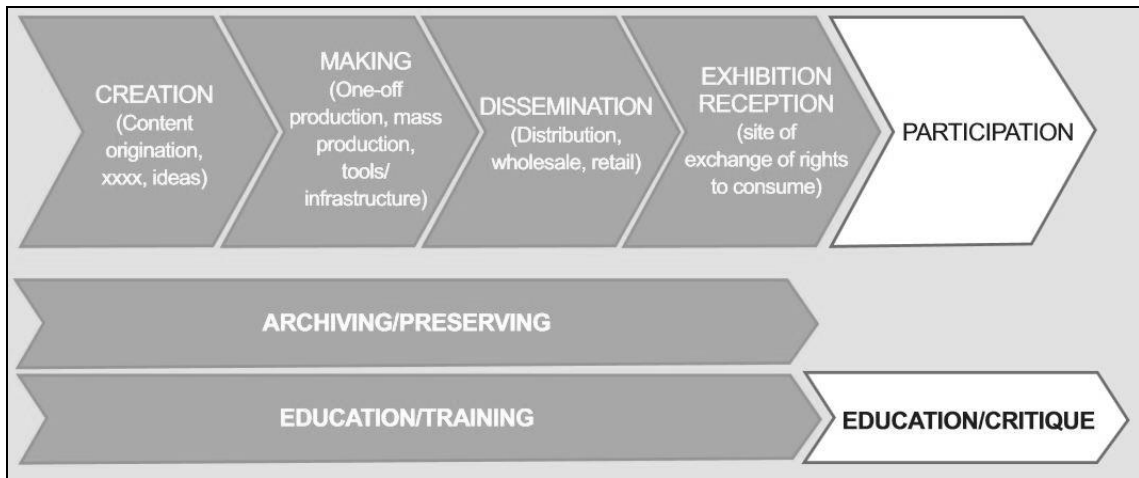


Figure 2.5. Creative Industries Value Chain
(Source: Burns et al., 2006 as cited in UNCTAD, 2010)

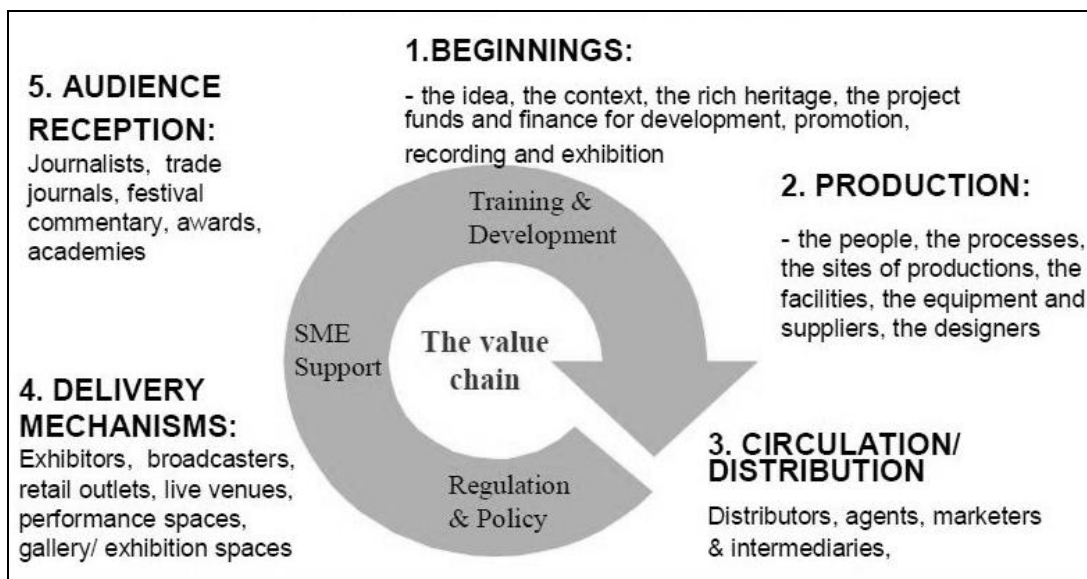


Figure 2.6. Value Chain Analysis
(Source: Gauteng Provincial Government, 2005)

Such value chain can easily be realized by the collaborative effort of different individuals, requiring various more or less specialized inputs and a complex division of labors ranging from primary creative, technical to creative managers, marketing employees, owners and executives as well as inexperienced and semi-skilled labor (Hesmondhalgh, 2002). The nature of collaborative production in creative industries enables a potential for competition and cooperation and brings various inputs from

different actors with different intentions. Such collaboration in the form of a variety of complementary and harmonizing actors can also explain the clustering of many creative industries (Pratt, 1997). In the Chapter 3, nature of clustering of creative industries will be discussed in details.

Lastly, according to Lash and Urry (1994), the organization in the creative industry production is characterized by, what they call “transaction-rich nexus of markets” which bounds local firms or individual actors into more complex interconnected stages of flexible production relations (p. 123). Regarding such features creative industries can be understood as a representation of the post-Fordist transformations in cities. That will broadly be discussed in the Chapter 4.

2.4 Fashion Industry as a Creative Industry

In earlier times the fashion industry was commonly described as a small subsection of the clothing industry. It was solely associated with Haute Couture, or more exclusive design elements of clothing whereas its industrially mass production processes, and trade were only considered as independent and separate. New economy structuring has changed this and has led to creativitization of all industries. Hence, through design containing creativity as well as advanced proficient manufacture advanced with technological developments, fashion is now considered as a creative industry (Rantisi, 2002a).

2.4.1 A Global Perspective of Fashion Systems

The word fashion comes under the design industry within the creative industries as stated in many of its classification. However, it should be mentioned that there are various definitions of fashion since it has different meanings and interpretations throughout history; the significance and reference of fashion varies with respect to different social structures.

Georg Simmel defines fashion as a system that driven by motives of imitation and distinction, and which is transmitted vertically to the community by a particular social group. For him, people has tendency to imitate others while distinguishing themselves from others. “Fashion represents nothing more than one of the many forms

of life by the aid of which we seek to combine in uniform spheres of activity the tendency towards social equalization with the desire for individual differentiation and change" (Simmel, 1957, p. 133). Thus, fashion needs both of these contradictory tendencies in order to feed the system to operate and to enable change. Rocamora (2009) refers to Walter Benjamin (1892–1940) who follows Georg Simmel to define fashion and he conceptualizes it as

“The ultimate metaphor for the varied views on modern life concentrating on its fragmentation and diversity. Benjamin’s attempt to single out fashion as the one commodity that is better equipped than any other to transpose myths into objects, one that significantly covers the human body and thus acts as a symbol of a material civilization” (Rocamora, 2009; 270).

Similarly, Kant studies fashion from the context of taste. According to him, fashion is more than genuine concern of taste, rather, it arises from social competition where people to get the better of each other and improve their social standing.

Fashion, in very general terms, is defined as a structure of bodily display, mostly comes with clothing, and extends to shoe and bag, jewelry and perfume with a broader definition of luxury goods (Pratt et al., 2012). A further definition can be made on the noun ‘fashion’ which signifies a constant and shifting cultural and economic value system being repeatedly changed and quickly transformed in society. “Fashion is a system of continuously changing images, and both fashion and space share in common the fact that they are nodes and systems of representation. “Fashion and space do not occur in isolation, but in tandem with other human activities (economic, political, cultural and social)” (Potvin, 2009, p. 13). Fashion is described as an “early warning system of major cultural transformations” (Kroker & Kroker, 1987, p. 16) and, as a “window into a cultural economy characterized by the ever more rapid circulation of meanings” (Crewe & Beaverstock, 1998, p. 295). Why does fashion change? From economic perspective, that it is designers, clothing manufacturers and businesspeople, and other parties who impose new fashions to serve the capital circuit, provoke the market and increase their trade. From sociological perspective, since fashion is imposed as a consumption tool to satisfy the needs of people through signification of certain values, as Simmel (1957) stated, fashion allows the individual to signal or express their own personality or personal values, and there is always desire for change as the mainspring of fashion behavior.

Then, the question arises: is fashion an industry, or a symbolic signifier? The answer is both. In addition to these questions and for the concern of this study, fashion is also a major driver for places to infuse networks of capital and achieve economic development from the urban planning perspective. “Networks of creation, production, distribution and consumption have long been examined without attending to the spatial dynamics that assists these activities. Fashion is not simply a product of labor, but a practice of being -in-the world, a sensual activity. And so, we must not lose sight of the role of senses play in both the conceptualization and experience of both space and fashion” (Potvin, 2009, p. 7-8).

Fashion as an Industry

From the first perspective one can regard fashion as an industry in the conventional meaning where raw materials are transformed and designed, reproduced in large quantities, and exchanged in a market (Pratt et al., 2012). The fashion industry is regarded as a combination of the textile and mass production processes in clothing industries, as well as fashion design and haute couture. Fashion system can be examined as an industry composed of various institutions. These institutions together produce and reproduce the image and culture of fashion in certain spaces, as happened in cities such as Paris, New York, London and Milan.

The structural functional perspective of fashion points out that the production, distribution and consumption of goods and services that all are intimately related. Fashion as a system of institutions, organizations, groups, producers, events and practices, all of which enable the making of fashion, is different from a mere dress or clothing (Kawamura, 2004). The systematic nature of fashion occurs between clothes and fashion as a system which two are two inter-related yet independent, separate entities. No doubt that the fashion system itself emerged with the phenomenon of fashion and thus can be seen as synonymous. However, the difference between and presence of one who produces the fashion via dresses and other who consumes through design, display, manufacture, distribution and sales, perfectly portrays the nature of the fashion system. In this regard, the system contains sub-systems comprised of a network of designers, assistant designers, stylists, manufacturers of textiles, garments, buttons, and cosmetics, wholesalers, retail buyers, publicists, advertisers and fashion photographers among many other fashion professionals. They all take part in the evolution of fashion as a creative industry. The value chain of the production steps and

the subsystems termed as intermediaries of the fashion industry and explained in further details in the following sections.

Fashion system conveys the all invisible/non-materials in clothing such as trends, styles, beliefs, values and, it is associated with creative skill performance, and connected with technological advancements, and identifies the social class as a signifier (Rantisi, 2002a). Similarly, Kawamura (2004) refers to Blumer's (1969) definition of fashion system and emphasizes the functions of fashion as a social mechanism that operates within industrial society. A predominant usage of clothing in society for the time being is actually a result of the acceptance of certain cultural values, all of which are under rapid influences of change Kawamura (2004). For Leopold (1993), fashion system is the inter-relationship between highly fragments takes part in the clothing manufacturing process and cultural phenomenon. Fashion has also a constructed symbolic signification since it not only a hardware that is the industrial production of clothing, but also software which enable the production of life style diffuses to our everyday urban living through various media.

Fashion as a Signifier

As stated above paragraphs, fashion is mostly taken to refer to fashion in clothing as an industrial system. Despite the word clothing denotes more stable and functional form of dress that changes only slowly and regularly, fashion of today connotes an aesthetic form, a global industry, a media phenomenon to an individual indulgence or sign of group membership and a technique of creating and re-creating a sense of self and persona (Senanayake, 2013). Despite the terms fashion and clothing tend to be used synonymously; clothing refers to generic raw materials of what a person wears, whereas fashion industry including the production, distribution, consumption processes of clothing have various further meanings. Kawamura (2004) shows the distinction between clothing and fashion and reveals that the clothing is a material production while fashion is a symbolic production process. Clothing can be regarded as a basic need to be covered up whereas fashion can be evaluated as an excess luxuriance. Where clothing has a utility purpose, fashion is characterized both as forms of everyday clothing and as luxury rather than utilitarian needs. The fashion system, in his account, operates to convert clothing into fashion and adds cultural and symbolic value manifested through clothing. Kawamura (2004) argues that a fashion system supports shifts, changes, and turns back to itself.

Fashion adaptation in cultural context drives the preferences of a group of people regardless of their social status, race, gender or age, and interprets and elaborates certain symbolic values through embodiment of the latest desirable and popular aesthetics within. Post-modern consumption is strongly characterized by such diffuse since fashion system enables the fragmentation and an 'aestheticization' of daily life (Aage & Belussi, 2008). In this way fashion system becomes a way of aestheticizing everyday life and the product of fashion design has been transformed into a status symbol, a signification of identity (Kozaman, 2010). For the concern of urban planning field, especially with regard to emergence of creative economy and urban restructuring, fashion system reshaping the urban life has become very vital for attraction of places, increase demand and economic growth. More fundamentally, it appears as a spatial tool for consumption.

On the other hand, the material production of cultural objects, Bourdieu claims, is only one side of the coin. This is what the industrial production of clothing. The other side consists of its symbolic production; that is "the production of the value of the work or, which amounts to the same thing, of belief in the value of the work (Bourdieu, 1993). For Rocamora (2009), it is a type of production which aims at ensuring the ontological promotion of the product of material creation. The label transcends the material object to which it is applied, and then takes on a higher value attached to the name. Thus, symbolic meaning of fashion signifies additional qualities attached to clothing, which become desirable for the consumers of fashion. Furthermore, Finkelstein (1996) argues that such consumers find these added values appealing and want to own them, when they purchase fashionable items. Kawamura (2004) refers to Bell (1976) and claims that fashion is a perfect signifier in our world without which its fundamental values can hardly be perceived. Fashion involves essential values added to product Kawamura (2004).

Fashion as a Driver for Cities

Simmel (1957) views fashion as an industry is the main driver in the city, "because it intensifies a multiplicity of social relations, increases the rate of social mobility and permits individuals from lower strata to become conscious of the styles and fashions of upper classes" (Ashley & Orenstein, 1990, p. 314). Since the statement

made by Soja (1989) that the spatiality is a social product is evaluated from the fashion perspective, fashion inevitably appears as a manipulator for cities.

Fashion is a contested and dynamic information stream that constitutes and defines value (Pratt et al., 2012). The critical aspect is not the product, but either design related or solely mass promoted its differentiation and distinction that enables crucial buy/not buy decision is made on, not on price alone. Fashion appears as a fundamental of any product other than dress and clothing, particularly within the industrial growth and economic restructuring. This is what Scott (2000) refers to the fashioning of industry. In this sense it can be argued that all industries are becoming fashion industries, particularly taking the new creative economic structure of today into account. This implies that the practices of economic actions conventionally context dependent are actually based upon the economic and cultural values produced, or even forced by the fashion system. The dynamism of values and shifting product differentiation in industries are hard to controlled and sustained, occurs very spontaneously many times, and these are the essence of the creative industries, and the fashion industry in particular.

Potvin (2009) refers to Quinn (2003) that “the fashion system is premised on visibility; a concept essential to the consumption of fashion but often underestimated in interpretations of it... Visibility is not the same as sight; it occurs when visual media and sensory perceptions intersect, where haze meets desire” (as cited in Potvin, 2009, p. 7). Such meeting, in his account, requires spaces and places. Thus, the fashion system cannot be realized without a spatial and place-based extension. When it comes to fashion and the city, Charles Baudlaire and Walter Benjamin appear as frontiers to map out the relationship between space and fashion regarding the modern condition. According to their experiences in the city of Paris there were a narrative of mobility and visibility of fashion. Similarly, Michel de Certeau refers a city consisting of intersections of mobile elements. For him, city is a place where the idea of fashion can be realized with action. No doubly, fashion has long transformed the understanding of certain cities. For instance, in Milan Giorgio Armani's ever-changing and considerably noticeable Emporio Armani billboard in Via Broletta, and Donna Karan's DKNY iconic advertisement on Manhattan walls have become key markets in cities where fashion infuses many facets of cultural and economic life. These all are now backbone of a new economy of space (Potvin, 2009).

2.4.2. Evolution of the Fashion Industry as a Creative Industry

The modern concept of fashion began in the 19th century as Charles Fredrick Worth (1826–1895) the English born, French based designer, sewed a name carrying label into the garments that he manufactured. It was the time that the idea of clothing and to merely make it substantially replaced with the need of design created by someone with fashion authority that has specific skills in defining a silhouette, cut and decoration (Arnold, 2009). Then, he thrived among other dressmakers with a design consciousness. This later became a trend in the west and many other countries started to follow what he created. By that time, the Industrial Revolution was at its paramount. As industrial revolution progressed, garment production grew to take in a range of different routes and became a popular industry practice within Europe and the US. Handmade, customized garments made at home place or produced to order by a dressmaker or a tailor changed owing to the development of the factory system. It was a standardized system of mass-production of garments. Along with the rapid increase of retails that sell garments at fixed prices, the industry production cycles began to accelerate and grander value was added on originality of design authority and following the industry launched its fame as the fashion industry.

By the 1920s, especially the women's wear industry saw the emergence of main institutions that reinforced the continuous growth of the fashion industry came with mass production in line with mass consumption. In the US for instance, particularly from the consumption side, the development of various retails in New York, such as department stores and particular boutiques, facilitated to serve to needs of the large capital market. This era witnessed also saw the arrival of fashion magazines, like Harper's Bazaar and Vogue, which published fashion editorials that established the trends for the fashion market and warranted the guidance and homogenization of consumer interests which was very vital to maintain the system. On the other hand, from the production side, the formation of the International Ladies Garment Workers' Union in 1910 stimulated safe working conditions and standardized wage compensation, which ensured high-quality goods and enabled workers to be active consumers. Moreover, establishments in fashion education at Pratt Institute (in 1888) and Parsons School of Design (in 1897) and of the Fashion Institute of Technology (in 1944), produced a steady supply of skilled labor for expansion of the fashion industry

(Rantisi, 2002a). Short after the first establishment in Europe and the US, fashion has entered and disseminated to the urban life as an international and highly globalized industry. Along with the expanding global capitalism, fashion is today an industry that indicates many countries in the production of at least one fashion item. The global expansion of fashion has considerably accelerated and fashion diffused significantly especially when the creative essence in industries became for vital for competition.

Hawkins (2001) claims that creative industries including fashion are the core of the creative economy. The world has been divided by digital technologies and at the same time by creativity that realized by people to express their talent through profitable products. Hawkins (2001) has systemized creative industries into fifteen sectors, as many other models given in the Chapter 1, but what is crucial about his system is that among these industries, Fashion Designer fashion is a small but intensely competitive business due to a volatile mix of art, crafts, design, manufacturing, retailing and publicity. For Hawkins (2001), fashion is the most visible tip, with an influence disproportionate to its size, and an example of an industry that is perfectly and limitlessly creative.

As listed as one of the creative industries given in the DCMS Model, as falls under the design in the UNCTAD Model, the related industries in the Concentric Circles Model and partial copyright industries in the WIPO Model, fashion industry has become popular, and became fashionable itself that is imposed on the 'creatives' through new forms of management, understanding, technology, and employment. The domestic manufacturing of fashion has given way to a highly semiotic production process that is synergistic with other cultural and consumption-oriented businesses (Scott, 1996; Currid, 2007) and especially creative industries. Fashion industry relies on media and other design related fields together has also developed highly skilled, mobile, international labor as much as shifted inner and periphery areas of cities as production and consumption sites. This new economic structure of the fashion industry is now supported by fashion magazines, fashion exhibitions, an expanding sector of artistic photography, the creation of agencies for models and so on. Many of the sectors cooperating with the fashion industries have been counted and categorized as creative industries as well.

Scott (2004) re-conceptualizes the industrial clothing production as part of a broader category of creative-products industries which are embedded in the creative industry development due to the local creativity and design. The importance of

creativity and design in the formation of the fashion lines up with the production of customized or style products strongly as part of the group of creative industries. Moreover, it is also argued that the transition focus from the discourse of the apparel or clothing industry to design and fashion represents a perfect example in a way which certain privileged sectors are being profitable within the new economy (Rogerson, 2006).

Fashion is considerably a creative industry in the global context where many nations experience economic benefits as a participant in the global fashion industry system. The fashion industry is a notable one among others that signifies several key elements of creative industries due to its continuous innovation, the evasion of product standardization, and the importance of symbolic knowledge, individual skill and talent in the production process. The production of fashion industry can be conceptualized as a collective process. There exist markets of models, hairdressers, make-up artists, assistants, in the industry. There are also markets for the magazines, cameras, computers, film, and many other types of creative services that the fashion industry utilizes for production, consumption and distribution. The industry structure is described by a high number of firms and small firm sizes, and represents many creative industries in terms of industrial dynamics and concrete spatial concentration in major fashion capitals such as Paris, New York, London and Milan that serve the global market (Wenting, 2008)

The position of fashion industry in the new urban restructuring revolves partially around the paradigm of cities as spaces of consumption (Zukin, 1998; Glaeser et al., 2001) and what Clark (2004) names the 'city as an entertainment machine'. In this way, the profit aspect of creative industries that differs it from the cultural industries are being realized by the fashion system and fashion industry. Now in the fashion industry, as in the rest of the economy, the globalization of taste, power and production has a crucial role. Fashion has evolved from a contained and craft-based model, to one of the industries in which a global division of labor is most noticeable (McRobbie, 1998; Santagata, 2004; Weller, 2004).

As we look the evolution of fashion from a conventional manufacturing-based industry and to the increasing role as a design industry generating symbolic value in the contemporary 21st-century metropolis, the place is marked spaces of consumption, amenities and place branding (Zukin, 1998; Florida, 2002; Clark, 2004; Glaeser et al., 2004). Fashion has re-shaped in the rational of creative economy (Scott 2000). Despite

the industry depends on manufacturing, the design aspect of fashion is now seen as a key aspect of the symbolic and creative capital of cities around the world as visible in New York, Paris, London and Los Angeles (Rantisi, 2004; Currid, 2007). The industry also clusters in particular headquarters (New York, Milan, Paris, London and Los Angeles) that are firmly connected to each other, where they illustrate a global city network of the creative industries (Sassen, 2001; Currid-Halkett & Ravid, 2010).

2.4.3. The Global Fashion Industry Value Chain

The value chain of the fashion industry describes the full range of activities which are necessary to bring a fashion product or service from conception, through the different phases of production, delivery to final consumers. The fashion industry basically contains four levels in its value chain. The first one is to produce raw materials, mainly fibres, yarns, textiles, leather and fur; second, is the production of fashion goods with the involvement of designers, manufacturers, contractors, and others; third, the retail process that also comprises distribution and sales; and fourth, different methods of advertising to promote the products. These stages indicate various separate but interdependent sectors. At each different level, the main goal of the industry is to fulfill the final fashion consumer demands with an economic advantage. The value chain is a practical illustrative instrument here to describe the relationship between the mere clothing production as a traditional manufacturing and the commercial or profitable fashion industry through the stages of the process in the production of creative merit.

The very simple value-chain of the fashion design industry is illustrated in the table (Table 2.4) below. The chain begins with the planning and the development of collection, and the process is followed by the prototyping, production, monitoring, manufacturing and assembly. The marketing and the distribution processes are also crucial (MUSIAD, 2008).

Table 2.4. A Typical Fashion Industry Value Chain
(Adapted from MUSIAD, 2008)

Stages	Planning & Development of Collection	Design & Prototyping of Models	Production, Design, Planning and Monitoring	Manufacture & Assembly	Marketing	Distribution and Logistics	Point-of-sale Marketing	Sales
Steps	1	2	3	4	5	6	7	8

According to the description of the process by the British Council (2008), the fashion designers initiated the process by drawing and sketching their ideas on a paper and/or computer aided drawing programs. Then, the design concept goes various stages of development until the product is finalized. The design process includes all the stages from idea generation to prototype development. The designers select the styling of the design concept (colors, fabrics, fit). They produce the design concepts within the studio or may outsource the production locally or across national borders. Following, the local or imported fabrics are acquired via an agent or from retail shops. The completed products are next sold through agents, retail outlets, and specific stores or through the designers' studio. Web-based or traditional methods of marketing and adequate public relations play a crucial role in the above process (British Council, 2008) (Figure 2.7).

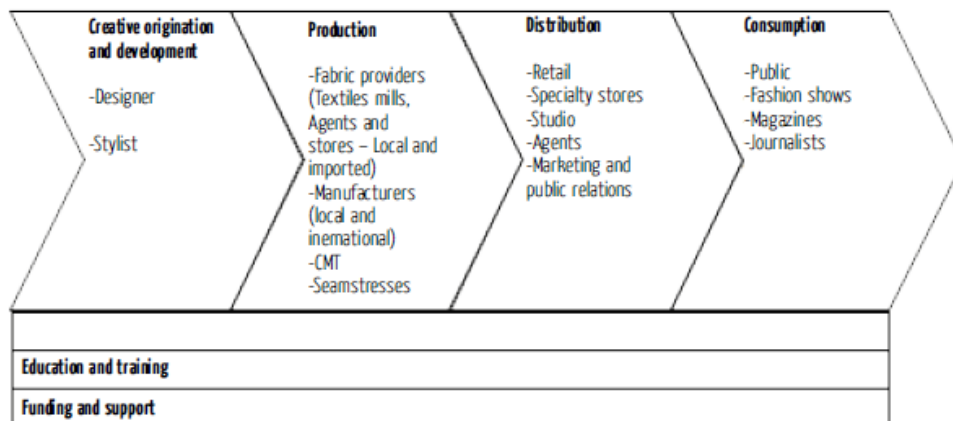


Figure 2.7. Fashion Design Value Chain
(Source: British Council, 2008)

In terms of creating value mentioned above, six distinct value-adding activities are presented by (Frederick, 2010) in the value chain; research and new product

development (R&D), design, production, logistics (purchasing and distribution), marketing and branding, and services (Figure 2.8).

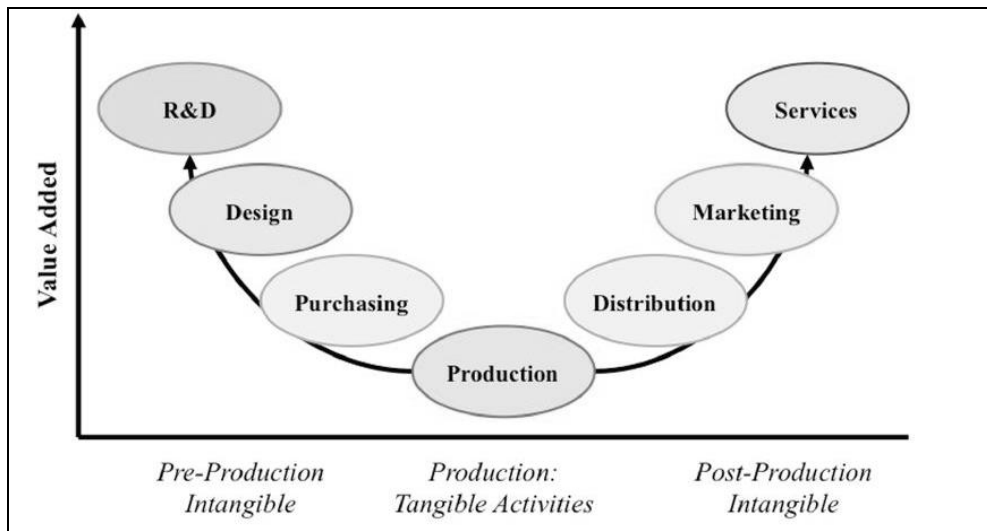


Figure 2.8. Curve of Value-Added Stages in the Apparel Global Value Chain (Source: Frederick, 2010)

Sinha (2000) summarize and illustrate a more comprehensive value chain for the fashion design process as practiced by industry (Figure 2.9).

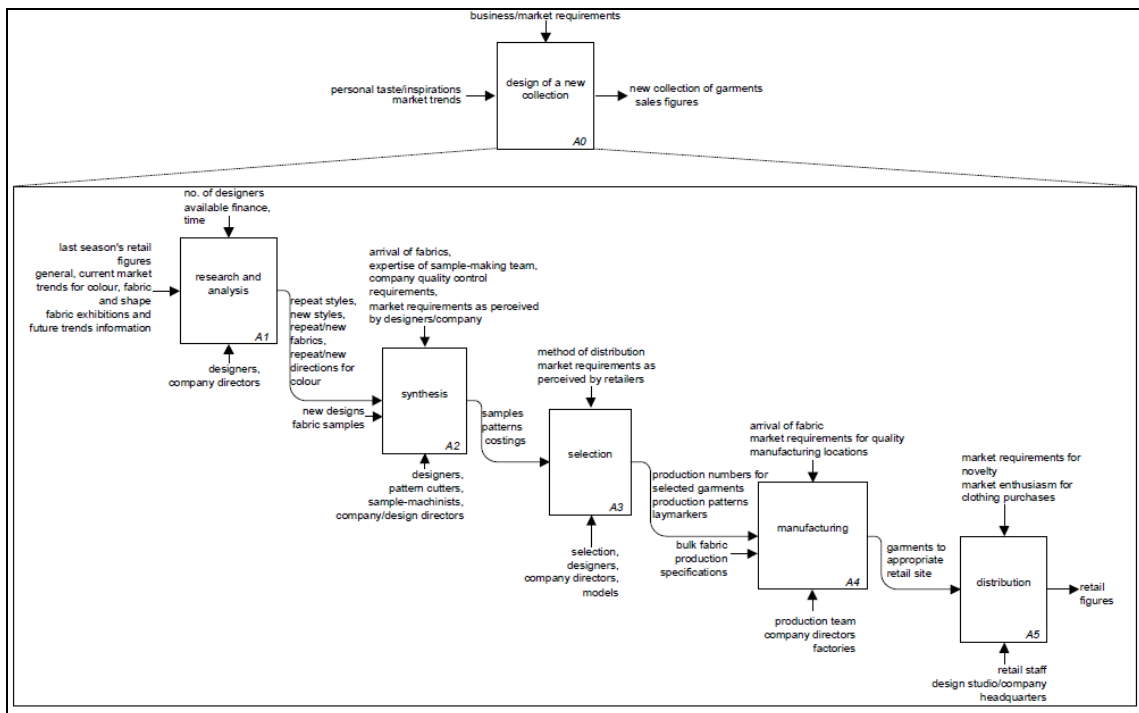


Figure 2.9. General Fashion Design Process (Source: Sinha, 2000)

For the further details of the value-added stages are also as follows; The R&D contains companies that involve in R&D, as well as activities for improving the physical product or process and market and consumer research. The Design covers people and companies that bring about detailed design services for products and components throughout the value chain. Design and style activities are fundamental for creating attention, improving product performance, cut production costs, and making the product a strong competitive advantage in the target market. The Purchasing/Sourcing (Inbound) indicates the processes encompassed in purchasing and transporting textile products. It also incorporates physically transporting as well as managing or providing technology and equipment for the supply coordination. Logistics can involve domestic or overseas coordination. The Production/Assembly/Cut, Make, Trim (CMT) indicates manufacturers cut and sew woven or knitted fabric or knit apparel directly from yarn. The cut-and-sew classification includes a diverse range of establishments making full lines of ready-to-wear and custom apparel. The Distribution (Outbound) stage is after where the apparel is manufactured, distributed and sold through various network of wholesalers, agents, logistics firms, and other companies outside of the production. The Marketing and Sales includes all the activities and media connected to pricing, selling, and distributing as well as further activities such as branding or advertising. These activities and media often do not deal with the physical changes over the product. The product is directly marketed and sold to consumers through retail channels. The Services comprises the actions a firm or industry provides to suppliers, buyers, or employees, often in different way to differentiate itself among others, competitors in the market, such as offering consultancy (Frederick, 2010). The important aspect of the value-added chain is that the most essential stages are intangible services that follow before and after the production process, which requires a considerable attention on R&D-design and services-marketing.

For the high-end fashion production, the scheme is rather different from the conventional fashion design value chain. The high-end fashion production concentrated in the sophisticated marketing and branding creates its own tools to tackle with the increasingly ephemeral and volatile markets. Uncertainties in the market have stimulated the use of branding as a means of differentiating products. Here, branding creates and builds reliability of quality and meaning accompanied with a collection. Under this strategy, the brand reflect and reinforce a particular company's or designer's image. The benefit of branding is primarily advertising. Through advertising, the high-

end fashion products fortify their impacts with editors of fashion magazines and buyers via marketing completely to the customers. Thus, the fashion industry can engage more directly in the process of creative production (Figure 2.10).

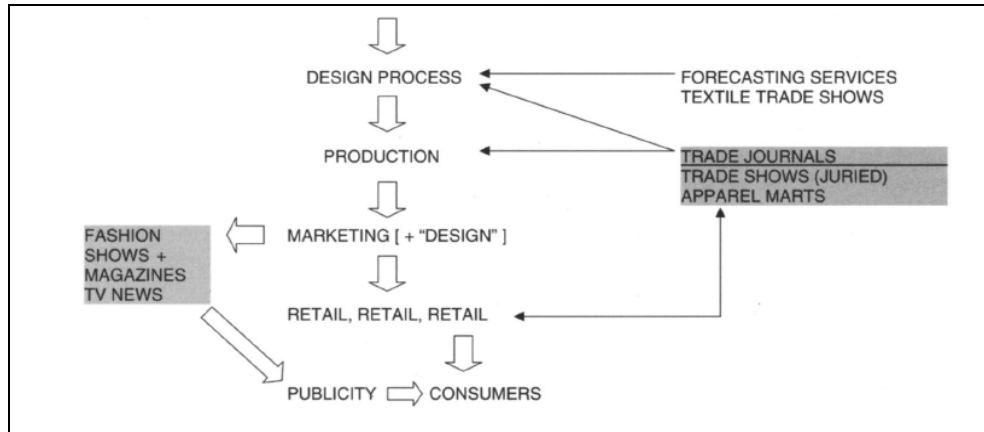


Figure 2.10. The High-end Fashion Production
(Source: Rantisi, 2002a)

On the other hand, the medium to low-end fashion production, there is a different strategy. The designers in such production work as employees of companies and they are generally inclined to be less creative and more market oriented in their designs. They are more short terms and aligned with market uncertainty by copying styles and concepts created by the leading designers. Since such fashion production cannot afford to purchase the same fabrics or employ the same quality labor consult, copying the designs becomes outright for it. In other words, the designers stay with the same dominant concept and adapt its specific design essentials to match with their own production experiences and materials, drawing on many support institutions along the way (Figure 2.11) (Rantisi, 2002a).

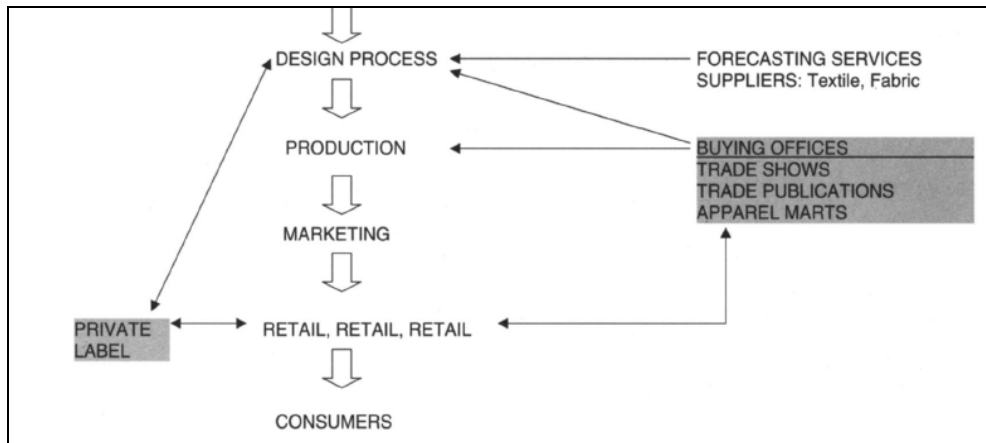


Figure 2.11. The Medium to Low-end Fashion Production
(Source: Rantisi, 2002a)

From the creative industries perspective, within the given framework of the value chain of the fashion industry, DCMS provides a scheme of details of the further players in the value chain (Figure 2.12). for the Core Activities, clothing design, manufacture of clothes for exhibition, consultancy and diffusion lines; for the Related Activities, magazine publishing, design education, graphic design, product design, fashion photography, hair care and cosmetics, accessories design, perfumes design, modeling; for Related Industries textiles, clothing manufacture, high street clothes retailing are defined.

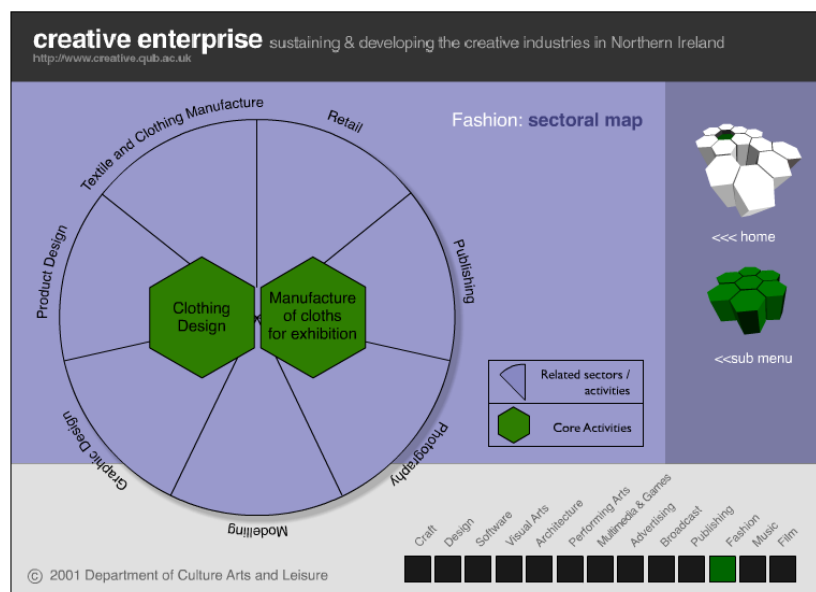


Figure 2.12. Details of the Further Players in the Value Chain
(Source: DCMS, 2001)

Moreover, there are ranges of activities within each link of the chain. For the fashion products processed in different links, in other words accepted and legitimated as fashion, goes through further a different process and mechanism called critical intermediaries by Zukin and Maguire (2004), which make a contribution to gatekeeping and distribution of fashion.

2.4.4. Intermediaries of the Fashion Industry

Very central to the fashion industry there are some intermediaries in facilitating the image-building process. Cities like New York have a considerable advantage over other centers of fashion design due to the presence of such intermediaries (Wu, 2005). Although the fashion designers, as stated in the value chain section, play key role in the system, it should also be mentioned that there are other fashion-related occupational groups (Kawamura, 2004). Kawamura (2004) asserts, fashion is a collective process where many different people and institutions from different proximities and professions come together as critical intermediaries (Zukin & Maguire, 2004). Each creative industry has noticeably its own settings that create, promote and bring it to the market. Various intermediaries direct the fashion industry, ranging from intermediaries such as buyers and stylists, fashion editors, and journalists, models, photographers, hairdresser and the make-up artists, fashion forecasters, fashion-related educational institutions, fashion fairs and fashion weeks, fashion magazines, advertising agency to a range of new intermediaries such as marketing and consumption websites, social networking websites, fashion bloggers (Figure 2.13). These intermediaries regulate what the consumer will see or hear (Pratt et al., 2012). There are also department stores, chain stores or smaller boutiques as intermediaries.

In the industry, a buyer is someone who decides on what items are stocked in stores, based on his or her predictions of what will be popular with consumers. Buyers usually work alongside designers and their chosen sales representatives and visit trade fairs, wholesale showrooms and fashion shows to observe upcoming trends. They are employed in large department stores, chain stores or smaller boutiques. Buyers work with other buyers to exchange knowledge. A buyer frequently meets with the buying manager to review the development of the range of fashion products.



Figure 2.13. Intermediaries of the Fashion Industry

Buyers more meet with the marketing, design, quality control, and fabric technology departments as well as interior architects, comparing to with the finance, marketing, and retail sales personnel on a less frequent basis (Goworek, 2007). Furthermore, fashion stylist appears in the process as the one who picks the fashion items for published editorial features, print or television advertising campaigns, music videos, concert performances, and any public appearances made by celebrities, models or other public figures. Stylists are often part of a larger creative team consists of fashion designer, models, fashion photographer, hair stylist and makeup artist to put together a particular look or theme for the specific fashion project. Stylists in the editorial and celebrity fields work primarily with designer samples, which are shown during fashion presentations and are lent to members of the fashion press during the 4–6 months before retail sales begin. The hairdresser and the make-up artist are usually less important in the production process than the stylist.

Besides, there is also fashion editor within the production team. The fashion editor decides on the fashion photographer to work with. Fashion photography is necessary for displaying clothing and other fashion items. It is most often used for advertisements or fashion magazines such as Vogue, Vanity Fair, or Elle (Aspers, 2012). Besides, fashion editors also write for fashion magazines, where its role merges into the role stylist. As the journalists' major task is to do fashion reporting, fashion editors are directly associated with retail stores and indirectly with manufacturers. They play a major role in building the fashion image and maintaining and continuing its value

and appeal. Fashion editors and buyers both from stores and the wholesale trade often discuss together. While editors tell his/her readers where the new fashions can be found, buyers work with that magazines steer public opinion and help with the sales. This is also the collaboration between press and trade in the fashion industry (Kawamura, 2004).

Moreover, trends in fashion are generally set by designers, trend forecasters, old and new fashion media and buyers. Yet, trends more often originate from urban subcultures. What consumers demand and what suppliers offer influence each other in a complex and multi-dimensional way (Pratt et al., 2012). In addition to that, the significance of the fashion-related educational institutions, national and international universities and design schools is also considerable since they serve as both a venue for fashion design education, and established key social networks (Wu, 2005).

On the other hand, fashion fairs, together with fashion weeks and showrooms, appear as central intermediaries in how fashion reaches buyers and consumers (Pratt et al., 2012). Their goal is to show new styles to journalists, editors and buyers as well as consumers. From its definition, a fashion show is a presentation of merchandise on live models. It makes one or more general statements about fashion while showing individual and specific items to support or illustrate these comments. These statements add value to clothing and convert mere products into fashion so that fashion culture can be sustained and keep the system work. At the same time, fashion fairs, fashion weeks and showrooms attracts designers to certain places that everyone believes is the fashion capital, and the city remains influential. These events attract designers in a way that they can reinforce their status and reputation and interest those who are representative of major magazines and newspapers (Kawamura, 2004).

Likewise, fashion magazines contribute to the distribution process since because they directly serve the interests of the fashion industry. They are tools to diffuse ideas create additional appeals to encourage the sales of latest styles. These magazines first appeared prior to and after the First World War and since then profited enormously from the developments in the techniques of photography and illustration (Kawamura 2004). Additionally, the role of the advertising agency is to run commercial campaigns for clothing companies, and contribute to the promotion of the customers' brand names and products. This can include a single product or a promotion in a specific market (Aspers, 2012).

Lastly, recently emerged new intermediaries of fashion industry are, comparing to conventional, are more visible and accessible to customers. Less than a decade ago, the fashion world was more exclusive and constrained by scarcity of opinions and information. However today, like in many other industries and businesses, fashion uses the new media revolution such as marketing and consumption websites, social networking websites, fashion bloggers and new online services to reach consumers instantly. Many of these services are also developed by designers to spread fashion more effectively and strongly.

2.5. Evaluation

This chapter initially has presented the issues of creativity, creative class, creative industries as well as different attempts to classify the creative industries. Creativity is defined as the ability to combine data, perceptions and materials to produce something new, and it not a mere economic activity although sometimes the result of the creative process can bring economic implications. Cities all over the world are planned and designed with creativity as their best strength or their crucial objective. In general, cultural industries are independent economic field dealing with production, distribution and intermediation of artistic and cultural products or services with creative content whereas creative industries are more business oriented consisting of diverse art and design related sectors. On the other hand, the creative industries encompass a broader range of activities that indicates knowledge and information live or produced as an individual unit, and indicate all the cultural industries. These activities in different industry categories are largely based on the capabilities of creative class, a substantial realization of artistic or creative endeavors. Therefore, the access to human capital and creative class are crucial for the creative industries since the industries indicating creative class are highlighted as an important contributor. Comparatively to the cultural industries, if the definition of creative industries has no cultural content, we can claim that the distinctive attributes of culture has purposely been overlooked in favor of a new economy approach. If capitalism is an unlimited accumulation then culture is always going to be questionable in this respect. Because, cultural value has nothing to do with the accumulation of profit (that cities can get through their competitions) and therefore sets a limit to it. If culture limits capitalism to accumulate then there are always going to

be difficulties in making cultural policy in conjunction with economic policy in such competitive environment. We can conclude that the creative industries are a large group of which the cultural industries are a sub-set. Despite their differences and no matter which terminology is adopted, the policy challenge is to find the right goal whether it will aim at creating cultural value for public to consume or generating and promoting economic value in the new economy in order to compete globally with the other cities. There is no standard definition of the creative industries in use. Most countries and research groups have their very specific models of the creative economy that identifying and classifying the creative industries. Different approaches can be applicable in different circumstances. UNESCO emphasizes more on the cultural industries through the production and distribution of intangible cultural content, whereas the World Intellectual Property Organization evaluates the creative industries within the copyright properties owing to its very commercial prospects. On the hand, the United Nations Conference on Trade and Development more concentrates on the creative term and as a driver of trading in the creative economy. The difference lays not only behind the definition but the usage in practice. For instance, the usage of advertising or fashion as a cultural industry heavily depends on the interpretation of what they indicate as a cultural content.

The chapter then argued the global perspectives of fashion system and the evolution of the fashion industry as a creative industry with its value chain and intermediaries. To start, there are numerous definitions of fashion due to its different meanings and interpretations throughout history, and regarding to the different social structures. From the economic and mere manufacturing perspective, one can regard fashion as an industry in the conventional meaning where raw materials are transformed and designed, reproduced in large quantities, and exchanged in a market. From sociological perspective, fashion is described as a never-ending consumption tool to fulfill the needs of people through certain signifiers that let individuals to signal or express their own personality or personal values. In its industrial structure, there is a value chain as a group of serial activities through information and resource flows and exchanges. This value chain portrays a structure to describe how the activities of fashion contribute to its tasks of designing, producing, delivering, transferring, linking and connecting, and maintaining its products and the industry itself in order to create value. Within the value chain, there are various intermediaries, that operate fashion production, distribution and consumption, ranging from intermediaries such as buyers

and stylists, fashion editors, and journalists, models, photographers, hairdresser and the make-up artists, fashion forecasters, fashion-related educational institutions, fashion fairs and fashion weeks, fashion magazines, advertising agency to marketing and consumption websites, social networking websites, fashion bloggers.

All in all, in order to realize its operations, physical and place-based dynamics carry the most crucial role for the production and distribution of fashion industry. Since the fashion industry is rooted in space, and in particular in locations, their structure vital to the urban planning can best be understood through the review of the creative environments and their formations.

CHAPTER 3

CREATIVE INDUSTRY CLUSTERS AND INVESTIGATION OF FASHION INDUSTRY CLUSTERS

The creative environment, district, cluster or city, is characterized by the agglomeration and clustering of firms and people in certain urban places involved with creative industries. However, their agglomerations are not homogeneously distributed across the territory; rather, they are concentrated in certain places and show different characteristics. For the concern of the present research, this chapter initially gives an overview of the theoretical discussions of clustering as a concept. Different arguments from multiple scholars complementary and contradictory to each other are discussed. Second, the reasons behind the clustering of economic activities and explanations by multiple scholars and thought schools are argued through different approaches to describe clustering of particular sectors. Here, the proximity is predominantly discussed in terms of spatial and non-spatial dimensions. Third, clustering of creative industries, their creative formula, their different scales and fundamental characteristics have been presented. Following, the different stages of clustering and their evolution processes as being emerged spontaneously or organically are underlined. Lastly, previously emerged fashion industry clusters in the world are reviewed with regard to their spatial features that associate with the concept of spatial clustering. Each fashion industry clusters with unique spatial formation and organization, policy approach and distinctive physical realizations in different contexts are presented.

3.1. Conception of Clustering

The term clusters were originally defined by Porter (1990) as geographic concentrations of firms producing a particular product or service. Later, Porter (1998) describes clusters as “critical masses -in one place- of unusual competitive success in particular fields” or “geographic concentrations of interconnected companies and institutions in a particular field” (p. 78). Porter (2000a) adds to the definition that “a

geographically proximate group of inter-connected companies and associated institutions in a particular field, linked by commonalities and complementarities”, while also stating that the geographic scope of a cluster can “range from a single city or state to a country or even a group of neighboring countries” (p. 254). “Clusters occur in many types of industries, in smaller fields, and even in some local industries such as restaurants, car dealers, and antique shops. They are present in large and small economies, in rural and urban areas, and at several geographic levels (e.g., nations, states, metropolitan regions, cities)” (Porter, 2000b, p. 18). The recent definitions by Porter on clusters have become influential ones in urban studies literature.

However, Porter’s definition is argued being mainly spatial so that some other authors have proposed new definitions that advantageously include also other aspects such as interactions and relationship between firms. Knoke and Kuklinski (1983) describe clusters as “a specific type of relation linking a set of persons, objects or events” (p. 12). Additionally, Rosenfeld (1997) stresses the importance of the interaction and cooperation, defining the cluster as “a geographically bounded concentration of similar, related or complementary businesses, with active channels for business transactions, communications and dialogue, that share specialized infrastructure, labor markets and services, and that are faced with common opportunities and threats” (p. 10). Similarly, Malmberg and Maskell (2002) underline a role for competition in spurring innovation and learning within a localized agglomeration. Following, Law (2002), stresses the importance of networking in terms of interaction in where cluster as “a localized network of specialized activities through which goods, services and knowledge are exchanged. The relationship between firms is complementary, competitive and cooperative. Unlike a sector, the actors are drawn from varied activities, suppliers, customers, private services and the public sector, and therefore the cluster and its size may be invisible as it is hidden in terms of the standard industrial classification” (p. 11). Besides, Montgomery (2003) emphasizes the relation between interaction and competition that “a grouping of industries linked together through customer, supplier and other relationships which enhance competitive advantage” (p. 298).

Porter (1998) argues that clusters are able to provide three sources of competitive advantage to the firms; Improvement of productivity via specialist inputs and skilled labor, information and industry knowledge, the development of complementary relationships with firms and other industries, the role of universities and

training institutions that enables information flow; Innovation opportunities due to proximity to buyers and suppliers, continuous interaction with other firms in the industry and; New business formation driven by the accessible information about opportunities and resources necessary for starting a new business. Further, Porter (2000b) has later formed more general opportunities of clustering as the access to specialized inputs and employees, to information, to institutions and public goods. He also underlines the importance of incentives and complementarities (intermediaries). First, spatial proximity within a cluster can provide higher or lower cost access to specialized inputs such as components, machinery, business services, and personnel compared to the links with outside the clusters, or the idea of importing inputs from distant locations. Second, extensive market, technical, and other specialized information also accumulates within a cluster that can be accessed easily and at lower costs. This applies to the flow of information between units as internal interaction of the same company as well. Proximity along with the presence of personal flow, relationships and community bonds, trust facilitate the information flow within clusters as a matter of external interaction. Third, the opportunity of recruiting employees already trained in local training programs can exclude or reduce the cost of internal training. In terms of the knowledge evolution, firms often can access to the accumulated knowledge and knowledge flow, as well as to the experts in local institutions at very low cost. These also include information and pools of technology, the reputation of the cluster location, and some of the marketing and sourcing advantages where the collective benefits taken by cluster participants. Four, clusters can be a tool to solve or mitigate some agency problems. Clustering can improve the incentives within companies, motivations for achieving high productivity. Due to the repeated interaction, diffusion of information and reputation, and aspiration for standing in the community, the interactions with cluster are more beneficial and reflect long-term interests. The last advantageous asserted by Porter (2000b) is the complementarities. The presence of various agents and actors as firm referrals, trade fairs, trade magazines, marketing delegations of related firms and industries in a location provides efficiencies for collaboration and cooperative marketing. Complementarities can also improve the reputation of a location in elsewhere and makes it more likely visible. Additionally, the shared information enables cluster firms to continuously merge and mix similar and non-similar resources to produce new creations. This stimulates specialization within the cluster and results in the development of competences (Porter, 2000b).

Dimensions of Clustering

One further argument has come from the work of Bathelt et al. (2004). Their argument is mainly based on that his very broad definition of Porter in terms of scale, where Porter (2000a) states “range from a single city or state to a country or even a group of neighboring countries” (p. 254), say very little about the advantages firms as locating within a cluster. As complementary to that, they suggest that one may distinguish between the horizontal and vertical dimensions of clusters and propose some advantages of local or regional as opposed to extra-local or inter-regional interaction between firms (Bathelt et al., 2004)

The horizontal (spatiality) dimension of a cluster comprises those firms which produce similar goods and compete with one another. This dimension can drive the early stage of cluster establishment and concentration. These firms do not necessarily have close relations with each other or either intensive input-output interactions that needs a very essential physical transactions. Instead, they take advantage of being co-located with one another so that they are well informed about the products and they can compare the quality and cost of the production factors of their competitors. Benefits of the spatial proximity come from continuous monitoring, comparison and evaluation. “Due to their co-presence, the production conditions are basically the same for all regional firms. This enables the firms to effectively compare their performance with that of their competitors” Bathelt et al., 2004, p. 8-9). Enlil et al. (2011) has found another important factor in the competition among companies producing cultural products in Istanbul that is the being located in prestigious areas and being associated with those areas to become visible and reliable in the market. The outcomes of their research show that the locational choices of companies working in the fields of film and fashion design bring the prestigious areas of Istanbul in attention which this directly affects their capacity and size of business.

On the other hand, the vertical dimension (non-spatial), indicates those firms that are inter-linked and connected through networks of supplier, service and buyers relations. That creates a motivation for suppliers to make locational preferences based on these firms since they together create the market. With the closeness to the market, the suppliers can expand economies of scale and allocate large parts of their production at low costs due to the reduced transportation costs. Therefore, the development of dense networks of transaction and material linkages across the cluster becomes favorable and advantageous (Bathelt et al., 2004).

The third dimension is highlighted in the work of (Enlil et al., 2011). The institutional dimension of clustering is the entire unwritten codes and traditions that together define the customs, habits, and patterns of business behavior. Firms located in the same space able to stay beside to new ideas and projects, cooperate in the solution of mutual problems and to make use of the creative interaction and cooperation. In this process, spaces such as restaurants, bars and cafes become crucial for constructing face-to-face relationships, sharing tacit knowledge, building up new business contacts and even for making gossip s about rival companies (Enlil et al., 2011).

3.2. Different Forms of Clustering

Explaining the reasons how economic activities concentrate is fundamental to understand the phenomenon of clustering. Multiple scholars have used various approaches to describe clustering of particular sectors, and the proximity has predominantly been treated as a purely geographical concept (Gordon & McCann, 2000; Feldman, 1999). On the other hand, the understanding of space as a social rather than a physical phenomenon leads the definitions of the terms spatial or geographical proximities often remain vague. As Torre and Rallet (2005) discuss about the proximity and claims that “the purpose of examining geographical proximity is to determine whether one is ‘far from’ or ‘close to’” (p. 49). Similarly, Asheim and Gertler (2006) refer to this type of geography which will be regarded as Neo-regionalism. In this respect, Neo-regionalists attempt to extend the idea of the region to that encompasses interactions and processes for knowledge, creativity and innovation.

3.2.1. Spatial Clustering

Some preliminary and dominant mechanisms are explored to describe the spatial agglomeration of economic activities and specifically design industries. The first spatial approach has been taken by the California school. Allen J. Scott and Michael Storper emphasize the relevance of economies of scale through reduced transaction costs. The transaction cost theory refers to the inter-firm linkages in locational agglomerations where exchanges of goods, capital, creativity and knowledge are very transaction-oriented. As a theory, it asserts that the spatial concentration of economic activity

reduces transaction costs and develops more intense inter-firm relations (Storper, 2000). Storper (2000) asserts that the most of the firms engaged in the same industries tend to locate to guarantee that they get access to the latest ideas about the product and market changes and shifts. Storper and Scott (1988) and Scott (1988b) claim that transaction costs are reduced via geographical (spatial) proximity. Costs for obtaining the relevant information are reduced and, flow and exchange of information is accelerated. Critics of this approach bring out that while the collective use of local resources and infrastructure are disregarded, input-output relations within a cluster are overvalued. Further, the exchange of knowledge is highlighted. It is claimed that the social interaction where exchange of knowledge heavily depend on, is not integrated into the transaction cost theory (Gertler, 2003). The transaction cost theory is accompanied by the institutional economics approach that will be discussed in the following section.

Secondly, Turok (2010) refers to Gordon and McCann (2000) in his work to distinguish three distinctive clustering models; pure agglomerations, industrial complex and social networks. Two of these models try to explain the spatial dimension of clustering. The classic model of pure agglomeration deals with the external economies of scale or scope driven by the other firms locating in the same area. In this regard, geographical proximity becomes a crucial element. In the model of pure agglomeration, inter-firm relations are rather temporary. The sizes of firms are inheritably atomistic and firms have no market power. Firms continuously reconfigure their relations with other firms and customers in accordance with the market opportunities. That leads to intense local competition, lack of trust and openness as well as collaborations among firms. To be placed in such clusters are dependent on the local real estate market rent so that rents can be seen as an indicator of the cluster's performance. Pure agglomeration form of clustering is best described in the Marshallian model of agglomeration where the notion of space is essentially urban space, in that this type of clustering only exists within individual cities (Iammarino & McCann, 2006). The Marshall's spatial agglomeration of economic activity can be explained within the conception of agglomeration economies. The concept of agglomeration economies suggests that firms possess positive externalities derived from the spatial concentration of economic activities. Agglomeration economies can be seen both as internal to the firm (economies of scale) and external to the firm, generated in the location (Birnkoff, 2006). Localization economies indicate externalities of firms located close one to another in the same industry. Firms co-locate, in spatial agglomerations, take advantage of sharing the

certain collective resources both physically and organizationally such as infrastructures and employees. The buzz as a previously mentioned concept is also created by frequent face to face communication through such spatial proximity. Also, the variety and diversity of firms in spatial agglomerations are key elements to promote growth and innovation since mutation and cross-over occur from outside the core industry (Feldman, 2000). Studies by Glaeser et al. (1991) support the idea that the more diversity in a local economy the higher rates of growth. However, there is inadequate empirical evidence for agglomeration economies (Feldman, 2000).

Thirdly, industrial complex or activity complex presented by Gordon and McCann (2000) and Iammarino and McCann (2006) can also be included in the concept of non-spatial forms of clustering. The industrial complex is characterized by sets of particular and predictable relations among firms in the cluster that comprise frequent transactions. Within this form of clustering, spatial industrial clustering is observable in terms of its aim to lessen transactions costs and can be best achieved by locating close to other. Firms have mainly complex and highly organized input–output supply chain production and consumption hierarchy in where they operate. Firms in the value chain or in the production chains locate close by one another in order to ease interaction and minimize the costs of communication. Also, a sound internal and external infrastructure and logistics can be provided for firms within industrial complexes. However, shared services, a specialized labor pool and spontaneous information exchange stays comparatively unimportant.

The industrial complex is based on the cumulative learning from collective sources within the industry and firm and indicates knowledge exchange and transfer specific to industrial applications. Such high industry concentration, in general, does not open to the other and has low entry possibilities and shows strong agglomerations at the spatial level (Iammarino & McCann, 2006). However, in the account of Iammarino and McCann (2006), the spatial concept of industrial complex is local, yet not necessarily urban, still can be beyond the local in sub-national regional level, and highly depends crucially on transportation costs.

However, while stressing the importance of ongoing business interactions, these models disregard historical processes, including the dynamics of cluster formation and obsolescence. Locational decisions may indicate historical accident or conditions derived from already existing industrial arrangements more than present opportunities for trade and collaboration (Coe & Townsend, 1998). The production can highly be

shaped by inherited conditions and firms can be path-dependent. Since there are also pre-existing suitable labor pool and related production dynamics or supporting firms, buyers and major customers were once accumulated, firms may mainly want to locate in these particular places. Also, the rationale of the spatial accumulation can be based on localized relationships. Moreover, there can also be internal economies of scale where successful local firms can be vulnerable to external competition and, rather depended on their local market power and sources. Finally, clusters may grow at the expense of other places, sometimes as satellites where the considerations for wider urban and regional system become an important issue (Turok, 2010).

Among the previously mentioned different forms of spatial clustering, the conception of agglomeration economies seems the most powerful framework of spatial concentration of design industries. Especially, it associates with the model of the approach taken for this present dissertation. Mostly, creative design firms benefit from the creative environment and creative workers in agglomerations. Spatial agglomerations of creative talent, diversity, competition and collaborations as well as the growth and success are often driven by the existing informal interactions. The spatial proximity also facilitates mutation and crossover between firms in similar and related fields. Likewise, horizontal relations between the firms are constructed and improved by spatial concentration. The presence of diverse firms in clusters provides a complementary competence across various creative and non-creative fields. That fosters their competitiveness and exchange of knowledge and creativity in the spatially agglomerated work environments. Regarding the previously mentioned models in this section, theories and concepts with their key features, the below table can be a base for the spatial concern of the present study (Table 3.1).

Table 3.1. Major Forms of Spatial Clustering

	Transaction Cost (the California School) (<i>Storper, 2000; Storper & Scott, 1988; Scott, 1988b</i>)	Pure Agglomerations (<i>Gordon & McCann, 2000; Feldman, 1999; Iammarino & McCann, 2006</i>)	Industrial Complex (Classic Economic Approach) (<i>Gordon & McCann, 2000; Iammarino & McCann, 2006</i>)
Key Features	<ul style="list-style-type: none"> - Transaction-oriented goods, capital and knowledge - Less emphasis on the collective use of local resources and infrastructure - Disregarding the social interaction 	<ul style="list-style-type: none"> - Atomistic firm size - Geographical (spatial) proximity - Urban scale - Open to others - Diversity - Positive Externalities - Economies of scale and localization (internal/external) - Mutation and Crossover - Diversity - Also include Locality (Buzz) and Networks (Pipelines) - Empirical evidence is inconclusive - Unstable frequent retailing 	<ul style="list-style-type: none"> - Some firms are relatively larger - Stable and frequent retailing - Local and regional scale - Specialization - Value Chain - Production Chain - Shared infrastructure - Shared logistics - Lack of spontaneous labor pool - Lack of information exchange - Closed to others

3.2.2. Non-spatial Clustering

Each model previously mentioned highlights different mechanisms whereby regions provide or generate the spatial conditions necessary for clusters. Complementary to different forms of purely spatial clustering discussions, some of the scholars have also developed additional approaches (Scott, 2000; Gordon & McCann, 2000; Iammarino & McCann, 2006) that indicate some hints referring to the non-spatial dimension of clusters.

Scott (2000), Iammarino and McCann (2006), Gordon and McCann (2000) propose a further approach that is the social network where active collaborations between firms and other actors emerge to stimulate trust and long-term relationships. That eliminates the limitations of pure market relationships and short-term contracts, and enables greater level of social integration. Networks can also be built upon the distinctive history and identity of places that represent by their own associations. Social networks also reduce some of the difficulties of coordination that result from fragmentation (Scott, 2000). Regardless of whether industry networks are national or

international, firms may create connections with customers, suppliers and other firms outside the cluster in case that offers more advanced capabilities, lower prices or larger markets (Scott, 2000).

Another approach suggested by Bassett et al. (2002) (as cited in Brinkoff, 2006) is based on the ideology of the school of institutional economics. The institutional economics approach makes emphasize on the role of an institutional and organizational involvement in the process of spatial agglomeration. In addition to the existence of embedded routines, norms, and habits embedded in inter-firm relations and interdependencies, the network of supporting institutions and organizations such as financial institutions, trade associations, training organizations, local authorities, and their infrastructure create interactions, collaborations and collective identity (Bassett et al., 2002). Spatial agglomerations of economic activities are considerably facilitated by the formation of local or regional institutions. Institutions as an integral part of the social, economic, and physical characteristics of localized networks enable the local economy function more easily by supplying essential services, facilitating flows of information, stimulating trust and cooperation. However, such approach does not take the role of informal institutions and conventions into considerations and fail to answer to what extent of local or non-local conditions have contributed to the development of an industrial cluster or region (Brinkoff, 2006).

Furthermore, Neo-regionalist approaches (Storper & Venables, 2002; Owen-Smith & Powell, 2002; Grabher, 2002; Bathelt et al., 2004; Boschma, 2005; Torre & Rallet, 2005; Asheim & Gertler, 2006; Maggioni et al., 2007; Gertler, 2008; Storper, 2009; Shearmur, 2011; Mattes, 2012) have predominantly concentrated on how geographic proximity should be approached from a wider perspective. In their account, spatial entities are loosely defined to meet the requirements for proximity indicating knowledge and creativity exchange, collaboration, cooperation and so forth. Their theoretical conceptions discuss different non-spatial forms of concentration of economic activity, and at the same time, broaden and further the discussions of non-spatial (vertical) dimension of clusters previously mentioned in the early section.

As previously mentioned by Mattes (2012), for example, geographical proximity is not enough to discuss the interactions of partners in distant locations (Gertler, 2008), and also social networks can be counted as complementary towards purely geographical clustering (Maggioni et al., 2007). This is the reason to further the clustering discussion towards also to non-spatial dynamics (Storper, 2009). Taking these into account,

geographical proximity cannot be the only tool to describe clustering. In addition to the geographical proximity that is spatial, Boschma (2005) identifies four further dimensions of proximity: cognitive proximity (sharing a common vocabulary and conceptual framework), organizational proximity (capacity to coordinate and exchange knowledge), social proximity (micro-level social ties of friendliness and trust), and institutional proximity (macro-level routines, rules and regulations).

The idea of proximity here enables flow of information and can be understood from a variety of perspectives so that, in Shearmur's (2011) account, there is no reason to put the geographic proximity prior to the others. Especially from the perspective of the Knowledge school, the cognitive dimension of proximity stands at the very core of the interaction processes, especially knowledge and creativity. According to Boschma (2005), first, cognitive proximity refers to that proximity means more than just creation and learning often depend on combining geography. In general, related actors need to a certain cognitive proximity to each other in order to communicate, absorb and process new information. For Mattes (2012), if the cognitive distance is too large, the actors involved will not understand each other and will not be able to interpret exchange their knowledge. Similarly, if it is too small, access to new knowledge or creativity cannot be guaranteed so that there should be an optimal level of cognitive distance. Second, the organizational proximity is defined by Boschma (2005) as "the extent to which relations are shared in an organizational arrangement" (p. 65). A single coordination is in charge of all the relevant activities, and all the related tasks being carried out within a single organization. Yet, it is not only the mechanism that coordinate but also a driver that enables transfer and exchange of information and knowledge between different actors. Third, social proximity brings about the result of micro-level shared personality characteristics, personal interaction and a sense of familiarity between individual actors (Mattes, 2012). For instance, sharing the same characteristics as gender or race can increase the ties between actors in a network. Forth, institutional proximity comprises many factors from laws to the social norms, values and routines rules which together built the socio-cultural, economic and political framework in which the actors are involved. Given that much of the current literature on non-spatial characteristics of clustering through geography simply assumes the neo-regionalist approach. Regarding the previously mentioned models in this section, theories and concepts with their key features, the below table can be a base for the non-spatial concern of the present study (Table 3.2).

Table 3.2. Major Forms of Non-Spatial Clustering

	Social Network (<i>Scott, 2000; Iammarino & McCann, 2006; Gordon & McCann, 2000</i>)	Institutional Approach - School of Institutional Economics (<i>Bassett et al., 2002</i>)	Different Proximities - School of Neo-regionalism (<i>Boschma, 2005; Mattes, 2012</i>)
Key Features	<ul style="list-style-type: none"> - Diversity of firms scales - Loyalty - Partially open to others - Integration - Collaboration - Trust - Long-term relationships - Location necessary but not sufficient - Very high and uncertain cumulative 	<ul style="list-style-type: none"> - Involvement of institutions and organizations - Existence of embedded inter-firm relations - Lack of definition for the role of institutions 	<ul style="list-style-type: none"> - Cognitive, proximity (sharing a common vocabulary and framework) - Organizational proximity (capacity to coordinate and exchange knowledge) - Social proximity (micro-level social ties of friendliness and trust) - Institutional proximity (macro-level routines, rules and regulations) - Regions are seen as individuals and have little or no effect on another's (Shearmur 2011). - Knowledge and creativity systems in clusters are a-spatial

In addition to these different forms of clustering, Storper and Venables (2002), Owen-Smith and Powell (2002) and Bathelt et al. (2004) build upon some of these discussions as they strengthen the spatial and non-spatial perspectives by adding the concept of local buzz and global pipelines. As complementary to the previously mentioned dimensions, there are also two scales of interaction for creation within the clusters; local buzz and global pipelines.

Storper and Venables (2002) has identified the conception of ‘buzz’ that refers to the spatial dimension of information and communication ecology created by face-to-face, contacts, co-presence and co-location of people and firms within the same industry and place or region. This type of interaction consists of specific information and continuous updates of this information, planned or spontaneous learning processes, and also shared cultural traditions and habits within a particular field. These all stimulate the establishment of conventions and other institutional arrangements as well. In a similar way, Owen-Smith and Powell (2002) use the notion of ‘local broadcasting’ and Grabher (2002) uses the concept of ‘noise’ to refer to the same. “Participating in the buzz does not require particular investments. This sort of information and communication is more or less automatically received by those who are located within the region and who participate in the cluster’s various social and economic spheres ... It is almost

unavoidable to receive information, rumors and news about other cluster firms and their actions. This occurs in negotiations with local suppliers, in phone calls during office hours, while talking to neighbors in the garden or when having lunch with other employees and so on” (Bathelt et al., 2004, p. 13). Being in close proximity, co-located and visible enables great potentials for inter-personal translation of important news and information among the cluster actors and firms. Also, Maskell et al. (1998) suggests that the trust exists in localities as something inherited, that any known-member can easily take the advantage of it.

On the other hand, Owen-Smith and Powell (2002) employs the non-spatial stand and propose term ‘pipeline’ where the channels are used in such distant relations and contacts. The findings of their study on the Boston biotechnology community proves that even though knowledge spillovers and creation may be more effective within a regional network than across, its borders, physical distance is not the only influence. According to them, the creation and information accumulation does not only result from the local and regional interaction but also often obtained through strategic partnerships of inter-regional and international reach. Often, planned, systematic and decisive knowledge flows occurs through these pipelines, instead of undirected and spontaneous local buzz. Unlike the local buzz between cluster firms, there is no shared trust in inter-regional and international environments that can be beneficial. Rather, the formation of global pipelines with partners in distance requires time and involves costs (Bathelt et al., 2004).

Regarding the mutuality of these two concepts, local buzz and global pipelines are feeding each other and they are complementary as well (Figure 3.1). The more firms of a cluster create trans-local pipelines the more information and news about products, industries, markets and technologies are channeled into internal networks and, the more dynamic the local buzz there will be.

Explaining the reasons why economic activities concentrate is vital in order to recognize why certain industries, capitals, and labors are attracted to particular places. In the case of creative industries, the concerns differ in a way that they are not driven only by the regional geographies, no matter spatial or non-spatial, of specialization in particular industries, but also by the externalities that arise from the diversity of these places. Without thorough analysis of particular industries in specific locations, mere theoretical approaches through certain models endanger producing correct prescriptions for the creative industry clusters. In this regard, (non)spatial clustering as a theoretical

approach is too vague, especially for creative industries, so that in the following sections more general notion that defines their spatial configurations, urban settings and organizational structures of creative industries as well as their formations will be explained.

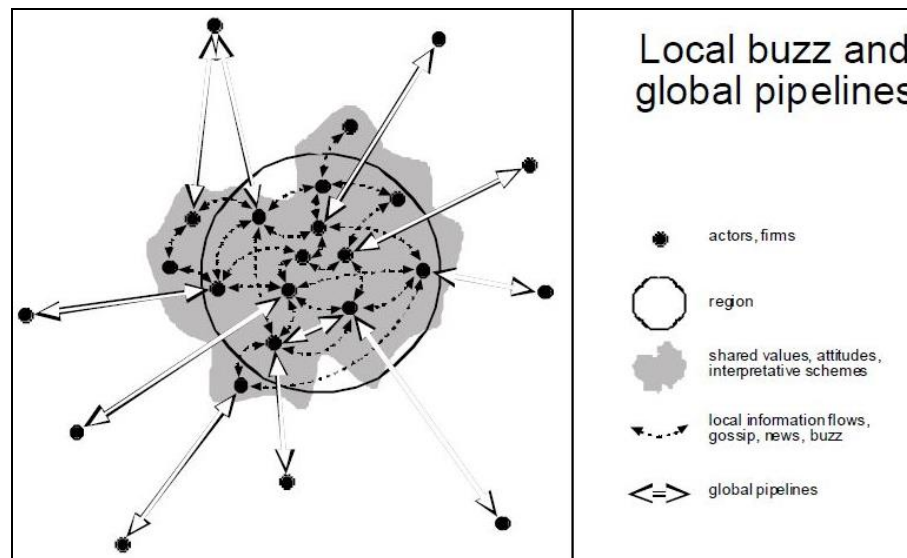


Figure 3.1. Buzz and Global Pipelines
(Source: Bathelt et al., 2004)

3.3. Clustering of Creative Industries

The term of cluster can be vague when applied to cultural or creative industries. The term cluster has derived from Porter's works on industrial/business clusters (Porter, 2000a; 2000b), where a wide range of interactions, diversity of complementary skills and evolving knowledge allow particular places to achieve a competitive advantage. The economic factors that contribute to such concentration entail cost-savings in the production chain, cross-trading, joint ventures (Evans, 2009). Yet, more central to this dissertation, creative clusters differ from typical business clusters since there are some additional factors vital to their development and formation. Creative clusters goals and intentions are not similar to the regular clusters in a sense that they have additionally social concerns as well as creative objectives (Bagwell, 2008).

Within the creative economy, economic advantage is now derived from the creativity through spatial proximity of producers, sharing of production facilities, and collaborative marketing of industries (Hitters & Richards, 2002). Creative industry

clusters then appears essential for stimulating the development of creativity; at the same time as creativity plays an increasing strategic role in the urban economy (Mommaas, 2000). “Successful (creative) cluster development can be a key to regional competitive advantage, and the challenge is how to ensure the continued success of existing clusters and nurture the growth of emergent clusters” (DCMS, 2001, p. 18). For understanding the creative economy, its content and functions for both developed and developing countries, the evolving concept of creative industries that associates with the emergence of the concepts of creative cities, creative clusters and creative districts is fundamental as major drivers of the growth of the creative economy. Post-Fordism associates with by globally shared local knowledge and creativity that was embedded at the heart of the creative industries. In this respect, creative clusters can conventionally be evaluated as autonomous and independent models of development. However, new approaches are emphasized the local–global perspective that underlines the necessity to access external creativity and knowledge, and to form external networks.

Today, creativity has detached from the unified national economic space of modernity and has diffused into a more fluid and multi-layered creativity-concentrated spatiality where the post-Fordist production is central. At this point, the research of Gu (2008) refers to many scholars (Porter, 1998; Storper, 1994; Landry, 2001; Scott, 2000; Mommass, 2004; Maskell, 2001; Drake, 2003) and takes attention to the literature investigating the cultural /creative industry networks and studying the notion of clusters (Gu, 2008).

Similarly to creative industries and cultural industries, the terms creative city, cultural quarters, creative clusters, creative places and cultural districts are used in the literature interchangeably and with many overlapping descriptions (Evans et al., 2005). While many research conducted in Europe choose the term cultural clusters, great number of researches originated from the US, UK as well as Australia mainly prefers to utilize the term creative clusters (Pappalepore, 2010). The same interrelation between the notion of cultural and creative industry cluster is applicable to the various definitions of cultural or creative quarters, districts, precincts, and clusters. Both concepts indeed highlight the advantages of localities for both creative production and consumption; stress the presence of diversity of intermediaries, various physical functions as leisure, retail, and entertainment and both concepts concern with their contribution to the image of place in different scales (O'Connor & Gu, 2010). There are different scales of creative industry clustering.

3.3.1. Creative City

Understanding how certain districts, cities, regions and even countries can provide a creative environment for individuals and firms to engage in creative endeavors has become a key issue in the new economic structure. For the last three decades, the formation of creative city has been the leading terminology of creative policies around the world. In this regard, many institutions and organizations which provides a global platform for cities around the world to share their own experiences and create new opportunities for followers have founded in order to strengthen the creative city vision: Vancouver's Office of Cultural Affairs started the Creative City Network of Canada in 1997; Partners for Livable Community, based in Charlotte, North Carolina, formed the Creative Cities Initiative in 2001; UNESCO launched its Creative Cities Network in 2004; Osaka City University set up a Japanese Creative Cities Network in 2005; the British Council joined with the Australian Council for the Arts to present a forum, Making Creative Cities, in 2008; and finally, in 2009, the British Council established the Creative Cities project involving the UK and 12 countries in East Asia. The creative city is one of the most influential recent concepts in the urban planning literature. Since the clustering can occur in different scales, the creative place formation in urban scale is worth mentioning as a frontier. Previous studies (e.g. Landry, 2000; Scott, 2000; Florida, 2002; Florida, 2004; Hutton, 2005; Durmaz et al., 2008; Evans, 2009) underline various conditions for the creative city formation.

The Creative City concept was developed nearly 25 years ago. The concept was originally put forwarded by Landry (2000) and he asserts that the formation of creative city involves open-mindedness, and motivation to take risks, having a long-term objective with considerate strategies, a capacity to work with local uniqueness, and a willingness to listen and learn. These qualities first make people, projects, organizations and then clusters, districts and ultimately cities creative. For him, creative cities can also be regarded as the centers of the hard infrastructure of creative industries (e.g. buildings, roads, galleries, museums, libraries, universities, and as the centers of soft infrastructure which defines its atmosphere and regulatory organization as well as the relational assets associated with trust, mutuality, exchange of creativity and knowledge. The transformation of such hard infrastructures is highly argumentative. Since the revitalization of ex-industrial buildings as studios and flats by creative producers and

their renewal, adaptation and redevelopment for creative production and consumption are currently being studied in urban regeneration literature. Yet, Hutton (2006) brings out the issue of the inner city restructuring and the question of whether these clusters represent a form of reindustrialization of the inner city or, conversely, the latest phase in the evolution of the urban services economy (Hutton, 2006). This industry sites, now, as clusters lead the convergence of creativity, culture and urban development through substantial value-added production, and provide the competitive advantage of the inner city for creative industries. Additionally, these inner city clusters enhance quality and quantity of skilled-human capital, amenities, and environmental conditions. These sites retake and flourish the abandoned or obsolescent districts of postindustrial cities, especially in Europe and North America such as in London, Glasgow, Hamburg, Berlin, Barcelona, Milan, New York, Montreal, Toronto, San Francisco, and Vancouver. In these cases, new spatiality of creative industry formations can be regarded as a revival of manufacturing sites, or as a new phase of the urban services economy (Hutton, 2008), as a rediscovery of live-work facilities and the shared workspaces within former industrial zones and buildings (Evans, 2009). Such new phases indicate design as well as older manufacturing techniques, inherited knowledge on arts and crafts but served as an appealing dimension of new urban development. This will be argued in details in the next chapter along with regard to the new economy and urban restructurings for the last three decades.

Additionally, Scott (2000) underlines three conditions for a creative city: first, multiple interdependency and agglomerations of competitive firms; second, regional policy enterprises those attract and retain creative industries and consider their locational preferences; and, last, the distinctive (refers to place quality) urban locations. Moreover, Florida (2002) claims that the ideas, knowledge and creativity exchange are the tools needed for the production of new artefacts and new methods and they are fundamental as natural resources and financial capital. Further, Florida (2004) suggests that the cities most likely to attract what he refers to as the 'creative class'. His theory of creative cities is centered on the creative class and such city attracts and retains talents and professionals, people from cultural and artistic communities as well as the education and training sectors (Florida, 2004). Durmaz et al. (2008) argues that creative city can be rendered; through well designed creative strategies (policy); with a strong presence of creative industries (economy) and; by a creative community (society)

(Durmaz et al., 2008, p. 2). These arguments have led this study to reconsider the creative industry clusters and their ecosystems.

To sum up, characteristics of creative cities can be shortly summarized as follows;

- Creative potential, open-mindedness and motivation
- Local uniqueness - Cultural capital
- Exchange of ideas, knowledge and creativity
- Well-designed creative strategies
- Presence of the hard infrastructure of creative industries
- Regional policy enterprises to attract and retain creative industries
- Interdependency and agglomerations of competitive firms
- Presence of the soft infrastructure that defines its spatial atmosphere
- Use of the urban design and architectural design
- The distinctive urban locations (the abandoned or obsolescent districts of postindustrial cities, use of urban design and so forth) - Place quality Educated and ethnically diverse population

Yet, that is not only valid at the city scale but also for the cultural quarters, creative clusters, creative places and cultural districts in general. Their properties vary regarding to the scale and the context.

3.3.2. Creative Industry Clusters

There are further examples of previous studies discussing about the forces behind the clustering of creative industries in the scale of district (NESTA, 2010; Montgomery, 2003; O'Connor & Gu, 2014; Lazzeretti & Capone, 2009; Evans, 2009). As mentioned before, for creative clusters, additional factors are required for their development and emergence. Specifically, the crossroad of production-consumption-policy enables creative districts to grow and develop. In this respect, Evans (2009) take attention to the a very naïve difference between the cultural districts where typically located in historic or re-developed heritage districts and creative districts that generally located in former industrial districts or adapted from the historic buildings with modern extensions with regard to the economic, social and cultural properties. Considering the opportunity of clustering, the following table (Table 3.3) summarizes such differences;

Table 3.3. Different Properties of Different Types of Districts
(Source: Evans, 2009)

Properties	Cultural Industry Districts	Creative Industry Districts
Economic	<ul style="list-style-type: none"> ▪ Local economic development ▪ Visitor economy ▪ Branding ▪ Zoning ▪ Culture and regeneration 	<ul style="list-style-type: none"> ▪ City-region economic development ▪ Know-how economy ▪ Creative tourism ▪ Production chain ▪ Cross-over
Social	<ul style="list-style-type: none"> ▪ Identity ▪ Mono-Use ▪ Ethnic quarter 	<ul style="list-style-type: none"> ▪ Mixed-use ▪ Diversity ▪ Urban design quality
Cultural	<ul style="list-style-type: none"> ▪ Historic preservation ▪ Conservation, crafts (skills) ▪ Festivals ▪ Cultural City 	<ul style="list-style-type: none"> ▪ Creativity ▪ Design and architecture ▪ Showcasing / Fairs ▪ Creative City

NESTA (2010) refers to the work of De Propris (2008) and highlights the fundamentals of creative industry clusters; a community of creative people who share an interest in originality but not essentially in the same subject; an inspirational place where people, relationships, ideas and talents can influence one another; an environment that offers diversity, openness, stimulation and freedom; A well-constructed and ever-changing network of relations and flow of knowledge exchanges that boost individuals' uniqueness and identity (De Propris, 2008 as cited in NESTA, 2010). Also, one of the reasons for creative industries to locate and stay in particular places can also be associated with the look and atmosphere of the place itself. To their users, places represent meaning, identities, and bond as well (Montgomery, 2003).

Creative industry clusters may also include large-scale subsidized institutions – museums, concert halls, galleries and educational facilities that are also known as cultural precincts or quarters. Since the 1980s, many of the cultural facilities have been related to the revitalization older industrial and manufacturing zones as a way of redevelopment of the declining parts of the city. These urban regeneration interventions indicates a large variety in terms of scales from a small-scale arts and cultural/creative industry production to recreation facilities as cafes, bars and restaurants and retails as bookstores, design shops and so forth (O'Connor & Gu, 2014).

In addition to the previously mentioned mechanisms and different forms of spatial clustering, further previous studies (Lazzeretti & Capone, 2009; Glaeser, 2000; Florida, 2002; Florida, 2005) investigate some further fundamentals behind clustering, particularly from the creative industries perspective. They have carried out comparative analysis for Italy and Spain. The results show that the small role of historical and cultural content, the size of the place, the size of creative industries, the productive diversity and the human capital and creative class are common drivers for creative industry clusters. Agglomeration economies is one of their proposed approaches already discussed in previous sections. The following propositions seem crucial for understanding the emergence of creative industry clusters.

Second, the cultural approach represents the relationship between culture and creativity. The relation between the cultural heritage and cultural cluster has been extended to the combinations and implementations of creativity and culture as a major driver of local economic development (Lazzeretti & Capone, 2009).

Third, the related variety as a new, evolving paradigm derived from the studies of evolutionary economic geography. A related variety for industry is described as related industry sectors since they have mutuality, shared and complementary instruments. In other words, a certain degree of proximity provides place with effective communication and collaboration among different industries. Therefore, the links between industrial sectors and economic activities exist in terms of know-hows, creativity and transfers of knowledge (Lazzeretti & Capone, 2009).

The fourth proposition is the human capital which suggests that the externalities depend not only on the concentration of people in certain areas, but also on the level of human capital. For, Glaeser (2000) an easy access to human capital bounds firms to clusters and, for Florida (2002; 2005) the concentration of human capital with creative talent can explain the concentration of activities in certain spaces and thus creative clustering.

The last one is the Florida's 3Ts: Technology, talent and tolerance. Florida (2002) asserts that certain clusters where specific groups and industries accumulate are considered creative only when there is a high presence technology, talent and tolerance. He proposed several index (see. Florida 2002) to investigate and understand the creative socio-demographic characteristics of the population associates with the creative industry clustering.

All in all the fundamentals of creative industry clusters can be summarized as follows;

- Agglomeration economies
- The size and diffuse of creative industries
- The concentration of creative people
- A certain degree of proximity
- Environment that offers diversity
- A well-constructed and ever-changing network of relations
- Mutuality, shared and complementary variety
- Communication, influence and collaboration
- Derived and adapted creativity, knowledge and innovations as cross-over
- Flow and exchange of creativity, knowledge and innovations
- Openness, stimulation and freedom
- Presence of the historical and cultural content
- Uniqueness and identity
- The look and atmosphere of the place
- Urban regeneration interventions and redevelopment
- High presence technology, talent and tolerance

Development Levels of Creative Industry Clusters

The stage in the cycle of cluster evolution is crucial to evaluate the existing structure of creative clusters. Their strengths and potentials associate with the degree of their development stage. Four levels of development for the creative industry cluster are identified by Evans (2009); dependent, aspirational, emergent and mature. Initially, for the dependent creative industry clusters, creative enterprises emerge as a direct consequence of public policy intervention via private sector collaboration, hard and soft infrastructure development for distribution and consumption and investments to SME and micro creative enterprises. Here, public subsidy is needed to sustain the cluster. Within this context there are limited and small, particularly underdeveloped local markets. The UK creative industry quarters and art venues in general, St Petersburg Creative Industries Development Centre, Regional film centers such as FiW, Film pool Nord, Film I Skane in Sweden, Digital Media City in Seoul, Tokyo's multimedia, video games and IT sector, Taipei creative industries development, Developing country regions in Pacific Asia and South America, and European programs such as ERDF and

ESF illustrate some dependent characteristics. Second, aspirational clusters of creative industry industries can be considered as some independent creative enterprises and/or recently privatized former public enterprises in certain places. They are found limited in scale and scope, as well as indicate limited consumption infrastructure regarding the underdeveloped local market. There are also a high levels of public and institutional promotional activity to boost and enhance the environment. The popular examples of this type of clusters are Creative Precinct in Brisbane Australia; The Digital Hub and MediaLab in Dublin, sometimes mixed cultural heritage as happened in Westergasfabriek in Amsterdam and The Veemarktkwartier in Tilburg, the Netherlands, Media cluster – Leipzig, Germany and digital media in Singapore, West Kowloon Cultural Centre Development in Hong Kong, and also Creative Gateway, King’s Cross and City Fringe in London, UK. Third, emergent clusters are initiated by growing number and scale of creative enterprises with infrastructural investment from the public sector. There are also rapidly developing local and regional markets around the area. Cultural consumption becomes noticeable and the market can be reached at the international levels. Product design, architecture, digital media in Barcelona, Film/TV clusters in Glasgow are the examples such development. Lastly, the mature clusters of creative industries are driven by established large scale creative enterprises in particular industries along with some sound linkages. There are highly visible developed national and international markets exist within such clusters. They evolve from business to business consumption. Mature clusters are independent and do not have a close relationship with public interventions (Evans 2009).

Spontaneity and Planning of Creative Industry Clusters

In addition to the creative cluster development phases, most authors (Stern & Seifert, 1998; Mommaas, 2004; Bell & Jayne, 2004; Hutton, 2004; Shorthose, 2004; Turok, 2004; Landry, 2006; Madanipour, 2011; Durmaz, 2012) consider the unplanned/spontaneously and planned development of creative clusters. Bell and Jayne (2004) conceptualize these development as un-planned/organically developed or planned/institutionally developed, Shorthouse (2004) as vernacular and engineered approaches, Turok (2004) as organically or by superimposition (Turok, 2004). Yet, there is no consensus in the literature. Regardless their names, considering the content of such conceptualizations, it can be claimed that there are commonly two main themes

on the involvement level of urban intervention; spontaneous and planned creative industry clusters.

Inner-city developments for creative clusters generally illustrate spontaneous type of creative industry clustering. Great numbers of creative industry clusters have been organically founded through the diffusion of communities and while some of them were intentionally planned and designed by governments. For Tallon (2010), the spontaneous approach is “better able to cater for the interactivity and fluidity of creative practice, and is more consistent with a view of culture and creativity as ends in themselves rather than as instruments for economic ends; and the outcomes of vernacular approaches are less likely to be susceptible to the vagaries of funding regimes, property markets and other macro-economic variables” (Tallon, 2010 cited in Durmaz, 2012, p. 54). Mommaas (2004) classifies three different levels of spontaneity in which cultural quarters can be rendered. The high level spontaneous clusters emerge when informal groups of cultural producers inhabit and engage in a particular location over a certain time and evolve it into cultural sites. Likewise, Madanipour (2011) claims that the decisions of individuals and firms rather than public policy influence the urban development process (Durmaz, 2012). In many other cases, policy makers consciously decide with particular goals and intentions to strengthen the existing market in a specific space through creating a cultural district. The least spontaneous emergence occurs when the project “comes to life from the drawing board of urban planners” (Mommaas, 2004, p. 508). Yet, there may still be number of public interventions. For instance, when policy makers decide on boosting the cultural production, distribution and consumption, certain places, which have already been creative and/or cultural in essence, are branded as creative or cultural quarter, and yet, economic incentives aiming at future development via creative industries in a particular quarter may expose to certain degree of planning. That might not necessarily be a physical planning. Stern and Seifert (1998) investigates the districts where places less emphasized externally and less driven by planning, more importantly rather than the imposed attempts. Such natural districts are portrayed as geographically–defined networks with the high presence of density of cultural assets in particular delimited areas where a great number of certain assets are clustered.

However, with regards to the degree of planning interventions, bottom-up approach might be over-persuasive and even counter-productive for the clusters. The development of cultural or creative cluster has recently been realized by the means of

various types of regeneration projects, and housing-led, tourism-led and culture-led policies, as well as by the means of urban design projects with the intention of attracting various investments to previously rundown and derelict areas. In the UK, for instance, the early examples of clusters as cultural quarters based regeneration policies date back in the late 1980s; Sheffield Cultural Industries Quarter and the Manchester Northern Quarter (Montgomery, 2003). Montgomery (2003) and McCarthy (2006) underline the contribution of different types of regeneration projects for creative clusters. On the other hand, the use of culture can be a driver for policy interventions. However, there should be more critical analysis of the application of regeneration projects. The regeneration strategies applied in the 1980s, especially in Europe, “adapted too narrow a concept of regeneration which focused on mainly economic or physical dimensions and failed to develop a more holistic approach integrating cultural, symbolic, social and political aspects” (Bianchini & Ghilardi, 2004 as cited in Durmaz, 2012, p. 58).

In general, the important aspect in this clustering is that the evolution occurs spontaneously or organically as a result of individual agents, creators and participants, producers in order to locate near to one another. It occurs without policy interventions or planning. Policy interventions mainly based on the regeneration projects are highly selective, only focusing on the particular spaces and user groups, and that overall it has been partial both spatially and socially. It rather should be case specific and comprehensive. The whole urban environment is needed to be taken into account.

3.4. Review of the Previously Emerged Fashion Industry Clusters

The examples presented here are famous for their certain districts where fashion production, consumption, distribution and communication occur in certain proximity. Therefore, here, not fashion cities; rather, fashion industry clusters where agglomeration of firms are observable and visible as well as have been previously explored by researches are described. In the following, previously emerged fashion industry clusters from the world will be reviewed in details;

Central Milan and Quadrilatero d’Oro, Italy

Milan has been experiencing the rapid deindustrialization with large areas of the city replacing with the peripheries since 1970s. Among the other creative industries,

fashion and design are directly associated with the city and region. Particularly, the clothing manufacturing is carried out subcontracted through large factories outside the metropolitan area since the labor is less expensive (d'Ovidio & Haddock, 2010). The textile and clothing industries in the wider Lombardy province, employ around 200.000 workers are employed (Arvidsson et al., 2010). On the other hand, the powerful market of fashion houses is highly globalized within the municipal boundaries. Within these boundaries, there 44 fashion houses are clustered in the center of the city where the Milan's most notable shopping district Quadrilatero d'Oro (Golden Rectangle) is located. Considering the proximity of fashion houses, the proportion of such cluster is evaluated as higher in Milan (d'Ovidio & Haddock, 2010) (Figure 3.2).



Figure 3.2. Fashion Cluster in the Center of Milan
(Source: d'Ovidio & Haddock, 2010)

Milan has long been the core of fashion industry and, industrial and financial capital of Italy. The industry comprises 12.000 companies, 800 showrooms, and 6000 sales outlets, 17 research institutes focusing on fashion and design. Milan is host to headquarters for some of the largest fashion brands such as Armani, D&G, Prada, Romeo Gigli, Trussardi, and Versace. On the other hand, Milan is also indicates a series of lifestyle-based industries that have close ties to and associations with fashion firms.

There are many districts are also involved with furniture and interior design retail as well as unique fashion and design consumption districts where inhabited by smaller-scale shops featuring fashion, antique/vintage, design, and art with considerable influences on the retail attractiveness and repositioning (Jansson & Power, 2010)

The given map (Figure 3.2) shows a strong concentration in the area of Quadrilatero della moda (Fashion quadrilateral) which is very central historical quarter where all famous brands and showrooms are also located (d'Ovidio & Haddock, 2010). The showrooms and ateliers operate as vital promotional spaces for fashion designers and fashion consumers. Such spaces are fundamental for maintaining the image of creative production, demand and aspire. For example, Armani's headquarters have been designed by a famous architect Tadao Ando who redeveloped a former Nestle' factory and turned into a 3400 m² showroom. Besides, Prada has rebuilt another post-industrial space that add to the profile of the city as a place where diverse high-status products and actors influencing the urban environment. On the other hand, direct advertising tools as billboards, posters for local and global fashion and design brands help to diffuse the fashion industry and the idea of fashion capital to every aspect of the fashion city. Even the tourist maps are distributed throughout the city for free and those are sponsored by certain fashion brands for detailed listings of design and fashion high points (Jansson & Power, 2010).

Other than its spatialities, the fashion industry in Milan comprises networks of creative professionals which successfully manage to build a sense of mutual trust within, and indicates many arrangements. Particularly, such organizational structure becomes a major mechanism for the recognition of talent and professionalism. In order to be perceived and recognized at the right spot, to interact with professionals, fashion designers, social environment is also crucial through meetings, fashion shows, fashion events and parties. Networks and necessary arrangements also stimulate fashion designers and other related professionals to promote the creative environment of the city, White, The Vogue Talents Corner, My Own Show, are some of the many organized by magazines, schools and fashion houses to enrich the physical creativity in the city (Pratt et al., 2012). Fashion events, specifically, have become a ritual for Italian seasonal shows that control and adjust the global fashion markets and collections. Milan introduces biannual seven-day Fashion Weeks alongside Paris and New York that diffuse fashion through designers, collections, products, and images from around the world and not just in Milan Considering with the other intermediaries of fashion, there

is variety of actors interested in fashion (producers, buyers, media) for their own strategic reasons collocate and implicitly cluster around the central of Milan to gain advantageous form such a prestige fashion hub.

Central London, UK

London is known as a world city as being a global center for the world, not only for the fashion industry but also entire service and finance economy. Its reputation of being creative city is depended on its structure which is more than a traditional fashion hub. London fashion industry contains many fashion houses, and many of them are relatively small as well as most of the textile production takes place in small workshops within the city (Breward, 2004). According to the data presented in the work of d'Ovidio and Haddock (2010), the area of Greater London metropolitan area comprises population of 7.5 million inhabitants according to the office for national statistics 2007 in an area of around 1,600 km². The large majority of fashion houses investigated out of 260 is agglomerated in the central London and the rest is dispersed over a comparatively much larger territory (Figure 3.3). 240 out of 260 fashion firms are located in neighborhoods at the center of the metropolitan area. The northern part of central London is preferred as a location of the traditional wealth and agglomerations of commercial and industrial activities of fashion. It is evident that there are five agglomerations are visible. Oxford Circus and the area from Knightsbridge to Sloane Square have a long history associated with the fashion industry. Particularly, Oxford Circus has always been the concentration of fashion industry since the mid eighteenth century, whereas Knightsbridge is the second core due the high-end department stores and luxury shops as well as the host of the London Fashion Week. In addition to these two, there are NottingHill, the area between Brick Lane and Hoxton Square, Clerkenwell to be mentioned. These three are newly developed areas emerged as result of the transformation of old setting into new neighborhoods for the creative industries. Specifically, the Notting Hill area comprises agglomeration of fashion designers and is benefited from the presence of the Portobello street market which attracts huge number of people. Complementary to those physical settings, the area around Brick Lane is a combination of cultural tradition and fashionable places including shops, bars and restaurants. Clerkenwell, on the other hand, has been under the influence of many young artists occupations, and already been through the process of urban renewal. Many

spaces for designers, fashion houses and other creative businesses are now available in this de-industrialized area (d'Ovidio & Haddock, 2010).

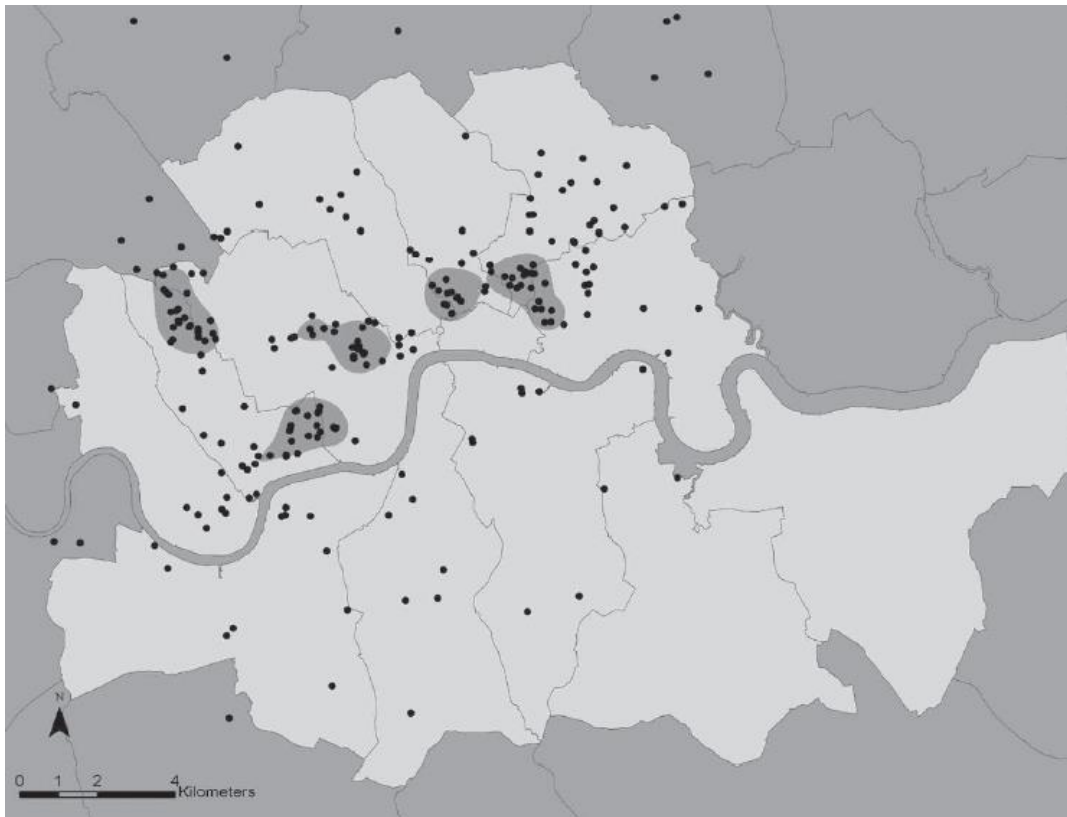


Figure 3.3. Fashion Cluster in the Central London
(Source: d'Ovidio & Haddock, 2010)

In London, designers and other professionals working for the fashion industry as reported at the research findings of d'Ovidio and Haddock (2010) that they provide all forms of inputs collected through the physicality and atmosphere of the city; specifically, through the open-air markets, Portobello and Spitalfields mentioned as important components of the city. Besides, the designers refer to constant and continuous creativity and knowledge exchanges and much cooperation with other designers and related sectors. The provisions of public and private institutions are also available in the forms of competitions or prizes and funds available for new projects. . Within the framework of creative industry-based policies that connects creative workers, particularly fashion designers in this case, to the world of fashion to the world and provides opportunities to take part in collective shows visible in the international press (d'Ovidio & Haddock, 2010).

The City Fringe in London, UK

The City Fringe is located along the northern and eastern boundaries of the City of London, and known as one of the wealthiest area in the UK. In the beginnings of 2000s, the unemployment levels among local residents in the City Fringe were almost double compared to the London average and it was one of the most deprived wards in the country. Almost 40% of the City Fringe residents had no qualifications at all and tended to be employed in lower-skilled occupations (Bagwell, 2008). On the other hand, the City Fringe has always been a core for several creative sectors including cultural tourism, fashion, furniture and product design, digital media, jewelry, and printing and publishing). Therefore, a comprehensive regeneration project was initiated the Corporation of London, that was funded by the four City Fringe municipalities to concentrate on the positive aspects and potential of distressed inner city areas, and on the creative industries to improve economic development and create jobs and wealth for local residents. The City Growth Strategy for the City Fringe as operated by the City Fringe Partnership (CFP), The City Growth Strategy (CGS) launched in 2001. The implementation was realized in the following years in order to “build an area of thriving competitive industries and an area whose residents prosper from the success of the region” and ”support and maintain a diverse economic base, a diverse residential base and diversity in employment” (Bagwell, 2008). Therefore, the strategy has been directed to six creative clusters; jewelry, fashion, furniture, publishing, digital media and cultural tourism. Among the others, jewelry has been regarded as one of the supporting sectors to the fashion industry. The cluster including estimated 446 firms situated in the City Fringe and the area has traditionally been a site for the UK jewelry trade since the 16th century (Figure 3.4). The sector consists of designers, silversmiths, stone setters and polishers, chain makers, bullion dealers, precious stone specialists, gold and silver experts, retailers and wholesalers and firms are mostly small, independent family-businesses. Due to the recently rising property prices, growing overseas competition and ageing workforce have led to a decline in employment and created a thread for the sector (Bagwell, 2008).



Figure 3.4. Jewelry Firms in the City Fringe
(Source: Bagwell, 2008)

The objective of the City Growth Strategy specific to the jewelry sector have been to promote the demand for quality, innovative design-led jewelry and related products, to develop the capacity of the sector to supply quality, creativity and design-led production, and to enable operative partnership and collaboration within the sector. Predominantly, the sector benefit from the close proximity of businesses to each other to feed different skills. The jewelry cluster has more internal networks rather than the links with other local clusters. All in all, the City Growth Strategy stresses the consideration of the structure of the creative industries within a cluster for development strategy. It presents an example as an approach to creative clusters that, unlike the conventional businesses, are heavily depend on creative skills and special talent that brings high added-value markets for future developments and survival. Besides, though the considerable private interventions have been obtained, the strategy has been dominated by public sector control and funding (Bagwell, 2008).

New York Fashion (Garment) District, USA

The New York (NY) Fashion District has been emerged to hold the mass market due to the inclining demands in the United States (US) for ready-to-wear apparel manufacturing. Especially, after the 1880s, the Jewish and Italian immigrants from Europe have largely contributed to the emergence of the NY Fashion District. By the 1920s, it was known as NY Garment District where specialized workforce, combined with low-cost labor, and brought about the centralization of the fashion industry within the region city of NY (Rantisi, 2002b). The Garment District now refers to the area between 5th and 9th Avenues and 34th to 42nd Streets. %79 of New York Fashion District establishments including all sectors have their centers within this neighborhood (Figure 3.5). There are also further locations which together form the district itself, and these locations are Long Island City in Queens, Sunset Park in Brooklyn and Lower Manhattan. Yet, the latter ones accommodate a much smaller number of establishments comparing to the Garment District in midtown Manhattan (Williams & Currid-Halkett, 2011).

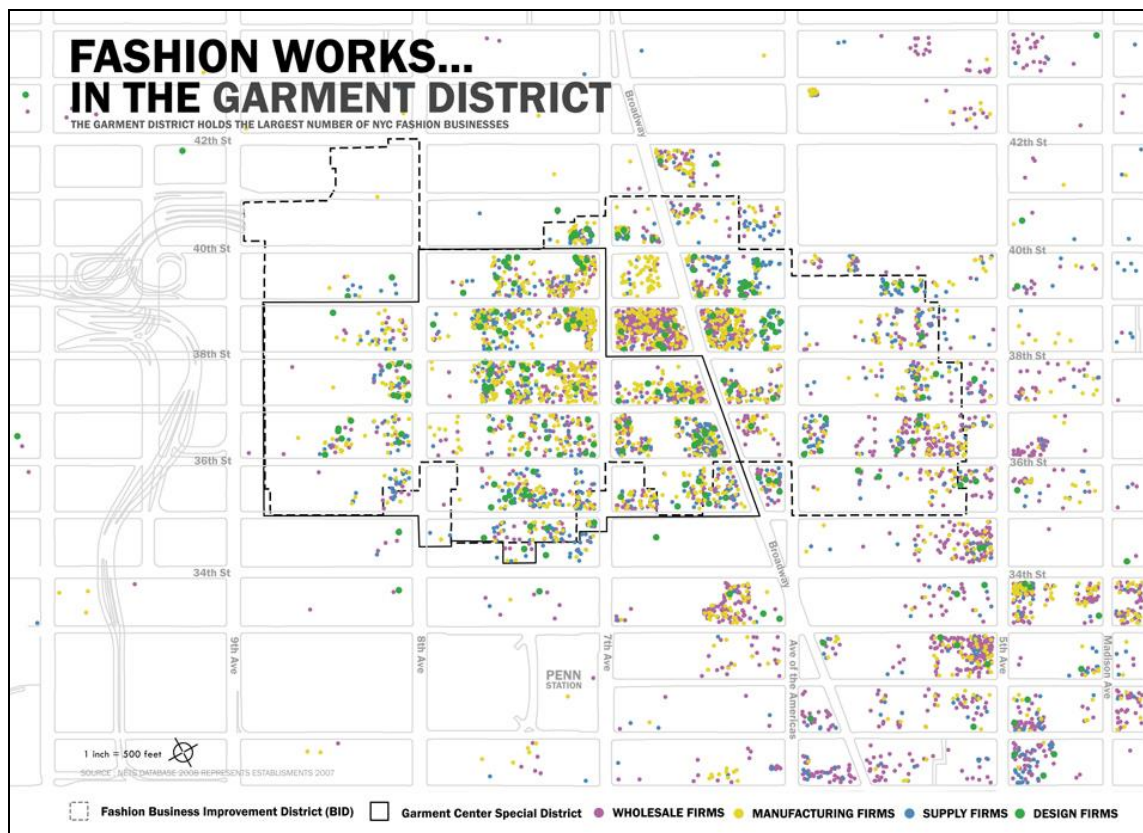


Figure 3.5. New York Garment District Map
(Source: Huffington Post, n.d.)

The NY Fashion District comprises a number of fashion related businesses including apparel manufacturers, textile mills, button and trim suppliers, accessory and jewelry showrooms, wholesale and retail units, trend forecasting services, buying offices as well as two major fashion design schools; Fashion Institute of Technology and Parsons School of Design (Rantisi, 2002b). Furthermore, within the Fashion District, there are 4271 occupants related to the industry, including fashion designers, wholesalers, suppliers, office professionals, architects, graphic designers, information technologists, artists and theatres, and there are great numbers of restaurants and 24 hotels (Rantisi, 2002b). This sort of clustering emerged around the related sectors where daily recreational activities are also integrated to the industrial system as service can be regarded as one of the best example creative.

The Fashion Center Business Improvement District was established as a project in 1993 to provide necessary services and collaborations for the Fashion District's real estate and tenant community's needs and for promoting the district, creating a safe and clean environment and managing the related fashion-based programs. Also this particular Fashion District has been constantly adjusting itself due to its variety and openness to new ideas and practices where eventually turned into an alternative fashion cluster that attracts creative class, especially young, creative and foreign born designers since the studio flats are affordable and contain mix of social and art-related communities (Rantisi, 2002b). The fashion cluster in New York accommodates various specialized, interrelated services provides significant externalities to fashion industry and facilitates the flows of information for the maintenance (Figure 3.6).

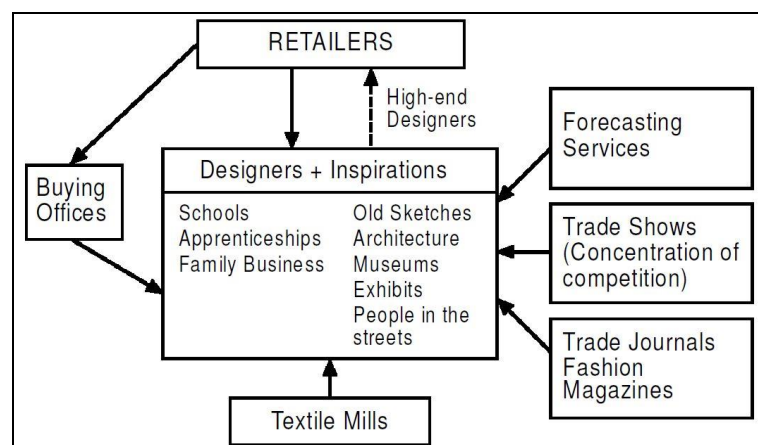


Figure 3.6. Flow of Information in the New York Fashion District
(Source: Rantisi, 2002a)

Los Angeles Fashion (Garment) District, USA

The fashion district is concentrated in the area of downtown Los Angeles (LA), which is a hub of fashion-related businesses and incubator for small to midsize businesses within 100 blocks. Within the central business district of LA focuses on apparel manufacture and fashion and was previously known as the LA Garment District. Since 1996, it has been known as LA Fashion District. The breakdown in the manufacturing sector of the fashion industry has compelled the industry to downscale, and evolved into in-house design. Thus, fashion has become a design oriented industry in order to survive in the post-industrial economy (Rantisi, 2004). Then, the LA Fashion District has been cooperated with city officials and service departments to overcome its shortfalls and transformed the area though undergoing a major redevelopment process where former factory buildings were restored by fashion district and turned into a bazaar-like atmosphere, and eventually the district has become the locus of upscale production and showroom activities (Scott, 2004, p. 479). It has been always the area for wholesale buyers, retail shoppers, designers, fashion students and stylists. Now, the district comprises bridesmaid & prom dresses, men's wear, textiles & notions with the largest concentration of trim, beading and fabric for apparel and home décor, accessories such as handbags, shoes, jewelry, sunglasses, hats, belts, and kid's wear including school uniforms and special occasions (LA Fashion District website). There are also a vast number of housing units, restaurants, art galleries as well as the flower market district, and design schools such as the Otis College of Art and Design and the Fashion Business Incorporated.

According to their research, Williams and Currid-Halkett (2011) claim that Los Angeles' more dispersed fashion industry and concentration of the different sub-sectors of the industry can be partially justified by urban sprawl. In addition to that, Los Angeles involves manufacturing activities that does not require close proximity of designers to each other due to the production process is less design-oriented. Yet, designers still have a tendency to be located in close proximity in order to produce the just-in-time parts of their innovation and production processes (Rantisi, 2002a; Currid, 2007). LA Fashion District illustrates a core location for the fashion industry, yet, the concentration contains only %32 of the industrial activities including manufacturing, wholesale and supply (Williams & Currid-Halkett, 2011). Other neighborhoods are also crucial to fashion within the city (Figure 3.7).

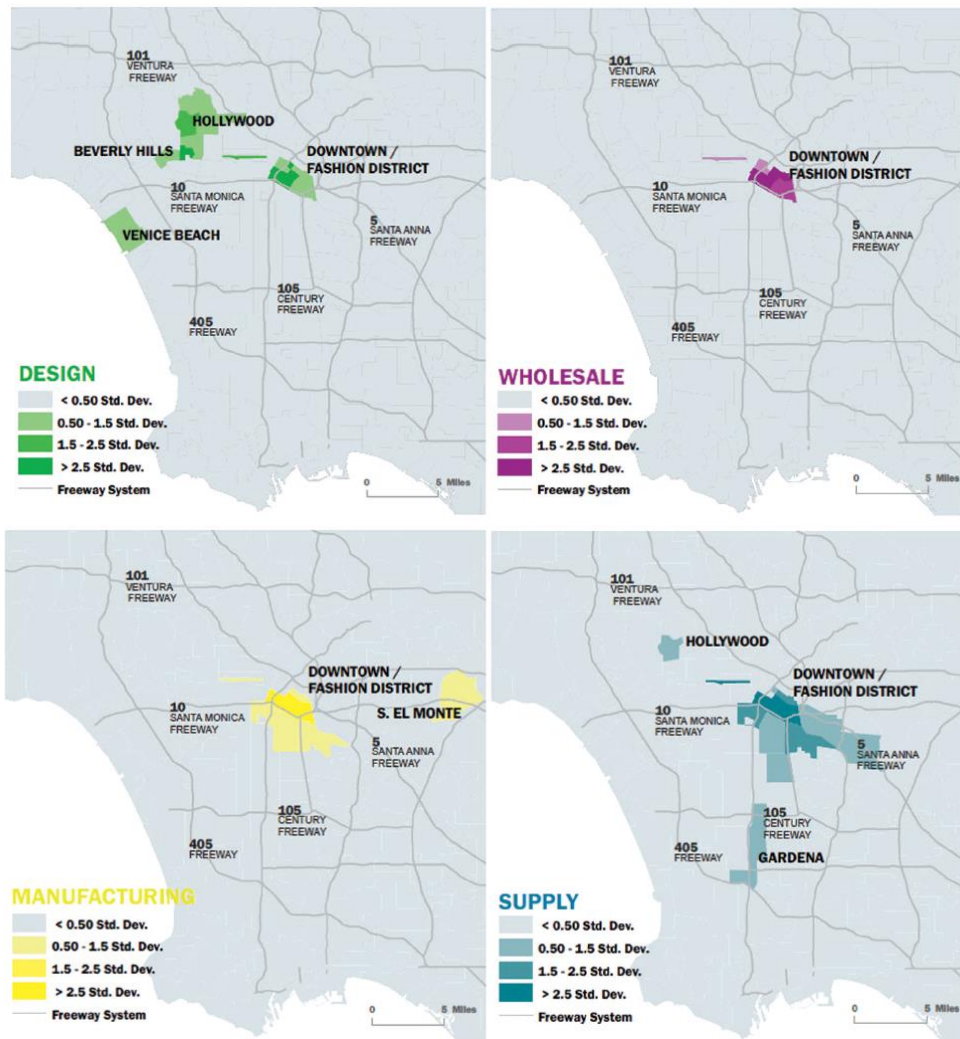


Figure 3.7. Fashion-related Industries in Los Angeles
(Source: Williams & Currid-Halkett, 2011)

Istanbul Fashion Industry Quarters, Turkey

The Turkish textile industry initially acted as a contractor for manufacturing, and has progressively taken a superior role by creating unique brands, establishing the textile and ready-to-wear companies, mostly in Istanbul. That has played an important role in the development of the fashion industry in Istanbul. For the past few years, along with the awareness for the benefits of creative sectors all over the world, there has been an attempt to promote Istanbul as a fashion design center in the international arena and thus a growth in the fashion industry and its supporting sectors as well as an increase in national and international fashion events. One of the most notable of these events is the Istanbul Fashion Design Week held annually since 2005. Besides, design departments

of universities, as well as private schools and courses of design have also been established in this city (Enlil et al., 2011).

The institutional associations engaged in the fashion industry are Association of Turkish Fashion Designers (ATFD), Istanbul Moda Academy (IMA), Istanbul Textile and Apparel Exporter Associations (ITKIB). Fashion designers are encouraged by ITKIB to take roles in different international fairs and shows. European Union project are also applied by ITKIB to strength the fashion industry in Istanbul. Funds are used to increase the interaction and cooperation among small and medium-sized businesses, and to make connections national and European businesses and institutions. One of the projects under the support of European Union has been the establishment of a fashion institute with the name of Fashion and Textile Cluster that contains research and development services and fashion consultation (Enlil et al., 2011).

Regarding the spatial concentration of the fashion industry in Istanbul, Nisantasi and Galata districts have been the central point where design companies are mostly found (Figure 3.8).

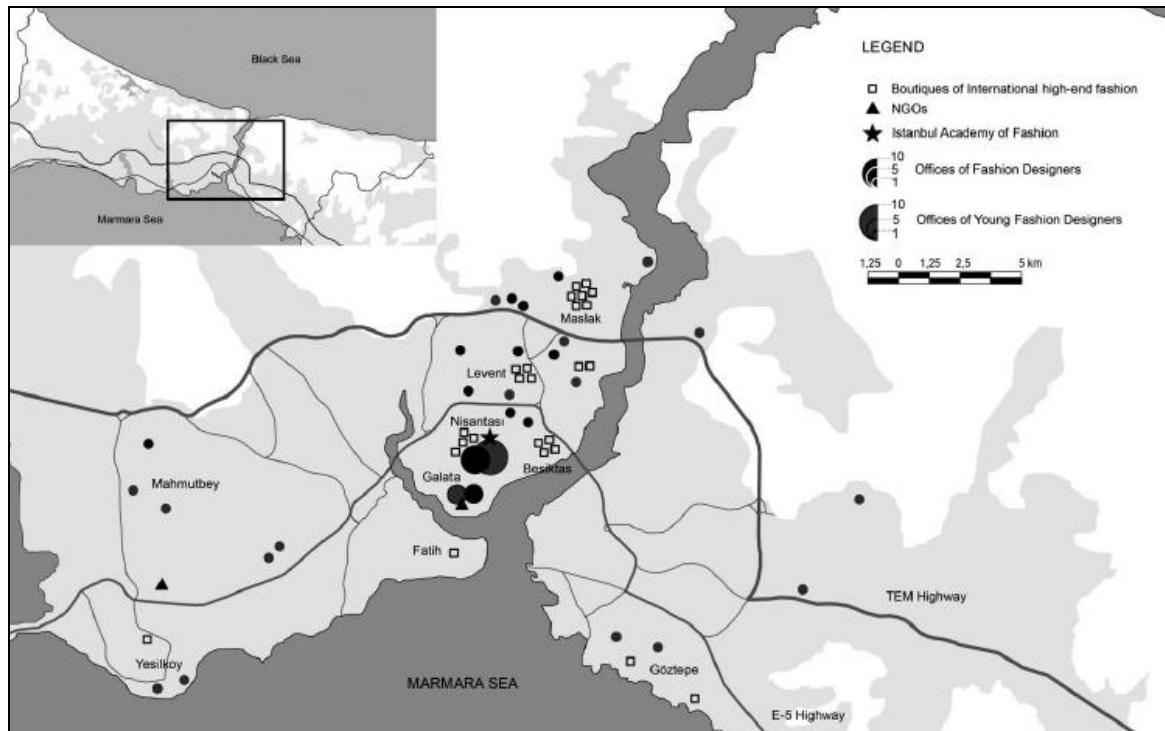


Figure 3.8. Spatial Concentration of Fashion Industry in Istanbul
(Source: Enlil et al., 2011)

The spatial choices of fashion firms depend on various reasons. First, these areas are not only the face of the fashion industry but also attraction point to the entire city as being the prestigious neighborhoods of central Istanbul. Second, many fashion designers consider their transaction costs and try to lower the expenses in their value chains through making businesses with relatively adjacent textile retailers and wholesalers for fashion production. Especially, huge number of fashion designers in Istanbul is situated in Nisantasi district since the material supply is relatively easier and cheaper from the textile companies located nearby. In general, the fashion industry clusters within these districts have been found in certain physical proximity to textile retailers and other related actors as well as one and other. Face to face relationships have been also dominant in these areas. For the industry, not the production and atelier parts of the value chain but the sales in terms of fashion distribution and promotion necessitates being in notable and central spots where the clients can easily access. Despite that the fashion firms owned by independent designers are relatively small enterprises that can only employ 7 people average; their contribution to the economy is noteworthy (Enlil et al., 2011).

Nottingham Lace Market, UK

The Lace Market is known as Nottingham's newly designated creative quarter and historic heritage. It was the center of the world's lace industry during the British Empire and recently has experienced spatial redevelopments since the nineteenth century. Until the early 1990's the Lace Market area was a rundown area. In the mid-1900, the old lace warehouses were realized as having historical architectural significance so that the area was designated as a Conservation Area. By the early 1970 the renovation process began and the area was acknowledged as the Industrial Improvement Area. The intention was to revitalize the physical space so that many refurbished spaces would be occupied by textile firms and related companies. At the late 1980, it was unlikely to be a leading role despite the fashion trade might still have a role to play in the development of the Lace Market. Therefore, in 1999 there were two reviews of the Lace Market development strategy introduced by the planning authority of City of Nottingham. The competitive advantage of textile firms were found weak since they were predominantly small companies (Ferris, 2002). Over the recent years, through the regulations, mostly the physical revitalizations, the Lace Market area has become a place where the retail spaces developed by independent creative

designers/retailers were often situated, and over a thousand people employed in this sector. The historic environment has been protected and enhanced so that the Nottingham Lace Market district has turned into a creative center of the city with various facilities and services complementary to the creative industries.

Currently, the area provides flexible office space, an alternative retail center as well tourist and leisure amenities with bars, clubs, restaurants and major entertainment centers. Now, there are currently 420 firms in the Lace Market, of which 320 are service sector based, and 168 are creative industry in the Lace Market (Figure 3.9). This is 40% of the total number of businesses located in the Lace Market, and they cover most of fashion related businesses (Shorthose, 2004; Crewe & Beaverstock, 1998).

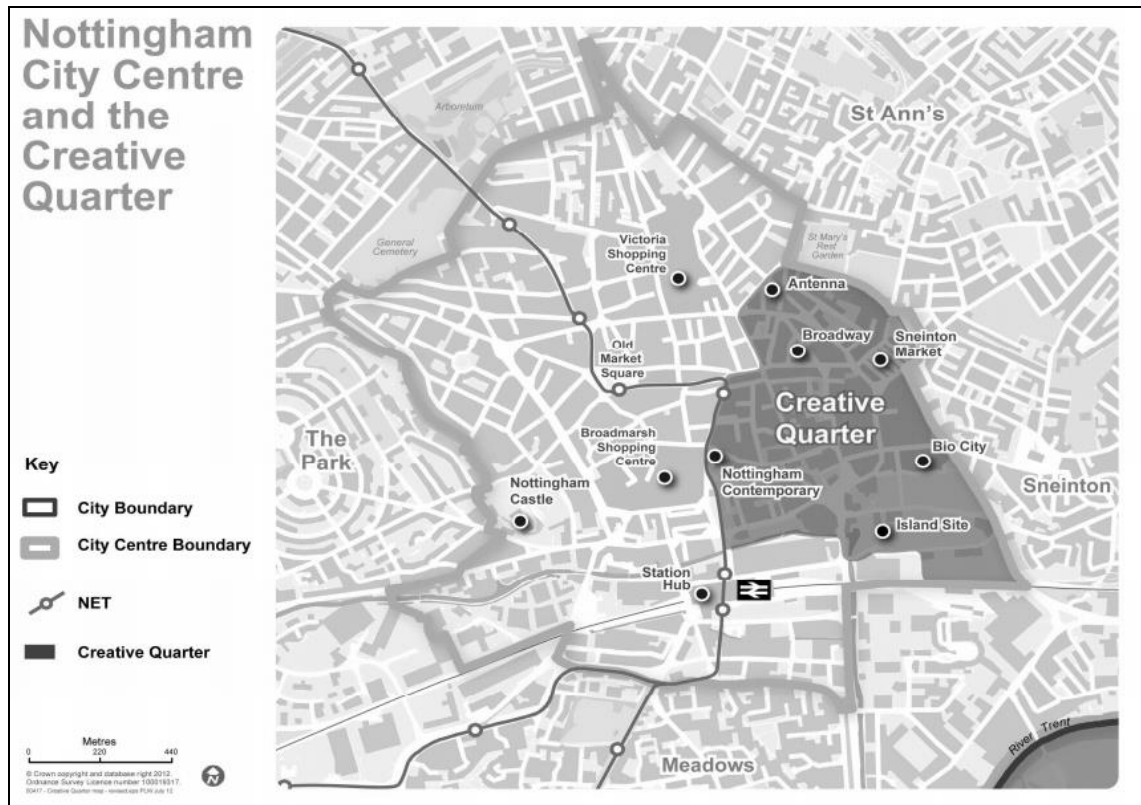


Figure 3.9. Lace Market Creative Quarter
(Source: Invest in Nottingham, n.d.)

Particularly, the Lace Market has known its long tradition of clothing production and has contributed to the redevelopment as being fashion and design quarter. Thus, its role as a fashion center is essential since it differs from the typical spaces as high street fashion and the mall. 85% of all fashion firms in the Lace Market have local sources, production and trade operations with other firms through networks and strategic

alliances. Such collaborations acknowledge the locality as an important resource. All the firms obtain the know-how and related knowledge through suppliers, customers and subcontractors. Also the role of the Fashion Centre is also crucial to the fashion industry with 70% of Lace Market firms use necessary services and sourcing and other information. It also creates networks among the firms enabling information, creativity and knowledge exchange (Crewe & Beaverstock, 1998).

Lace market as a place of creative consumption used to have low rent spaces in former factory buildings for artists and creative entrepreneurs, and that created a spatial agglomeration of small workspaces which later brought people together and stimulated innovation and building relationships. The regeneration of the Lace Market has been mostly driven by the firms located and agglomerated here in proximity to businesses and provide crossover effects between sectors such as fashion, design, architecture, music, food and drink. Particularly, the vibrant socialization opportunities have become a driver for urban regeneration, and bars, nightclubs, cafes and restaurants have stimulated local producers and atmosphere of the Lace Market. The creative rise and specifically the night-time economy have added considerably to the competitiveness, wealth creation and cultural regeneration of the area (Crewe & Beaverstock 1998). However, physical improvements and infrastructural developments have reported recently changing the area through a slight gentrification. The old warehouse used as independent studios has been replaced by expensive loft-type residences, and also many new chain stores, bars and restaurants have moved into the area. Today, many of the independent creative cannot afford living and physical maintenance of their environments, yet still have the feeling of being a creative community. There is an atmosphere of the creative activity and a sense of possession of the area (Shorthose, 2004).

Toronto Fashion Design Cluster, Canada

Toronto has considerably large industry and is best known for quality, flexibility, and quick turnaround times. Though it is not regarded as one of the global fashion cities it indicates 550 manufacturers where in total more than 50,000 employees are employed and half of these workers are engaged in manufacturing. However in the previous researches, the map physically illustrating the fashion industry clusters have not been reached. The Fashion District is the name given to the area of Downtown

Toronto, which has been derived from formerly many clothing manufacturing businesses (Figure 3.10).



Figure 3.10. A View from the Fashion District in Toronto
(Source: Blog To, n.d.)

Many fashion designers based in Toronto now chose to outsource the production of their garments to local manufacturers on whom they can easily rely on in terms of quality. However, similar to the other cases, fashion manufacturing in Toronto has seen a significant decrease almost of 55 percent between 2002 and 2012 due to the exclusion of trade barriers and charges (ICF, 2010). Following this decline, the City of Toronto has set objectives for the fashion industry and introduced it one of ten key clusters. The officials see the fashion industry playing a vital role with bold ties with other creative industries. They have also considered the industry as a milestone to re-design the image of the city as a fashionable and design-oriented metropolis (Leslie et al., 2014).

Since 1980s, the City of Toronto has been providing important resources to the fashion industry and showing a supportive structure. Starting with the first authorized fashion incubator, a non-profit small business center, the city has been nurturing creative workers, design talents and bringing them together with other designers, businesses, equipment, and resources. Besides the fashion incubator, there are other institutions such as the Fashion Design Council of Canada and World Mastercard Fashion Week, and Ryerson University having fashion degree program and several college programs such as Seneca, Sheridan, International Academy of Art and Design, and George Brown. Further, other important organizations include the Apparel Industry

Development Council, Apparel Ontario, Canadian Apparel Federation, Fashion Design Council of Canada, Fashion Group International – Toronto Chapter, Furriers Guild of Canada, Ontario Fashion Exhibitors and UNITE. The Toronto Economic Development Office coordinates the Fashion Industry Liaison Committee (FILC), a catalyst for public-private cluster development there are also fashion media outlets and modeling agencies in the country (ICF, 2010).

In the research conducted analysis of policy reports, newspapers, and trade journals, and interviews with fashion designers, educators, and government officials by Leslie et al. (2014), it is evident that It is evident that the Toronto fashion design sector has been heavily affected by the global trends, yet the case of Toronto still highlights four strategies that independent designers in Toronto are pursuing, including an increased emphasis on quality, exclusivity and timeless design in contrast to the globalized fast fashion, and a focus on niche markets, local supply chains, and own-brands.

Johannesburg Fashion District, South Africa

Johannesburg appears one of the fashion capitals from Africa that can be listed at the global fashion network. However, different from the previous cases, the fashion industry of Johannesburg is not located completely in the inner city. The major design houses and individual fashion designers are situated outside the inner city fashion district and located through the suburban areas. Fashion industry as a cluster consist of rather heterogeneous enterprises run by emerging designers and more established design houses that does not reflect an articulate group. Regarding its history, until 1994 South Africa's fashion industry has been lacking unique objective and fashion taste and quality. The fashion design as an industry has been guided and dominated by the demands of the internationalization and standardization (Rogerson, 2006). Since then, the fashion industry has experienced considerable change. The inner-city of Johannesburg was always been the location of clothing manufacturing. Yet, the sector has been endured massive decline in the mid-1990s when there was a decrease in the number of clothing manufacturers, increased unemployment within these sectors, scarcity of skilled workforce and increasing labor costs, have led to this change. In 2005, the Economic Development Unit of the City of Johannesburg brought the creative industries into attention and set particular objectives to support both cultural workers with talent but limited institutional support, as well as emerging companies with an

entertainment industry focus. Johannesburg's fashion district has been strategically and physically planned to become Africa's fashion capital. Regarding, several initiatives have taken role since 1998 to emerge a cluster of formal and informal clothing producers and suppliers. Some further projects have been launched to enhance the overall performance of this cluster (Rogerson, 2006). All the spatial, economic and social obstacles resulted in the decision of moving fashion designers and fashion houses into surrounding through the periphery neighborhoods of the Johannesburg (Harvey, 2013). The planned area has been named as fashion district and includes 20 blocks situated on the eastern edge of the inner city (Figure 3.11). Besides, the fashion industry has been aimed to be more than garment manufacturing, rather to be a cutting edge fashion design the future prosperity of the district is to be anchored no longer upon garment production.

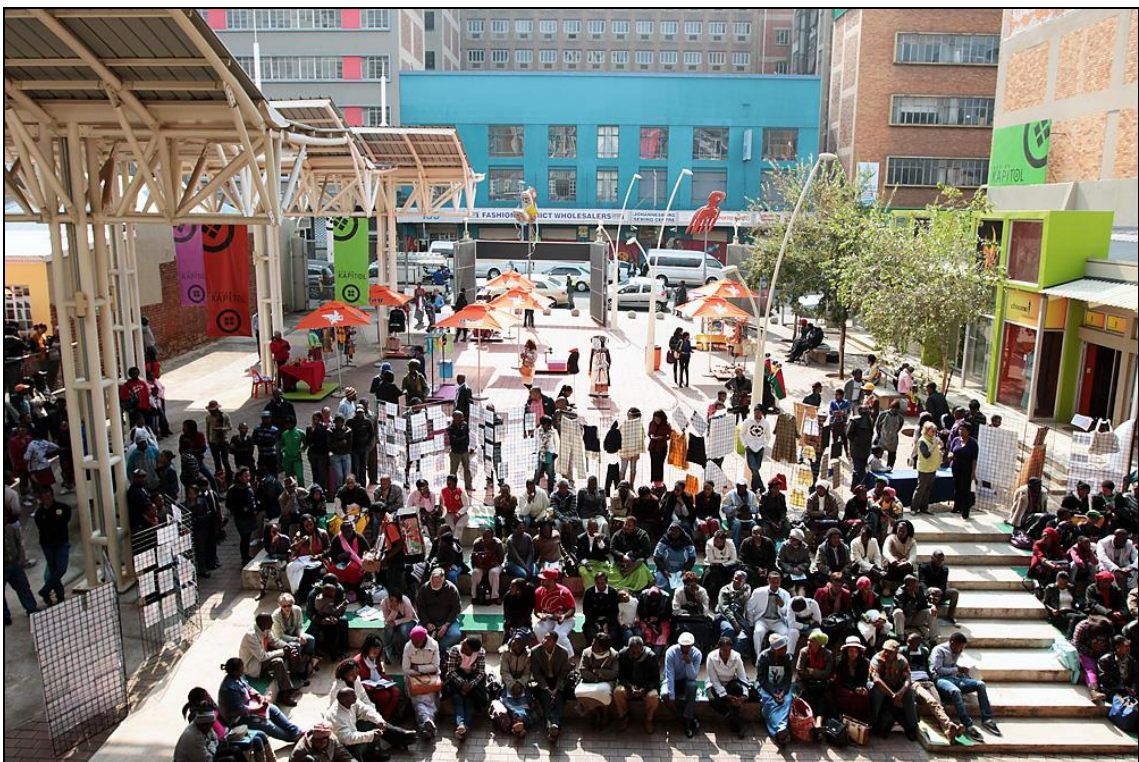


Figure 3.11. A View from the Johannesburg Fashion District
(Source: Skyscraper City, n.d.)

The Fashion District comprises more than 200 fashion-related businesses including approximately 1000 clothing micro-enterprises, both producers, as well as an increasing number of designers manufacturers, a budget clothing retail industry, established fashion designers, SewAfrica House and the Fashion Kapitool incubators.

The Fashion Kapital has been designed with open-air fashion ramp, a small amphitheater, 30 shops, and a walkway. SewAfrica House, on the other hand, has been a private sector initiative to become the nucleus for the creation and promotion of African designers to enter to the fashion industry, to rent studio space to access to equipment, machinery, and exhibition spaces. It also indicates the Fashion Shack where designers sell their designs to the public and where showcases take place for promotion of products designed by young creative on the rooftop of the same building. In addition to the incubators, the Fashion Square has been designed as an incorporate space for young designers, as well as retail that create attraction to the fashion brands. Moreover, the fashion industry has strengthened through the fashion trade journals, fashion training institutions, and trade shows, most importantly South African Fashion Week (Rogerson, 2006). From the creative workers side, diversity has been the focal point for Johannesburg Fashion District. A significant role is played by a group of distinctively black-owned fashion enterprises who established leaders in African brands of design and fashion clothing, and take national and some international interest. The Johannesburg Fashion District has encompassed and improved the diversity in the industry design also through non-South African from neighboring African countries (Harvey, 2013).

Auckland's Fashion Districts and Incubators, New Zealand

Fashion industry is claimed embedded in physical environment, everyday practices and consumption in New Zealand cities through fashion shows, city promotional material, particularly in Auckland (Lewis et al., 2008). As like many governments in the world, creative industries are here also seen as the major drivers of economic success in New Zealand. The Fashion Industry New Zealand was formed in August 2002 with 119 small to medium sized enterprises with 1500 direct employees. Its structure and planned objectives can be regarded as an example of industry-making work of governmental projects and the political work. Fashion Industry New Zealand has aimed to provide a supportive network and identity to the industry and to recognize the value of the industry economically and culturally. The Auckland City Council has stimulated the notion of fashion district, particularly in the High Street area of the city, with refurbished places and stylization (Larner et al., 2007).

However, the High Street is not the only fashion-based urban environment among the others with long-standing reputations for the fashion industry. There are also

the Dunedin incubator set as a local government initiated partnership between local and central government agencies, local capital and education institutions, and local fashion and businesses where people are supplied by studio and retail space and services, design mentoring, public relations support and media, and the Christchurch's fashion cluster initiative managed by the regional economic development agency, and provides vocational training and infrastructural support for the small to medium enterprises focusing on the sportswear and textile manufacturing (Lewis et al., 2008). Yet, it is most evident in the High Street area of the central business district that the fashion industry is visible. The area is now carrying the reputation of being Auckland's first fashion district since the market crash of 1987 that resulted in cheap inner-city rental space for the area (Larner et al., 2007).

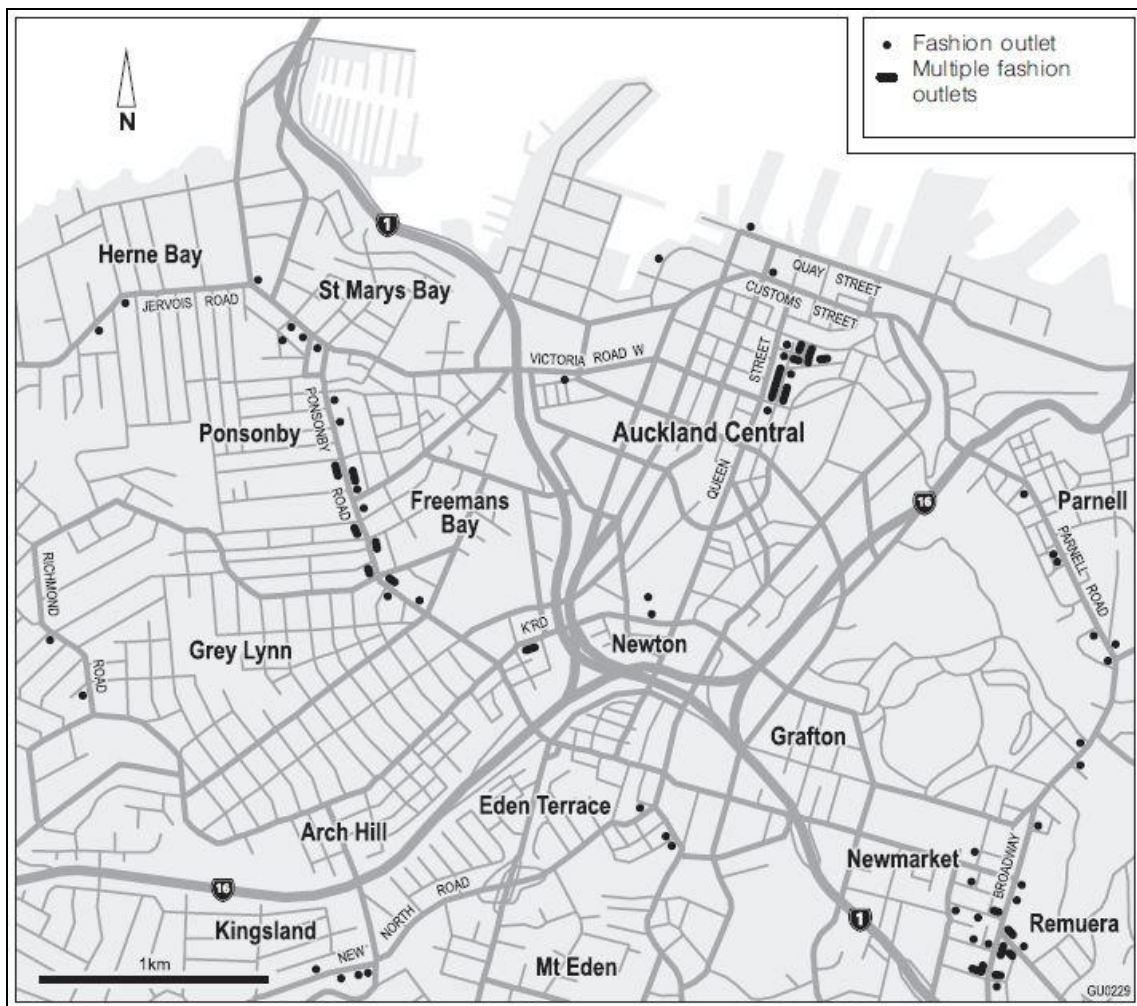


Figure 3.12. Fashion Cluster in New Zealand
(Source: Larner et al., 2007)

Seoul Dongdaemun Fashion Cluster, South Korea

The Dongdaemun area located in Seoul is known as a famous garment cluster in Korea, where almost 30,000 garment, textile, and accessories shops are situated in close proximity to each other. The development of the area as a national hub of the fashion industry illustrates a considerable transition from a historical local market into a mega complex. Different than the other cases in the world, the area has evolved without under the influence of global buyers. On contrary, many firms have been clustered in Dongdaemun as a service point for wholesaling and retailing to supply the Korean domestic market. Besides, it has not been supported by national policies too. Since 1960 the area has been grown rapidly due to the explosion in the domestic market for ready-made garments. The local production system of Dongdaemun has provided the market with local capacities for design and production were enhanced to produce various fashionable clothes within short intervals. The area also includes many inter-related sectors to fashion that engaged in buttons, zippers, labels, and wrappings, within Dongdaemun. The spatial agglomerations of inter-related firms have provided a quick-delivery system since they collocate at the same area with close physical proximity. Due to the financial crises occurred at the late 1990s, the change of the exchange rate provided short-term price competitiveness for Dongdaemun, and later, Dongdaemun has become an original design manufacturers and an attractive supplier for low-to-mid priced markets for the international buyers from mostly the Asian countries including Japan, Taiwan, and Hong Kong, and where consumer demand has been diversified and product cycles got much shorter. However, this has led an expansion of sales and the number of firms and increased the size of the market. There were also some the increasing number of Chinese garment producers as external threads. Therefore, such short-term price competitiveness has challenged its production system and necessitated to improve and renovate it (Kim & Lee, 2012).

Dongdaemun has had a chance to be a fashion hub for garment market of East Asia with the improved design capabilities, quick delivery, and flexible small-batch production. The design capabilities have been advanced with the complex domestic demand and arrival of designers into the area. The other developments have been supplemented fostering its networks between design and production firms and enabling quality of the products for export. Following such attempts without assistance from government policies, Dongdaemun, has recently been considered as a major design

center and been finally recognized as historical and cultural center in the Seoul's plans and policies.

Recent developments in the Dongdaemun fashion cluster have been initiated along with the interventions of the governmental plans. A new Dongdaemun Design Plaza and Park has been designed and constructed instead of the former stadium area. The City of Seoul plans have proposed several fashion shows and design advisory and education for the industry. On the other hand, the Seoul Fashion Centre has been constructed after the collaboration of the City of Seoul and Small and Medium Business Administration in 2000 (Figure 3.13). The transformation of the area into a mega complex with various amenities has supported the fashion industry. However, the questions for whether these recent plans and policies will be enough Dongdaemun to improve and maintain the production system of the fashion industry and promote the cluster's connection with the global market are still unanswered (Kim & Lee, 2012).



Figure 3.13. Recent Developments in the Dongdaemun Fashion Cluster
(Source: Tour Imagination, n.d.)

Antwerp Fashion Cluster, the Netherlands

Antwerp as a fashion cluster has been exposed to the branding process as a fashion city since the 1980s. After the 1970s the Belgium textile industry went through a crisis due to the external effects of the oil crises in 1973. The Belgium textile industry

was then planned to be more creative and needed a transition towards fashionable products and niche markets. The regional government decided to launch a Textile Plan, which was approved in 1980, and established the Institute for Textile and Confection in Belgium. The fashion department of The Antwerp Royal Academy of Fine Arts at that time supported successful fashion design students and graduates to be appear at the prestigious fashion shows.

Another important progress for the branding process associated with the fashion industry occurred when Antwerp was selected to become European Capital of Culture in the year 1993. It's repositioning as a European cultural center and a fashionable destination for cultural tourists has been one of the most influential developments. Flanders Fashion Institute was also founded in 1997. Following, the event Mode2001 as the leading cooperation of public and private parties for the fashion in Antwerp was realized Mode2001, to improve and legitimate the image of Antwerp as a fashion city. After the success of Mode2001, a very important milestone has also been the ModeNatie a building that indicates major representatives of the Antwerp fashion cluster opened in 2002. ModeNatie has always been considered as the physical evidence of the collaboration between several public and private actors. Today it contains the fashion department of the Antwerp Academy, the Flanders Fashion Institute, the Copyright Bookshop and the fashion ModeMuseum. The ModeMuseum has been established combined with the plans for the ModeNatie in 1998. The ModeMuseum has responsible specifically for conserving, displaying and archiving, and has made fashion accessible for not only insiders but also for the public; inhabitants and visitors of Antwerp (Klaver, 2010).



Figure 3.14. A View from the ModeMuseum Provincie Antwerpen (Source: City Plug, n.d.)

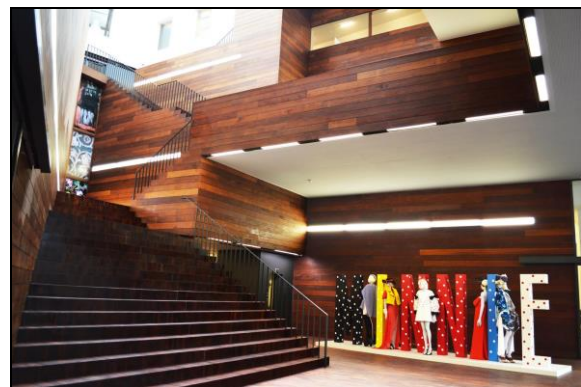


Figure 3.15. A View from the ModeMuseum Provincie Antwerpen (Source: The Magger, n.d.)

Not only the Mode2001, ModeNatie, ModeMuseum and other several institutional initiatives that include education, research, the archiving and displaying of designs archives and display processes which encourage fashion designers, but also in the realization of a structural touristic policy program has been contributed to the fashion industry production and consumption in the city. In addition to the specific expertise, know-how and network of these institutions and organizations and events, the tourism policies has also added the recognition of the Antwerp as a fashion cluster (Klaver, 2010).

The World Fashion Centre in Amsterdam, the Netherlands

The city of Amsterdam supports almost all the creative industries including the fashion industry. International characteristics of the city attract various fashion designers and fashion houses from all over the world. The creative class theory by Florida (2002), in that respect, is very observable in the urban environment. The tolerant environment here is well blended with the variety and talent. There are also a sound education centers as Amsterdam Fashion Institute that offers a variety of studies for international students and participates. There are also the Dutch Fashion Foundation as a non-for profit organization supported by the Dutch Ministry of Economic Affairs, Agriculture and Innovation that provides the local fashion industry with network of fashion designers. Many projects including the transformation of the traditional touristic characteristics of the Red Light District such as sex shops, brothels and coffee shops into the fashion district called the Red Light Fashion Amsterdam.



Figure 3.16. The World Fashion Centre in Amsterdam (exterior)
(Source: WFS, n.d.)



Figure 3.17. The World Fashion Centre in Amsterdam (interior)
(Source: WFS, n.d.)

The main target of the project has been the clearance of the area and to attract the international fashion industry and designer into the area. However, that proposed project between 2007 and 2008 has been taken huge amount of reaction from the city as well and has been very controversial when it comes to the current benefits gained from its well-known attraction of the district. Lastly, the city makes room for bi-annual activities of the Amsterdam Fashion Week that on the other hand offers the LAB program that provides opportunities for young fashion talents to prepare their showcase their designs at the official fashion weeks in Amsterdam. The World Fashion Centre in Amsterdam can be considered as a hub which is known as the largest fashion wholesale center with over 400 showrooms indicating various national and international brand names.

The center is known as a meeting point of different fashion-related sectors from clothing to accessory available in different segments the middle and higher segments. In such a hub, there are agents, importers, manufacturers, wholesalers, purchasing organizations, designers to follow the latest trends in the industry. This center serves as a showcase where established and emerging fashion labels appear. The World Fashion Centre has ideally planned for fairs, exhibitions, corporate events, conferences and provides with all the necessary equipment for any fashion events (The World Fashion Centre official website). However, Amsterdam's vision as a fashion cluster has been exposed to too many initiatives, different agendas and conflicting interests. The lack a shared agenda and contradictory creative vision about Amsterdam on various industries has put the fashion industry in unstable and unsustainable collaborations. That has recently changed the policy regime for the fashion industry in the city of Amsterdam (Klaver, 2010).

3.5. Evaluation

Clustering is an activity that brings numerous benefits for both firms and the districts or regions in where they operate, and creates fostered competition higher productivity, new knowledge and creativity formation, increased job availability, innovation and urban growth. Considering the creative industry formation and their properties, even though they are also mostly place-based, there need further requirement to operate. Transaction Cost put forward by the California School, Pure

Agglomerations, and Industrial Complex claimed by the Classic Economic Approach are major spatial forms of clustering. On the other hand, there are also most influential non-spatial dynamics such as Social Network, Institutional Approach offered by the School of Institutional Economics and, non-spatial proximity presented by the School of Neo-regionalism too. Non-spatial proximity is conceptualized in terms of similarities between agents through cognitive proximity with shared knowledge bases or skills, organizational proximity with shared methods and procedures, social proximity with shared relationships and institutional proximity with shared culture.

To describe the clustering of creative industries, there are different scales and related terms as creative city, cultural quarters, creative clusters, creative places and cultural districts that are used interchangeably. Particularly, the characteristics of creative industry clusters comprise an agglomeration of certain creative businesses with certain degree of geographical proximity where there are the size and diffuse of creative industries. There is also the concentration of creative people with a well-constructed and ever-changing network of relations, mutuality, shared and complementary varieties. Their environment offers diversity, indicates communication, influence and collaboration, openness, stimulation and freedom. Besides, there are high presence technology, talent and tolerance as well. Their inner structure have derived and adapted creativity, knowledge and innovations as cross-over, as well as flow and exchange of creativity, knowledge and innovations. Physical settings generally comprise particular historical and cultural content, uniqueness and identity. The look and atmosphere of the place can be emerged naturally or planned. Therefore, urban regeneration interventions and redevelopment projects can be involved in certain cases. On the other hand, the levels of creative clusters vary and their strengths and potentials depend on the degree of their development stage. The levels are described as dependent, aspirational, emergent and mature. The diffuse of creative industries clusters in certain districts in various scales comprises important aspects of what the new economy has brought spatially.

Particularly for the fashion industry clusters illustrate various features that associate with the concept of spatial clustering. Regarding the fashion industry clusters, in general, in certain districts where fashion production, consumption, distribution and communication occur in certain proximity. Agglomerations of fashion firms are observable and visible. The previously emerged examples show different formation stories in their own localities as well as similarities with each other due to the global

fashion industry influence. Fashion industry has long been dominated by global cities, yet on the other hand, several localities can play significant roles at the international level and have lasting impacts.

Fashion clusters can play in global fashion systems, and the strategies they use to compete with relatively larger cities. Despite central Milan and London, London City Fringe, New York, Los Angeles, Istanbul and the Lace Market Nottingham indicates the fashion industry production, consumption and distribution agglomerated through certain districts, their structure are relatively larger and greater that their impacts echo at the entire urban environment comparing to the other cases. These clusters have been spontaneously emerged and strategically planned. Fashion industry in Milan, London, and fashion production and consumption in, New York and Los Angeles can be considered as major examples of mature clusters. On the other hand, Toronto and Johannesburg fashion clusters are found at the district scale, Auckland in New Zealand at the street scale, and Dongdaemun in Seoul, Antwerp and Amsterdam in the Netherlands are found at the building scale. These clusters, also, have been physical planned and exposed to the several regeneration phases that indicate urban design tools and planning interventions.

More specifically, Milan, London, New York, are acknowledged as the main fashion cities, differ from each other with respect to the kind of products, the market niches serviced and consumer characteristics. Milan is not only a hub of fashion, but also a major site for accumulation of its manufacturing and, research and development, education, and related distribution. Milan also indicates a series of lifestyle-based industries that have close ties to and associations with fashion firms. Its reputation of Milan as a fashion capital is not only a function of the fashion cluster in the region but also supporting industries and the atmosphere they create. On the other hand, London as a global center of fashion industry contains social and creative environment where designers are also part of the artistic communities that supply a different state for creative exchange, mutual appreciation and encouragement. Here, spatial proximity matters for fashion industry, especially for the designers in the central London, for realizing creative side of their work with the help of interaction with other creative workers, whether designers at large or artists. In the case of the London City Fringe, it is evident that the competitive advantage of clustering requires the input of different skills. The main spatial advantage of the area is the reduced transaction cost due to its central location and good transport connections. However, considering the overall strategy

including other sectors as well, the cost of supplies and supply chain go beyond the area appear more essential than geographical proximity. That is because there is an internal market within the cluster that contains a strong supply chain among the smaller firms.

On the other hand, Los Angeles and New York symbiotically have benefited from the global fashion branding. However as national policy, while New York is counted as the design capital, Los Angeles is the production center in terms of actual manufacturing and global trade in the wholesale market. In other words, Los Angeles has become a niche market complementary to it. Particularly, the New York example show the transformation of the garment manufacturing into a global fashion industry supported by the other creative industries and most importantly the creative atmosphere of the city that indicate all the forms of proximities. The attraction and the retention of the creative class are also crucial strategies that can be realized through the urban environment as well. Following, in Istanbul, it is evident that there are a very high concentration of fashion houses in specific clusters with close geographical proximity and consequently a high potential for face to face interaction. Its national success is considered as the result of fashion fairs and fashion shows that provide an opportunity to interact and make contacts in international bases that show institutional and cognitive proximities as well. Nottingham's success has been dedicated to the regeneration efforts and physical revitalizations, and the fashion district here is embedded in a conservation and regeneration zone which also indicates the contribution of heritage-tourism planning. Yet, over investment and the increasing cost of maintenance have also been severely changing the area through gentrification.

Furthermore, the case of the fashion industry described by independent fashion designers in Toronto proves that urban environments with creative activities blended with well-developed supporting services such as the media, retailers can maintain and develop the local market production. The Johannesburg fashion cluster with the development of several incubators show various spatial opportunities including shops and boutiques, offices and studio spaces, restaurants, public squares, outdoor fashion activities that are spatially close to each other. Auckland, on the other hand, similar to the London City Fringe, example have witnessed to the creative city projects and strategies for redevelopment. More extremely, in the Asian context, Seoul has gone through a massive transformation of its fashion district into a mega complex with various amenities, which eventually has physically affected the locational choices of the fashion industry. Besides, from the European perspective, and considering the fashion

regime and its policy making processes for several decades, Antwerp in the Netherlands with the fashion related organizational and physical settings has been observed as being different than the contemporary fashion cities emerged with the physical redevelopment-led projects. While cities such as London or Milan may represent a more traditional couture fashion aesthetic, Amsterdam clearly offers a different dynamic. The fashion production and fashion designers diffused through the city does not illustrate a firm-based clustering trend.

All in all, the fashion industry needs a central location in cities, for all the reasons previously discussed in the relevant literature. Some preliminary and dominant mechanisms portray the spatial agglomeration of economic activities and specifically design industries place-based. On the other hand, it is also evident that there are further necessities are needed for their operations through non-spatial relations.

CHAPTER 4

CONSIDERATION OF THE EXTERNAL ENVIRONMENT

This chapter gives an overview of the theoretical framework in which this study is embedded; external environment of the ecosystems of creative industry cluster formations. First, it discusses the emergence of the new economy as a background which has led the restructuring of cities and the revival of the inner cities along with the creative industry conception. Second, the chapter explores the shift from the Fordism as a particular way of production and how it has evolved and restructured to Post-Fordist forms of production. It looks into how debates around these two forms of production have altered the perception of cultural and creative industries. Most fundamentally, this section argues how cultural industries practices are associated with the Fordism while creative industries' structures appear as exemplars of Post-Fordism suggesting a new relation between culture, creativity and economy with regard to the concrete arguments on the post-modernism, spectacles and consumerism. At the same time, it argues how the creative industry system has emerged by adopting a cultural industry model by comparing the two industrial system formations, and how cultural industry practices amalgamated with creative industry systems. Third, the recent and current issues in Turkey and recent developments in terms of the creative industries as well as how creative industry conception is approached in the Turkish context are highlighted. Several recent researches in Turkey on creative industries and recent national developments and organizations for creative industries are presented. Lastly, the shift of fashion system in Turkey and, as a base for the case study, evolution of and recent developments in wedding wear sector are described.

4.1. New Economy and Urban Restructuring

For the last mid-century, urban areas have witnessed various shifts of evolving production systems and economic formations that have triggered many urban restructuring processes. During the 1950s and 1960s, urban restructuring was based on the mass production and industrial development with a substantial growth of size and

height of city centers. Through 1960s, the character of urban areas and their political context have dramatically altered with the tendency for the decline of industry (Simmonds & Hack, 2000). There is a period between the 1970s and 1980s when the post-Fordist mode of production became visible, new service sectors including management, marketing and engineering consulting, commercial and industrial real estate were emerged. In the 1970s, the crises of Fordist mode of capital accumulation triggered flexible mode of production, internationalization of finance and new global division of labor (Marcuse & Van Kempen, 2000); particularly in Western countries as well as US have seen a considerable transformation into the Post-Fordist mode of production, deindustrialization, geography of capital flows, rise financial and producer services industries and so on (Brenner, 1998). According to Castells (1989) new international division of labor has resulted in relocation of manufacturing industries to the periphery and location of business services at the core of cities. In the 1980s, Soja (1989) claims that there is a “restless formation and reformation of geographical landscapes in 1980s as a significant transformation of urban areas with rise of service sector under the globalization (p. 10).

Through the 1990s, new specialized services, information technology, innovation and design, cultural production and international mega-projects have led a major shift in the spatial and social structure of cities. Since then, cities have been shifted and expanded, consequently evolved to a new spatial as well as social organization. “Whereas the dominant industries of the nineteenth and twentieth century’s depended on materials and industry, science and technology, the industries the twenty first century will depend increasingly on the generation of knowledge through creativity and innovation” (Landry & Bianchini, 1995, p. 2). Following, the first decade of the twenty-first century was marked by a reappearance of interest in creativity and cities and enthusiasm for a postindustrial ‘new economy’. Especially over the past 30 year, many scholars (Landry & Bianchini, 1995; Scott, 1997; Begg, 1999; Leadbeater, 2000; Hall, 2000; Florida, 2002; Uzun, 2003; Hutton, 2004) have underlined the rise of new economy which is also named as creative economy or/and knowledge economy. At the heart of the new economy are creative industries. The new economy has been an emerging concept started in the 1900s and rooted in creative assets of the urban environment which likely generate economic growth and development. It should be also mentioned that there is a convergent relationship between the new economy and creativity.

However, even that old industries have faded away as the industries of the 21st century initiated the applications of new knowledge to products, processes and services, the case is not only for our century, but also throughout the history where cities have tied together their technological, organizational, productive, intellectual and cultural innovations for many years Hall (1998). Similarly, Landry (2000; 2003) refers to history that creativity has always been significant contributor for cities that it is needed to work as markets, trading and production centers, with the entrepreneurs, artists, intellectuals, students, administrators and power-brokers. The arguments for the necessity of creativity to our economy have been made by many authors such as Caves (2000) from an industrial perspective and, Markusen and King (2003) and Markusen et al. (2004), from an occupational approach.

The emergence of the creative environments is very much based on how creativity is being used. A significant finding of the report presented by UNCTAD (2008) is that some developing countries have started benefiting from the dynamism of the new economy and they are establishing cross-fertilizer policies to enhance different existing creative sectors. Within the new economy framework, is claimed that there is a competition between cities through urban restructuring in order to promote themselves to attract international attention and gain profit from various investments. In this regard, the study of Sassen (2001) addresses four major interrelated functions that cities should perform in their attempt at being at the global scene. She asserts that cities should be “highly concentrated command points in the organization of the world economy; second, as key locations for finance and for specialized service firms, which have replaced manufacturing as the leading economic sectors; third, as sites of production including production of innovations, in these leading industries; and fourth, as markets for the products and innovations produced” (p. 3-4). Sassen (1996) adds that, cities, as the urban agglomeration sites, have experienced major agglomerations and new conditions for new centralities. Considering, service sector and manufacturing sector has enabled the restructuring of the core. Much of the literature draws a frame in relation to substitution of industry by service sector in core areas and displacement of industry (Savage & Warde, 1996). As the peripheral uses transform to industrial production the core is placed by service sector. Similarly, King (1990) uses the terms center-margin to define the emergence of service sector in the center and manufacturing in the margins.

The transition from the classical industrial city to the Fordist type city is exemplified below (Figure 4.1) where central business district was at the core and the decentralized services constructed an external, sub-center. Its transformation into a post-Fordist type has become evident when the evolution of new programs and their dispersal in space occur (Figure 4.2). The inner city once has a central role, later has turned into a global command center (Knox & Pinch, 2000 as cited in Carmona et al., 2003). New spatial organizations with different functions have begun to take place in the suburbs. The post-Fordist cities have become the sites of consumption through shopping centers, theme-park areas, industrial areas, technological parks and new housing areas, and gated residential communities. The so-called contemporary city is now shaped by non-spatial proximities that comprise flow of capital that governs the everyday living. The inner city was used to be the main holder of the city's identity, however now they are the sites of spectacles.

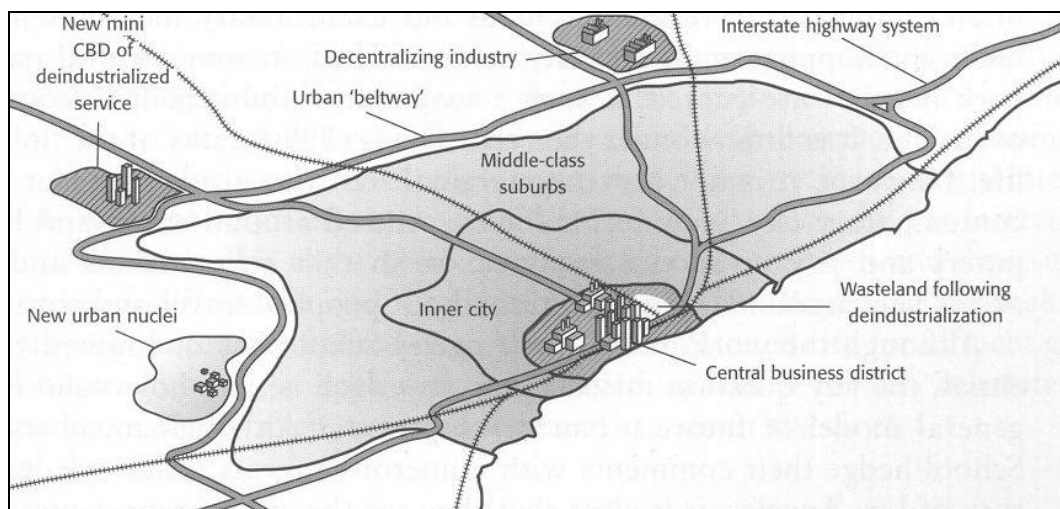


Figure 4.1. Structure of Cities in the Fordist Mode of Production
(Source: Knox & Pinch, 2000 as cited in Carmona et al., 2003)

No doubly, there has been an unavoidable partial replacement in cities to locate the finance and for specialized service firms on the former locations of manufacturing within its globalization process. Such urban restructuring has enabled clustering of creative industries, and accumulation of financial and service sectors in city centers. Consequently, the main centers of activities as well as peripheries have witnessed some replacements. Regarding the disintegration of the industrial base of the cities and the rise for cultural of the service sector, policy makers have more focused on the arts and culture as an economic development area with substantial creative potential.

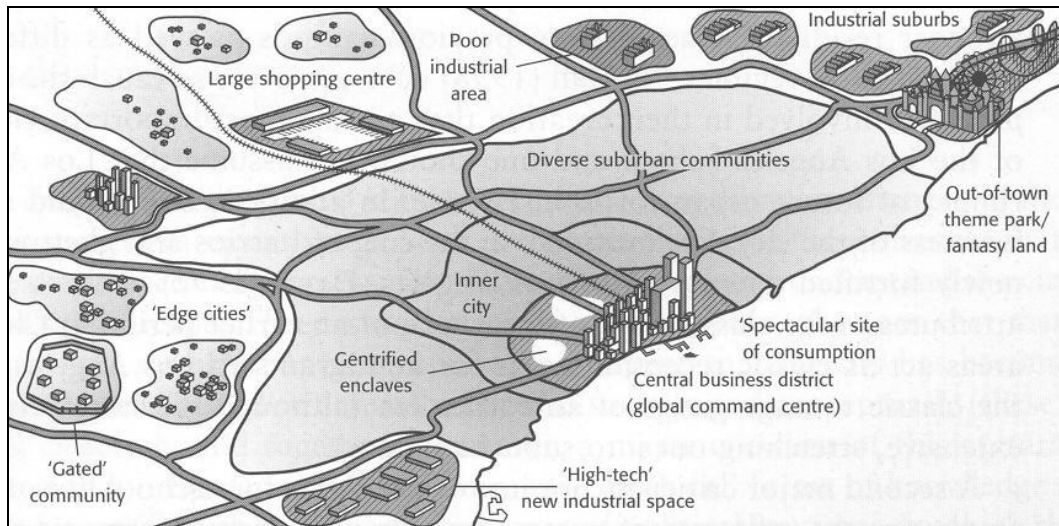


Figure 4.2. Structure of Cities in the Post-fordist Mode of Production
 (Source: Knox & Pinch, 2000 as cited in Carmona et al., 2003)

Considerable clusters of new economy industries are situated more especially the metropolitan core that illustrates a creative habitat par excellence for these new industry clusters. Regarding the governmental and planning issues for creative industries, there is a debate of investing in whether city centers or urban peripheries (Bianchini & Parkinson, 1994). Durmaz et al. (2010) refers to Hutton (2004) and highlights the opportunities regarding the cluster and location of creative industries in inner cities, and how inner-city investments enable a rapid growth in the new economy. In addition to that, Yigitcanlar et al. (2008) asserts that central location of creative industries is vital with reference to the city of Barcelona and the project 22@ Barcelona seen as successful inner city regeneration example. However, there is also a contradictory view that planning and designing new zones, particular villages with mixed use patterns of residential and recreational activities can also contribute to attraction and clustering of creative industries and new creative precincts can be profitable in terms of the investments. One-North Singapore, Helsinki Virtual Village and Zaragoza Milla Digital are examples to some of these examples where one can find adequate infrastructure and well-designed attractive built environment.

The rise of new industry enable inner city restructured to a fundamental reorganization of space that consists of new production sites, place-based production networks and various inter-linked industries. The diffuse of creative industries within certain clusters in the inner city comprises important aspects of the spatiality of the new economy. These industry sites as clusters lead the convergence of creativity, culture and

urban development through substantial value-added production, and the competitive advantage of the inner city for creative industries. Additionally, these inner city clusters enhance quality and quantity of human capital, amenity attributes, and environmental conditions. These sites retake and flourish the abandoned or obsolescent inner city districts of postindustrial cities in Europe and North America such as in London, Glasgow, Hamburg, Berlin, Barcelona, Milan, New York, Montreal, Toronto, San Francisco, and Vancouver. In these cases, new spatiality of industry formations can be regarded as a revival of inner city industrial sites, or as a new phase of the urban services economy (Hutton, 2008). Similarly, Scott (2006) claims that creative production in the industries demands the existing cultural heritage left over from the previous manufacturing sites to build up workplaces for the creative fields Scott (2006).

The inner cities were then started to be occupied as sites of new production and consumption places driven by new enterprises that often connected with artistic and creative ways of production. According to Sassen (1996), cities can be identified with economic activity those depending on multinational financial services and are linked to the circulation and realization of wealth as large and centralized urban agglomeration areas, while older industrial cities reflect the specifications of former industrial capitals in decline with the collapse of urban manufacturing. There is a physical transformation to achieve such a sectoral transformation. This process can also be conceptualized as 'built environment for consumption' as Harvey (1981) declared. Within the conception of new economy, inner city is believed incorporates new territorial forms of specialized industrial production which accommodate leading firms, ateliers, galleries, together with further distinctive consumption amenities, effectively demonstrating the new form of the social and economic worlds of the inner city that comes along with the creative industry formation.

The emergence of creativity-related industries within the inner city can be seen as a sign of new economic and urban restructuring that dated back to the downfall of Fordist production systems in the metropolitan core started at the 1960s and accelerated at the 1980s. As a concrete proof of the structuring processes, Hutton (2000) exemplifies the contemporary development of new economy clusters of the inner city within the expansion of creative and design-based services as part of the "reconstruction" of inner city heritage districts and conservation areas, dating from the

mid-1980s in many large- and medium-size cities and, Hutton (2004) the emergence of hybridized firms typified by creative processes.

As Uzun (2003) pointed out that the period after the 1990s was the period where fundamental change occurs in cities through a shift from a Fordist mode of production to a post-Fordist production system. The consequence of shift has come somewhat immature, reflecting the unpredictable nature of growth trends, the complexities of new industry formation, and different experiences from place to place. With the impact of the new economy, the restructuring of the urban area, employment, social class, and space defined variously as post-industrialism or post-Fordism (Hutton, 2008).

4.2. The Transition from Fordism to Post-Fordism

The debates that have emerged around the creative industries for the last decades have been raised in the light of a statement that there has been a shift from Fordist to post-Fordist forms of production (Harvey, 1989; Lipietz, 1992; Amin, 1994). From the 1980s onwards, various academic studies suggest that the world, especially the western world, has been witnessing a transition from Fordism to Post-Fordism. This shift indicates a new way of industrial production, a new kind of capitalism, or mode of accumulation (Harvey, 1990; Lipietz, 1992). For some others (Lash & Urry, 1987; Giddens, 1991), such shift suggests a profound transformation in the character of modernity itself. That is s part of the emergence of an informational and network society (Castells, 1989; Castells, 1993).

“Fordist modernity is far from homogenous. There is much here that is about relative fixity and permanence - fixed capital in mass production, stable, standardized, and homogenous markets, a fixed configuration of political - economic influence and power, easily identifiable authority and meta-theories, secure grounding in materiality and technical - scientific rationality, and the like. Postmodernist flexibility, on the other hand, is dominated by fiction, fantasy, the immaterial (particularly of money), fictitious capital, images, ephemerality, chance, and flexibility in production techniques, labor markets and consumption niches” (Harvey, 1989, p. 338-339).

The following section will explore Fordism as a particular way of establishing the mass production process and how it has led to new ways of understanding the

cultural industries and along with the economies of scale and vertically integrated production systems has been seen to give way to 'post-Fordist' forms of production as a new form of organization of production is the notion of 'flexible specialization' as opposed to mass production (Amin, 1994; Harvey, 1990; Scott, 1986; Storper, 1994; Storper & Christopherson, 1987).

4.2.1. Cultural Industries and Mass Production

In the economy report published by the UN Agencies (2008), cultural industries are defined "... a set of economic activities that combine the functions of conception, creation and production of culture with more industrial functions in the large-scale manufacture and commercialization of cultural products" (p. 11). Such economic activities have been through a massive growth in the last years, however, cultural industries become a relatively an old object of interest due to the changing economic structure and required policy implications underneath. In general, the cultural industries include all market-oriented economic enterprises such as music ensembles, sound studios, record labels, publishing houses and the production of sound storage media, book and music dealers, art dealers and galleries, concert agencies, film actors, film producers and cinemas, architectural offices and design studios, artists' studios, offices of authors and journalists, agencies for cultural services. Cultural industries integrates the whole production chain of cultural goods, from creation to consumption and re-use, within the final usage and also ranges across from the fine arts to popular culture, and in some versions to tourism, sport and health (Pratt, 1997). The term cultural industry refers to bringing together the creation, production and commercialization of creative contents which are generally intangible and naturally cultural. Cultural industries are formed as goods or services and their contents are protected by copyright. The Greater London Council employed the UK's first cultural industries strategy as a new sort of cultural policy. The cultural industries were then seen as a major foundation of local employment. Encouraging the small independent sector as part of a local economic strategy encouraged the locally based companies rather than those operating at more global level (O'Connor & Wynne, 1993; Bianchini & Parkinson, 1994; O'Connor, 1999; Garnham, 2001). However, the impact of mass industrial production on forms of culture had long caused serious concerns.

Mass production of the cultural industries along with the Fordist ideology has witnessed an enduring tension within the cultural industries and has furthered the conflict between capitalism and culture. The most well-known reaction was first expressed in philosophical form by Theodor Adorno and Max Horkheimer who were the members of Frankfurt School of Critical Theory. The term cultural industries was first introduced by Theodor Adorno and Max Horkheimer in 1947 (Adorno & Rabinbach, 1975; UN Agencies, 2008) as a combination the old and familiar nature of products and services within a new perspective. In 1975, the relation between the culture industry and the customer was portrayed by Adorno (1975) as “the customer is not king, as the culture industry would like to have us believe, not its subject but its object” (p. 12). Adorno and Horkheimer (1979) reflect on what they perceived as a standardized ‘mass culture’ providing the conditions both for authoritarian governments and capitalist businesses over the easily manipulated mass audiences. Along with the emergence of the term culture industry adopted by governments and businesses, Adorno and Horkheimer (1979) assert that cultural products are made in almost the same way as others manufactured in a Fordist mass production system. In their interpretation of cultural production, such as music, publishing and films, they refer to the assembly-line character of the products, as in factory-like studios (Adorno & Horkheimer, 1979). From the Marxist perspective, it is increasingly argued that the industrialization of cultural production has triggered the standardization of cultural commodities, and this has harmed the art and popular culture (O’Connor, 2007). Cultural commodities are specially formulated to fit into the mass consumers who are basically reduced to component parts of the cultural industry production machine. The instrumental approach in the mass production of culture has turned it into routinized operations performed by artists and designers those are believed have no artistic or creative input into the cultural commodities. Rather they work as gears and mechanisms in a machine.

Despite, later, the assumptions of Adorno and Horkheimer have been questioned as being too pessimistic despite they assert some enduring anxiety over the culture in a Fordist production system that has predominantly been homogenized. Since their argument, especially around the 1960s and 1970s, the mass production of cultural goods has been questioned in a number of different ways (Hesmondhalgh, 2007; O’Connor, 2007; Banks, 2007; Garnham, 2005; Cunningham, 2002).

Garnham (2005) and Cunningham (2002) argue that as Adorno and Horkheimer (1979) first presented the term culture industry they did as a reaction. It was a polemical

stand by the Frankfurt School. For the problems such as commoditization and alienation, the given term culture was used as an opposition to civilization which was described by superficial taste and social practices of elites, and by art represents freedom and utopian hope. However, the attention shifted from a concern of the analysis of social structure and class to analysis of culture. Then, cultural industries started to drop its origin that a replay of the Frankfurt School's analysis where it is criticized as being materialist basis for art and culture. The term has lost contain the elitist and negative manner underpinned in the Frankfurt School and the Marxist perspective of commodification, commodity exchange, capital concentration and worker alienation at the point of production. The term cultural industries have tied art and culture and economic processes together.

The main argument for these critics is about the difference between mass production and culture. The Production of Culture School in the USA (Hirsch 1990), for instance, argues that the cultural industry is restricted to the culture as an outcome of ultimate individual creation, and claim that cultural production should be analyzed like in the conventional industries in terms of the market-product relation, the division of labor and the market strategies. Similarly, British Cultural Studies (Williams, 1958; McRobbie, 2005) underlines the same argument but rather focusing on texts produced by cultural industries instead of their organizational conditions. Specifically, these studies contradict with the idea of passive mass consumption and that the culture industry as whole is much more complex, what Adorno and others suggested.

The Fordist production processes in the cultural industries have also been discussed. There have been several disputes about how certain industries are more Fordist than others. The film industry, for instance, appeared relatively more Fordist. To Storper (1989), at the time film industry established in California, USA in the 1920s, and the Universal Film Manufacturing Company produced 250 films in a year that equals to the film production of the entire country's film industry today. On the other hand, relatively late, the advertising and different forms of design industries detached from the Fordism in 1970s (Nixon, 1997). Likewise, the fashion industry also combined elements of mass production and the services through the transition from the Fordism to Post-Fordist (Wark, 1991; Braham, 1997; McRobbie, 1998). Clothing manufacturing was once a highly skilled, craft based industry, before the independent couture house emerged in Paris in the mid-19th century particularly after 1945 (Wilson, 1985; Braham, 1997). In the 1960s, there was a Fordist style mass production in the fashion

industry. The expansion of the fashion market and its evolution from being only the garment manufacturing to a much wider consumption-oriented has resulted in the mass production of ready-to-wear clothes, and later such mass production has been organized around several services that now considered as post-Fordist.

Following, politicians and economists, especially in France and the UK, started to debate that the culture industries producing cultural commodities have to be reconsidered within certain policies and laws in order to make profit (Garnham, 1990; Hesmondhalgh, 2007; O'Connor, 2007; Banks, 2007). The conditions of this profitability were not ruled uniquely by an ideology of controlling the mass production of culture and keep its cultural value; instead, by the intention of making profit through its use value. Yet again, the cultural industries did not entirely excluded as mass culture however, started to be seen as valuable cultural goods for the needs of consumers.

The important turning point for the cultural industries occurred around the 1980s when some real re-structuring of cultural industries that partly to do with a repositioning of the cultural industries agendas in academic and policy writing (O'Connor, 2007). After the downfall of the Greater London Council government in 1986, UK picked up on the creative industries and tried to position them as part of their economic future after the collapse of Fordist industries. Since then, increasingly the creative industries are linked to wider strategies in the formation of post-Fordist economies and are part of a new concern with image, heritage, tourism and urban regeneration as solutions to post-industrial cities (O'Connor & Wynne, 1993; Landry, 2001; Hesmondhalgh, 2002; McGuigan, 1996). At the same time, academic research on the creative industries has become more interested on the emergent discourses around post-Fordism within the emergence of a new economy in relation to the development of this new form of industry reorganization.

4.2.2. Post-Fordism and Creative Industries

Around the 1980s a considerable shift from mass production to the flexible specialization, in other words Post-Fordism occurred (Lash & Urry, 1987; Lash & Urry, 1994; Scott, 1988a; Harvey, 1989; Amin, 1994). Post-Fordism and flexible specialization have been positioned as future trends within the globalization and new economy, and the cultural industries have been then started to be redefined and the

creative industries emerge in the 1990s along the increasing fragmentation and volatility of consumer markets.

Piore and Sabel (1984) describe the notion of flexible specialized production as “mass production involves the use of special purpose (product specific) machines and of semi-skilled workers to produce standardized goods while ‘flexible specialization’, or craft production, is based on skilled workers who produce a variety of customized goods” (p. 12). The main objective for post-Fordist industries is to generate new knowledge and creativity through the enhancement of information and creativity flow and exchange. However, such an objective can never be achieved by individual firms alone. Thus, the firms are, after the post-Fordism more rely on the market, the technological circumstances and the spatial practice of the industry itself.

The flexible specialization introduced with the post-Fordism has basically met the growing consumer demand for non-standardized, better quality goods and short shelf-life. For many authors (Piore & Sabel, 1984; Harvey, 1990), flexible specialization has enabled the opportunities in order to reduce the pressure and the uncertainties of demand emerged in the crisis of Fordism. The just-in-time production has been realized to provide the industries with more production efficient, adaptable and flexible to unsteady market demands (Gu, 2008). Storper (1989), for example, has usefully pointed out that flexibly specialized industries can be characterized by the changing market in tastes, more complex and frequent decisions in product development and, competition and cooperation among firms in the industry. Therefore, it is evident that, first, there have been production of highly differentiated, so-called creative goods for a constantly changing tastes of consumers in the market and firms have tried to adapt to changes more rapidly and responsively. Second, the existing production system has merely been to provide flexible goods with regard to the use of flexible and multipurpose production techniques. Such techniques has altered the process of production and required to make more complex and frequent decisions in product development so that the Fordist production system has been replaced by a better qualified workforce and creative workers. Third, with this transition, then, it has become possible to realize competition and cooperation among firms in industries. Before, it was presumed that cooperation had been discarded in favor of competition led innovation in the Fordist period. On the other hand, consumption is conceptualized as role player consumers who demand change and continuous evolving within the flexible production in the post-Fordism. Social class that was once more obvious in Fordism is

now less evident and important in one's choices in post-Fordism. The variety of lifestyles available detaches individuals from tradition and standardization.

However, within the Harvey's (1989) critical approach, the post-modernism associated with the post-Fordism - flexible specialization - can be said is portrayed by accelerating turnover time in production, exchange and consumption. As consequences of such acceleration; 1) the sensory overload 'throwaway' society has been emerged 2) everyday life has become short-term, the act of planning has been restricted and there has been an addiction to work, 3) the taste and opinion have been manipulated by the advertising which is increasingly geared to manipulating desires and tastes through images that may or may not have anything to do with the product to be sold, and lastly 4) there has been a instability and temporary of products (Harvey, 1989). The post-Fordist new production system has brought up a whole new aesthetic accompanied by the high commodification, privatization, globalization, and specialization. Such new formation have most importantly the commodification of cultural forms which in turn the new form of cultural industries; so-called creative.

Creative industries are very much part of the post-industrial urban economic profile, showing structural expansion due to these new consumer market characteristics outlined by Harvey (1989) and due to the faster and more detailed flows of information back to the producer and an ability to respond to quickly changing demand through a more flexible production process. Among the creative industries, especially from those which have been first described by the Department of Culture, Media and Sport in the United Kingdom in the late 1990s, like included many other classifications discussed in the Chapter 2, the fashion industry perfectly illustrates the condition of post-Fordism as a production and post-Modernism as the most recent way of urban living. The first major consequence as stated before, of the flexible production in the post-Fordism occurs in the fashion industry as one of the creative industries through the volatility and ephemerality of its products, production techniques, labor processes, ideas and ideologies, as well as values and established practices in everyday urban living. Moreover, advertising and spectacles flow in the space are also considerably part of the current practice that has been emerged along with the post-modernism.

Specific to the fashion industry as a creative industry, the diffuse of fashion in the market accelerates the pace of consumption demands not only in clothing, but also across the life-styles and recreational activities. Particularly for the fashion industry, the throwaway market once described by Harvey (1989), now can be considered as a site

for fast fashion has become almost the norm (Tokatli et al., 2008). This type of fashion is now called fast fashion, and has been influencing almost every consumer from different ages throughout the world for recent years (Tokatli et al., 2008). For Cachon and Swinney (2011) fast fashion system indicates two central dynamics: short production and distribution lead times, enabling a close matching of supply with uncertain demand (which we refer to as quick response techniques); and trendy product design (Cachon & Swinney, 2011). There has also been another shift happened in fashion, and it has departed a way from consumption of goods and into services indicating not only personal, business, education and health services but also entertainments, spectacles, happenings and distractions. The fashion industry has never been completely considered as the ideal models of Fordism or post-Fordism (McRobbie, 1998; Banks, 2000; Mole, 1996; Rantisi, 2004). It is because fashion is not only about innovation and creativity but also the speed that is being created. The speed of fashion trend and the quickness of its being replaced by another have been difficult to be achieved in the Fordist production. Because the essence of mass production entails some standardized models that help to manufacture and distribute in large quantity. Thus, the pace of fashion contains rapid seasonal changes and market fluctuations have always set fashion away from Fordist mass production (Wark, 1991).

Similar to the fashion case, not only that but also the entire production and living practices have been altered and the following explain why everyday life has mainly moved towards short-term rather than long-term planning; “in the realm of commodity production, the primary effect has been to emphasize the values and virtues instantaneity and of disposability. The dynamics of ‘throwaway’ society...began to become evident during the 1960s. It meant more than just throwing away produced goods, but also being able to throw away values, life-styles, stable relationships, and attachments to things, buildings, places, people and received ways of doing and being” (Harvey, 1989). In addition to that, advertising that originally emerged around the idea of informing or promoting in regular sense has considerably attached to manipulating desires and tastes via images which signifies more than the product itself. That argument put forward by Baudrillard (1981) refutes the notion of Marx’s analysis on the production of commodities themselves and discusses that the capitalism in post-Fordist era is more dominantly concerned with the production of signs, images, and sign systems rather than commodities themselves (Harvey, 1989). In contrast to the predictable patterns of mass production and consumption, the proliferation of goods and

services has now symbolic content and that constructs the social identity away from the mainstream.

However, in our account, cultural activities do signify symbolic ideas and meanings, and play a crucial role in communicating with the free will of our expressions. If it was entirely the market-driven, the production and consumption of culture would cause some limitations both for individuals and society in their cultural participation and expression. And, the same does not apply to the creative industries. For example, the purpose of fashion design is to persuade people to buy certain types of clothing, or of advertising whose main goal is to influence people to buy more. Fashion, in general, is very much linked to the strategies of the individuals that handle with a variety of roles. For many of those who are with multiple roles, fashion is as an opportunity for detachment from his/her role and switch into other roles. As Goffman (1961) asserts that clothing is a basic element in the “situated system of activity” (p. 97), the particular system of interaction in which the actor makes her choice for one of her “multiple self-identifications”, or, rather, decides which self-identifications she should privilege in a particular situation (p. 151). Similarly, criticizing postmodern culture, and thus post-Fordism, Jameson (1993) emphasizes the essential structural function and position of aesthetic innovation and experimentation as “a cultural form of image addiction” (p. 46). Such image addition is most evident in the concept of spectacles and everyday life.

Through the everyday life which occurs in the space and stands in the intersection of our daily routines and continuous rational actions, now more visible that it has considerably evolved into where certain forms of images and representations of particular ideologies, and spectacles take place. In his book ‘The Society of the Spectacle’ in the chapter ‘The Culmination of Separation’, Debord (2010) asserts that “the language of the spectacle consists of signs of the dominant system of production — signs which are at the same time the ultimate end-products of that system (p. 37). The variety we live in starts to get captured by the forces of the spectacle and everyday life- which was, to him, commoditized- became illusory, deceptive and seductive. “From automobiles to television, the goods that the spectacular system chooses to produce also serve it as weapons for constantly reinforcing the conditions that engender lonely crowds” (Debord, 2010, p. 46). Such spectacles of life was analyzed by Guy Debord, and named described as a fiction of reality, as a sort of theatre everywhere. Everyday life- which was, to him, commoditized- became illusory, deceptive and seductive. That

was the current mode of production realized the situations, and suppressed oppositions in order to achieve its ends. Such spectacles have become bold, spread and diffuse through the fashion system and advertising as its tool. This argument can be forwarded by the claims made by Marx (1990) about the blurring up-limits of consumption.

“As against this, the commodity-form, and the value-relation of the products of labor within which it appears, have absolutely no connection with the physical nature of the commodity and the material relations arising out of this. It is nothing but the definite social relation between men themselves which assumes here, for them, the fantastic form of a relation between things. In order, therefore, to find an analogy we must take flight into the misty realm of religion. There the products of the human brain appear as autonomous figures endowed with a life of their own, which enter into relations both with each other and with the human race. So it is in the world of commodities with the products of men's hands. I call this the fetishism which attaches itself to the products of labor as soon as they are produced as commodities, and is therefore inseparable from the production of commodities” (Marx, 1990, p. 165).

Central to the creative industries, there has been an increasing focus that concerns with the understanding of the dynamics of post-industrial cities and consumer demands, and with more specific relations other than those of conventional cost-benefit analysis. Such focus illustrates some hints from those of the informational or network society that stresses the non-material content of post-industrial production, information, services, symbols, experience and the role of creativity and knowledge and their specific organizational requirements as well as why certain localities are more competitive than others, and dynamics which could not be instantly transferred from one place to another.

4.3 Creative Industries in the Turkish Context

In terms of its geographical position, Turkey is situated at the intersection with the east and west where different cultures have long been influential on its cultural and artistic heritage. Due to its history through several civilizations and current available international markets, industries and technologies, Turkey has been playing a considerable role in attaining notable economic performance not only in Middle East, but also in Europe and Asia. Considering the shift in mode of production into the post-Fordist type in the world, Turkey remains naïve and many production activities are still carried according to the Fordist principles. Aksoy and Enlil (2011) in Istanbul and Guran and Secilmis (2013) in Ankara have been only two large scale studies to date

about Turkish creative industries that enable comparison between different years. In order to elaborate to this problem and add to the limited literature about creative industries in Turkey, the nation-level research outcomes for 2011 of Lazzeretti et al. (2014) is remarkable.

According Lazzeretti et al. (2014), the number of the employees in Turkish creative industries is approximately 191634 for 2011. Since 2008, the overall growth has been 38 per cent up to 2011. However, Turkey has a low share of labor employed in all industries comparing to the other industries in the other countries in European region by composing only %2 of the total employment in Turkey. From this perspective, manufacturing is the industry with the highest proportion of workers with the share of 28%. For certain creative industries, the best performance has been attained by the software and programming industry with an increase 487%. That has been followed by the publishing industry (465%) and radio and TV industries (264%). The lowest development has been observed in the advertising industry with a decrease of -8%. Therefore, it is hard to claim that there has been a steady distribution of developments in different creative activities. Yet, it is possible to state that traditional industries such as publishing, architecture and engineering, music, movie, video, performing arts, have been more effective than non-traditional ones such as IT, advertising in terms of their contribution to creative employment in Turkey (Lazzeretti et al., 2014).

Furthermore, previously conducted researches described in the following paragraphs appear more crucial than the ones computed through city-level data because such data is indeed hard to get retrieved due to the lack of data at a national/regional level in Turkey. As a concern of the approach of this dissertation, there have been a number of research studies which focus on the city and sectoral/industrial levels, particularly thesis studies since 2008. Many of these studies have employed a mix definition and classification of creative industries mainly based on the approaches of Department of Culture, Media and Sport (DCMS) in UK and United Nations Conference on Trade and Development World Investment Report (UNCTAD). The details of these studies are as follows in chronological order.

Recent Researches on Creative Industries in Turkey

Gulcan and Akgungor (2008) in their studies compare two textile-manufacturing based clusters in Turkey from the perspective of regional innovation system; Istanbul containing a textile and fashion design cluster and Denizli where

traditional export-oriented production of bathrobe and home textiles exist. Findings of the empirical findings show that despite these cities have different knowledge orientations in their own contexts even though they are the subsectors of the same textile sector as a creative industry. They have been improving economic activity for Turkish economy, specifically considering the case of the textile and fashion design cluster in İstanbul at the regional scale. The results of this study suggest that Istanbul benefits from its large number of knowledge institutions yet still can be considered fragmented. The proposed action for Istanbul is to increase the international links with knowledge-intensive firm clusters. The presence of higher diversity in the city can be managed through government policies for better communication and network relations with the economic actors.

Durmaz et al. (2008) investigate creative city strategies and formulation and explores the film industry as a creative industry in Antalya. The city Antalya located southern Turkey is here portrayed as an emerging film industry-oriented creative city and a Eurasian film. Their research benchmarks some recent creative city examples and figures out potentials and constraints of Antalya and Turkish film industry in order to open up a discussion and propose recommendations for Antalya's transition to a Eurasian film center. According to the findings, Antalya's rapidly increasing global connections through film industry and tourism have brought new creative activities to the city regarding to the recent film industry developments and can better perform with possible place branding strategies. For the city, film industry has particularly been seen as a relevant creative industry both for city's local economic development and its formation. Yet, the needs for through the incentives of government and film associations have critically been mentioned. On the other hand, the lack of city marketing perspective has been underlined due to the several interconnectedness problems where local identity or authenticity of place becomes invisible.

Ozkan (2009) in her doctoral dissertation explore the regeneration potentials of the film industry in Istanbul as a cultural industry. The organizational and the spatial configuration of the film industry in the city have been analyzed regarding the tendencies of the global film industry. Through the exhibition as one of the most significant tools of urban planning, the urban regeneration potentials of the industry has been described qualitatively and quantitatively. The focus of the study is conceptually and methodologically to evaluate regeneration strategies from the cultural industries perspective. The methodology undertakes the Growth Clusters Model that investigates

the growth dynamics and potentials of cities. The findings show that the film cluster in Istanbul is a dynamic and a growing structure; however, there are still insufficiencies and the legal obstacles. Film industry in Istanbul consists of many related industries and activities like TV and advertising and provides considerable employment and value for urban economy through these industries. Besides, the film industry associates with the tourism sector and carries vital importance for the image of the city. In Istanbul film industry operates with certain actors and networks and appears as an important tool for competitive advantages and culture-led regeneration of the city.

Ozturk (2009) in her master thesis investigates the current structure of four creative industries in Beyoğlu district in Istanbul that are considered strategically important for the development of the city. The spatial distributions and locational choices of the film, architecture, photography and advertising agencies as drivers of creative industries have been explored that are classified under cultural / creative industries. For the case study, 28 interviews have been carried out with the directors and professional workers from the agencies based in Beyoğlu. Particularly, the existing spatial features of related sectors in Istanbul have been examined to find out the locational criteria for these industries. The findings illustrate that the historic heritage, cultural diversity and urban vitality in Beyoğlu provide available conditions for flourishing creativity and creative industries. This study shows the locational criteria of these industries the factors that affect the locational decisions of their formations in city. On the other hand, the effects of cultural and creative industries on sustainability, urban economic and spatial redevelopment, and 2010 European Capital of Culture processes have been considered to create base further studies.

Durmaz et al. (2010) examine the relation between creativity, tourism, culture and the film industry; argue their effects on place-making and tourism comparatively in Beyoğlu, İstanbul, and Soho, London in terms of the characteristics of place for filmmaking and the locational, property preferences of film companies. The findings present that there have been positive effects of the film industry on tourism through developing creativity potential, increasing place recognition with specific locations of movies as well as the organized film that attract national and international visitors and establishing interaction among different visitors, places and cultures. The cosmopolitan structure and diversity in Beyoğlu, Istanbul has promoted more creativity and inspirations for film companies. This case study highlights that also different qualities of place, the presence of diverse natural and built areas are worth mentioning in terms

of their contribution. On the other hand, it states that the tendency of decentralization towards sub-centers has already fragmented the structure of Beyoglu, and now prestigious sub-centers as Mecidikoy, Sisli are more favorable for the industry.

Uckan (2011) evaluates the knowledge communities and creative cities in Turkey and claims that Ankara has been performing better than İstanbul in terms of the presence of science and technology and its contribution to city. Especially, the programming sector as a creative industry has a considerable potential for clustering and smart growth of the city of Istanbul. However, the management and thus the realization of such potential have been found rather problematical due to the lack of creative city strategy for the city's development.

Dogan (2011) investigates the cultural ambience of Istanbul in the context of festivals and the research findings present that the leading role has been taken by Istanbul Foundation for Culture and Arts (İKSŞ) in promoting culture and creativity for the city. The research mainly explores the interrelation between the city and the festivals and its role building the image of city and provides a picture of contemporary arts and culture industry in Istanbul. It takes the case of culture and festival from the Guy Debord's spectacle perspective and explains how diversity and the chaotic structure of the city deliver attraction point through the creative sectors and their presentations.

Enlil et al. (2011) explores the structure of three industry clusters in Istanbul from the cultural industry perspective. The study focuses on the arts and culture festivals, the film industry, and the fashion design industry within the city. The findings illustrates that these three industries are spatially clustered in the city, and the locational pattern they create has been interpreted as the cultural triangle in the research. The cultural triangle includes the districts of Fatih in the old city, Beyoglu, Besiktas and Sisli on the Northern Banks of the Golden Horn, and Kadikoy on the Anatolian side across the Bosphorus. The study shows that such locational triangle provides the experience of different cultural facilities and activities through museums, theatres, cinemas and culture centers with diverse social networks and interactions, and provides richness in the historical built environment and monumental structures. More specifically, the metropolitan area beyond this triangle unique and attractive urban core so-called critical mass, on the other hand, has been shown as highly underprivileged in terms of creativity and culture. The study suggests that certain spatial planning policies can be employed to cover the creativity gap between the core and the periphery. The

cultural triangle of Istanbul provides the opportunity of experiencing different types of cultural facilities and activities, accommodates a density of social networks and interactions, and offers an abundance of historic buildings that constitute a unique and attractive urban core.

Evren (2011) examines the locational and structural dynamics of jewelry industry in Istanbul. The study concentrates on the old city jewelry cluster which is the oldest and largest urban industrial districts in the city. The area is occupied by small scale artisanal producers relying on outworkers with the production value chain. The study underlines the important role of place in the all stages of jewelry production through examining how agglomeration within the old city adds to creativity, competitiveness and sustainability of the industry. Findings also suggest some policy implications to engage with various threats and opportunities in the jewelry industry.

Cetindamar and Gonsel (2012) employ an index in order to measure the degree of creativity in Istanbul. The overall results show that despite the lack of research/development infrastructure and technical support, Istanbul is still able to provide an innovation-friendly climate. In order to evaluate the creative potential of cities, the methodology of the study proposes global creative index that indicates five main criteria namely; creativeness, innovativeness, intellectual development, global network connectivity and world city-ness which reflects the multinational corporate economy, international division of labor and high intensity of producer and financial services. The proposed criteria has been comparatively employed for nine cities, Hong Kong, Istanbul, London, Los Angeles, Moscow, New York, Shanghai, Singapore and Toronto. Consequently, the findings out of these nine cities shows that Istanbul has been building an innovation environment, yet there has been still inadequacies of the research and development infrastructure, technical support as well as investments in creative higher education. The study offers several strategies for policy-makers to improve the city's current conditions in terms of creativity and innovativeness.

Incekara et al. (2013) conducts a research for economic evaluation of the film industry in terms of strategic management within the scope of the creative innovative industries. The film industry, and all managed with the principles of strategic management are related to the success of the creative industries. They analyze the market share of Turkish movies in the film industry. The economic analysis of movie industry in Turkey has been carried out through data researching, compiling, evaluating and analyzing works within the framework of strategic management of the film industry

with an underlying importance of cinema and TV series industry. It has been found that Number of film producer, entrepreneurs, enterprises, employees in film production and going to domestic films have become higher each year, cinema industry as a driver of strategic decision-making regarding its power of creating economic value presents considerable potential for creative industries with a high potential for its development with 409 million euros of total production size in Turkey for the year of 2008.

Lazzeretti et al. (2014) investigates the creative industry clusters in Turkey with the methodology derived from the European level as most recent approach on creative industries. In this study, creative industry clusters have been geographically mapped through the GIS and analyzed through a benchmarking with two other so-called Mediterranean countries, Spain and Italy. The scale of this research is rather nation-regional; Mediterranean. The creativity level found in Mediterranean region is described as being similar to Spain and Italy and that has enabled the research to argue the Mediterranean type of creativity, cultural and heritage which is different from technology related creative industries diffused in Northern Europe. The findings show that creative industry clusters have been emergent in Mediterranean region including Turkey and can be ranked as on the same level of other European countries. Also, creative industry clusters correspond to the urban phenomenon that being agglomerated at certain locations and especially in large metropolitan areas which also visible in the Mediterranean region. The major creative industries that characterize the three countries are the traditional industries such as advertising, architecture, entertainment and publishing. The study also related the clustering phenomenon with the historic landscape and well-established presence of cultural industries in the Mediterranean countries.

Besides the research projects investigating the creative industries and city as well as adding case studies to the limited literature about Turkey, there are also recent developments in turkey in the name of creating awareness about creative industries and promoting its development as follows in chronological order.

Recent Development and Organizations for Creative Industries in Turkey

İstanbul Foundation for Culture and Arts (İKSEV): İstanbul Foundation for Culture and Arts (IKSV) is a non-profit, non-governmental organization that was founded in 1973 by seventeen businessmen and art enthusiasts who gathered with the

aim of organizing an international arts festival in İstanbul and providing the public with opportunities to experience the finest examples of cultural and artistic production from around the world and learn about new initiatives and movements. Further goals are also raise Turkey's cultural and artistic assets and transforming Istanbul into a major international center for culture and the arts. In this regard, it has been organizing festivals, biennials and events in Turkey and abroad. IKSEV is involved in protecting traditional arts and cultural heritage, promoting and facilitating artistic production from various creative fields and disciplines, and contributing to the development of cultural policies. The foundation has also been collaborating with several organizations and networks that form the EU's cultural policies.

Design Forums and Izmir Mediterranean Academy, Izmir: In Izmir Cultural Workshop in 2009 which is realized under the direction of Izmir Metropolitan Municipality brought creative people and scientists, artists and intellectuals from the creative fields in order to construct a new vision based on design for Izmir. One prominent outcome of this workshop was to improve the city vision through relationships with big cities of Mediterranean. Therefore, Izmir Metropolitan Municipality has formed the Mediterranean Academy as a department in order to support this vision and support the city with culture, art and design. The Academy's first facility area was to improve cultural and historical activities. In May 2011, the Design Forum was held in order to decide on particular strategies for realizing Izmir as a design city. The two outcome of the forum were crucial; increasing the design capacity in Izmir and increasing the awareness and demand in design. In the discussions, the Coast Design Project was also initiated within these discussions. The Academy has also become responsible for promotion of organic agriculture and ecologic settlement design in Izmir due to its high potential in agriculture, possible contribution to sustainability. Later, very recently, that has been followed by forming the design and specifically the fashion design working groups from the field and universities to improve design and fashion design activities in Izmir. In the preparation process of this dissertation, there has been several meetings and projects carried out within this working groups in the field of design, fashion design and the wedding wear sector.

All Design Conference, Istanbul: All Design Conference has been held since 2010 in Istanbul as Creative Industries and Technological Fair and International Design Conferences. The conference has been aimed to reach creative producer, users,

participants meet with each other for building new creative business opportunities. The attendees of the event has generally been from various design fields including interior and decoration, product designers and manufacturers, architectural project offices, technological product design firms, digital designers, fabric and wall facing, carpet and the other floor coat pattern designers, lightning and accessories designers and producers and also non-governmental organization and publications in order to introduce the last trends of the design world.

The Yekon Creative Industries Council: The Yekon Creative Industries Council has been activated with the intention of promoting the creativity in cities, constructing a platform to bring creative industries together, building the value of creativity in industries for two years. Following, the Council was officially established in May, 2012 with 11 representatives and related associations from each field within creative industries. Since then several ateliers and panels have been held. The most recent one, in 2013 the panel was held entitled Turkish Creative Industries: Challenges & Opportunities discussed the creative industries in Turkey.

Istanbul Creative Economy, Cultural Industries and Creative Cities Research Center: Istanbul Creative Economy, Cultural Industries and Creative Cities Research Center was established as a research center within the Istanbul Commerce University in September, 2012. The center has been collaborating with private and public sector institutions for promoting the creative industry in Istanbul. More specifically, the center has been located in the area of economy, finance and trade and within their sub sectors, and initiated to realize theoretical and applied scientific researches, studies and projects, deliver reports, publication, conferences and organizations, both in micro and macro scales.

Istanbul Creative Industries Network: In the 50th anniversary event of United Nations Conference on Trade and Development (UNCTAD) held in Istanbul in November, 2014, the Turkey's media, design, music and arts industries have been under focused. The protocol of cooperation between UNCTAD and Istanbul Commerce University has been signed and that followed by the launching of the Istanbul Creative Industries Network. Establishment of the Istanbul Creative Industries Network is supported by the Ministry of Trade and Customs of Turkey; Istanbul Metropolitan Municipality; Istanbul Development Agency; Istanbul Chamber of Commerce; Yekon Creative Industries Council; Istanbul Creative Economy, Cultural Industries and Creative Cities Research Center and UNCTAD due to Istanbul's growing role as an

economic, cultural and creative center has globally been recognized. Creative industries like films and TV, fashion design, architectural design, industrial design, music, contemporary arts, and new media; have increasingly been contributing to the jobs and adds to the cities vibrant and lively character. According to the claims on the official website of the UNCTAD after the event claim many creative sectors have been showing remarkable growth. Turkey has become the second-largest TV series exporting country in the world after the United States. According to UNCTAD, Turkey's exports of creative goods amounted to \$7.3 billion in 2012, with design goods exports accounting for the largest share of it (UNCTAD Website, accessed in February 2014).

4.4. Fashion Industry in Turkey

Post-Fordism and its effects have also been echoed in the fashion industry in Turkey. Along with the unstable and growing consumption trends, a necessity to take an action for proposing a creative use value rather than manufacturing of textile and ready-to-wear has become recently obvious in Turkey too. Similarly, growing global competition also necessitates textile and ready-to-wear sectors to concentrate more on design than ever before and, that has enabled a transformation in the production. In a highly competitive market, many other outsourcing countries threat the textile sector in Turkey so that there has been a shift towards more design based creative production and improving the quality of what is produced (Table 4.1) (MUSIAD, 2008).

Table 4.1. New Type of Fashion Production Structure Influential in Turkey
(Adapted from MUSIAD, 2008)

Stages	Old Type	New Type
Production	Mass Production and Bigger Capacity	Customized, Faster
Design	Outsourcing	Still Outsourcing but advanced with some contributions and Own Designs
Marketing	Passive Marketing	Active Marketing
Branding	Outsourced Products	Own Brands

Turkey is the fifth largest global apparel supplier and the second largest supplier to the EU, which accounts for 80% of the total exports of Turkey (Istanbul Chamber of Commerce, 2008). Turkey's background in textile and ready-to-wear sector has been

based on its very historical path that has enabled it to connect and reshaped the economic relations with the east and west. The period between 1923 and 1970 as a milestone, these sectors have been re-approached and emphasized in the development plans and state policies, and therefore have received several investments to improve their industrial production capacities. Similar to the new economic development and urban restructuring processes seen in the world, in Turkey, after 1980s, the market was started to be dominated by the allowance of international trade and goods, and this also resulted in the commence of the foreign trade in the country. Turkey began exporting apparel and became the fifth-largest exporter in the world, after China, Hong Kong, Italy, and Germany. Since it offered an attractive combination of free trade zones, skilled low-cost workers, and proximity to Europe, several international companies started to build networks within its borders in the 1980s (Seidman, 2004; Neidik & Gary, 2006). Along with the appearance of the international brands in the ready-to-wear market, there was a demand for consumption of the fashion design products, especially for the ready-to-wear goods in the 1990s. By the 1990s, Turkey established network relations with European buyers, mail orders and other specialty chains, such as H&M, C&A and Mexx (Neidik & Gary, 2006).

The structural change of the industry by these years has been rapid due to the low-cost labor and first investment, and the availability of resources for raw materials. The production size of the existing companies has grown due to the opportunities derived from the international trading in the ready-to-wear sector. Due to the expanding sector and its structural change with the post-Fordism, the global market based on the contract manufacturing has been transformed into a competitive environment entailed with creating brands (Kozaman, 2010). The sector has carried on upgrading through a transformation from full-package operations of textile and ready-to-wear to design and more recently developing its own brands (Fernandez-Stark et al., 2011). In order to compete, and add value to the existing productions, the fashion design has been incorporated into the processes. The large cities, specifically Izmir and Istanbul, therefore, have benefited from the locational choices of the industries and that has enabled the agglomeration of certain sectors within urban environment. In Istanbul, there have been several developments for the fashion industry since the 2000. Especially in Istanbul, Kozaman (2010) has explored if the emerging fashion industry in Turkey has been influential the decentralization of the textile and ready-to-wear production. According to the interviews carried out by the research with various Turkish

fashion designers in Istanbul (Kozaman, 2010), the spatial relationship between the design and production has been interpreted in different ways; on one hand it is claimed that the fashion industry is an activity detached from the mass production and without the spatial dimension there still be a fashion production through non-spatial connections, on the other it is believed that fashion industry cannot be realized out of the core while the textile and ready-to-wear production can still be possible at the peripheries of cities.

In addition to Turkey's experience from working with global brands in the early stages of the industry's development, Turkey's fashion industry sector has relied on highly skilled employees to guide its upgrading into this segment of the value chain, particularly to staff their marketing departments. There have been a large number of university business schools and vocational schools that offer industry-relevant courses, such as marketing and brand management. For the design part of the fashion industry, relatively to the textile education, the fashion design education has more recently been established in Turkey. Due to the developments in the textile industry, the need for design has emerged. The fashion design education has become widespread after the 2000s. Simultaneously, several international fashion academies from abroad have also founded education centers in Turkey. Ecole Supérieure des Arts et des Techniques de la Moda as one of the world's oldest fashion school was opened in September 2010 with a three year program in fashion design. Today many designers that work in fashion design sector are graduates of the local universities that have departments of fashion design or textile design. There are currently various institutions, public universities, vocational schools and high schools offer specialized courses and certifications in engineering, information systems, design, marketing, sales, tailoring, and others. Specifically for the fashion design education, there are 22 universities with four-year programs named as fashion design, textile design and, fashion and textile design in Turkey (Coruh & Cegindir, 2014).

The establishment of the Fashion Designers Association in 2006 as a facilitator of introduction the world fashion movements to the Turkish fashion industry accelerated the recognition and the institutionalization of the fashion design industry in Turkey. Such institutional structure that represents the sector and the creative profession has allowed solving the problems and making necessary improvements through collaborations and intensifying the relations with the governmental bodies (Kozaman, 2010). Istanbul Moda Academy (IMA) has been founded in order to contribute to the

development of the fashion industry in Turkey. The collaborations with the world's leading fashion schools such as London College of Fashion in UK, Domus Academy in Italy), and IFM in France have been realized.

For the development of the fashion industry along with the textile, there are also some further associations in Turkey, especially in Istanbul and Izmir that are engaged with development and improvement of the fashion industry and fashion design as well as the related sectors. There are Turkish Clothing Manufacturers Association (TGSD) founded in 1976 with the purpose of enhancing the environment developing the clothing industry in Turkey, promoting the sector abroad and achieving sectoral cooperation and Turkish Textile Employers' Association (TUTSIS) collaborates with schools and started a vocational school to train young workers on skills such as computers, entrepreneurship and marketing. In Istanbul, Istanbul Textile and Apparel Exporters' Association (IKTIB) comprise four associations, namely; Istanbul Apparel Exporters' Association, Istanbul Textile and Raw Material Exporters' Association, Istanbul Leather and Leather Products Exporters' Association and Istanbul Carpet Exporters' Association. Under the umbrella of Istanbul Textile and Apparel Exporters' Association there are more than 16,000 companies. This makes it the largest association by membership. It offers practical help for its members from governmental and trade regulations to international trade advice. It also helps its members to participate in trade fairs and participates promoting the industry at trade events. Istanbul Textile and Apparel Exporters' Association has a commitment to the development of talent in fashion design. To this end each year the association realizes Young Designers Contest and Fabric Designers Contest. On the other hand, it collaborates with the government and private schools to offer certificate programs in financial management, foreign trade, sales and logistics management; academic programs in fashion design and technology (master's and certificates), fashion prep, and foundation art and design; and continuing education programs in fashion design, management, photography and styling, drawing, accessorizing and other workshops. In Izmir there are Aegean Clothing Manufacturers Association (EGSD), Aegean Exporters Associations (EIB) and Association of Aegean Leather and Leather Products that bring the private sector and public institutions together in order to improve the global positioning of Turkish apparel sector.

For the promotion of the fashion industry, there has been several events in Turkey since several textile and ready-to-wear firms have shifted into the design process of the value chain as part of a greater strategy to introduce the country as a

fashion center since the 2000s. The associations and government organizations began working in collaboration to promote the fashion production firstly in Istanbul, than in Izmir. Especially Istanbul appears as a scene of several important world fashion events of Turkey from the Istanbul Fashion Lab in 2008 followed in 2009 by Istanbul Fashion Days and FashionableIstanbul recently to the Istanbul Fashion Week. Istanbul Fashion Lab was the first international fashion activity organized by Istanbul Moda Academy to bring together the design brands in fashion industry with professional purchasing groups and attract attention to Istanbul within the world fashion network. Istanbul Fashion Days was a cooperatively organized event by Istanbul Textile and Apparel Exporters Association (ITKIB) and Fashion Designers Association for first time where 27 trade markers and fashion designers were involved and a total of 230 international and 520 national press attendants attended. Fashionable Istanbul in 2009 was the first attempt to make Istanbul one of the fashion capitals, in which local designers had a chance to make their fashion shows and line previews for the press and buyers. Istanbul Fashion Week (IFW) is currently a major and leading event that has been organizing for 8 years. IFW aims to enhance the design force in the industry and to provide economic growth through national and international recognition of Turkish designers and brands. Besides, since 2010 Fashion Night Out Istanbul has been organized every year to challenge the economic crisis and enliven sales in the retail sector. That event has been realized in Izmir since 2010 as Fashion Night out Izmir.

The recent fashion events in 2014 were the Dossodossi Fashion Show Fair in Antalya for the ready to wear, fashion, fabric, textile industries, IFEXPO 2014 11th Hosiery Underwear Fair in Istanbul, FASHIONIST Evening Gowns, Wedding Dresses And Suits Fair in Istanbul for ready to wear, fashion, fabrics, garment industries, and IF Wedding Fashion İzmir which showcased the Wedding Dresses, Suits and Evening Gowns and Accessories). In Izmir, IF Wedding Fashion has been held since 2007. The 9th IF Wedding Fashion Wedding Dresses, Suits and Evening Gowns Fair has recently been held in 2015 in cooperation with Aegean Clothing Manufacturers Association (EGSD) and Turkish Fashion and Apparel Federation (TMHF). In 2007 there were only 75 participant firms that attracted 4.864 visitors. These numbers have been increased to 171 firms with 14.881 visitors in 2014. In 2014, there were 171 exhibitors 21 of which were foreign exhibitors which were world's leading companies from Lebanon, Italy, Ukraine, USA and important sectoral publication from Russia. Domestic exhibitors were from Antalya, Bursa, Canakkale, Erzincan, Gaziantep, Istanbul, Izmir, Kocaeli,

Sakarya. Throughout the nine years, the most visitors have been from Iran, Egypt, Germany, Saudi Arabia, Iraq, UAE, Libya, Lebanon and Italy (see. IF Wedding website).

Regarding the growing educational opportunities, recent design city attempts in city through the creative industry promotion, the historical path and the spatial agglomerations of the production and retail sites of wedding wear firms as well as the established, well-known fairs, Izmir dominates Turkish market and drive its global trade with the wedding sector under the fashion production of the country.

4.5. Wedding Wear Sector

Wedding wear sector is necessarily associated with the marriage and surely dominated by the demographic relations. The wedding dress is the clothing worn by a bride during a wedding ceremony. Color, style and ceremonial importance of the gown can depend on the culture of the wedding participants. In Westernized societies, brides often wear a white wedding dress which was made popular by Queen Victoria in the 19th century. In general, wedding dress is selected within the height of current fashion, with the richest materials since the amount and the price of material a wedding dress contained is believed as a reflection of the social standing and indicated the extent of the family's wealth to wedding guests.

However, the case for the wedding suits and evening gowns is quite different. Wedding dress is defined as garments purchased for or by the bride to wear at her wedding. In addition to traditional gowns and two-pieces, other occasion wear, suits or dresses designed specifically for the special occasions such as engagement, graduation and others that require certain attires. Therefore, the wedding wear sector, by definition, cover all the processes consisting of production, distribution and consumption of wedding dresses, wedding suits and evening gowns. There are also suppliers and related sectors that support the wedding wear sector with textiles, accessories, bags and shoes.

For the production of wedding wear products, Italy is known as a leader in the world. The area called Putignano in the province of Bari is specialized in the production of wedding dresses called Sposa Moda Italia and its manufacturing covers about 92% of the total production (Quatraro, 2003). Along with the wedding wear intensive regions Lombardy, Tuscany, Puglia, Emilia Romagna, Veneto, Varese, Italy has 1877 wedding

wear firms. The other important producer is Spain with more than 700 wedding wear manufacturer and 13.000 workers. Spain is owed its success to the very established world-wide brands. Pronovias is one of these brands with 200 stores in 3800 different locations in the world. The Pronovias is special in its production and distribution methods with the ready-to-wear type of wedding dresses. The brand called Rosa Clara is also considerably a big wedding wear manufacturer with 150 stores and 1000 sales spots. In addition to these European leaders, China is another large capacity manufacturer in the world. Especially in the east part of China, Jiangsu area contains 1200 wedding wear firms with the production of country's %60. Also, the city of Chaozhou indicates nearly 500 wedding wear firms with more than twenty million piece productions. For the export of wedding wear products, China has again a major role in the world. Spain is also of the export leaders within the regions of Italy, France, Holland, USA, Japan and Russia. Comparing to the production rates in China, Italy has been struggling in the international market as export. In order to compete, nearly 40 wedding wear producer and export in Italy has been collaborated and started to produce under the same name of Giovanna Sbiroli SRL. That collaboration has later extended to the international levels (IEU, 2013). In the international level there are important fairs in the sector; Barcelona Bridal Week and Paris Bridal Fair being organized since the 1990s, Russian Wedding Fair and Iosposa-Milan Wedding Fair.

Unfortunately, the statistical records and continuous monitoring for the wedding wear sector has long been lacking in Turkey since the tariff statistical position numbers (GTIP) specific to the wedding wear sector has not been created. However, after the 2012 with the collaboration of the Aegean Clothing Manufacturers Association (EGSD), Ministry of Economy and Ministry of Customs and Trade the tariff statistical position numbers for the sector was introduced. Under the NACE Codes, further economic activities related to the wedding wear sector have started to be registered. NACE (Nomenclature of Economic Activities) is the European statistical classification of economic activities. Statistics produced on the basis of NACE are comparable at European level and, in general, at world level in line with the United Nations' International Standard Industrial Classification (ISIC).

Turkey has recently been the supplier of the wedding dresses, wedding suits and evening gowns to Europe and Middle East. According to the data retrieved by the İstanbul Bridal Wear Manufacturers' and Exporters Association, 350.000 wedding dresses are being rented and in total 600.000 wedding dresses are currently being

produced. The industry is worth 600-650 million dollars and employs nearly 80.000 workers. The national wedding wear firms mainly produce for Egypt, Saudi Arabia as well as Spain, Italy and Portugal and Russia. The export of the wedding wear products is almost 400.000 in numbers except the unregistered exports that generally done by individual travels. The country's main objective for the sector is to compete with the greater producer, Italy and Spain through lower prices and China through better quality. Aegean region, after Istanbul, is considered as the second headquarter for the textile and ready-to-wear exports. According to project meetings with Aegean Exporters' Associations in 2013, it has been reported that Izmir plays a major role regarding its role in manufacturing the %70 of the wedding wear products of Turkey.

Zobu et al. (2010) in their sectoral analysis report suggest that there are variety of suppliers and related organizations in relation to the sector in Izmir. For suppliers, textile and pile fabric producers and retailers, any sort of accessories and freelance fashion designers appear essential. In the research report of IEU (2013) adds that the businesses of photography, advertisement, graphic design, design agencies and fairs as well as machine suppliers and related mechanical industries are vital to the wedding wear sector. There are also four vocational schools, 2 education centers, 4 university programs, 2 academies exist in Izmir, and further several organizations in touch with the sector; Izmir Development Agency, Izmir Chamber of Commerce, Izmir Fair IF Wedding, Aegean Region Chamber of Industry, Aegean Clothing Manufacturers Association and, Aegean Ready-to-Wear and Apparel Exporters Association. From the spatial perspective, Mimar Kemalettin Fashion District situated at the city center has a significant place for the wedding wear production as well. Mimar Kemalettin Fashion District in Izmir is a district where numbers of wedding wear firms are situated in close proximity to each other and together create the cluster of wedding wear of Izmir. The development of this cluster and its current conditions will be explained in details in the case study section of the Chapter 6.

The conditions of the wedding wear sector specific to Izmir have been studied in the recent research reports by Izmir Development Agency in 2009, 2010 and 2013 focusing on the sectoral clusters in Izmir and by the research group from Izmir University of Economics in 2013 concentrating on the international competitiveness of the wedding wear sector that also covers wedding suits and evening gowns.

According to results of the sectoral analysis conducted by Izmir Development Agency in 2010, this sector has been rated good in terms of knowledge and know-how,

and internal interaction and networking in the field of national trade and production, sufficient in terms of its production capacity, human resources, financial resources. However, it has been rated as insufficient regarding fashion design implications on their products range. Also, the human resources and knowledge at the international level has been found very poor (IZKA, 2010). In order to evaluate the potentials of the cluster of wedding wear, the following report in 2013 further suggests that specific training programs for the sector need to be taken, and the awareness of clustering among the existing firms can be built. Also, institutionalization of the sector as well as applications to the international and national incentives should be encouraged. Besides, for the sectoral development, the university-industry collaborations can also be beneficial (IZKA, 2013).

In the outcomes of the research project conducted by Izmir University of Economics in 2013, the wedding wear sector has been analyzed in terms of its strengths, weaknesses, opportunities and threats. For its strengths, knowledge-intensive character of the sector has been underlined. Since the wedding wear manufacturing is a knowledge-intensive process that requires particular know-how and creativity its final outcome is considerably becomes value-added. In this respect, the sector requires more creative and skillful workers. For the sustainability of the firms and their survival, quality products, trained and/or educated workforce and in-house knowledge are essential. The other strength is the low-cost of investment to enter to this sector, the first investment is relatively low that requires to have only a manufacturing machine and textile and other necessary material supplies around. Further, geographical location and rooted cultural relations in the market between the Middle East and North Africa regions are considered as one of the strengths. Further, the wedding wear is accepted as a cultural signifier to provide benefits to the sector. Besides, the presence of the relatively mature wedding firms, IF Wedding and similar fashion related events as well as the very established regional ready-to-wear industry contribute to the sector. For its weaknesses, first of all, inadequate institutionalization in which the present firms are generally family-based and have their own relations and links through relatives, even in the international levels, is considered as the major weakness. Also, the lack of brand recognition that firms are generally derived their brands through its family names which are inconvenient for the international competitiveness, the lack of special sectoral association in the nation and regions, insufficient promotion and advertisement are other weaknesses. Additionally, on-the-job-training practice is considered sufficient and

sustainable for the sector. Lastly, the presence of strong and well-known countries such as Spain and Italy as well as China in the wedding wear market creates struggle for Izmir. For opportunities, tourism potential, increasing interest in the Turkish culture among the Middle East, growing internationalization awareness as well as the presence of the Free Zone create chances for the sector. Finally, the economic instabilities, infrastructure problems and obstacles as well as higher rents and high property prices are considered as threads for the wedding wear sector (IEU, 2013).

All of the research reports previously engaged mainly emphasized the need for detailed analysis of both the internal and external environment and, essentially development of the clustering approach to the wedding wear sector. The particular approach taken by the present study to such clustering is explained in the next chapter.

4.6. Evaluation

This chapter has initially reviewed the external environment which has considerably influenced the creative industry cluster formations. The urban restructuring framework and new economic development brought significant transformation of urban areas with rise of service sector under the globalization especially after 1980s, have also triggered the replacements through core-periphery and center-margins of urban environment as development sites for the creative industries and related sectors. If the concept of creativity was one of the more common explanations for the tendency toward the agglomeration of creative industries in urban centers, the other was linked to the revival of the inner city. In this regard, the finance and specialized service firms have taken on the former manufacturing sites. At the same time, policy makers have more focused on the commercial values of arts and culture, which together enabled clustering of creative industries. Creative clusters are now situated more especially at the core that illustrates a creative habitat. Simultaneously, there has been also a shift from the Fordist to Post-Fordist mode of production has altered the urban environment and, the essence of creativity and design blended within the post-Fordism has been accompanied by the development of highly flexible manufacturing techniques and flexible working practices.

Following, the chapter has explored the shift from the Fordism as a particular way of production and how it has evolved and restructured to Post-Fordist forms of

production with regard to the cultural industries and creative industries previously mentioned in the earlier chapters. Within this shift, the cultural industries have been redefined and the creative industries started to emerge in the 1990s along with the policies, especially in the UK. In opposition to the dissolving conceptions of the Fordist mass production and its geography, the late 1980s saw an increased emphasis on creative industries as a crucial factor in urban development which ran in close parallel to the creative turn in economy and urban restructuring.

The fashion industry has departed a way from consumption of goods and into services indicating not only personal, business, education and health services but also entertainments, spectacles, happenings and distractions. Moreover, advertising and spectacles as well as the throwaway society formation have been associated with the fashion industry along with the post-Fordism. The diffuse of fashion in the market has raised the pace of consumption especially in the life-styles and recreational activities. The speed of fashion has always separated the industry away from Fordist mass production. Yet, the fashion industry has been considered as never been completely the ideal model of Fordism or post-Fordism.

Additionally, the recent and current developments in Turkey in terms of the creative industries practice and particularly the evolving fashion system have been presented in this chapter. The subject of creative industries along with the cultural industries has been growing interest among the scholar in Turkey for a decade. The most notable achievement is seen in the software and programming, followed by the publishing and then, the radio and TV industries. The advertising on the other hand has been relatively slow. There have been some research projects and thesis studies since 2008. There are also many organizations involved in the emergence and recognition of creative industries such as; İstanbul Foundation for Culture and Arts, İstanbul Creative Economy, Cultural Industries and Creative Cities Research Center, The Yekon Creative Industries Council, İstanbul Creative Industries Network and Izmir Mediterranean Academy. However, many of these studies and organizations have concentrated on the case of İstanbul.

The shift from Fordist to the post-Fordist production has mostly influenced in the fashion industry in Turkey. Along with the endless demands from the local market through the globalized consumption trends, the need for creative value in the traditional textile and ready-to-wear manufacturing have become visible in Turkey as well. Due to the growing global competition, textile and ready-to-wear sectors start to call on design

to restructure their systems. The structural transformation of the fashion industry can be founded at the advancement and institutionalization of the clothing and textile sectors, and establishment of the education and organization of the related fashion events, particularly at the certain regions of the country. The relationship between the fashion design, and the textile and ready-to-wear manufacture has always been crucial since the textile and ready-to-wear manufacturing processes go hand in hand with the fashion industry in this context. For the spatial relationship between the design and production there have been debates that the fashion industry is separated from the mass production in a way which can be realized with non-spatial connections. On the other hand, other views defend the role of the city center as a place for fashion production claiming that the textile and ready-to-wear production is more favorable at the peripheries. In Turkey, Izmir and Istanbul appear as large cities where the locational choices of the industries and agglomeration of certain sectors are visible. Here, the fashion design education, the related associations have supported the education, finance, promotion and research development to direct the emerging fashion industry with the sectoral and national incentives. Istanbul has long been among the world cities with a potential for the development of the fashion industry while Izmir is considered as secondary in Turkey. However, for the wedding sector within the fashion production of the country, Izmir dominates the Turkish market. The conditions of the wedding wear sector specific to Izmir have been studied in the recent researches. The general conclusion for the analyses of the wedding wear sector in Izmir can be its potential and emerging clustering and its current needs about creativity and design, marketing and advertisement, and fashion branding. The emerging wedding wear cluster in Izmir and the approach for its development is crucial. Particular approaches and the analyses of this emerging cluster will be presented in the following chapters.

CHAPTER 5

ECOSYSTEM APPROACH: DEVELOPMENT OF THE DICE MODEL

In this chapter, initially, the ecosystem approach containing insights from the theoretical and applied fields of business ecosystem, ecosystem management and creative ecology is portrayed. Following, the metaphor of ecology to describe the operation of the creative clusters is explained. Here, the characteristics of fundamentals of the conventional ecology and creative ecology are compared. Regarding, the previous researches from the related fields are reviewed. Through the review of these studies, the key ecological concepts are identified, grouped and analyzed. Third, the concepts are examined under the significant factors and added into the model to be used in the case study. The measures of the DICE are explained in terms of their general definitions and their crucial uses in the model. Lastly, each measure of the DICE model has been complemented with insights from the fashion industry context and the queries for each measure have been specified with the fashion industry perspective.

5.1. Conception of the Ecosystem Approach

The ecosystem approach as a research perspective of this dissertation appears as a tool that encapsulates emerging understandings of how the creative industries operate in certain environments. This reconceptualization of the creative industry clusters with the ecosystem framework encompasses much that has been known about the creative sectors for many years, but provides a useful mechanism to assemble these facts in a naturally emerging creative cluster. The ecosystem approach is based on the application of appropriate scientific methodologies focused on levels of biological organization that encompasses the essential processes and interactions among organizations and their environment. In the present research, the ecosystem approach indicates insights mainly from the previous researches from the fields of business ecosystem and ecosystem management.

The ecosystem approach recognizes that humans are an integral component of ecosystems (Maltby, 2010). Connection between individuals or groups and even firms is not steady or consistent, rather varies over time, and with the diversity, density, intensity and quality of interactions (Comunian, 2010).

Despite the recent numerous attempts, it is useful to cite the definition of the United States Inter-Agency Ecosystem Management Task Force (1995) and the description independently agreed to in Malawi. According this report, the ecosystem approach is a method for sustaining or restoring natural systems and their functions and values. It is goal driven, and is based on a collaboratively developed vision of desired future conditions that integrates ecological, economic and social factors. It is applied within a geographic framework defined primarily by ecological boundaries (Report of the Inter-Agency Ecosystem Management Force, 1995). In addition to that, in the report of 1998, key feature of the ecosystem approach includes conservation of ecosystem structure and functioning. It should consider all forms of relevant information, including scientific and indigenous and local knowledge, creativity and practices. The ecosystem approach, indeed, seek the appropriate balance between conservation and use of biological diversity (Report of the Workshop on the Ecosystem Approach, Lilongwe, Malawi, 1998).

5.2. Creative Ecology Metaphor

One of the complex aspects characterizes the creative environment of such industries, is the presence of particular systems that regulate and inform the environment. These can be identified by their unique ecosystems. Starting from its definition, ecology is a field of science looking into the complex relationships and interaction among members or species of a certain communities and their relation with the environment. Traditionally, it is defined as a scientific study on the interactions that determine the distribution and abundance of organisms (Krebs, 1978). Thus, the ecology includes several living organisms interacting in networks. Ecosystem is described by A.G. Tansley in 1935 as “a unit of vegetation which... includes not only the plants of which it is composed but the animals habitually associated with them, and also all the physical and chemical components of the immediate environment or habitat

which together form a recognizable self-contained entity” (as cited in Pirot et al., 2000, p. 7).

Dvir and Pasher (2004), Hearn et al. (2007) Shorthose (2004) and Duxbury and Murray (2010) use the metaphor of ecology to describe the operation of the creative clusters. In the literature on the clustering of creative industries, many perspectives focusing on geographical proximity to facilities and people and many others concentrate on the role of the urban environment.

The ecology generally has a balance in itself where the process of interactions and evaluation based on major principles; resources, correspondence and, limits and boundaries. When the ecology is radically disturbed and loses the balance, it dissolves. On the other hand, space is considered as a crucial aspect because while the ecology can operate successfully in some place it does not in other places and even not in adjacent with similar components (Chan, 2012). Based on such analogy, the following comparison reflects similarities (Table 5.1);

Table 5.1. Similarities between the Ecology and the Creative Ecology
(Revised based on Chen, 2012)

Fundamentals of the Ecology	Creative Ecology
Organisms interact with one another and their environment	Actors involved in the process interact with one another and their social and physical environment
Everything goes somewhere	Creativity and Knowledge flow along the value chain processes
There are limits to the growth and resource use of every population	There are limits to the growth and resource use of every actor in the ecosystem
There is tradeoff when resource is limited	There is tradeoff when resource for creative development is limited
Organism evolve over time as continually facing new challenges	Actors and their social environment evolve over time as continually facing new challenges
Space matters (environmental conditions change over space)	Space matters (environment condition for creativity change over space)
Life would be impossible without species interaction	Creativity would be impossible without social interactions

In the next section, key ecological concepts and the focused components investigated by various authors in the previous researches have been presented in chronological order. All the concepts discussed are mapped and the most significant ones are included into the model presented in the following sections.

5.2.1. Review of the Previous Researches

Using ecological metaphors to describe business structure and operations is increasingly common especially within the field of business management. Very recently the term business ecosystems is used to refer to environmental issues as they relate to business, as a concept or metaphor, to describe the increasing complexity of relationships among companies. Initially this concept was defined as an economic community, structured as a network between economic agents, based on strong relationships and common foundation. That is based on biological analogy of business ecosystem.

The concept of the business ecosystem was first introduced by Moore (1993).

“An economic community supported by a foundation of interacting organizations and individuals--the organisms of the business world. This economic community produces goods and services of value to customers, who are themselves members of the ecosystem. The member organizations also include suppliers, lead producers, competitors, and other stakeholders. Over time, they coevolve their capabilities and roles, and tend to align themselves with the directions set by one or more central companies. Those companies holding leadership roles may change over time, but the function of ecosystem leader is valued by the community because it enables members to move toward shared visions to align their investments and to find mutually supportive roles” (Moore, 1993, p. 26).

Moore (1993) describes the concept of business ecosystem as an economic community indicating many industries operating cooperatively and competitively in production, customer service and creation. To him, many different actors such as customers, market intermediaries (including agents, channels, and players selling complementary products and services), suppliers, lead producers, competitors and other stakeholders are involved in the ecosystem. For businesses, learning how to create and capture creativity and knowledge through connections created between partners is very essential issue. Because, when firms are highly dependent on each other, creation doesn't depend on a single firm, rather, is co-produced by the entire ecosystem. The ‘keystone’ firm is also suggested by Moore (1993) whose role is to ensure that each member of the ecosystem remains in good health. Keystones integrate new technological innovations of other participants and encourage the creation of new markets by new infrastructures (Moore, 1993).

Pirot et al. (2000) underlines the characteristics of ecosystem for the management field. Despite that there are several fields dealing with the ecosystem in

their vary terms; it is beneficial to examine and convert what has been found in previous approaches to the specific tools to understand the nature of the ecosystems of creative industry clusters. The characteristics presented with the research by Pirot et al. (2000) are; interrelation and interaction that create the structure and function of ecosystem, boundaries as a human concept where the researcher sets them, natural and domesticated-planned physical features, evitable constant state of change and lastly, goods and services provided.

Argote et al. (2003) identifies common areas of research according to which contextual properties of units, relationships, and knowledge affect knowledge management outcomes that are creation, retention, and transfer. They identify the key causal mechanisms which are ability, motivation, and opportunity that help explain how and why certain contextual properties affect knowledge management outcomes.

Dvir and Pasher (2004), while investigating innovation engines for knowledge cities, regard innovation from the ecology perspective. They propose several specifics for the innovation ecology which we can apply to our subject creativity and knowledge ecosystem as follows. Vertical organizational structure, loose boundaries between departments, low emphasis on hierarchy enable the generation and flow of ideas. Regarding the fact that similar people generate similar ideas, diversity with different occupations, experiences, backgrounds, professions, background, and variety in the same industry play a role in the creation of fruitful ecosystem. On the other hand, creative space, both the shared and private space, can considerably add to the working atmosphere. Additionally, innovation, just as creativity, needs risk taking, exploring new things, learning, applying, and pushing the boundaries of the unknown. Also, virtual space has multiple roles such as enabling collaboration between distant players, catalyzing the flow of ideas and exchanging and creating knowledge. Furthermore, the vision and strategic intentions merge all creative forces and energies and direct them towards the creative benefit of the industry. Despite that creative people are self-motivated; recognition and incentives can still contribute to their success. Certain degree of spontaneity between structure and creativity can be useful. Though the structured processes enhance the creative capability of the workers and firms, too much structure and bureaucracy can destroy creativity. Moreover, serious innovation, just as creativity and knowledge, necessitates investment of financial capital in realizing brilliant ideas in outcomes.

Shorthose (2004) in his research on the ecology of the Lace Market area of Nottingham claims that interdependence is vital for an understanding of the social and cultural underpinnings of the ecology and the motivations of the creative industry clusters. Another key feature is the migration that takes place amongst the various micro-businesses within the ecosystem. Employees are more likely to come and go, in and through various projects, groups and events (Shorthose, 2004). Nature of the creative community in the Lace Market also contains collaborators and the informal trading among the ecosystem that is the most vital resources for the ecosystem. This often leads to collaborators becoming friend's as much as professional colleagues. The Broadway Media Centre at the areas runs various outreach and educational programs that enables mutation and growth (Shorthose, 2004).

Iansiti and Levien (2004a) relate and compare the business ecosystem with biology and claim that an ecosystem provides a rich analogy for understanding business networks, since the biological ecosystems are characterized by a large number of loosely interconnected participants who depend on each other for their mutual effectiveness and survival (Iansiti & Levien, 2004a). Iansiti and Levien (2004b), further, suggest that each loosely interconnected participant is specialized in a specific activity and it is the collective efforts of many participants that constitute knowledge, while individual efforts are useless outside the collective effort. Networks within the ecosystem contain both cooperation and competition link firms across products, services, and technologies. Keystone companies for (Iansiti and Levien, 2004b) create a base, such as services, tools, or technologies, which open to the others in the ecosystems to enhance their own performance.

Teece (2007) describes the basic characteristics of business ecosystem as complexity, openness, dynamic nature, competition and cooperation, evolution symbiosis, centrality, diversity, self-organization and flexibility. To him, business ecosystem has vague boundary in a form of network structure; it is an open system containing dynamic interactions between each firms, surrounding environment as well as other ecosystems. Through competition and cooperation, and evolution, the ecosystem system is built around members presented diversity.

Hearn et al. (2007) uses the metaphor of a 'value creating ecology' to describe the operation of the creative industries. "The value creating ecology metaphor encapsulates emerging understandings regarding how the creative industries, as part of the knowledge economy, operate" (Hearn et al., 2007, p. 432). According to them, this

concept compresses three important tendencies, the shift from consumers to co-creators of value; the shift from thinking about product value to thinking about network value; and the shift from thinking about cooperation or competition to thinking about co-opetition. The metaphor itself here does not propose that such ecologies are equalitarian, nor distributive justice. Rather, there are marked inequalities and intense competitive processes at work. Hearn et al. (2007) refers to Rainbird (2004) compares key strategy elements for the conception of value creating ecology in clusters. For the customers as a strategic element; consumers, suppliers, competitors, for the environment; chaotic/uncertain, for the relationship type; Dynamic and evolving, for the both knowledge and resource approach; sharing, and for the key driver they underlines the knowledge. They have also underlined that knowledge leverage occurs not only within but also across the ecosystem. Similar to Scott (2006), strength of the ecology metaphor is defined as it recognizes the importance of the collective context. Hearn et al. (2007) emphasized the mutual interdependence and interconnectedness in an attempt to make "... visible many of the less apparent and perceptible connections between ... phenomena at a regional and even global level" (p. 162), and their relationship to other industrial ecologies whether local, regional, national or global.

Duxbury and Murray (2010) propose a 'cultural ecology' approach to the built or natural creative spaces within communities of any scale. In their holistic model of creative processes in creative spaces, the key ecology concepts are utilized here as a remarkable resource consisting of looking outward globally and competitively, and inward, locally and co-operatively to assess the actual situation and needs for creative space-making, renovating or adapting in particular contexts the existing, historically developed urban environment. Diversity is described as the ultimate outcome of dynamic systems if it is increasingly recognized as a means of achieving sustainability for the cultural ecology as a whole. Integration is also underlined within the everyday culture of clusters and is considered as addressing wider social issues, economic development dimensions, and other challenges of community life.

Ecosystem theories and ecosystem management approaches from different fields have introduced a creative view into organizational science that has received significant attention.

Chen et al. (2010) in their ecosystem management focused research presents four concepts to provide major functions in ecosystem research. They are distribution, interaction, competition and evolution of species and the acronym for this is designated

the DICE model (Chen et al., 2010). First, ecology focuses on the relationships among organisms in an environment so that it illustrates this configuration of biological system to show the distribution of species or resources within and without. Such distribution is defined as a snapshot of a given space at a particular moment to enable us to understand the intensity and diversity. Here, knowledge distribution is the static situations of a knowledge community. In many cases, the success of an organization is determined by the quality of a particular type of knowledge and by the composition and distribution of many different types of knowledge. Second, populations residing together within a certain environment create a higher frequency of interaction than the populations further away from each other. This creates collaboration or competition depending on the strategy different populations adopt. Third, populations in the same ecology may collaborate or compete. Those having niche overlap or sharing of the same niche will develop collaborative or competitive relationships during their interaction. Collaboration exists when species in a community find supplementary values. When resources are limited, competition is more natural, because each population has to fight against the other to sustain or develop itself (Carrol, 1988). Four, as the interaction and competition occur, a process called evolution emerges when the population progressively shifts its congenital properties over generations to meet habitable circumstances. The evolutionary pattern of a population is dominated by the selection process. The evolution process is usually developed as a selection process that maximizes the suitability, capability or growth rate of a population because of the fact that the biological evolution refers to populations where changes must be passed on to the next generation (Grant, 1991).

Chan (2012) proposes a creative ecology framework to discuss how actually the creative cluster can successfully be fostered. In this respect, his study focuses on three main criteria which are; interactions, diversity and culture. He also indicates evolution as an inner driver of the each small component in the ecosystem. According to Chan (2012), when a place contains social and economic diversity, and enables interactions, creative activities, such as idea generation, creative production, distribution and consumption.

Winden et al. (2012) in their regional research report, analyze three ecosystems, Brainport Eindhoven (The Netherlands), Kista-Stockholm (Sweden) and Suzhou Industrial Park (China) to disclose the drivers and experiences behind these examples. Their innovation ecosystem approach contains some key actors including companies,

research institutes, capital providers, start-ups and talented individuals; linked through various types of platforms such as innovation communities, organizations and real or virtual, permanent or temporary localities where networks are being built, maintained, and promoted (Figure 5.1).

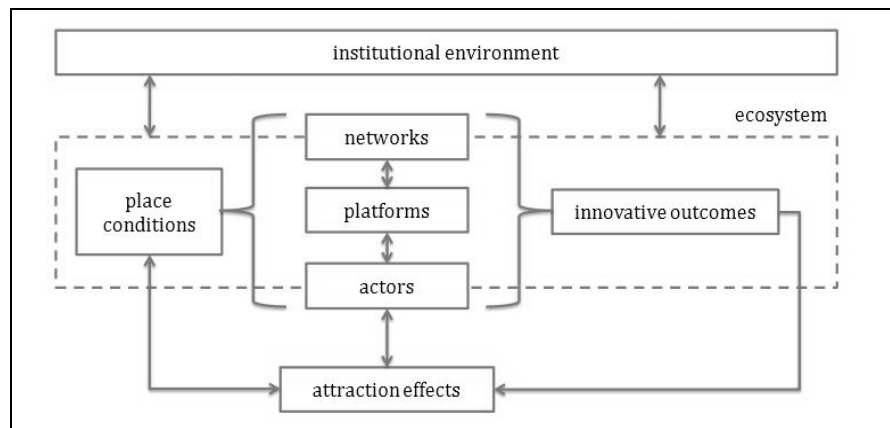


Figure 5.1. Example of the Ecosystem Analysis Based on Key Actors
(Source: Winden et al., 2012)

For them, a strong ecosystem operates as incubator for new products, new ventures, new technologies, patents, new business models and so forth. Since the ecosystem grows with success, it draws new firms and talented people from outside. However, such ecosystem can only function with satisfactory place conditions that provide quality of life, accessibility and cultural assets to attract creative people. Winden et al. (2012) finds that the development of an innovation ecosystem requires certain takeaways for the management of ecosystems. First, the role of planning is vital that the spontaneous developments are always more powerful. They occur out of a diverse urban environment. Second, there should be a balance between openness and protection, between sharing and hiding, between giving and taking. Third, there should also be a balance between specialization and diversity. Specialization of a hotspot can present a distinct identity, and perhaps increases the chance of meaningful interactions between tenants while reducing the unexpected interactions. Fourth, the degree of the trade-off between short-term profits and long-term concept value is important. There is a dilemma between them that should be approached carefully. Fifth, deriving knowledge from other regions can boost the vitality of the ecosystem. Sixth, not only the hardware as a physical environment, but also the orgware (networking) is needed. Last, a successful

ecosystem has a strong brand that captures the public and private attention and investment.

Kannangara and Uguccioni (2013) in their research focus business depend on the external knowledge as a significant source of risk. In their conceptual approach, they investigate how this risk may be overcome by taking a business ecosystem perspective. In particular, Kannangara and Uguccioni (2013) investigate the keystones of the ecosystem health. Their research reveals three major keystones which are niche creation, productivity and robustness and their determinants. In details, first, niche creation encourages diversity within ecosystems so that ecosystem can have a meaningful diversity to foster new valuable creation. Variety as a determinant which refers to the participants coming from different backgrounds and engage in different niches in the environment as well as value creation that generated by the brainstorming of the ecosystem actors are taken into account in this keystone. Second, productivity is the efficiency of the ecosystem in generating new innovation. Productivity improvements are also crucial determinant to contribute ideas and solutions to the process. Third, robustness is the ability of survival of the ecosystem to provide durability. Survival rates and continuity are the basic determinants in this respect to retain future existence and development.

Furthermore, creative ecology approach has been used as a model in various studies as the venture capital backed internet companies (Zacharakis et al., 2003); mobile telephone businesses (Feldman, 2002), Danish pop music innovation (Lorenzen & Frederiksen, 2003) and the film industry (De Vany, 2004).

5.2.2. Key Ecological Concepts

As an outcome of the above reviewed previous studies that has utilized ecological framework in their field-related studies, the following table (Table 5.2 and Table 5.3) summarizes the key ecological concepts raised in these studies;

Table 5.2. Key Ecological Concepts Reviewed in Previous Studies

Moore (1993)	Pirot et al. (2000)	Argote et al. (2003)	Dvir and Pasher (2004)	Shorthose (2004)	Iansiti and Levien (2004a, 2004b)	
Mutuality	Boundaries	Ability	Diversity	Interdependence	Interconnectedness	
Cooperation	Interaction	Motivation	Variety	Migration	Mutuality	
Competition	Integration	Transfer	Motivation	Collaboration	Collectivity	
Different Actors	Change	Creation	Spontaneity	Mutation	Networks	
Learning	Natural Settings		Boundaries	Growth	Cooperation	
Integration	Planned Settings		Idea Flow	Environment	Competition	
	Goods & Services		Space		Enhancement	
			Exploration			
			Vision & Strategy			
Teece (2007)	Hearn et al. (2007)	Duxbury and Murray (2010)	Chen et al. (2010)	Chan (2012)	Winden et al (2012)	Kannangara and Ugucioni (2013)
Complexity	Interdependence	Competition	Distribution: Intensity & Diversity	Interaction	Accessibility	Variety
Openness	Interconnectedness	Cooperation	Interaction: External & Internal	Diversity	Cultural Assets & Localities	Productivity
Dynamic Structure	Collectivity	Adaptation	Competition: Collaborative & Conflictive	Culture	Different Actors	Robustness
Interaction	Evolution	Mutation	Evolution: Mutation & Cross-over	Evolution	Networking	Creation
Competition	Competition	Integrity	Habitability		Spontaneity	Continuity
Cooperation	Uncertainty				Openness	
Evolution	Sharing				Specialization	
Diversity	Cross-over				Distinct Identity	
Self-organization	Dynamism				Cross-Over	
Vague Boundaries					Diversity	
Surrounding Environment					Sharing	

The above given, inter-related concepts derived from the creative ecology, business ecosystem and ecosystem management studies are highlighted and linked to each other at the next section to create a base for the ecosystem model taken in this study.

The possible measures of the model are illustrated under the significant factors which are central to the ecosystems of creative industry clusters as in the following figure (Table 5.3). This categorization has been made upon the most recognizable and cited characteristics of the various ecosystem characteristics and their unique properties. In addition to those characteristics, the space described in the previous works, carries a considerable importance. Spaces as a (surrounding) environment either with natural settings or planned settings create habitat for the ecosystem. However, this space has (vague) boundaries. Goods and services become more accessible. Explorations for further physical or organizational developments occur here. Vision and strategy along with the culture bounds and motivates the ecosystem components in such space. Clustering environment is associated with the business climate and knowledge infrastructure and with the interactions between various institutions and companies. The level and intensity of the creation is also an important factor in the dynamics of the territorial system (Cunha & Selada, 2009). Thus, space is taken into account to define the physical and geographical environment where the ecosystem operates, and it refers to physical presence of the entire ecosystem which all the vital characteristics are observable.

Table 5.3. Contextual Summary of the Significant Factors

Diversity	Interaction	Competition	Evolution	Space
Variety	Sharing	Motivation	Migration	(Surrounding) Environment
Ability	Integration	Collaboration	Change	Natural Settings
Creation	Collaboration	Cooperation	Mutation	Planned Settings
Productivity	Openness	Mutuality	Cross-over	(Vague) Boundaries
Different Actors	Interconnectedness	Survival	Continuity	Goods & Services
Complexity	Cooperation	Interdependence	Growth	Habitability & Accessibility
	Collectivity		Dynamism	Motivation
	Transfer		Transfer	Vision & Strategy
	Information-exchange		Learning	Culture
	Networks		Enhancement	Exploration

5.3. Development of the DICE Model

Regarding the given table, the model as a base of the methodological approach of this dissertation has been finally designed to investigate the following measures of ecosystems seen in creative industry clusters at the illustration given above. Some of the characteristics overlap with more than one factor, since each factors is also interrelated. These overlapping will be explained in the analyses, referring to their unique roles for different factors. For the interest of our research in the planning field we have also derived the necessary tools and definitions predominantly from the DICE model proposed by Chen et al. 2010 and others (Pirrot et al., 2000; Argote et al., 2003; Dvir & Pasher, 2004; Shorthose, 2004; Hearn et al., 2007; Duxbury & Murray, 2010; Chan, 2012; Kannangara & Ugucioni, 2013).

In the process of determining the measures of the model to be analyzed under the case study, the previously generated model Chen et al. (2010) has been taken as a base and re-designed. The letter ‘D’ indicated in the model DICE refers to the distribution that contains both intensity and diversity within the firms. Since the focus of this thesis disregards the question of how creative or how knowledge-based the ecosystem of the cluster is, the ‘D’ indicated here has been revised as an only diversity component of the ecosystem of the cluster (Figure 5.2). Regarding the concept of ecosystem as the representation of activities accumulated in a certain place, we can finally describe four key measures of the DICE Model are described as follows;

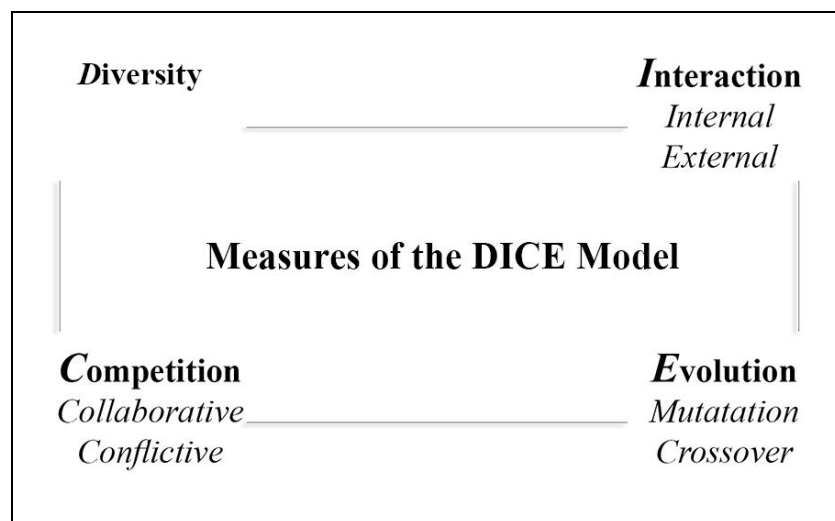


Figure 5.2. Measures of the DICE Model

Diversity

The diversity is a crucial factor for understanding why clusters exist and how they can enhance the knowledge-creating process (Rantisi, 2002a). In the firm level, groups whose members have more diverse configuration outperform those whose members are more homogeneous (Chan et al., 2010). Regarding, Loden and Rosener's (1991) two divisions of the concept of diversity is useful. First, as primary dimensions, the unchangeable varieties that are inborn as age, gender, ethnicity, physical features, race and sexual orientation have considerable influence on our development in early socialization as well as for our livings (Loden & Rosener, 1991). Second, as the secondary dimension, the varieties that can be changed, such as education, geographic location, income, marital status and religious beliefs are effective in these respects as well. Thus, these two dimensions are both very relevant and significant to ecosystems. However, diversity should not be viewed as only racial or religious differentiation, but it is the combination as well as distribution of all differences.

Diversity means the variability among employees from all sources including other ecosystems and which they are part; that includes diversity within firms, between individuals and of ecosystems. The role of diversity in finding inspiration involves not only a mix of people in the environment, but also diversity in the physical environment (Heebels & van Aalst, 2010). The built environment provides an extra facilitation here the chance of accidental or deliberate encounters and new combinations the greater just as the diversified urban areas show faster growth ratio rates than cities that are rather homogeneous in economic, social and spatial terms. Diversity alone is usually not sufficient to stimulate the emergence of an ecosystem. However, crossover evolution is also needed in which creativity and know-how transposed from one organizational forms to another.

Diversity is vital since the more diverse the clustering of ecosystems in a large area, the greater the chance that some will survive a considerable distress in the area; the more species represented in a given ecosystem, the better the chance of survival of the system if the populations of some species are disturbed; and the higher the level of individual diversity within a population, the better its chances of undertaking the evolutionary changes necessary to adapt to shifting or new conditions (Pirot et al., 2000). Diversity is the crucial component of dynamic systems where it is increasingly recognized as a means of surviving too for the ecosystem as a whole (Bradshaw & Bekoff, 2001).

Interaction

Interaction is a key component in the process of gaining access to, acquire, and develop creativity and new knowledge for the stimulation of a firm's or even industries' activities. Interaction within and with other firms helps to grab creativity and knowledge from internal and external parties more effectively, and enables to produce new goods and services. Interaction can take place within a firm as well as between a firm and other organizations.

The form of interactions can be personal communications within the community or outside the community and are called internal interaction and external interaction. The interaction involves individuals in multiple aspects comprising creativity and asset exchange with a range of operations and process. Thus, the firms are simultaneously influenced by their internal capabilities and by their complex interactions with the ecosystem (Iansiti & Levien, 2004b). However, the lack of interacting or pathways for coordination, and existing tensions between the firms refer to that staff may prefer not to co-ordinate (and sometimes even not to compete) with their counterparts. In daily life, people require to exchange ideas, express feelings and share information as a natural process to form self-organization that occurs from the bottom-up approach at every level when enough individual elements interact. For industries and clusters, face-to-face interaction remains a major mean of communication among the workers, and the physical proximity that this necessitates, is why the clustering of certain industries occur in specific quarters of cities. Many of the benefits of clusters come from the personal relationships and that enables linkages, fosters open communication, and builds trust. Interactions though communication is the essence of successful clusters. "From the outset, major efforts will be required to ensure efficient and regular communication, both internal and external" (Porter, 2000b, p. 32).

- *Internal Interaction*; People share information within a community. Internal interaction between populations allows information, creativity and knowledge to be shared among different populations in the same organization.

- *External Interaction*: Population communicates with other populations outside the organization this is a common practice and allows creativity and knowledge to be introduced into an organization from outside sources. From this perspective, the main reason for a firm to interact with other organizations is because it cannot solely rely on its internal resources.

In addition, networks are ideal information resource for the allocation/information flow mechanisms of creativity. A network is basically a set of relationships that involve the people for one another, the exchange of information, or more tangible aspects, such as goods and money. Fundamentally, networks facilitate rapid information transfer through horizontal and vertical links cutting across ecosystem boundaries to put individual in direct contact with each other. Moreover, networks help both create information and transmit it. Networks with the related industries are a great part of the interaction where individuals share new ideas and build them in a cluster.

Competition

When an organization is under resource constraints, different populations will need to compete in order to grow. Wherever there are numerous demands on resources, there is a potential for competition and conflict between the different demands. The competitive behavior among creative and knowledge populations will influence the organizations ability to manage its knowledge effectively. In a business ecosystem, networks link various organizations consist of both collaborative and competitive relationships that results in a ‘co-opetition’ structure (Moore 1993). “Business ecosystems span a variety of industries. The companies within them coevolve capabilities around [an] innovation and work cooperatively and competitively to support new products, satisfy customer needs, and incorporate the next round of innovation” (Moore, 1996, p. 15).

- *Collaborative Competition*; Populations share certain common resources or values while they compete. This sort of competition often results in the win-win situation. Because a collaborative culture reduces the fear and increase trust to others, it affects sharing performance through increased knowledge and creativity. Knowledge sharing could only be achieved through mutual trust, an element of collaborative culture. Through collaboration in a network, firms use their interdependencies and have a competitive advantage over other companies which do not (Iansiti & Levien, 2004b).

- *Conflictive Competition*; Populations have direct confrontation for common resources or values while they compete. When such competition occurs, the gain-loss condition takes place as a consequence. Chen et al. (2010) claims that a proper level of internal conflict can enable the strategy-making in an organization and be beneficial to organizational performance. Therefore, a level of conflictive competition is advantageous, yet within specific limits.

It should be clear that clusters represent a combination of competition and cooperation (Porter, 2000b). The model of competition of the Fordist period, where companies win through showing off the best assets, has been replaced by a more general model, where competition mixes with cooperation to create greater value for an entire collection of organizations. In this sense, their entire collection is the cluster. The combination of cooperative and competitive processes has been termed co-opetition.

Evolution

Evolutionary theory is summarized as the change of species over time (Huang, 2009). Evolution is an analogy of the method that used to vary the chromosomes from one generation to the next. It has been adapted is from gene crossover, one of the most important mechanisms for genetic variation (Chen et al., 2010). The ecosystem evolution is a vigorous process and for this reason the roles vary. For example, species can take roles, reject unimportant or unnecessary species, and can execute a strategic shift towards another role. In this type of ecosystem, the members and roles of the ecosystem may change, but the system as a whole endures. There are two major mechanisms of evolution; mutation (internal, genetic) and crossover (changes forced from outside).

- *Mutation*; It is derived from genetic mutation, and recognized as an internal force to change the population. It is suggested that the better an organization improves its internal environmental management mechanism, the better its performance will be. Shih et al. (2006) assert the importance of internal environment of an organization, to serve as a trigger for mutation. This environmental awareness helps the continuous update of the operating creativity and knowledge and results in performance enhancement. Similar to the mutation, Hearn et al. (2007) refers to an informal education is oriented to the challenges created by an environment characterized by innovation, the increasing impact of knowledge and creativity on the economy, and of globalization and new technologies across all areas of work and experience.

- *Crossover*; it is regarded as the transmission–genetic process by which the combinations of chromosomes existing in two parental individuals become shuffled in offspring individuals, thus resulting in a new combination of maternal and paternal alleles on the same chromosome. For the creative and knowledge intense environment, it is identified as changes or enhancements of creativity and its knowledge initiated by forces outside the community, such as acquiring a patent license or hiring a new

creative from a competitive organization (Chen et al., 2010). This essence of transmission and complementarity thus confirms that there is a cross-pollination of creativity generated for the benefit of different levels; at the level of the individual, firm or the ecosystem.

Additionally, Moore (1993) emphasizes the notion of ‘co-evolution’ where for any company to really evolve its capabilities, others must evolve in support (see. the relationship between Intel, IBM, and Microsoft). “A co-evolutionary approach assumes that change may occur in all interacting populations of organizations, permitting change to be driven by both direct interactions and feedback from rest of system” (Volberda & Lewin, 2003, p. 2114)

5.4. Application of the DICE Model to the Fashion Industry

In this section, each measure of the DICE model has been complemented with insights from the fashion industry context. Research queries are given at the end of each measure as specified with the fashion industry perspective. All the queries have been designed for the case study of this dissertation, wedding wear sector clustered in the Mimar Kemalettin Fashion District.

5.4.1. Diversity

Physical variety and human diversity is vital to the creative environments. Fashion as a system aims at, one hand, preserving the diversity and the excess of its components; on the other, out of these and under the various species of a unique aim, imposing a unified meaning and linking its parts together, enabling progress and change. Such fashion as a whole is driven by a seeming diversity: that associated with the ideology of choice and taste developed by the consumer culture (Rocamora, 2009). The transformation of taste, and also the ideology of choice, is derived from the diversity of experience that occurs in the fashion-related interactions (Kawamura, 2004). Thus, diversity appears a must in the business. For fashion jobs, diverse spatial choices and conditions are supported and are satisfied by various requirements of fashion workers. In terms of the spatial diversity for fashion, for instance, the Prenzlauerberg and Mitte districts in Berlin in the 1990s, attracted many young artists,

designers, socialists due to its diverse use of building forms of apartments and spatial dynamism (Jakob, 2009).

Senanayake (2013) in his research focusing on the role of fashion design for the emerging creative economy of Sri Lanka, points out that the local market driven by the creative economy is identified as people willing to see diversity and carry on the latest global trends in the market. It should also be mentioned that the diversity does not necessarily related to a positive measure; rather, it is the capability to increase creation of new valuable functions for the creative industries, fashion industry in our case. Both the diversity of individuals in the fashion system and diversity of the surrounding environment have a dramatic influence on behavior, survival, reproductive success of firms and it will influence dynamics and stability at the same time. Diverse experiences, cultural backgrounds, professions, academic background, ages, and personalities contribute to the creation of fruitful dialogues based on multiple perspectives. Since similar people generate similar ideas as a general discourse, fashion industry goes hand in hand with all sorts of diversity. Similarly, Landry (2000) claims that the success of a creative industry, fashion industry in our case, depends on the personal qualities and diversity of employees and the access to varied talents. Fashion designers who emphasize the creative side of their work tend to portray creativity as the result of interaction with other workers and the ecosystem as well, because fashion designers draw from diverse influences from the inner and outer environments. Here, it is also essential to mention that there also other workers, in addition to the fashion designers, therefore not only the different fashion designers (in numbers or skills) but also diverse production team with all the components enables the system work and facilitates creativity. Such team work is not only internal to the firm but also external.

For the fashion ecosystem, a diverse input of many different disciplines, sectors and stakeholder interests are available. This is necessary to construct and evaluate information, on the basis of which interactions can be made about using the goods and services provided by the system. As Kawamura (2004) asserts, fashion is a diverse and collective process where many different people and firms from different proximities and professions are linked together. Each firm with its unique settings create, promote and bring the final outcomes to the market. In the market, there wide range of intermediaries that lead the fashion industry and creates the diversity within the system , previously mentioned in the Chapter 2, ranging from buyers and stylists, fashion editors, and journalists, models, photographers, hairdresser and the make-up artists, fashion

forecasters, fashion-related educational institutions, fashion fairs and fashion weeks, fashion magazines, advertising agency to new medias as marketing and consumption websites, social networking websites, fashion bloggers (Kawamura, 2004).

Regarding the diversity in relation to the fashion cities, d'Ovidio and Haddock (2010) in their comparative research conducted in Milan and London that focuses on the interactions among fashion designers based in specific quarters by mapping the location of the main fashion houses located in two international fashion capitals, summarizes that fashion industry embodied in the space as a fashion house or fashion clusters construct a link between the aesthetic quality of the built environment and the sophistication and originality of the fashion products. Both in Milan and London, designers are knowledgeable about the diversity in the city as a motivation for creative work. According to the interviewees, with the help of art galleries, museums and exhibitions, as well as the mix and diversity of people in the streets, open-air markets, individual buildings and their settings and qualities are regarded as a range of vital resources that contributes to the fashion industry operation, and also to the formation of new ideas and innovative directions to explore (Ovidio & Haddock, 2010). In addition to that, the case in the city of New York where, in numbers, has a 4% advantage over Los Angeles in terms of the variety and diversity suppliers of fabric and other inputs, as well as a 5% advantage in the number of women's wear wholesaler. Comparatively, at the scale of US, New York drives an externality advantage from the variety and diversity of its input in the fashion industry (Doeringer, 2012).

Crewe and Beaverstock (1998) in their research in the UK, Nottingham's Lace Market as a cultural cluster indicating accumulation of various fashion firms have conducted interviews with 75 of the 110 fashion firms, including suppliers, designers, manufacturers and machinists. We then interviewed all of the firms involved in image related activities (media, visual communications, graphic design, advertising, public relations and marketing), property-related activities (architects, designers, surveyors, developers) and entertainment and leisure businesses (nightclubs, pubs, cafes, restaurants, gymnasias, art galleries and retail outlets, primarily clothing, food, books and music). They have found out that the policy of support for the small entrepreneurial firms in a diverse range of sectors including design, media, fashion, leisure, retail are crucial. Similarly, a series of dissimilarities and differentiations occurs between the mainstream and the alternative (avant-garde in other words) ; for examples, shopping malls as mainstreams are not necessarily exclusive, rather diverse and alternative spaces

are exclusionary to certain class and social groups consuming the fashion. There a diverse client group coming to those fashion districts because they loved the spatial settings and variety. The interviews asserts the same; “It’s a very diverse area with lots of similar small interesting, alternative types of shops ... Such new urbanites display a preference for products which are not franchised and/or nationally ubiquitous but seek instead niche markets offering unique, exotic or alternative products” (Crewe & Beaverstock, 1998, p. 300). Lace Market’s economy highly depends on a diverse group of people who are impossible to classify according to certain class or status, the only thing about them is they do not see themselves as being part of the mainstream. Not only the clients but also the physical environment consists of diverse range of small independent stores, bars, restaurants and cafes in the Lace Market (Crewe & Beaverstock, 1998).

The measure of diversity derived from the discussions above and from the previous section, along with the context and necessary research queries which could be adapted to the case study is given as below;

Table 5.4. Research Queries for the Diversity Measure

Measure	Context	Research Queries
DIVERSITY	Varieties that can be changed and unchanged	What’s the total number of college graduates? What’s the total number of technical experts? What’s the total number of designers? What’s the total number of female workers?
	Size Qualifications Distribution of different actors	How long has the firm been in business? Is the firm registered for making trade? What’s the total number of workers? How’s the distribution of responsibilities of different workers? Which different services does the firm outsource as trend research, PR, web development, social media management as well as photography production etc.? To what extend the firm employs fashion designer?
	Productivity and value chain	Does the firm produce for its own brand? How can the variety be defined for current product range? To what extend the diversity affects production process through different styles and choices?
	Ability for creation	To what extend the diversity affects creativity? To what extend the firm reaches the customers from different socio-economic backgrounds? To what extend there is uniqueness (not mainstream) in designs?
	Diversity of external environment	How can the everyday life in the given area be defined? (Diversity of activities and diversity of physical settings) To what extend historical and cultural diversity influence the creativity of the firm?

5.4.2. Interaction

The base of the creative ecology of fashion is mutual cultural understanding of particular moods, tastes and choices (Gu, 2008). Today's fashion system depends on a constant interaction and ties between consumers and producers (Fine & Leopold, 1993; Bianchi, 1999; Entwistle, 2000). More simply, it indicates formal, economic transactions between small firm buyers-and-sellers in the production chain; and informal social and cultural interactions. Also, fashion is a complex system consisting of production, distribution and promotion processes that indicates a wide range of actors. In this regard, interaction is internal to it because it is a collective and social activity. Thus, interaction seems to be considerably essential, especially, in the case of fashion industry clusters where all the processes occur and all the actors intersect. Along with the industrialization, there are two major players dealing with the designs; designer and stylist. There are also further actors such as textile experts, assayer, mechanist, warehouseman in the industrial production. However, fashion design is not only about designing and producing garments or products, but also mass distribution, marketing and sale strategies. Yet, a direct interaction from the producer to the customer is rarely seen in the fashion industry. For this, there two interfaces available; retails/buyers which takes the products from the producer or wholesaler and serve to the customer in efficient in convenient ways, and wholesaler which sell the products taken from the producer to the retails with minimum profit margin. However in sometimes, the interaction can only take place between the retailer and the wholesaler in the case of retailer do the production as well, (Kipoz, 1998). Distribution can also be best understood through the commercial power of a successful brand logo, advertising billboards, brand identity where convenient colors and patterns are employed in terms of interaction. Additionally, there are printed materials necessary for firms' communication through flyers and handout, catalogs. Such communication is needed for customers, fairs and fashion related events. In this regard, interaction with graphic designers and fashion photographers are involved in such process too. They can be either a member of the design team or outsourcing bodies dealing with the rendering, photoshooting and editing. Therefore, fashion system of today is rather image making; thus, there is a need for interactions with these actors to build such image.

Within the context of interaction, Storper and Venables (2004) develop the term of loop, or circle of recognition, that produces social capital at different levels. It constructs trust between operators, promotes the circulation of information and it promotes the recognition of designer or talent in the industry. Further, trust and recognition are necessary tools to enable designer and the other team members work together and share their knowledge and know-how, not only at the in-house scale but also externally. Fashion industry consists of a vast range of network links. One of the key point within this network is about maintaining continuity of work and moving from one engagement to another. Here, networks operate as a mean for the recognition, promotion, competitiveness and demonstration platform of the qualities (Pratt et al., 2012). The fashion industry shares a constant demand for innovation and creation. Due to that, it heavily relies on face-to-face relations and to be concentrated in specific quarters. Within the face-to-face interaction, they need to build relationships involving trust that is crucial in clusters since the nature of creativity and knowledge entails individual ability, skills, taste and lifestyle communicated and transferred only through interaction based on mutual trust (d'Ovidio & Haddock, 2010). Proximity here becomes a crucial factor for this property.

According to the results of the interviews conducted by d'Ovidio and Haddock (2010) in Milan and London, mentioned in the previous section in details, the work of fashion designers is all about being engaged in building and maintaining relationships through internal and external interactions that requires direct and frequent interaction and therefore co-location of the involving actors. Such co-location refers to the geographical proximities and their externally benefit-oriented place choices of the clustering firms. Fashion designers stress the frequent meetings with the creative workers from different fashion houses to exchange ideas and inform one another. That also refers to the geography of this interaction: parties, events, specific restaurants and places where they come together for both social and professional reasons. The main demand of sometimes for the fashion firms is to be visible in the city, constantly accessible and available to meeting people that are involved in the fashion system or engaged in any creative field connected to the fashion. Fashion in their account can be described as a contact sport. In the fashion industry there are three levels of interaction. First, the designer is placed at the center of a network consisting of continuous interactions in-house (internal) in order to direct his/her creativity into a marketable product. In such an environment, there are a pool of different abilities, skills, values

and, taste and style interpretations monitored and mutually adjusted. The second level of interaction occurs with other fashion designers and other firms. According to the interviewees from two different case studies in Milan and London, the relationships among the fashion designers and firms form an external and larger network based on an exchange system where information and support circulate. Here, the relationships are constantly reconsidered and regenerated according to the opportunities for developing collaboration. Third, fashion events such as fairs and fashion shows are the main source of external interactions. Participation to the fashion events appears as requirement to affirm designers as well as firms their belonging to the system. Since not only the production processes of fashion, but also its communication and promotion are crucial, it is important to increase visibility and recognition by the press and media. At this point, journalists and media play a considerable role because they can legitimize the work of a designer or firms, and interpret their fashion to the general public (d'Ovidio & Haddock, 2010).

Aage and Belussi (2008) have conducted a research focusing on the structure of the firms, the range of products, their innovation strategies, and the ability of the firm to access information and knowledge outside the district of Montebelluna where several important international producers of sport shoes and sport items are located. The interviews has been carried out with representatives from 40 firms, including 13 important leaders, 13 small firms and 14 designers out of a total population of about 400 firms. The application of specific field know-how (or problem-solving knowledge) where sport shoes and sport items are being sold, find out that typically fashion conceptualization is not just organized based on internal capabilities but also on the external designers to mix their internal capabilities with additional, new sources of creativity. They claim that, there are two types of strategic networks for firms. First, the networks of market agents where the information on new fashion trends flows; and second, the networks of creative agents and design studios collaborate with firms for the process of materializing fashion into a product. Their chosen sample space illustrate that the external-to-the-district fashion studios together with a plurality of sources, provides face-to-face contact with further actors as international designers, shop retailer nets, retailers, customer groups, marketing research subcontractors and specialized suppliers. Firms here can access to street fashion, special sector exhibitions, other sector exhibitions as well as virtual sources by way of fashion journals and the Internet. By doing that, each single firm can gain form the outside parallel information about the

global fashion trends and customer expectations. Here, the external linkages in the district are predominant. Yet, many fashion firms are willing to see the possibility by double-checking; on one hand, they rely on the experience of the accumulated capabilities of the internal other firms and agents, and on the other, they can absorb a variety of external information (Aage & Belussi, 2008). Similarly, Aspers (2012) argues the necessity of the mutual dependence of internal and external interaction for the fashion industry. Since internally where it is difficult to define the quality of products objectively and thus actors are faced with uncertainty, it becomes vital to acknowledge those of other producers to determine how customers perceive the commodity or service (Aspers, 2012). “Fashion is nowadays developed at the international level. On the one hand, district firms must absorb external fashion trends (fashion selection); on the other hand, they must internally conceptualize new product designs (the development of the firm’s prototypes)” (Aage & Belussi, 2008, p. 481).

Moreover, fashion industry as a creative industry contains many sub-sectors as textiles, clothing, shoes, jewelry, advertising and architectural services interacting with each other. In such an aesthetic market, creativity is best comprehended as an applied practice rather than a given entity. As such, it resembles a series of interaction processes (Hauge et al., 2009). Understanding of information and knowledge can be associated with the contextual conditions and dynamics of their interaction. For example, designers, service providers, people in marketing, media, retailers and consumers enable the fashion knowledge flow and exchange through time and space. Hence, knowledge and creativity within the fashion industry can be well understood as a process requires interpretation and comprehension of information. Also, how the available products are perceived by consumers is highly related to the brands’ or firms’ history and reputation in the market.

“For example, in the case of history of fashion has long been dominated by a hierarchy of places where information and knowledge have been formed: the Rive Gauche in Paris, the Garment District in New York; central Milan. Modern developments in transport and communication technology admittedly do allow greater long distance interaction than ever before but certain types of information and knowledge exchange continue to require regular and direct face-to-face contact” (Hauge et al., 2009, p. 532).

Kawamura (2004) emphasizes the power of the informal person-to-person communication. For her, verbal personal influence is the most effective type of communication in the fashion related situations. Reactions of friends and acquaintances

or salespeople on someone's hair style and outfit, and in most cases influence other's choices and selections. Approval and admiration encourage behavior of the same kind. This approach is based on a structural approach where fashion is bounded not to one single product, rather to a number of products linked together with a mutually reinforcing representation of identities (Kawamura, 2004). It is also evident that "powerful corporations constantly try to use fashion as a tool and dictate fashion trends" as a form of "planned obsolescence", as well as for "creating identities through advertising" (Tokatli & Kizilgun, 2004, p. 229). The measure of interaction derived from the discussions above and from the previous section is considered within two categories; internal and external. The context along with the necessary research queries which could be adapted to the case study is given as below;

Table 5.5. Research Queries for the Interaction Measure

Measure	Context	Research Queries
INTERACTION	Sharing and the level of sharing	To what extend the knowledge is shared in different scales? (Within firm, within cluster, outside the cluster, national and international)
	Internal interaction within the cluster	How often does interaction with other sectoral firms occur within the cluster? How type of interaction occur among firms (face-to-face, external-to-district)? How the customers are being reached? (Different actors, organizations, fairs, advertisements etc.)
	Internal and external knowledge-exchange through different populations within the cluster (internal to the cluster)	To what extend the internal information-exchange occurs across the units and employees? To what extend internal information-exchange occurs across the other firms within the cluster? What types of improvements have been realized through certain outcomes of these internal/external information-exchanges?
	Internal and external interaction areas	To what extend the specific information derived from other firms within the cluster influences the firms in terms of design, creativity, production, marketing, advertisement, trade, fairs and organizations, sectoral circumstances? To what extend the specific information derived from other firms outside the cluster influences the firms in terms of design, creativity, production, marketing, advertisement, trade, fairs and organizations, sectoral circumstances?
	Face-to-face relations / the role of proximity	What communication means are being used to keep updated with the sectors?
	Collaboration with other sectors (external interaction)	How of often interact occurs with the supporting sectors (accessories, shoe designers, interiors, photographers, magazines and journalists, bloggers etc.)?
	The role of cluster for interaction / proximity	How important is being located within the cluster in terms of interaction? How important is being located close to the collaborated sectors?
	Networking and organizations	To what extend fairs help firms with creating networks and information sharing? How different scales of events contribute to the firm perspective?
	Cluster's external interaction/the role of greater proximity	To what extend collaboration and business relations occurs with different districts of Izmir?

5.4.3. Competition

Competition among the textile and apparel manufacturers has recently been extremely severe. New competences for countries, regions, and districts that are willing to redevelop and upgrade their in-house (firm) activities have received significant attention. Accordingly, the focus is now to add value to manufacturer's production, from cut-make-trim operations to promotion that requires a full package of services. Competitive advantage of fashion firms is found primarily in the production and distribution of fashion and design that embedded in different types of marketable products. Competitive firms which are specialized in creating, selling and promoting their products can vary from a physical product as accessories, cosmetics, perfumes, bedding, or interior to an idea (Power & Hauge, 2008). For the fashion industry, as stated by Porter (2000), and as previously mentioned, close linkages connected with buyers, suppliers, and other sectors contribute, not only to foster the production, but also to create competitive advantage through its effects on productivity (Porter, 2000). Equally, the contribution of the design schools in nurturing talent for the fashion industry is also important to ensure competitive success based on strong skills (Crewe & Beaverstock, 1998).

Enlil et al. (2011) in their research focusing on the creative triangle of Istanbul finds out that, in order to be competitive, additionally, fashion trends are need to be closely followed, retail outlets of companies should be opened in different locations and even in abroad and promotional campaigns have to be carried out (Enlil et al., 2011). Besides, since fashion shows, fairs and fashion weeks are primarily strategic promotional actions organized and arranged by different and competing private sector actors, they provide an opportunity for recognition and enable chances to make collaborations with other firms in the competitive market.

Instead of the term conflictive competition, Hauge et al. (2009) employ the term of networked rivalry. According to their research, many companies in the fashion industry have broad knowledge about their competitors since they keep track of one another's turnover, business models, the outsource companies that they work with and the production plants and so forth. This mutual information of companies about each other creates a strong competitive ground based on a sort of networked rivalry. That also refers to the presence of a certain degree of conflictive competition. Yet, despite

this gives a conflictive atmosphere, fashion companies need each other. Simultaneously, most fashion firms closely collaborate with other actors from the fashion industry with high levels of mutual interdependencies. That situation is related to the contacts between fashion producers and retailers, and producers and the fashion media. In the Stockholm fashion cluster it has been found a considerable rivalry, but also a slight collaboration between fashion firms. There is also a specific environment where they know each other through a constant process of reciprocal monitoring (Hauge et al. 2009).

Gu (2008) in his research about social networking in the creative industries through case studies in Manchester Fashion Network (MFN); local fashion designers' interpersonal connections work beneficially regarding their mutual support that they provide to each other, protecting them from the conflictive competition with high street chains and global brands. MFN seems a collaborative competition platform where the firms share the same interests for developing the fashion in the city. Their aspirations from this collaborative competition can later relate to the development of better branding for the city (Gu, 2008). Therefore, sometimes firms have to be self-oriented in order to compete against the globally interconnected fashion businesses. Such firms have to also be multi-tasking since they not only design and make, but also outsource fabrics, promotional works such as advertisements, fashion shootings, stylists, hair makers, and even graphic and interior designers for the spatial environment in order to catch up with the dynamic global market.

Products of the fashion industry are commodities portrayed by aesthetic, cultural, and symbolic values that are formed in environments that are considerably time and space specific. Their competitive and commercial value is found in immaterial qualities (Storper, 2000; Power & Scott, 2004). Considering the international market, even though the conventional fashion season has the annual cycle consisting of spring/summer and autumn/winter, the competitive environment along with the fast fashion has reduced the speed of fashion turnover into 4 seasons and, even between 4-6 weeks, or less. (Pratt et al., 2012). Life cycle of fashion is interpreted as a period from the introduction of the fashion to replace it with the new fashion. In this regard there are five levels with this cycle; innovators and creators that lead the entire fashion system; pioneers those who manage the first implementation, marketing and promotions; mass producers which creates satisfaction and accessibility for relatively average customers; lingers which are late to break in due to internal or external economic and

physiological inconveniences, and lastly anti-fashions who are explicitly contrary to the fashion of the day and represent an attitude of indifference arise from political or practical goals which make fashion a secondary priority. Regarding the dynamism in the fashion industry, the confrontation about being competitive has turned out to be climbing the higher levels in such model and more about attracting consumers to view shopping as an event and enabling them to do that as much as possible. Here, another dimension of collaboration appears as co-branding where fashion brands launching a special co-branded line, particularly in the fast fashion. For instance, H&M, a popular fast fashion brand from Sweden has been involving collaborations with various luxury designer fashion brands to compete with the other fast fashion brands. Starting with Karl Lagerfeld in 2004, many designers Stella McCartney, Viktor & Rolf, Madonna, Roberto Cavalli, Comme des Garçons, Matthew Williamson, Jimmy Choo, Sonia Rykiel, Lanvin, Versace have been involved in such collaborations.

The measure of competition derived from the discussions above and from the previous section is considered within two categories; collaborative and conflictive. The context along with the necessary research queries is which could be adapted to the case study given as below;

Table 5.6. Research Queries for the Competition Measure

Measure	Dimensions	Research Queries
COMPETITION	Collaborative/Cooperative competition within/outside the cluster The willingness for collaboration (conflictive or collaborative)	How is the competition defined in this sector? (win-win or win-lose) To what extend there is collaboration among the firms while competing in the sector?
	The role of the cluster and spatial proximity for competition	To what extend the cluster provides a ground for competition? To what extend the physicality of MKMM provides advantageous for firms to compete within the sector?
	Fear/Trust and Openness (possibilities for collaboration)	To what extend is there trust and openness between firms in MKMM? To what extend knowledge is shared with others while competing?
	Need for mutuality/interdependence/survival	To what extend the collaboration with other firms is needed to survive in the competition? To what extend the follow-up with others designs and collections are needed? To what extend national and international fairs play role for competition? To what extend promotion and advertisement are necessary for competition? (Catalogs, billboards etc.) To what extend the external R&D (or consultancy) is needed for competition?

5.4.4. Evolution

The fashion industry mainly is about all the culture-based and creatively designed products produced, distributed, consumed within a continuously changing and uncertain environment. Fashion is one of the major drivers of today's behaviors, habits, wants and needs. "The system of constantly shifting meanings, codes and values is in fact fundamental to fashion as we understand it in our culture ... Though changes in fashion correspond to macrochanges in cultures or societies; they nevertheless require human action, the work of creative people, of industry and the complicity of consumers" (White & Griffiths, 2000, p. 94). How the customers' taste develops and what influences their choice is a valuable tool in predicting the chances of success for the next season's product, and in forming future strategies for the company. Regarding its structure discussed at the fashion system in the Chapter 2, it facilitates the change, and refers to constant evolution. In other words, ideas and images of fashion are organized around certain themes, and they communicate through specific meanings. Here, mimetic behavior becomes crucial for the fashion industry; people naturally observe and imitate what they see. Consequently, fashion diffuses considerably and has the mass adaptation to it and the theorists of mimetic in relation to the fashion (e.g. Georg Simmel, Rene Girard) largely argues that such behavioral characteristic of human push the diffusion of fashion and cultural transformation (Lynch & Strauss, 2007). That also affects the wants and needs of fashion consumers. Therefore, the fashionable appears to be systematically associated with notions of trendiness, newness, change, utilization and consumption. On the other hand, technological developments are considerably influential on the fashion too. The technology affects fashion production as transforming the entire production process, and packaging, communication and distribution. The recent technological and infrastructural evolution in e-commerce through certain websites leads the market and consumers (Pratt et al., 2012). New online business is now available for every sectors of the fashion industry where you browse through catalogues on screen, or ask their computer to search specific items such as trousers or dinner sets, they could even change the color of garments to assess different combinations. What he refers to also true in a way that despite the e-commerce opportunities available nowadays, the pleasure of going shopping and experiencing the physical environment of the store itself as well as the social interaction are still

important aspects of urban life. As White and Griffiths (2000) have mentioned, the future of the fashion stores will depend on the confidence to look different and separate themselves from the mainstream as turning the act of shopping into an entertaining, exciting or in some way distinctive experience which extends from clothes to any related fashionable (marketable) items. Necessarily, that experience can be turned into certain rituals as generally happens in the wedding wear sector.

Besides, the textile developments also need to be considered for the production process. As evolutionary aspect, following up the innovative solutions can be indicated in the entire process of the fashion product development as well as its marketing. Thus, there is a considerable influence of the research that can be the primary reason for a product's success (White & Griffiths, 2000). Not only the technical and fabric research, but also the market research, retail, information gathering is vital to the evolution of fashion firms.

The motivations for creative ideas in fashion are always originated from the variety of different sources and from the influences exerted by exhibitions, films, writers, geographical areas, traditional cultures and metropolitan phenomena. Thus, fashion can appropriate practically anything and turn it into a look (White & Griffiths, 2000). The findings from the study by Cillo and Verona (2008) show as fashion firms look for new styles, they tend to adopt different approaches. Their approaches correspond to the evolution component; mutation and crossover. For mutation, while some firms present predominantly internal focus where their search process is guided by an individual designer or design team and their evolving knowledge and creative that later result in particular changes accordingly within the organization; some companies are more sensitive towards to the global market evolutionary changes and their search process is directed by a team or the entire firm. The first approach is taken when companies led by a designer are more locally, and specifically restricted to the neighborhood of the designer's expertise. Changes and investments in human capital as mutation, is considered as a key for firm's evolution and adaptation to a changing environment. Designer-driven kind of search stresses the capacity of the designer's knowledge and creativity to interpret market changes. The search strategy does not include any inputs from the external environment. Similarly, Hearn et al. (2007) suggest investment in the fashion education and training activities, and facilitation of learning and communicating among in-house designers and other workers that together produce long-term benefits for the firms as one component of the fashion ecosystem. In addition

to that, organizations like fashion fairs, shows and fashion weeks enables individual firms to gain knowledge about the latest trends, and for the production team of firms can make interpretations, comparisons and, thus managements and adjustments among each other.

For the crossover, the study by Cillo and Verona (2008) refers to the second type approach that goes beyond the current boundaries of the firms while searching, not in-house, rather through the surroundings and far geographies. Such fashion firms anticipate emerging market trends for a major selection criterion while developing new collections or new activity. Accordingly, internal resources are used to trigger a firm's process of change and adaptation to the evolutionary market. The roles of the designer or design team do not only include doing the in-house, internal, creative activity, but also regards many other company choices that affect their designs and products (Cillo & Verona, 2008). The crossover for the fashion industry can be expressed by the flow of designers and any members of the creative and production team. Creative professionals such as designers, advertisers, craftsmen, public relations representatives are hired from outside the creative industries, and they carry new techniques, ideas and ways of working (Storper & Venables, 2004). In this respect, key stakeholders such as photographers, journalists, media hunters are crucial as well. For example, in the case of Lace Market, UK, there are a series of overlapping and interacting markets that illustrate significant crossovers within and between different sectors of activity (Crewe & Beaverstock, 1998). Aage and Belussi (2008) make a bold statement that in the complex world of fashion, large firms are better placed to deal with the ever-changing evolution of fashion than small firms placed in industrial districts. Large fashion firms have more assets, resources, supplies and connections to direct fashion trends, to dominate the international market, and influence the relatively smaller firms. However, in such organizations, plans are made very rigid that they must follow various previously planned steps that go from the selected designs to the launch of these products in the market. Their decisions are made and cannot simply be reversed. On the other hand, small-sized firms that mostly located in certain district having wide, global, overlapping nets, and firms can also be equally competitive due to their undeveloped practices that can easily fit into the dynamic fashion industry open source. Here, they can absorb particular creations and knowledge about the industry through crossover (Aage & Belussi, 2008).

All in all, mutation gives the affirmation of a firm’s stylistic identity while crossover is primarily related to the ability to adapt to market changes for the fashion industry. Above all, these studies show that the external environment as an organizational and physical ecosystem can also be an influential trigger in the process of change.

The measure of evolution derived from the discussions above and from the previous section, along with the necessary research queries which could be adapted to the case study is given as below;

Table 5.7. Research Queries for the Evolution Measure

Measure	Context	Research Queries
EVOLUTION	Mutation /willingness to learn Growth/enhancement/change	Have anybody working in the firm ever taken any education or training program? (design, language computer, marketing, trade etc.) Have anybody working in the firm ever been to international fairs or fashion tours? What have been the outcomes of such attempts? (individual knowledge, internal knowledge share, design, networks, collaborations, increase in sales and trade) To what extend such outcomes provides enhancement for the entire firm? How does the firm follow up with the sectoral developments? (Market research, trend research, technology research, fabric research, new sale/trade opportunities)
	Crossover/transfer/mitigation/cross-pollination (internal to cluster)	What have been the outcomes of hiring someone experienced in the sectoral and specifically this cluster? (individual knowledge, internal knowledge share, design, networks, collaborations, increase in sales and trade) To what extend such outcomes provide enhancement for the entire firm?
	Crossover/transfer/mitigation/cross-pollination (external to cluster)	What have been the outcomes of hiring someone experienced in the sectoral but outside the cluster? (individual knowledge, internal knowledge share, design, networks, collaborations, increase in sales and trade) To what extend such outcomes provide enhancement for the entire firm?
	Integration to the environment/survival	If the cluster was forced to move somewhere in the city, how would it integrate and survive in new place? The need for supporting sectors?
	Adaptation to changing environment (planning and branding)	How did the firm adapt to the physical changes of the cluster when first it was planned as a fashion district? How positive such planning efforts in the area has become for the firms performance?

5.5. Summary

Most studies on creative industry have stressed the importance of variety, communication, and the informal exchange of knowledge, growth in such clusters. However, as the notions of what this study suggests, there is still not a comprehensive and concrete study on the entire dynamics of the creative industry clusters that investigate when, how, and for whom local diversity, interactions, competitions, growth and survival is important. The ecosystem of creative industry clusters is defined as a self-sufficient entity where particular contacts and relations occurs between creative and knowledge workers, as well as those who has the know-how, and industries. Besides, their interaction with their physical and social environment is also a matter. The development of such ecosystem supports and governs the creative industries and enables them to operate. There is also a social aspect within the ecosystems that bounds people together. Since the concept of ecology has the implications of continuous evolution and interaction among organisms, environment and species, creative ecology refers to the interaction among creative actors and interaction between actors and urban environment regarding social, physical and economic factors.

Considering the focuses and methodologies of previous researches from different field engaged in the ecosystem approach, the possible measures of the model undertaken within this dissertation have been illustrated as significant factors. Consequently, four key measures of the DICE Model have been described. They are diversity, interaction, competition and evolution of species and the acronym for this is designated the DICE model.

First measure of the ecosystem is diversity. Diversity has been regarded here as in the widest meaning of the word, as the variation between the individuals, their knowledge and creative skills and the activities they pursue. In most ecological approach, diversity come together with interaction as it is critically essential for generating creativity. Second, Interaction expresses the information flow across different populations, through the organization and space, both directly and indirectly, in constructing an infrastructure to support the breadth and depth of creativity and knowledge flow. The form of interactions can be personal communications within the community or outside the community and are called internal interaction and external interaction. Third, competition is believed occurs when the ecosystem members are

under resource constraints, different populations thus compete in order to grow and survive. Wherever there are numerous demands on resources, there is a potential for competition and conflict between the different demands. The competitive advantages of creative industries through creativity and knowledge drive organizations to manage their sort of sources effectively. In business ecosystems various organizations are involved both in collaborative and competitive relationships. Diversity as a last measure, it is a strategy that a population uses to cope with the pressure of environmental variability. It is the dynamic capability, to which every organization should strive to integrate, build and reconfigure their competences under a rapidly changing environment. According to the evolutionary theory, nature creates species and, species adapt and continuously try to survive in the competitive environment. The competition pressure coming from internal equals or external rivals drives two major mechanisms of evolution; mutation (internal, genetic) and crossover (changes forced from outside).

Lastly, each previously mentioned measures of the DICE model has been reconsidered and interpreted from the fashion industry context. For diversity from the fashion perspective, it is mainly related with the ideology of choice and taste. Diversity stands at the core of the mainstream and the alternative choices. Consumers want to see diversity of choices and diverse trends in the market. The people engaged in the fashion industry are happened to contain diverse experiences, cultural backgrounds, fields, academic background, ages, and personalities contribute to the creation of fruitful dialogues based on multiple perspectives. Not only the people but also the built environment where the fashion is consumed is crucial. It is important to have diverse spatial choices and conditions reflecting aesthetic quality of the built environment. Further, related actors from diverse range of sectors including design, media, fashion, leisure, retail are engaged in the fashion industry. For interaction, since the fashion industry consists of production, distribution and promotion processes that require wide range of actors and itself is a collective and social activity, both internal and external interaction appears vital, particularly, in the fashion industry clusters. Despite the recent developments in communication enables strong and long distance interaction, certain types of information and knowledge exchange continue to require regular and direct face-to-face contact for the fashion industry. In this respect, trust and recognition appear as necessary tools within the fashion industry value chain for sharing in different scales. In order to build and sustain fashion-based relationships through internal and external

interactions co-location of the involving actors are also important for ecosystems. Geographical proximities and the place of the clustering firms are still needed. By that, fashion can diffuse from a micro-scale interpersonal perspective to macro-scale social value. Ultimately, fashion is not the sum of solitary elements, instead, interrelations among its components. For competition, fashion firms can upgrade the sources of their competitiveness through design capabilities, variety of creations, quick and efficient delivery. In order to compete, fashion enterprises collaborate with the media, the urban tourism industry and the beauty and popular entertainment industries since fashion industry connects services and professional service sectors into a complete product system. Fashion events, in this account, have significant economic value for facilitating nationally and globally competitive base for participants and network members. In the fashion business, it is very common to keep track of one another's turnover, business models, the outsource companies. Yet, that creates a considerable competitive ground based on conflictive competition. However, fashion industry can also get benefits from the relations built on the collaboration-competition that allows creativity and knowledge to diffuse through the network. Indeed, global market is extremely competitive and offers little space for the new brands not only because of the enormous resource requirements attached to the international promotion of new brands but also capacities. Lastly, for evolution, the fashion industry creates a continuously changing and uncertain environment. It drives behaviors, habits, wants and needs and corresponds to macro changes. Considering its very internal structure, it continuously suggests change, and constant evolution.

Regarding the characteristics of each them, research queries for each measure has been formed and specified with the fashion industry perspective. All the queries have been incorporated into the case study of this dissertation, Wedding Wear cluster in the Mimar Kemalettin Fashion District in Izmir, Turkey.

CHAPTER 6

CASE STUDY: ECOSYSTEM OF THE WEDDING WEAR CLUSTER IN IZMIR

This chapter investigates the cluster of wedding wear sector in Mimar Kemalettin Fashion District in Izmir/Turkey from the ecosystem perspective, through the DICE Model components. Each four identified components, diversity, interaction, competition and evolution is interpreted through the empirical work and related investigations carried out on the case study as well as in the related literature. First, the chapter starts with the preliminary study which intends to analyze its business network and locations in Izmir to understand the ways in how fashion industry are situated in complex webs of economic activity network and agglomeration trends and locational dynamics. The network map that illustrate locational relations of the fashion industry, and the map showing how network players are distributed in the entire city has been linked to the case study area. Second, the focus on the wedding wear sector and Mimar Kemalettin Fashion District is extracted from that structure, and how the district has been developed within years and recently is presented. Additionally, the spatial structure of Mimar Kemalettin Fashion District and the cluster of wedding wear firms are described accordingly to several sets of field studies. This section presents several maps produced with the field study findings that illustrate the locational distribution of the wedding wear firms as a cluster, and more specifically, the locations of the producers of wedding dresses, wedding suits and evening gowns where the data have been collected. Third, the collected data set through the questionnaire named as DICE survey for the DICE Model components are analyzed and processed within such spatiality. And lastly, those analyses are evaluated and compared for each component in order to explore how wedding wear sectoral cluster operates as an ecosystem in the given urban environment.

6.1. Preliminary Studies: Analysis of Fashion Industry in Izmir

Upon the investigation in the case study area, preliminary studies have been conducted to analyze the network and locational distribution of the fashion industry in the city. The collected data have been processed in two phases; creating a preliminary chart after the collection of initial data that illustrates certain components and functions, and developing a more detailed locational map indicating the findings from additional interviews. The overall aim here has been to draw current picture of the fashion industry in Izmir. The design of this research is based on the open-ended interviews through snowball sampling with the information-rich academic members of the Fashion Design Department in Izmir University of Economics. Snowball sampling method has been conducted to identify key players in the field, product, manufacturing processes, and other interrelated actors and sectors, since the department academic members are considerably involved in the fashion design practice of the city. Snowball has applied here to use one contact to help us recruit another contact, who in touch with someone else. However, the research content for this study has been kept limited to the academic members. The Fashion Design Department has been regarded as a primary source to us to know the sector, especially the key players, creative workers, organizations and associations as well as their locations.

Specific to Izmir, textile sector covers 9,8% of the total employment in Turkey (IZKA, 2010). Textile industry is the third most demanded sector with 732.012.937 USD export share (8,85% of the total export in the district, % 6,13 of the total export in the country) and has the second largest employment range in Izmir (IZKA, 2009; IZKA 2010). According to IZKA (2009) research report prepared for Izmir province, there are 12.603 people employed in the textile sector in Konak (6,32% of the total employment in the district) 10.443 people in Bornova (8,8%), 1.657 people in Karsiyaka (3,49%), 4,160 people in Cigli (10,60%), 7.458 people in Gaziemir (23,05%) 638 people in Torbali (2,21%) and 2,384 people in Buca (8,44%) by the year 2008. For the recent years, there has been a growth around the city center in terms of clustering textile sector. Despite the accumulation of the textile in Cigli has decreased, it has risen up in Buca, Gaziemir, Konak and Bornova (Figure 6.1).

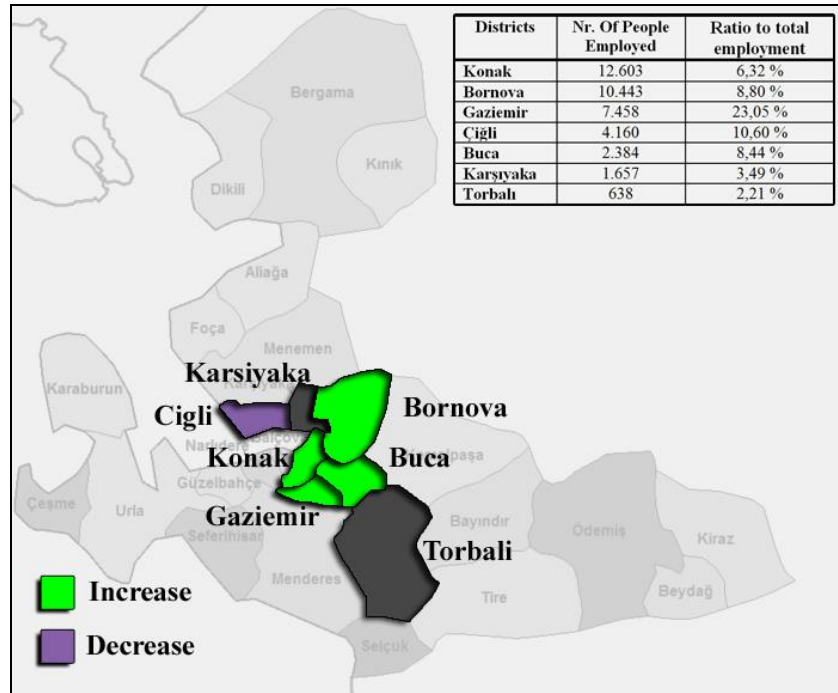


Figure 6.1. Izmir Province Textile Sector-Intense Districts Employment and Accumulation Change between 2004-2008 (Adapted from IZKA, 2010)

6.1.1. Network Mapping

Specific to Izmir, there are basically five non-governmental organizations in Izmir namely Aegean Region Chamber of Industry, Aegean Exporters' Unions, Aegean Clothing Manufacturers' Association, Association of Aegean Leather and Leather Products, Izmir Chamber of Commerce and Izmir Development Agency. There is no other professional association of which covers managing the fashion design, textile and manufacturing. This absence is one of the reported inadequacies with the industry. However, Izmir fashion industry together with textile sector illustrates a different picture (Figure 6.2). According to the Aegean Region Chamber of Industry data, for the Aegean Region where Izmir is located, there are 904 textile firms and 45113 workers registered in the Aegean Region Chamber of Industry. In recent years, Izmir has become synonymous with fashion, increased profits and opportunities for apparel manufactures focusing exclusively on wedding dress design, accessory and outsourcing for ready-to-wear.

The industry is governed by the Aegean Region Chamber of Industry, Aegean Exporters' Unions, Aegean Clothing Manufacturers' Association, Association of Aegean Leather and Leather Products, Izmir Chamber of Commerce and Izmir

Development Agency. With respect to the interviews, fashion industry in terms of its clusters and the organization of stages for the value chain is limited and old-fashioned in Izmir. Yet, there are still some signs of three components of the fashion industry; main activities (e.g. clothing design, wedding industry), related activities (e.g. textile and ready-to-wear) and cooperated activities (e.g. events and fashion education) (Figure 6.2).



Figure 6.2. Fashion Industry Network Map in Izmir

The workers in the industry are hardly called creative class who design and develop new products, use knowledge and skills to invent brands and new life styles. While companies and firms develop their own brands they do not entail and employ any knowledgeable fashion designers or stylist collaborating with photographers and magazines. There are problems with managing and organizing the whole fashion industry and its supply since a leading agent is absent. In addition to that, there is also a steering agency problem that dealing with industry's relation to the related sectors. Many of the previous researches on the subject discussed the power of specialized industry built-ups in specific localities and clusters since the signifiers of new economy are found in fashion precincts that generally clustered in the inner-city rental space.

Though having such a network including main activities (e.g. clothing design, wedding industry), related activities (e.g. textile and ready-to-wear) and cooperated activities (e.g. events and fashion education) of the fashion industry, there are hardly formed a thorough ‘fashion district’ in Izmir. However, the findings from the interviews show that the fashion industry is more than textile and manufacturing, should be empowered and re-envisioned in Izmir. This research has illustrated that Izmir lacks of a comprehensive public policy, a team work or a full-bodied robust network for the improvement of fashion as a creative industry. Spatially, Izmir has rather wedding wear firms and their major cluster, as well as outsourcing and manufacturing based organized zones.

6.1.2. Locational Distribution

In a locational analysis of the industry in Izmir, Cankaya and Kemeralti traditional bazaar in Konak are found as places associated with rather low profile and generally copy design fashion industry, and also excessively wedding dress retail and mostly wholesale and production. Comparatively, Alsancak spatially serves for higher profile boutiques and fashion design stores which are yet clustered. Alsancak is also a place to the trade chambers and associations as well as some fashion-related sectors’ (supporting activities) agencies (Figure 6.3). Throughout the peripheries of the city, there are some manufacturing-based industrial sites; namely (Textile Manufacturers Site in Izmir), Shoes Manufacturers Site, ESBAS Free Zone, AOSB Izmir Ataturk Organized Industrial Zone, and Buca Clothing Organized Industrial Zone. For the education aspect, Balçova on the west axis of the city is where Izmir University of Economics and Dokuz Eylül University fashion design departments are stand out. Furthermore, Ege University the department of Textile Engineering is located on the east axis. For business characteristics and locations, certain points in the center of the city and peripheries especially industrial zones and free zones stand out. According to this analysis, most of the textile and manufacturing companies reduce their production costs by locating in the organized industry zones and free zones. Also, some, but not clustered, boutiques and fashion design stores and administrative chambers and associations are located in the prestigious spots in Alsancak.

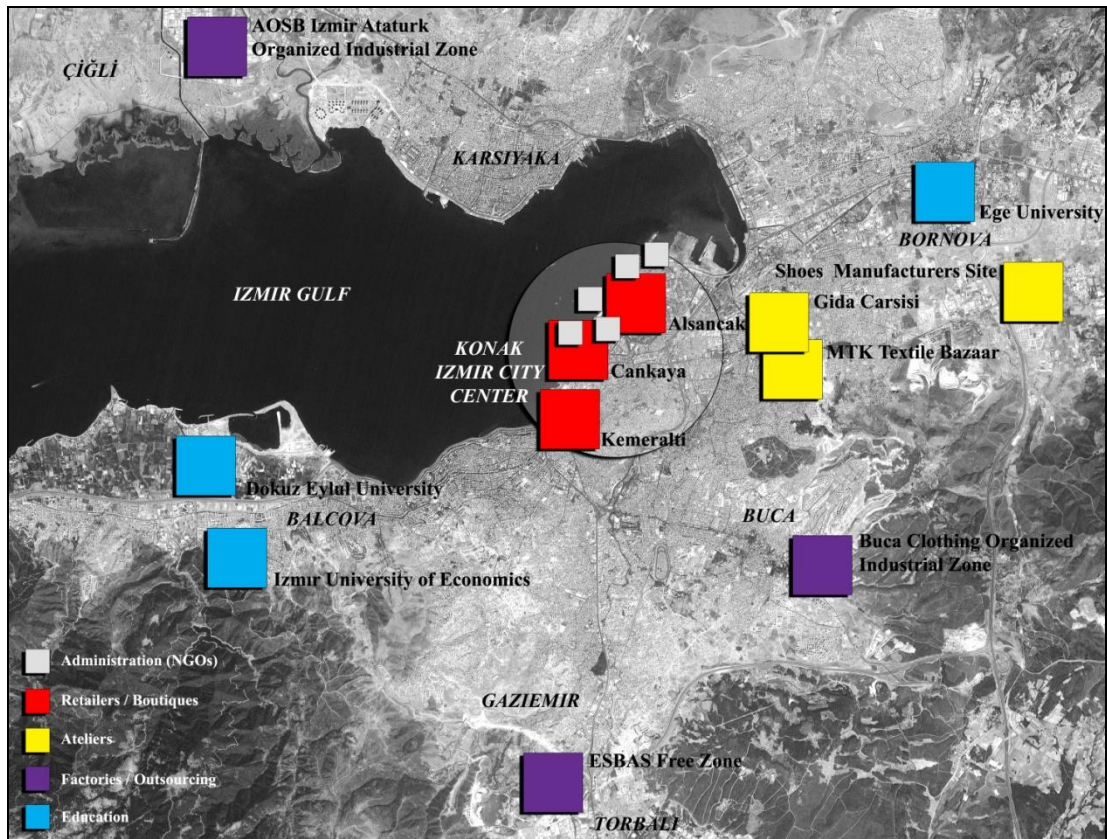


Figure 6.3. Location of Fashion Industry in Izmir

Fashion design in Izmir has seen promising as an industry that can do more than manufacturing and outsourcing. More generally, this study has brought some important clues into the components of the business network of fashion industry in Izmir. Specifically, wedding wear sector has been found carrying a considerable importance to the city's creative potential through clustering of particular types of activities in such specific geographical location. As a result, Mimar Kemalettin Fashion District stands out as the area in where mainly wedding wear production, wholesale and retail activities are carried out.

6.2. Mimar Kemalettin Fashion District, Izmir, TURKEY

The case study area of this research covers Mimar Kemalettin Fashion District and its very adjacent area. The retailing extension of the sector into the traditional bazaar in Konak has been excluded since its physical dynamics are not associated with clustering, but rather with locating in the city core and traditional bazaar. The case study area is situated in the historical downtown of Izmir between the traditional bazaar area

in Konak, central business district and Alsancak. Mimar Kemalettin Fashion District is located in Konak surrounded by Cumhuriyet Blvd. in the west, Blvd. in the south and Gazi Blvd. in the north, and positions along the west-east axis (Figure 6.4).



Figure 6.4. Mimar Kemalettin Fashion District: Case Study Area

6.2.1. Development of the District

Mimar Kemalettin Fashion District is the renewed name given to the area around the Mimar Kemalettin Street. The sources including maps and photographs do not give particular insights from the study area but city center in general. Also, many maps date back to the commercial fabric before the fire of 1922. One old photograph in the *Arkitekt Magazine* dated 1931 mentions the area as a new bazaar among the parallel developments within the city (Hamamcıoğlu, 2000). Early studies basically refer to evolutions and characteristics of Konak and Alsancak districts. As similarly mentioned one of the earlier studies which specifically concentrate on the Mimar Kemalettin area from the historic perspective claims there is no particular work and evidence that addresses itself to the evolution of this area (Hamamcıoğlu, 2000).

The area takes its name from one of the famous architects of the late Ottoman period since its settings reflects the unique architectural style of the 1920s. Ahmet Kemalettin, widely known as Mimar Kemalettin, was a renowned Turkish architect of the very late period of the Ottoman architecture and the statue of Mimar Kemalettin located in the area gives its name to the street. First, the street has been planned according to the proposal by the famous planners Rene and Raymond Danger and its role as being trade center comprising wholesale and retail since 1800s. The area around the street has always been a part of the trade activities started in the Ottoman period and improved by the pier constructed in 1800s. By then, the tradesmen who arrive to the Basmane Gar by train, reach the trade activities located in Konak Pier and Gümrük through this area (Figure 6.5). Owing to such importance, the area was one of the firstly planned zones in Izmir after the survival of the Great Fire of Izmir in 1922. Notably in the 1940s, along with the other major boulevards, Plevne Blvd., Vasıf Cinar Blvd. and Fevzi Pasa Blvd., Mimar Kemalletin Street was opened (Sayar, 2010).

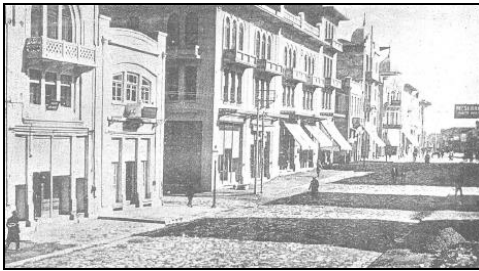


Figure 6.5. Case Study Area in the Early Republic Period
(Source: Kami Refer, 1931 as cited in Hamamcıoğlu, 2000)



Figure 6.6. Case Study Area Before the Plan
(Source: Postcard of Tepekule Collection, 1996 as cited in Hamamcıoğlu, 2000)

The area was rebranded and redeveloped as a fashion center in 2002. According to the current Implementation Plan Report, the area has been embraced in the central business district area since the 1970s when the manufacturing functions decentralized and diffused throughout the periphery areas. In the 1970s when the industrial decentralization took place, the wholesale trade of textile goods was a dominant function yet unhealthy interventions have been done within the historical space organizations. Alteration of conservation decisions, and unification of small historic plots and the demolition of historical buildings and construction of huge building masses considerably changed the area (Figure 6.6) (Hamamcıoğlu, 2000).

Since then, the area has been under the activity of service and finance sector as well as with the dominant textile sector, especially the wedding wear sector (MK Conservation Plan Report, n.d.). Examples of monumental commerce buildings in Neo-Ottoman style named as early Republican Nationalist effects have always been visible at the area where the lot sizes are larger and there is more number of floors compared to those of the Ottoman buildings. Building forms were made already for the wholesale and trade of textile goods due to the historical purpose (Hamamcıoglu, 2000). Later, its unique style has been blended with more recent architectural movements, especially after the 1980s. By time, the physical environment and spatial conditions around Mimar Kemalettin Street has become unattractive and declined. Due to its major role in wholesale, the area has been detached from the city despite its very central location, and the traffic has been dominated by the vehicles engaged in loading goods throughout the day. From the pedestrian perspective, the area was considerably inaccessible. Therefore, the area was rebranded and developed as a fashion center in 2002, and that given role was added to its original name. The redevelopment efforts were carried out by the Konak Municipality after the early 2000s in order to improve the urban quality around the area, according to its proposed use as a fashion center. The implemented design comprised the traffic calming arrangements, new urban furniture, and façade constructions. Also, a fashion square, several sitting units and benches was constructed. The area was given a large space of open green spaces with around 200 newly planted trees (Eyüce, 2002). Following these planning interventions, the Mimar Kemalettin Fashion District Association was also opened in 2002 with the intention of organizationally bringing the sectoral firms together and physically maintaining and improving the district. The association is not only responsible for the wedding wear sector but also other wholesalers of ready-to-wear sector as well as their suppliers. The services supplied by the association are mainly daily arrangements around the district including parking, safety, and lighting, and also, conducting meetings and flow of necessary information as well as a place on the association official website for promotion.

A series of interviews have been carried out by representatives of the association and by relatively older wedding wear firms located on the site in order to intake the recent structure of the district. The representative from the Mimar Kemalettin Fashion District Association who runs the daily activities with many members from the sector has told about the development of the district and claimed:

“The wedding wear sector has been moved to this area from the traditional bazaar in Konak. Even though the wholesale and trade has always occupied the area, first wedding wear retail shops started to open almost 40 years ago. That was initiated by relatively large scale, well-known companies, namely, Demet, Üstün, Hocasade, Tahsin, Kahyaoğlu, Pınar and Nihan. Throughout the years, employees experienced in these big companies and owners of several other irrelevant businesses influenced by the idea of collocating here have started to break into the sector, opened up their own firms and join the area due to the growing reputation of the district in wedding wear sector and to the developments especially after the 2000s.”

Three interviewees among the oldest firm owners have all touched upon almost the same point and underlined the emerging demand to the district. One of them has said:

“Since the first investment cost is relatively low for this sector, the accumulation of the wedding wear firms and their clustering has not been hard to happen here. Due to the growing reputation of the district, cafes and restaurant around have all been converted to the wedding wear stores. Even many people used to be running flower kiosks have broken into this sector. You do not need to know the sector, all you need is someone experienced in large and relatively old companies.”

According to the interviews, there have always been replacements in and around the area. One of the oldest firm owners has highlighted the replacements around the area and has mentioned about the development of the district:

“For ten years, Gazi Blvd. as an extension in the north of the district has been engaged by the wedding wear retailers rather than the wholesalers which located in the core of the district while the core (Mimar Kemalettin Street) was occupied rather by ready-to-wear sector, men shirts in particular, and outsourcing companies. However, now Gazi Blvd. is full of its capacity. That pattern has been started to change very recently due to the limited available space at the ground floor along the boulevard and major problems of traffic, parking and pedestrian. Retailers are currently taking over places at the core of the district, particularly along the Mimar Kemalettin Street which is more calm and pedestrianized.”

The redevelopments around the area, and its name as a fashion district were mainly associated with such movement. The district is now dominated by the wedding wear wholesaling activities comparing to the less retailing. Along with the interviews about the recent conditions of the district regarding the relations in the sector, the general portray of the wedding wear sector has been drawn due to the characteristics of the clustering and agglomeration of the sector.

One of the firm owners who run the wedding wear manufacturing and retailing business with his wife for a year has commented on the sectoral togetherness and said that:

“Mimar Kemalettin Fashion District is a perfect place for daily communications. We communicate with the other firms here about the sectoral strategies and future scenarios. I see this is vital for the firm enhancement and sectoral development. These improvements can be resulted in better connection with the wedding wear sector outside the country.”

One of the firm owners who has family roots in the sector and was born into the sector has mentioned about the locational aspects of the district and claimed that:

“The appeal of the district has been developed over years. Now it is a well-known place not only for Izmir, but also for several countries. To many firms here, this place is too expensive due to the land prices in the central location of the city. However, its closeness to the outsourcing firms located around here and to customers who know the district make things easier and keep us here. Many large manufacturing firms have their ateliers in the textile bazaar located in the MTK (Textile Manufacturers Site in Izmir) whereas relatively smaller manufacturing firms have their small ateliers in Mimar Kemalettin Fashion District. Yet, every wedding wear-related firm is here. Fashion boutiques and individual wedding wear companies located separately in Alsancak and Karsiyaka buy wedding dresses and evening gowns from the firms in the district.”

The development of Mimar Kemalettin Fashion District has been accelerated within the recent years, particularly in terms of awareness and potentials of wedding wear sector. The district itself is different from the massive retailing profile in Kemaralti and is currently mostly involved in manufacturing and wholesaling firms of wedding suits and evening gowns.

6.2.2. Investigation of Spatial Structure of the District

The area is portrayed as an historical site characterized by the historical and registered buildings as well as more recent structures. Mimar Kemalettin Fashion District itself is 11.65ha in size with 61 registered buildings (Figure 6.8). A continuous pedestrian way cut through the area and small scale urban plazas in certain spots illustrates major outdoor characteristics. The parcels within the area vary due to the surrounding dynamics; thus the parcels are relatively larger along the major boulevards.

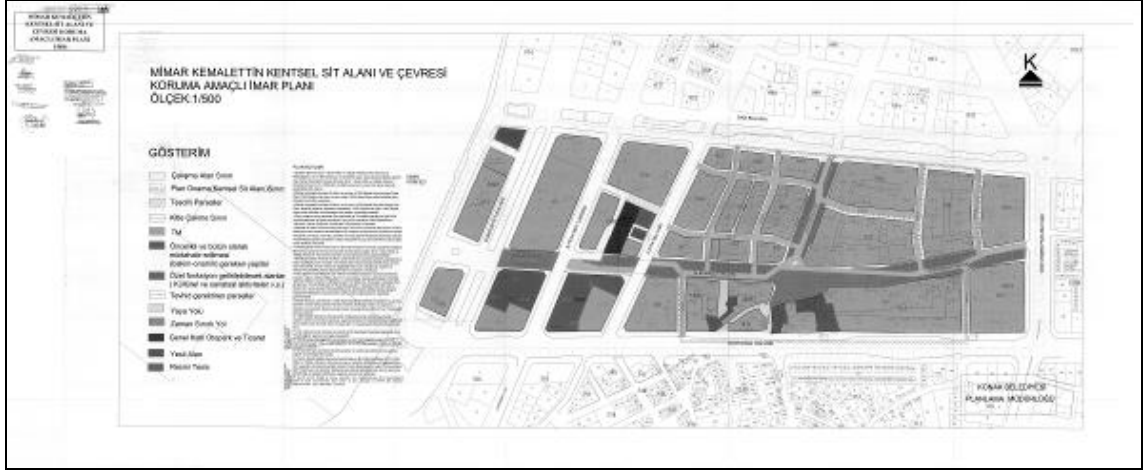


Figure 6.7. Implementation Plan in Use
(Source: MK Conservation Plan Report, n.d.)



Figure 6.8. Conservation Areas
(Source: MK Conservation Plan Report, n.d.)



Figure 6.9. A View from Mimar Kemalettin Fashion District



Figure 6.10. A View from Mimar Kemalettin Fashion District

The land-use is dominated by the textile firms (wedding wear) with more than 50%. Other uses are governmental buildings, banks, ateliers, warehouses, and accommodation facilities and so forth (Figure 6.11). There are 272 buildings situated in the area of which the 53% are less than 5-storey (Figure 6.12).



Figure 6.11. Land-Use
(Source: MK Conservation Plan Report, n.d.)



Figure 6.12. Building Heights
(Source: MK Conservation Plan Report, n.d.)

Among the other uses in the area, wedding wear sector as included in the textile sector in the Implementation Plan portrays the main character of the area. As mentioned in the IZKA 2010 report, wedding wear sector do cluster within Mimar Kemalettin Fashion District and adjacent areas (Figure 6.13, Figure 6.14, Figure 6.15, Figure 6.16). The clustering occurs both horizontally and vertically around the district.



Figure 6.13. A View from Clustering Wedding Wear Firms



Figure 6.14. A View from Clustering Wedding Wear Firms



Figure 6.15. A View from Clustering Wedding Wear Firms



Figure 6.16. A View from Clustering Wedding Wear Firms

6.2.3. Cluster of the Wedding Wear Firms

Several mappings and use of the illustrative methods and following figures in this section show how locationally the wedding wear sector is distributed and clustered in Mimar Kemalettin Fashion District. According to these findings, wedding wear firms mostly gather around the core of the area. According to the final investigation, there are currently 266 wedding wear firms including retailers, wholesalers and manufacturers have been found in the area (Table 6.1). Their locational distribution as a Cluster in Mimar Kemalettin Fashion District is given at the Figure 6.17.



Figure 6.17. Locational Distribution of Wedding Wear Firms on Site

Table 6.1. Number of Wedding Wear Firms and Suppliers

Ground Floors	144
1st Floors	42
2nd Floors	28
3rd Floors and up	52
Total	266
Suppliers	31

Regarding the number of wedding wear firms per urban block, each of three urban blocks with central location is inhabited by average 25-30 firms (Figure 6.18). Besides, %25 of the manufacturing activities and %30 of retailing activities of these manufacturing firms at the site occupy more than one floor in buildings. Thus, % 30 - 40 of the firms is located more than more floor in building.

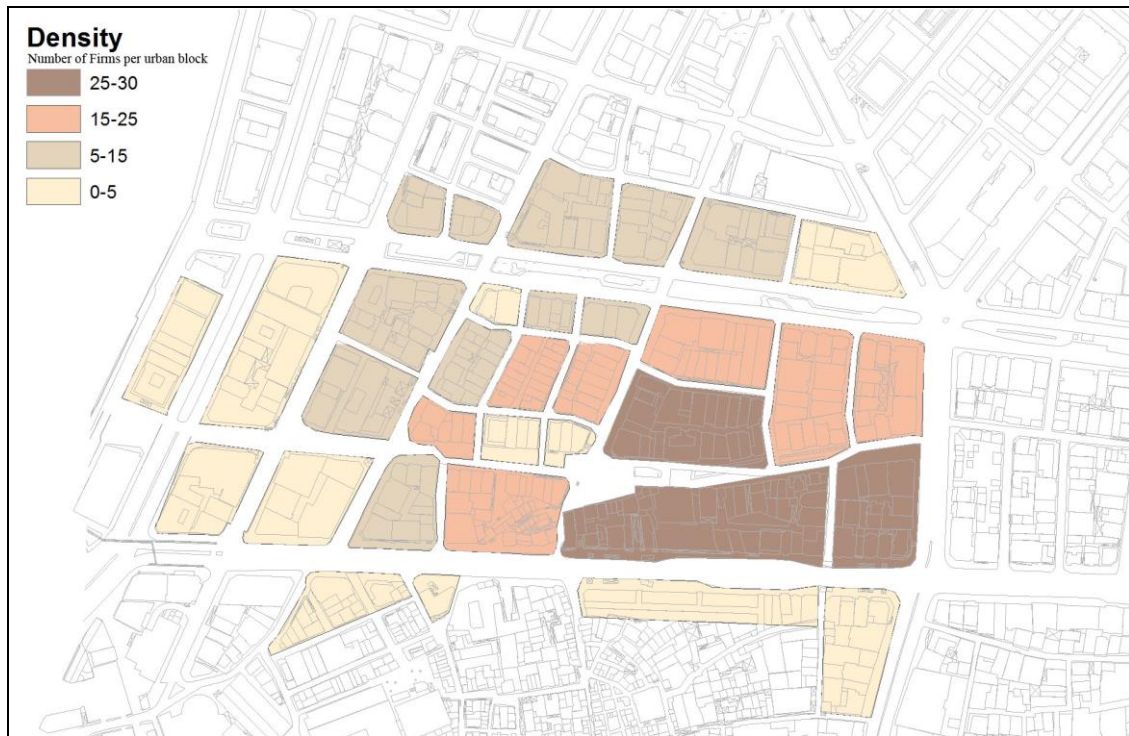


Figure 6.18. Density of Wedding Wear Firms

Distribution of wedding wear firms explored in the field study is given according to their positions at the following figures (Figure 6.19, Figure 6.20, Figure 6.21, and Figure 6.22). Each spot with numbers on top also present the other floors that they occupy at the given location. However, only their first floor positions have been marked at the given maps.



Figure 6.19. Distribution of Wedding Wear Firms for Ground Floors



Figure 6.20. Distribution of Wedding Wear Firms for 1st Floors



Figure 6.21. Distribution of Wedding Wear Firms for 2nd Floors



Figure 6.22. Distribution of Wedding Wear Firms for 3rd Floors and up

In addition to the firms, there are also suppliers which have very close ties with the sector. Within the study area, there are also 31 suppliers of buttons, yarns, fabrics, laces, beads which associated with the sector that illustrate the same distribution pattern (localities) with the wedding wear firms. As does the wedding firms, the suppliers are also situated in the core (central) spot in Mimar Kemalettin Fashion District (Figure 6.23).



Figure 6.23. Locational Distribution of Suppliers on Site

6.3. Descriptive Analysis of the Ecosystem

For analysis of the wedding wear cluster, each of all 266 firms located in different spots in Mimar Kemalettin Fashion District have been reached and requested for conducting the DICE survey with at the final field study. It has been found that, among 266 firms, only 28 of them are not manufacturers, but only engaged in wedding wear retailing have been excluded from the survey. Consequently, there have been 132 survey respondents which accepted to participate to the DICE survey (Figure 6.24).

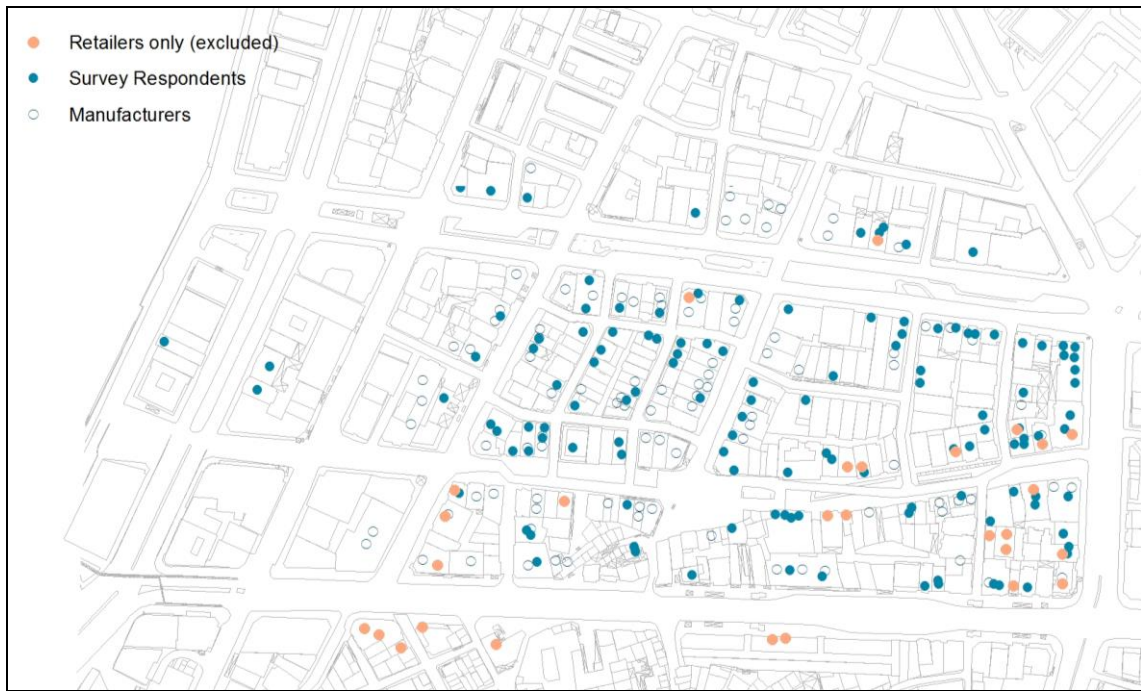


Figure 6.24. Map of Survey Respondents on Site

6.3.1. Diversity

For the diversity regarding the firms on the site; first, size and sectoral experiences of firms are considered. This consideration indicates only the manufacturer wedding wear firms. As shown at the graph, the capacity of these firms referring to the numbers of employees, the average size of firms is 12. The ecosystem represented by respondent firms here (with approx. 55% rate of return) contains 1675 workers. Except a relatively great manufacturer with 350 workers, the large companies generally vary between 40 - 80 workers who are engaged in diverse occupations (Figure 6.25). Firms are distributed homogenously on site in terms of their sizes based on their number of employees (Figure 6.26). Considering the life of the ecosystem here, the average of the firm experience on the site is 11 years. There are 27 relatively older firms which have been at the Mimar Kemalettin area for more than 20 years and their experiences change between 20 - 65 years (Figure 6.27). Older firms in the wedding wear sector are distributed along the major axis around Mimar Kemalettin fashion District, particularly along the Mimar Kemalettin Street (Figure 6.28).

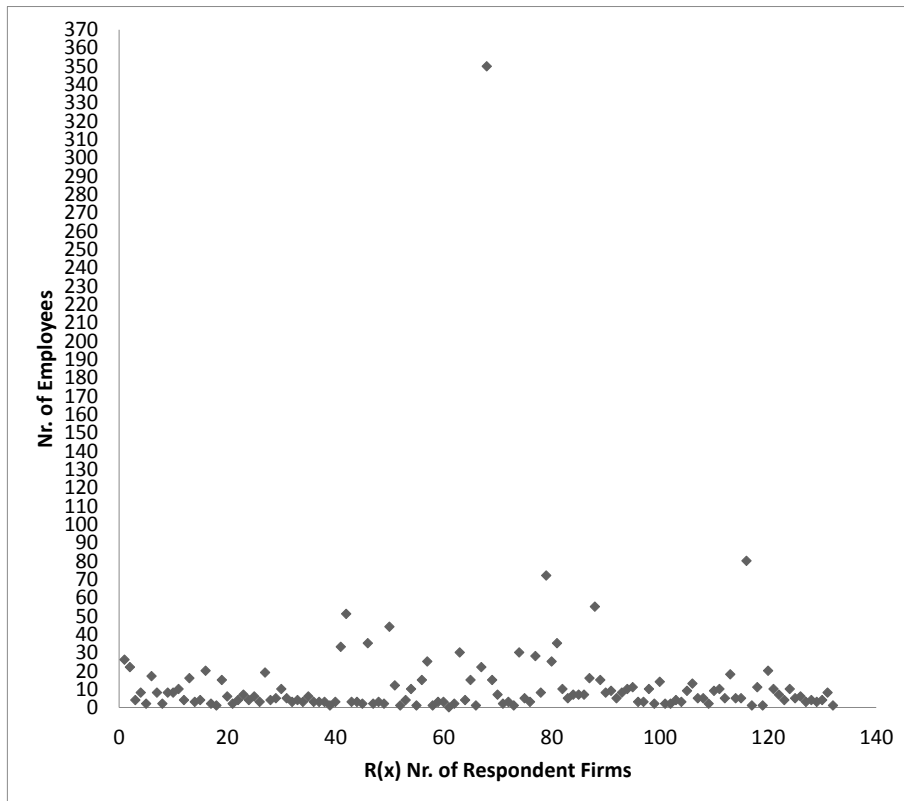


Figure 6.25. Sizes of Firms



Figure 6.26. Locational Distribution of Firms Sizes on Site

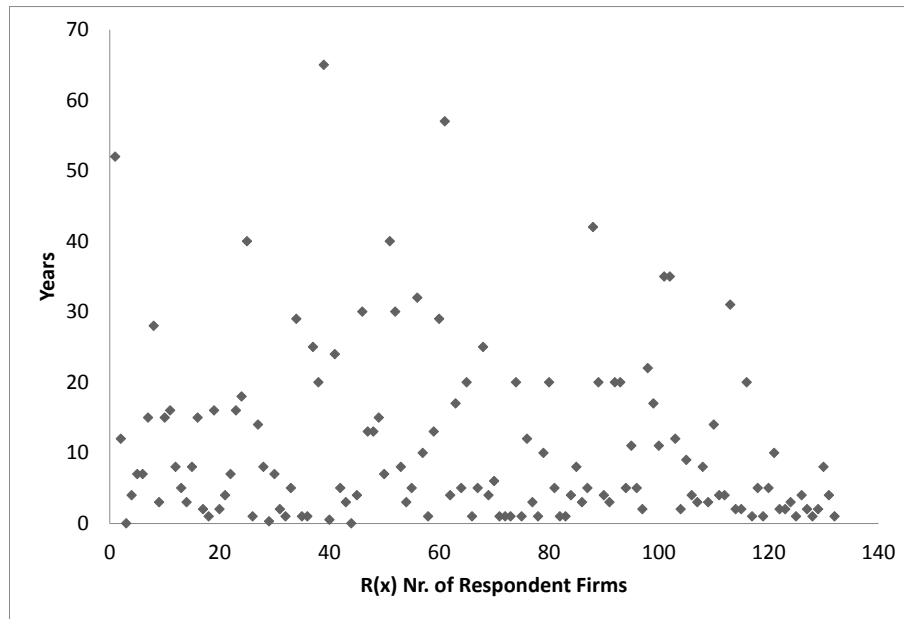


Figure 6.27. Experience of Firms in the Sector

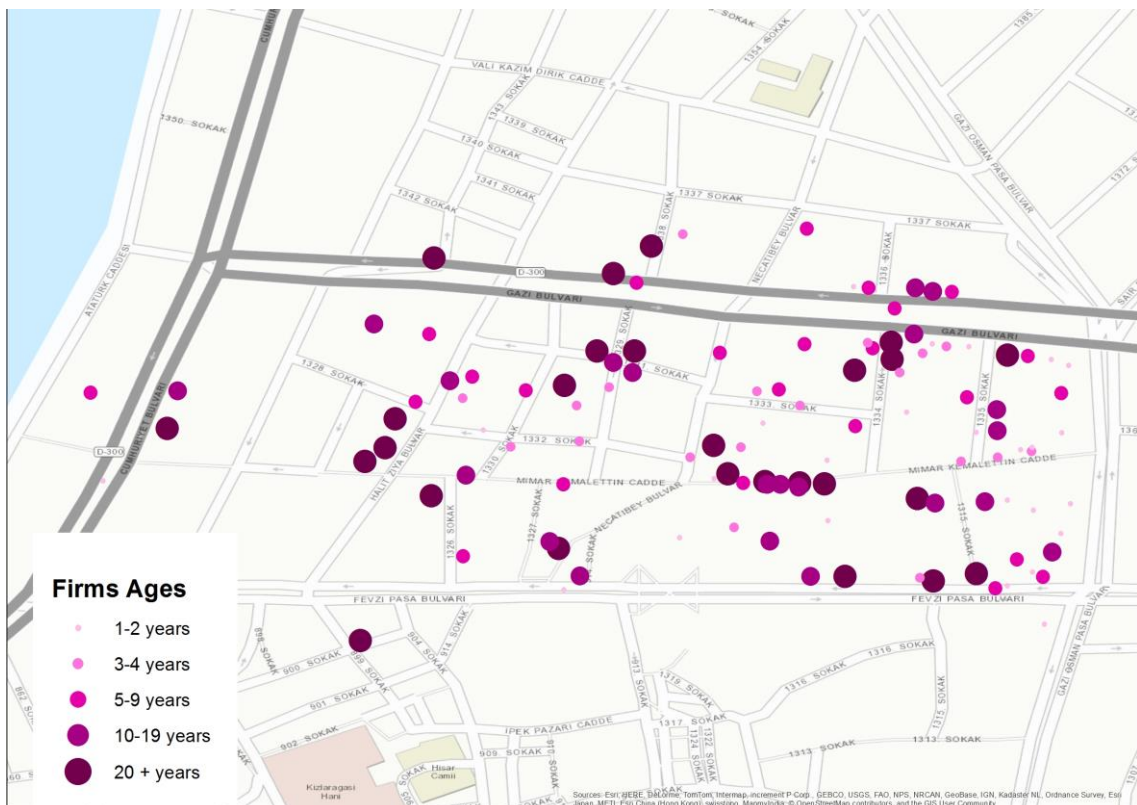


Figure 6.28. Locational Distribution of Firms Ages on Site

For the qualifications of firms in such ecosystem, as mentioned earlier chapter, the firms are characterized by manufacturers which mostly produce for their own brands. According to the graph illustrated below, 98% of firms manufacture for their

own brands while a very small proportion of them operate as an outsourcing firms that produce for other brands (Figure 6.29). Regarding certain certifications, more than half of the ecosystem is portrayed by firms of which their brands are patented (63%) and export operations are under registration (57%) (Figure 6.29).

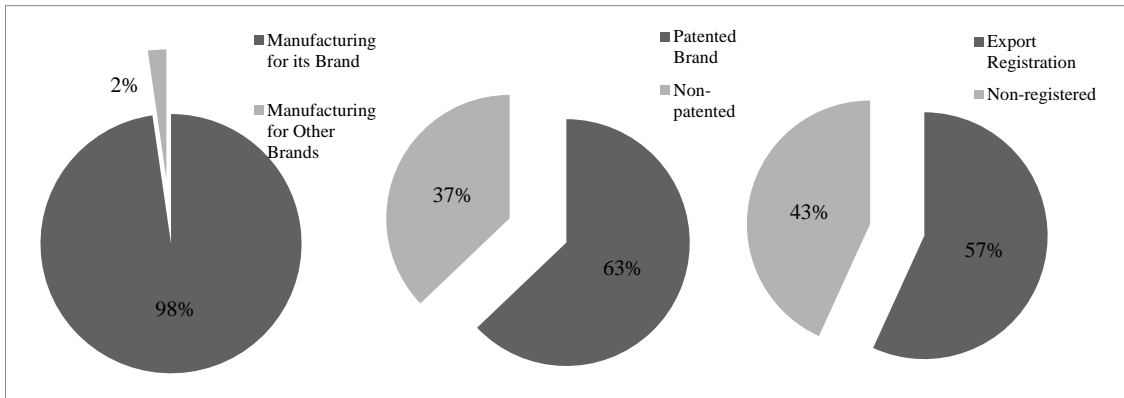


Figure 6.29. Qualifications of Firms

The site survey reveals that there are a great number of female workers in terms of the worker profile with the percentage of 82 % (Figure 6.30). Besides, only less than one third of the existing employees in firms are graduates. Especially, for the design background of workers hired as designers, the proportion of graduate designers is only 12% (Figure 6.30). Diversity of individuals based on their occupations indicates 16 different jobs in different proportions in firms (Figure 6.31). Among them, more than two-thirds of the firms hire cutters and mechanists, while craftsman, ironer, pattern maker, salesman, account and financial responsible and designer are employed more than half of the firms on the site (Figure 6.31).

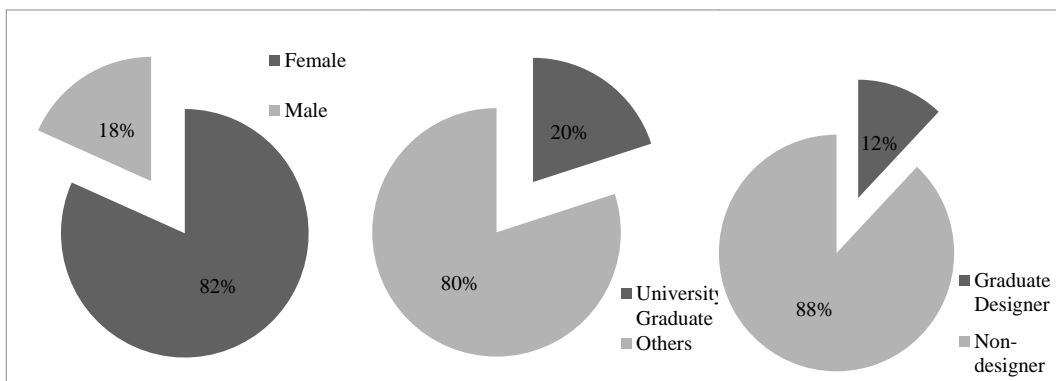


Figure 6.30. Worker Profile

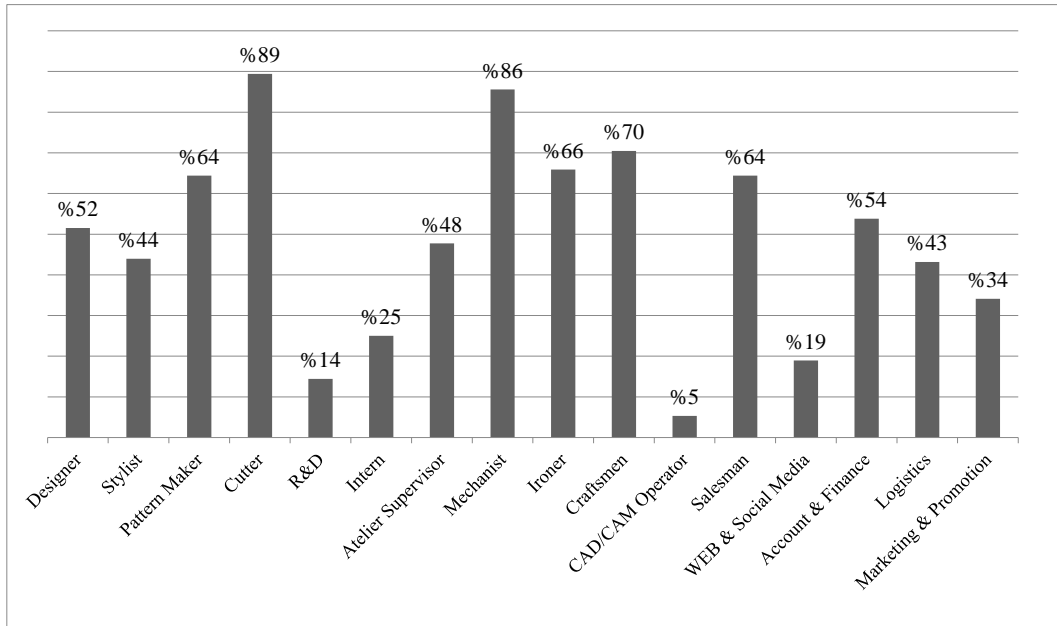


Figure 6.31. Occupational Distribution in Firms

For the product and manufacturing range that is associated with the consumer culture, abilities for creation variety have been explored from three different perspectives. First, majority of firms, i.e. 44%, strongly agree that they offer products and services mostly for customers with different incomes. Second, taste, and also ideology of choices in products that existing firms provide for the market also vary considerably and depends on a diverse group of people. 44% of the respondents are agreed that they manufacture wedding wears for different tastes and choices. Third, only 40% of them produce are disagreed that they produce unique products with the mean score 3.61 with standard deviation of 1.2. (Figure 6.32).

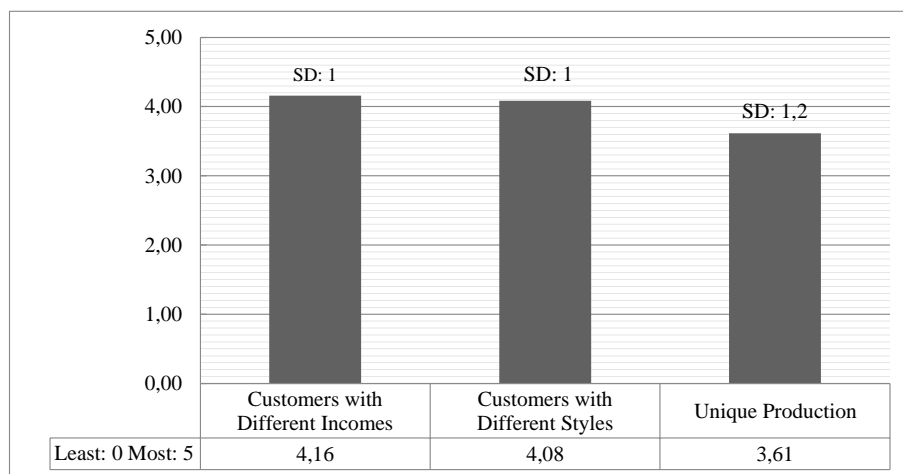


Figure 6.32. Abilities for Creation

6.3.2. Interaction

For the sharing of creative ideas and knowledge among firms through interaction in different scales, the following graph illustrates that relatively in-house sharing, in other words, internal interaction within firms are more excessive comparing to the current interactions with others within the ecosystem (Figure 6.33). However, the same graph shows that among external relations, national relations within the country with different wedding wear companies in different cities are also higher comparatively to the internationals. Also, considering the standard deviation of 1.2 for the international scale of interactions, firm characteristics vary; while some firms, i.e. 35%, report that they have good relations with foreign companies abroad, 32% of them have weak relations.

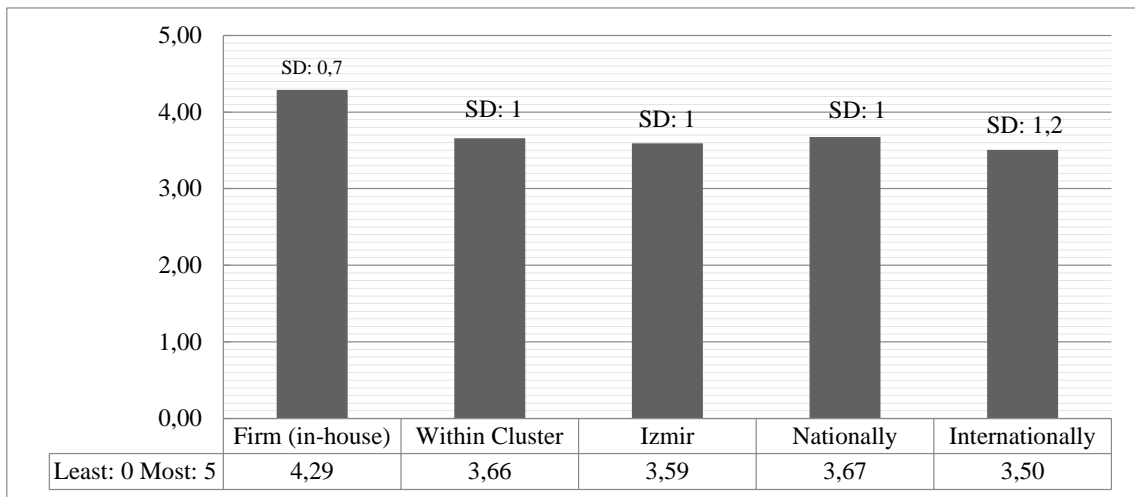


Figure 6.33. Different Scales of Interaction

In terms of the outcomes of internal and external interactions within firms with other wedding wear firms in the cluster, the interactions among workers in the same firm provide more contributions to firms themselves comparing with the external interactions with other firms as given at the below graph. Considering each queries, the improvement in variety of designs have been agreed the most and, secondly, the enhancement in design quality of wedding wears manufactured by firms have been realized through both the through internal and external interactions (Figure 6.34).

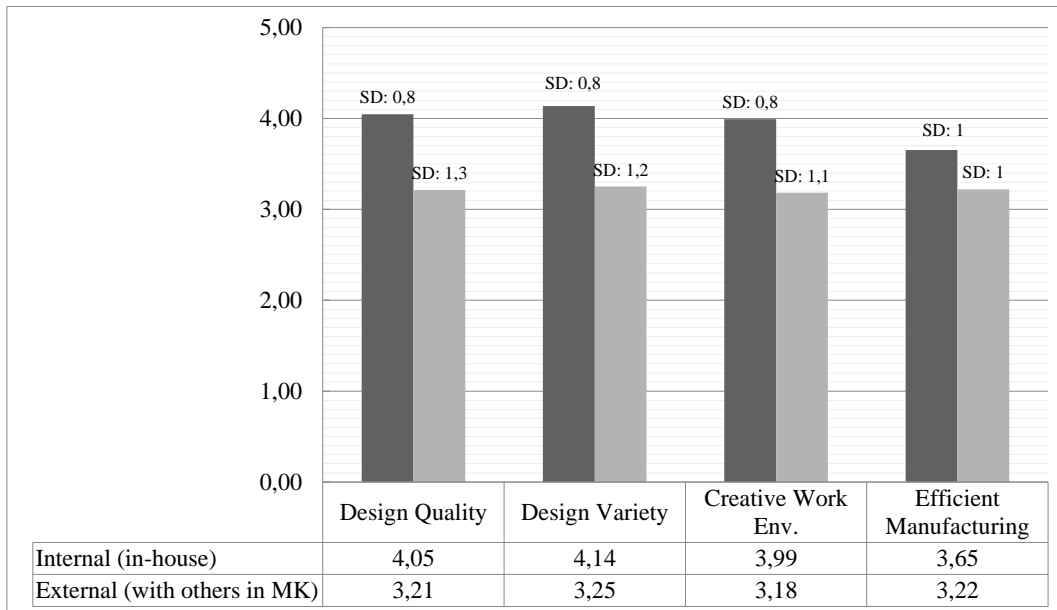


Figure 6.34. Outcomes of Internal and External Interaction

For knowledge and creativity sharing and exchange with others, firms have reported better communications within the cluster as given at the graph (Figure 6.35). According to the survey results; especially the different of degree of sharing between inside and outside the cluster is relatively great in terms of the knowledge exchange that indicates the issues of manufacturing that refers to the textiles, materials and production methods, and of current conditions, needs and demands of the wedding wear sector (Figure 6.35).

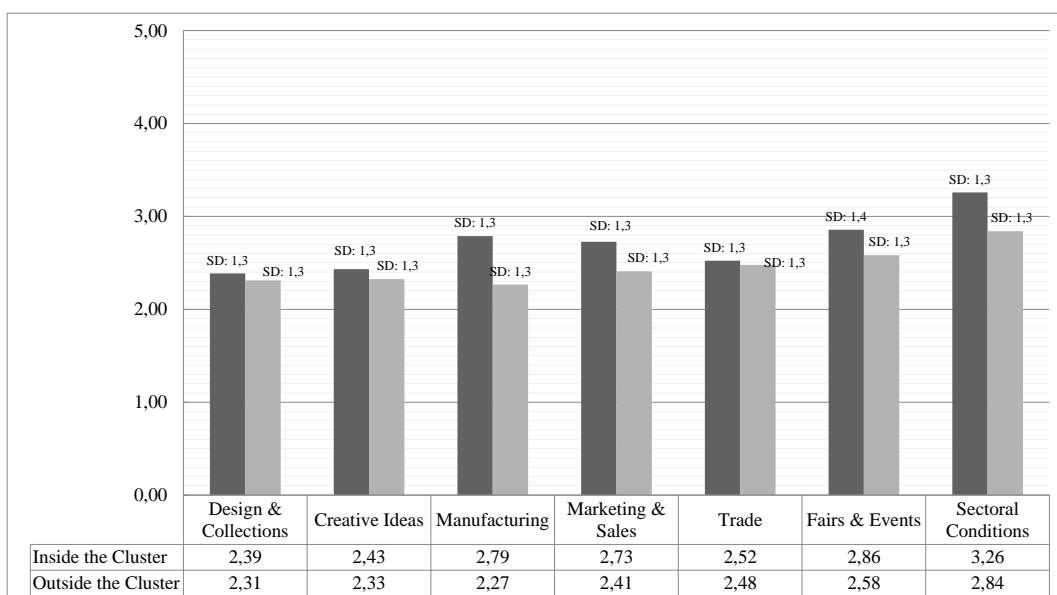


Figure 6.35. Knowledge Exchange around the Cluster

Specifically for the internal interactions within the ecosystem, in order to keep up to date and get informed about the recent sectoral developments in the cluster, face-to-face relations are employed the most as a medium. Following, the fairs and relations with other firms are agreed in terms of providing information flow to firms considerably. However, comparing to other mediums, the role of Mimar Kemalettin Association and the contribution of leisure times to to talk about the current conditions of the sector in this ecosystem are relatively disagreed (Figure 6.36). For the external interaction outside the ecosystem, particularly the interactions with the other sectors and (or) creative industries, the accessories are agreed as a sector mostly interacted with. Following, magazines and journals related to the sector, photographers and fashion designers are agreed to currently being engaged in by the existing wedding wear firms (Figure 6.37).

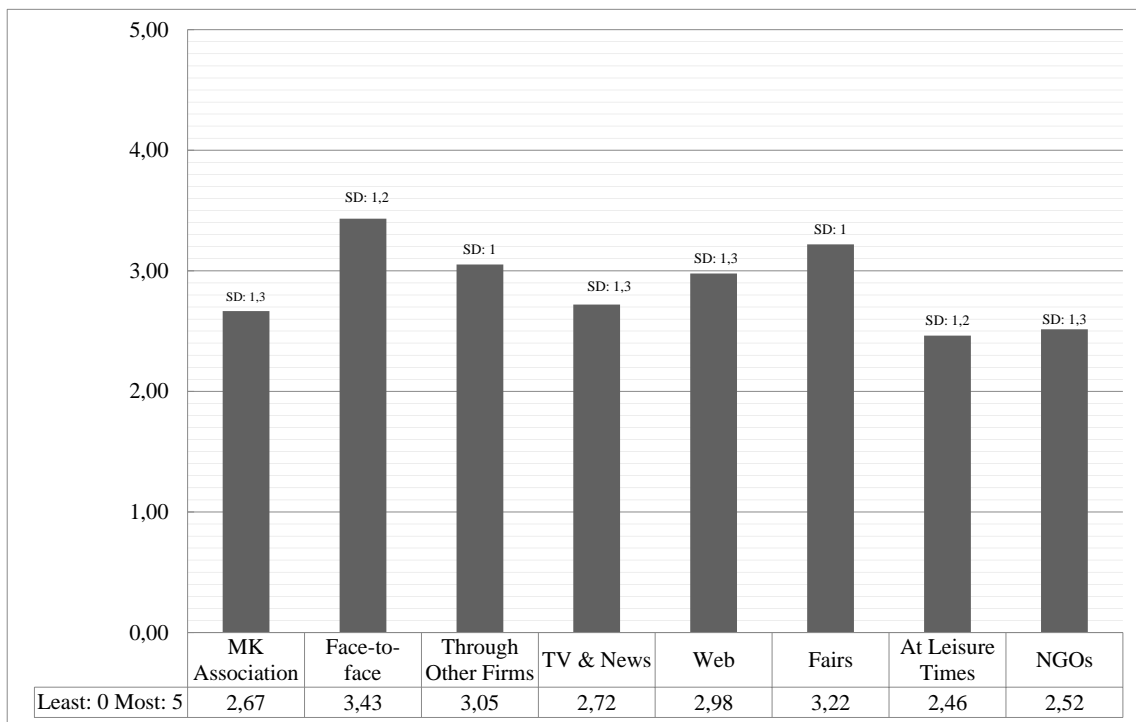


Figure 6.36. Mediums of Interaction for the Cluster

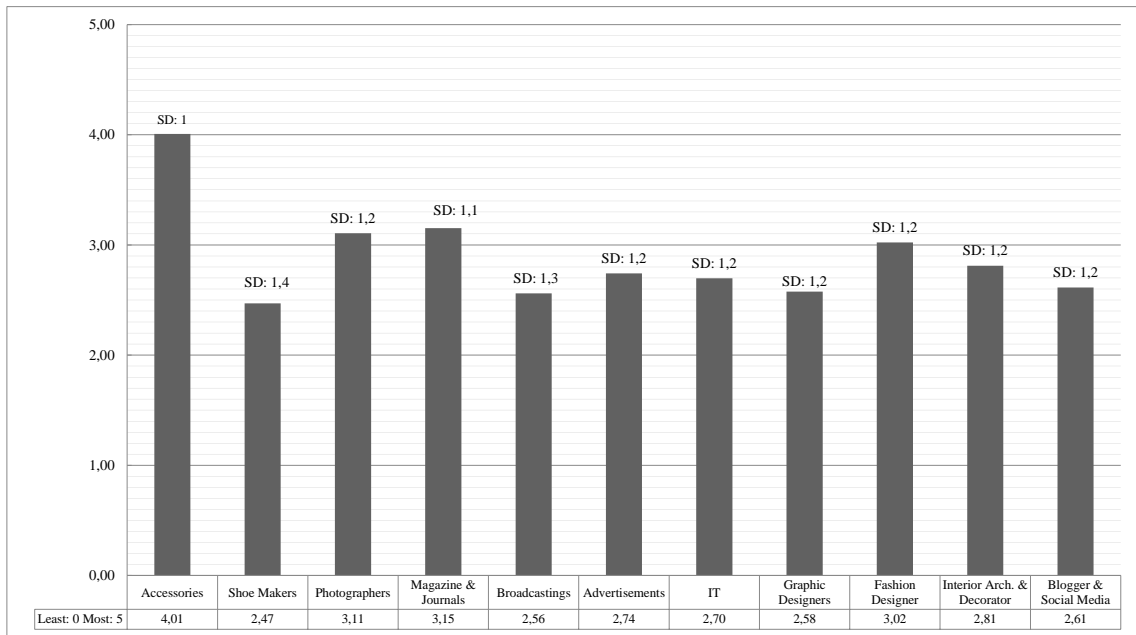


Figure 6.37. External Interaction with Other Industries

Specifically, for the fairs as a crucial medium of external interactions outside the cluster, the respondents are mostly agreed on their roles to build mostly the new business relations and create new contacts as well as provide new sales and trading opportunities. Their role in creating design awareness for the firms is comparatively minor (Figure 6.38).

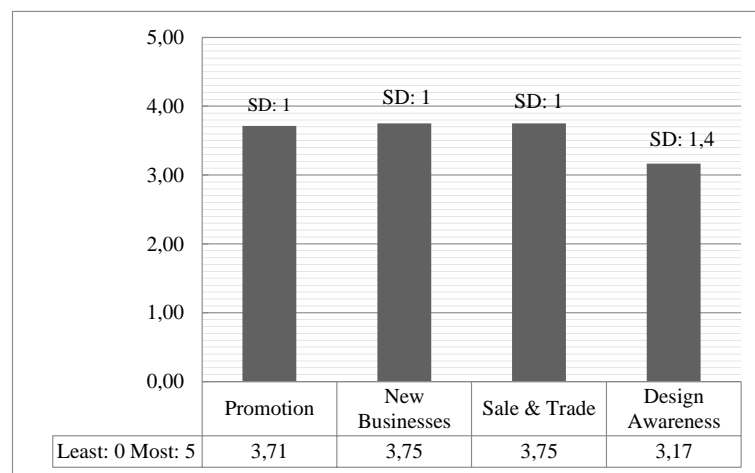


Figure 6.38. The Role of Fairs as External Interaction

In addition, the service that outsourced by more than half of the firms from outside the cluster as external interactions is the photoshooting staff and equipment. On the other hand, design consultancy (14%) that indicates creative ideas and knowledge of

professional designers outside the sector, and also the trend search (2%) which is vital for trend forecasting about the wedding wear design of the upcoming years are not demanded by the majority of firms (Figure 6.39). In terms of the mediums, the use of internet and present fairs are very often used to reach the customers. However, the advertisement and promotion modes as well as the existing connections of the non-governmental organizations with the market that are related to the wedding wear sector are relatively less employed by firms (Figure 6.40).

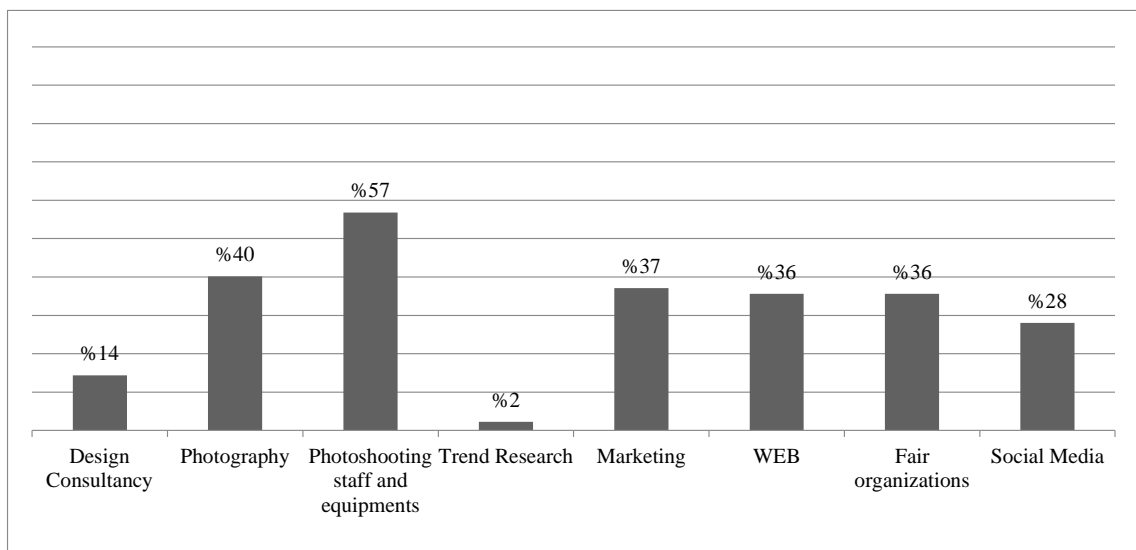


Figure 6.39. Services Outsourced by Firms

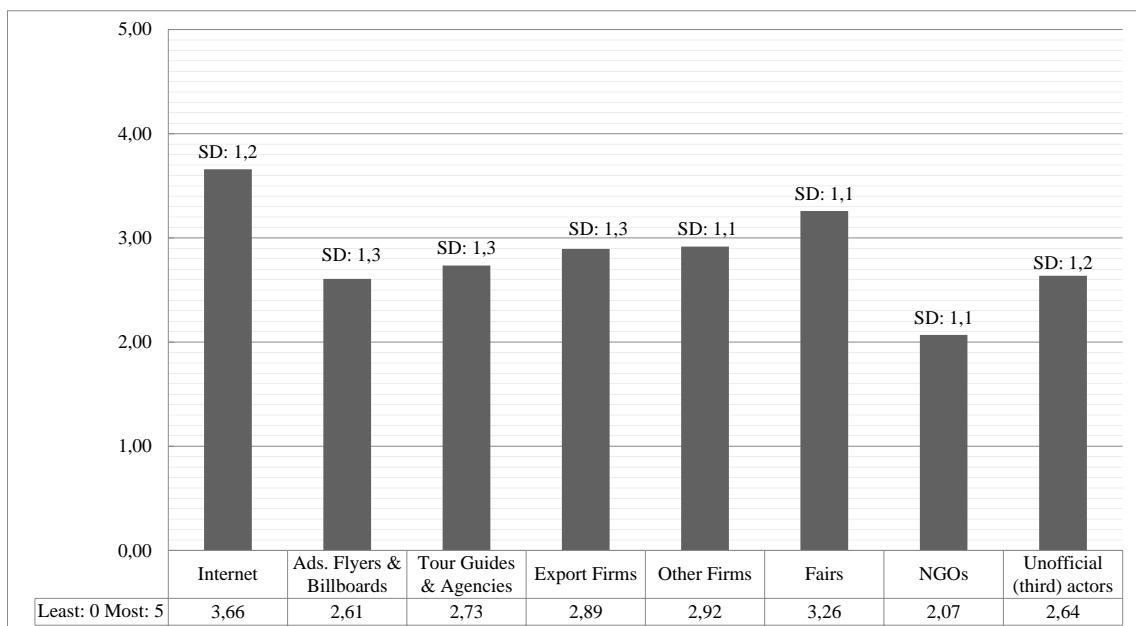


Figure 6.40. Mediums of Interaction with Customers

6.3.3. Competition

According to the responses retrieved from the site, the advertisement and promotion of firm itself through shows, fairs and fashion weeks appear as the mostly agreed medium among respondents to be competitive in the market. In addition to that, the fairs held in Turkey and in abroad create opportunities for firms in terms of the competition. Relatively, keep track of the design and collections of other wedding wear firms have been reported as rarely employed (Figure 6.41).

In terms of the collaborative competition, collaborations are less matter in this ecosystem. Yet, regarding the different scales of the collaborations, the collaborations with foreign wedding wear companies are more important comparable to the collaborations with the other firms in the cluster (Figure 6.41). The respondent firms are agreed on having direct confrontation for common resources or values so that they compete win-lose situation that describe both the competition within the cluster and the other wedding wear firms in Izmir (Figure 6.42). Win-lose situation, rather than sharing common resources or values while they compete, firms are agreed on there is a conflictive competition among firms.

On the other hand, despite the firms are agreed on they are open to the firms in the district; mutual trust, an element of collaborative culture emerge as an issue in this ecosystem due to the responses, is undecided among respondents with standard deviation of 1.2 (Figure 6.42).

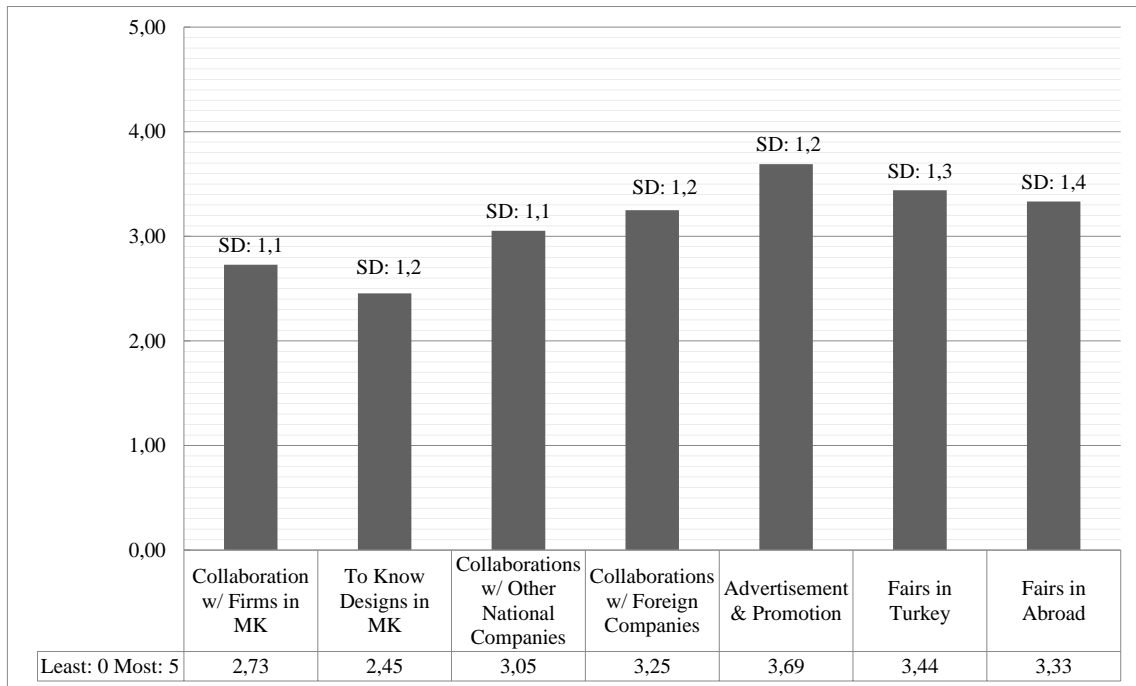


Figure 6.41. Needs for Sectoral Competition

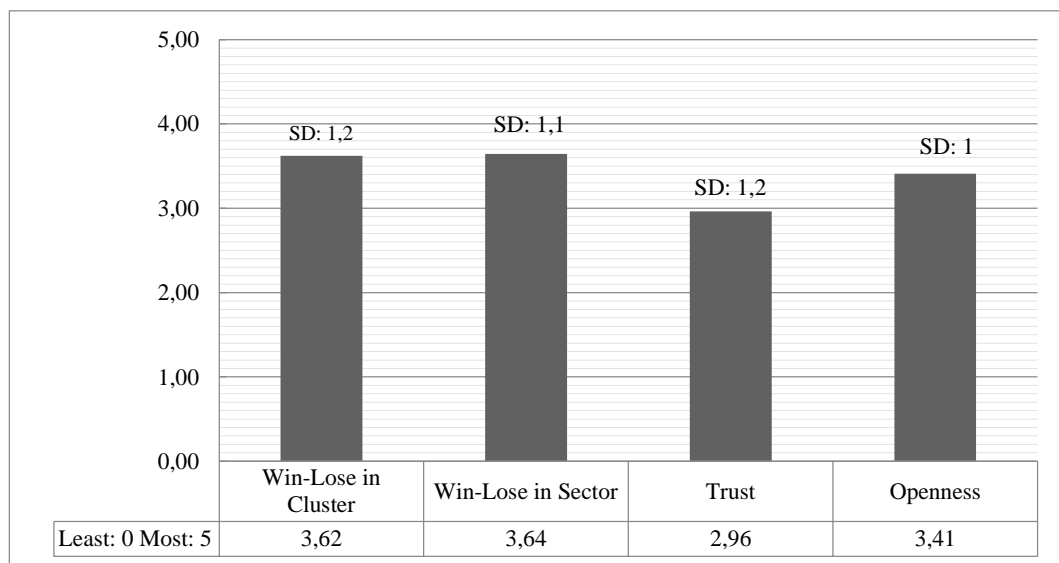


Figure 6.42. Collaboration and Confliction

6.3.4. Evolution

For analysis of the firm-based development attempts and evolution dynamics that firstly refers to the changes and investments in human capital as mutation, the survey shows that more than half of the firms have enabled their employees to take the pattern maker and design training (Figure 6.43). According to the analysis below,

regular sectoral visits and participations to the fashion and wedding wear fairs as well as sectoral tours to the other manufacturing firms in Turkey are also substantial. However, the survey shows that the attempts for keeping track of international developments and sectoral environment as well as foreign language training as a communication medium are relatively low. Additionally, the technical operative training of computer-aided manufacturing is the least common attempt comparing to others (Figure 6.43).

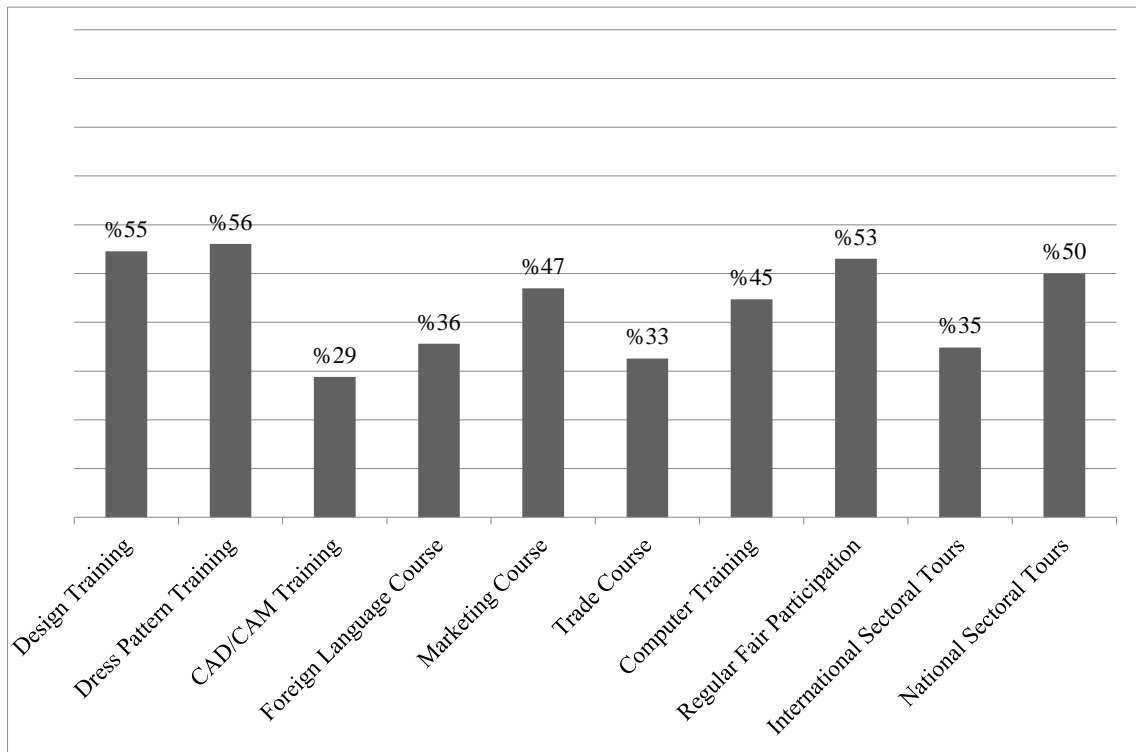


Figure 6.43. Attempts for Development and In-house Development

In terms of the development attempts through mutation mentioned above, the major outcomes indicates national new networks, competitiveness, increased sales, knowledge mutation among workers with share and exchange, knowledge accumulation within firms, international new networks and increased trade activities. Comparing each outcome with each other's; firms have reported that new connections and networks through other wedding wear firms in the country have emerged the most. Following, new designs and collections different from the other firms as well as their sales have been increased as well (Figure 6.44)

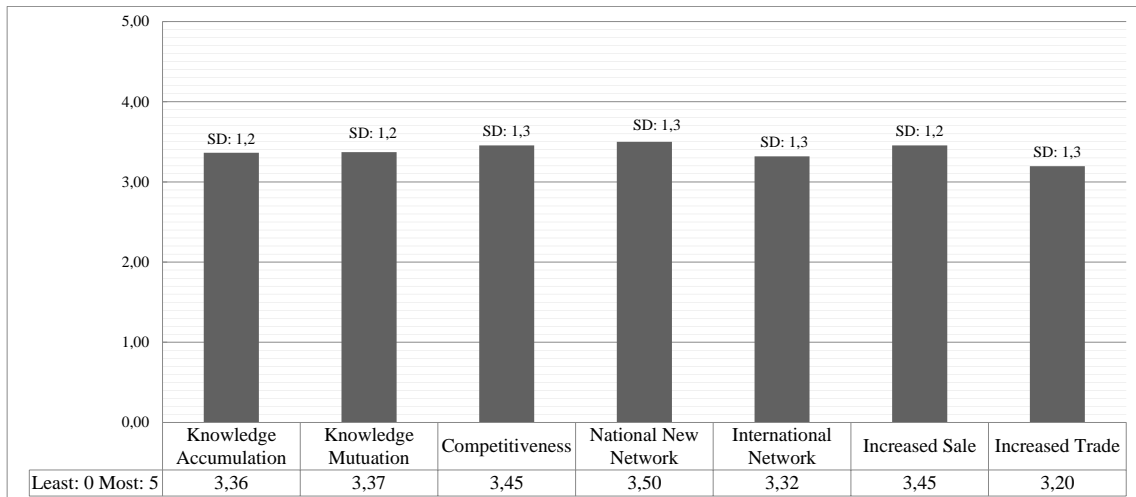


Figure 6.44. Outcomes of Mutation and In-house Development

In terms of knowledge crossover through hiring employees who has experience in the sector, there is a different degree of benefits coming from inside and outside the cluster. The knowledge crossover through inside the cluster is greater than from the outside (Figure 6.45). Comparably, from the same environment, experienced in the cluster, the respondent firms are mostly agreed on that the most beneficial aspect of the hiring a new employee contributes considerable to firms in terms of better designs and collections. That also provides increased sectoral knowledge transfer to firm through a new employee and also results in more efficient wedding wear manufacturing. Besides, the increase in the number of customers has been agreed through arrival of new employee hired from the cluster. From outside the cluster, new employee who is experienced in the sector but in different localities, is undecided with the standard deviation of 1.2 for its major contribution to firms about sectoral knowledge according to the survey results (Figure 6.45).

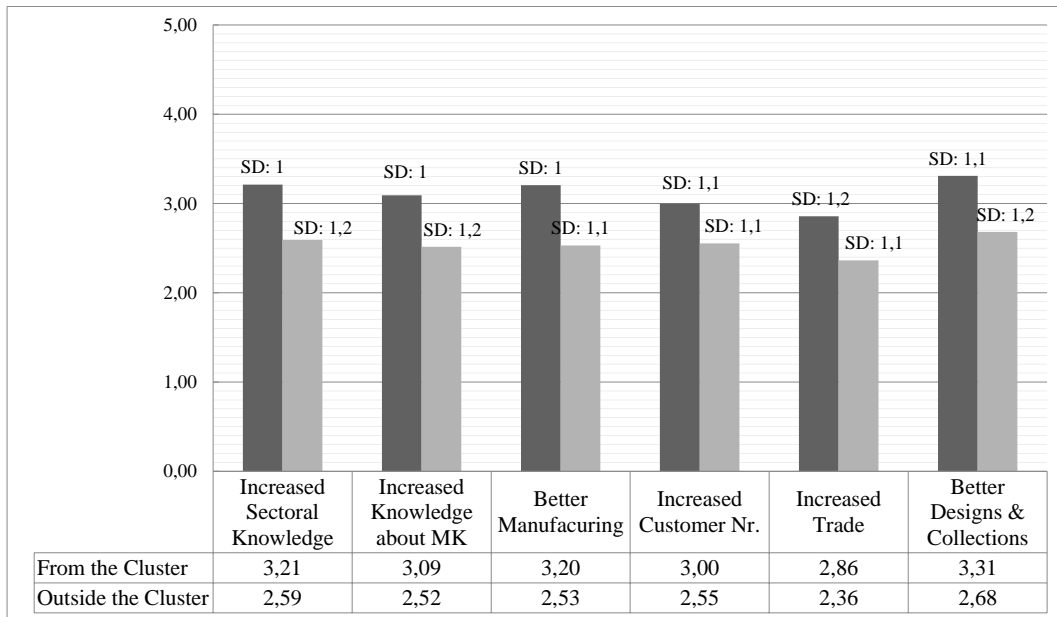


Figure 6.45. Knowledge Crossover through Hiring

For research and development as major drivers of evolution of ecosystem, firms are agreed on that they follow up the new sectoral developments and externalities through new technologies and developments in products and materials such as new fabrics and textiles as well as through market and trend research for demands and forecasting in the wedding wear. However, the e-commerce opportunities that are widely available to customers nowadays are available in very limited extents (Figure 6.46).

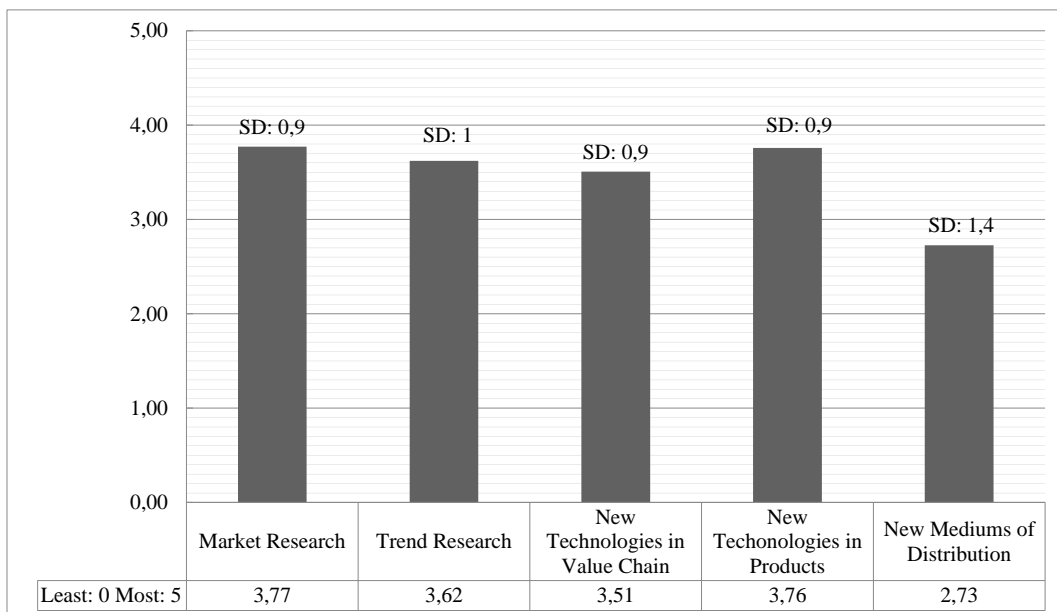


Figure 6.46. Research and Development for Evolution

For the first set of questions concerning the integration to the changing environment in order to survive in an evolving external environment, first, firms mostly are agreed with standard deviation of 0.8 on the positive aspects of establishment of the district as a fashion district and its branding. They also are agreed on the contributions of the physical planning efforts made in the early 2000s that transformed the area (Figure 6.47). For the second group of questions, firms are slightly agreed on their attachment to the district. On the other hand, the same respondent ratio has been calculated from the survey that, firms are undecided on the togetherness with related sectors; in case of a future top-down intervention for replacement, firms are only slightly undecided with standard deviation of 1.2 that they can adapt to new places (Figure 6.47).

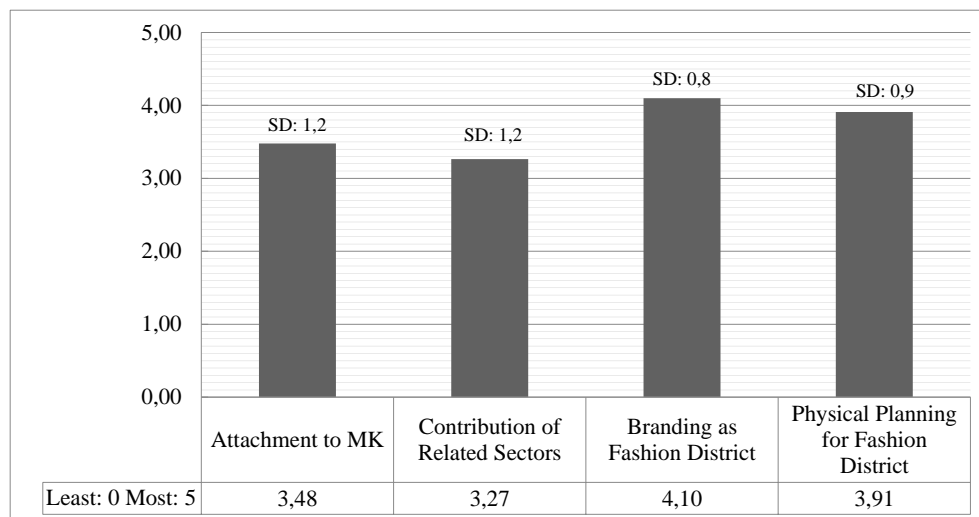


Figure 6.47. Integration and Adaptation of Firms to the Ecosystem

6.3.5. Spatiality of the Ecosystem

The spatial environment that contains both the manufacturing and retailing activities in this ecosystem, the survey results show that 80% of respondent firms conduct manufacturing activities within this cluster. Only 20% of them locate manufacturing process in some other localities, yet still are located in this ecosystem with retailing and wholesaling processes of their value chains (Figure 4.48). Yet, conducting the retailing activities in the district is more common among firms comparing to the manufacturing activities that also locate in other part of the city.

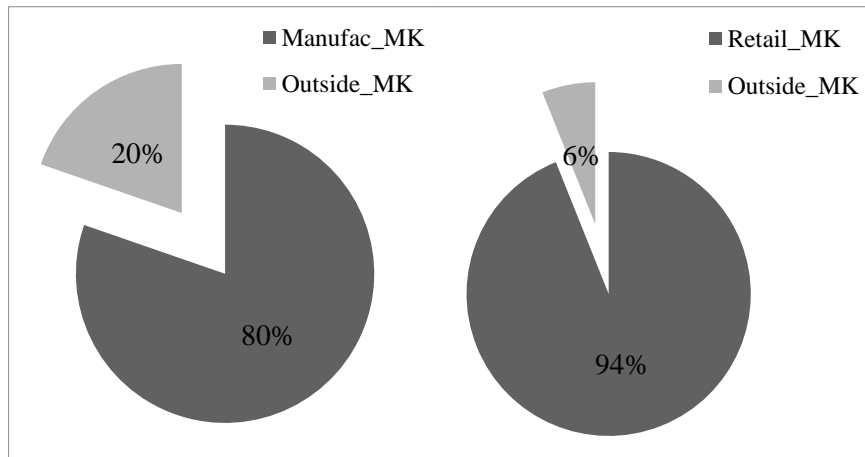


Figure 6.48. Comparison of Manufacturing and Retailing Activities

The spatial environment that contains the ecosystem of the cluster regarding its interactions, the concept of spatial and non-spatial dynamics has been interpreted from the particular interaction queries. In this respect, approximately 20% of firms are excellent at the face to face interaction while only small number of them is poor at such communication method (Figure 6.49).

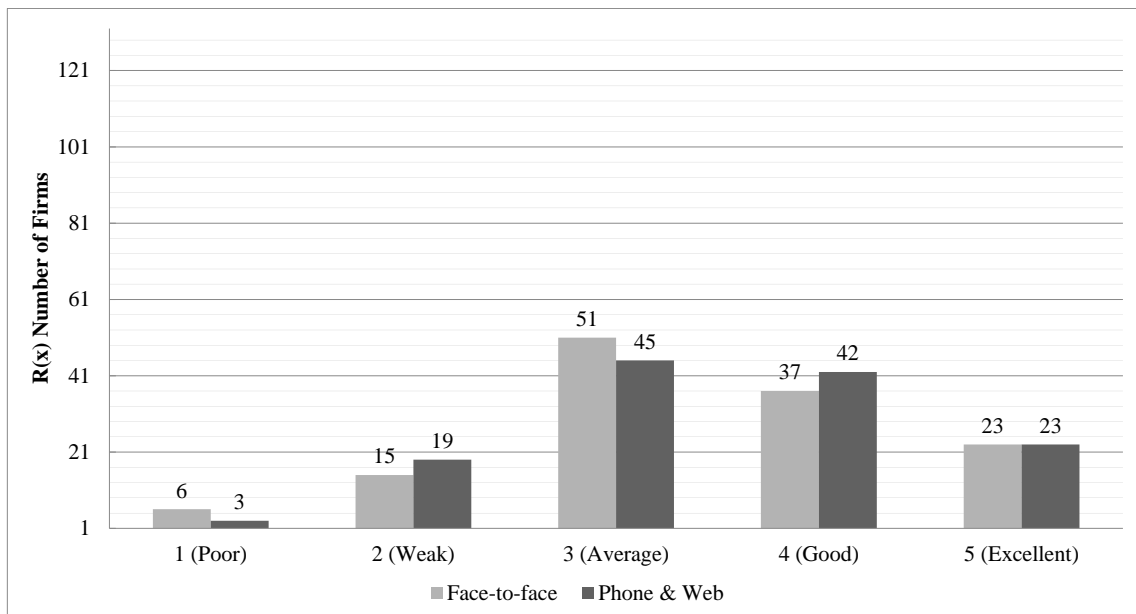


Figure 6.49. Spatial and Non-spatial Interaction with Other Firms

Locational distributions of firms in terms of their use of face-to-face interactions on site illustrate a relatively homogenous structure in general. Yet, the more densely populated part of the area indicates more face-to-face relations (Figure 6.50).

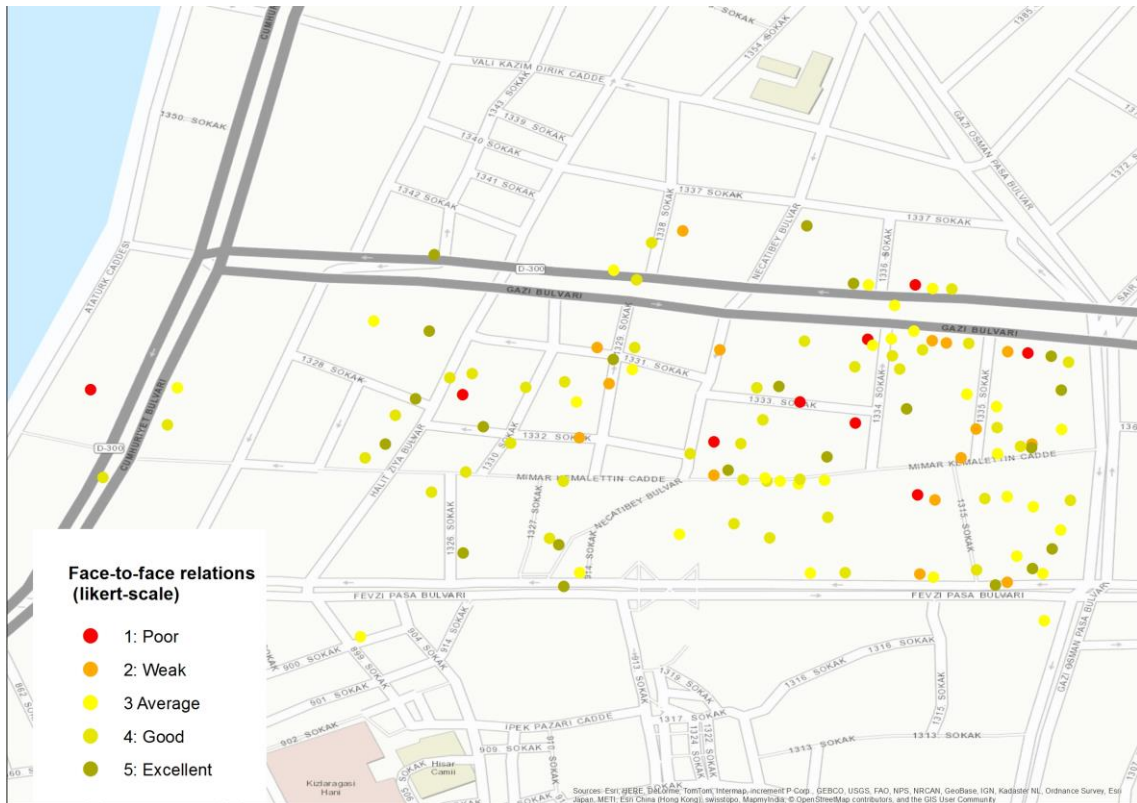


Figure 6.50. Locational Distribution of Face-to-Face Relations on Site

Despite the average use of face to face relations mostly, the use spatial proximity due to the presence of this cluster is considerably significant with the percentage of 84% (Figure 6.51).

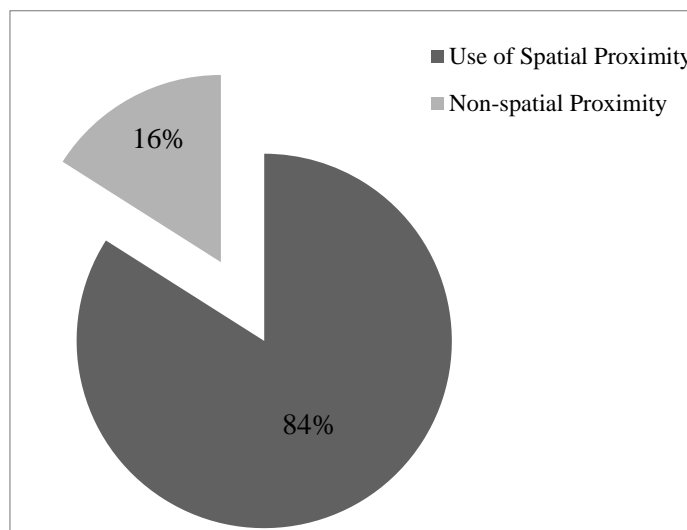


Figure 6.51. Need for Proximity on Site

In terms of the rationale behind such sectoral clustering and the reasons of why wedding wear sectoral cluster and the advantages, the below graph illustrates that firms are slightly agreed on the proximity of the outsourcing companies and wholesalers to this ecosystem is advantageous. That is followed by the competitive environment among the same sector firms and their evolutions and developments depending on each other. Comparably, the contribution of the presence of the NGOs and Association engaged in this sector as well as the openness of the firms to others in this sector has been found limited (Figure 6.52).

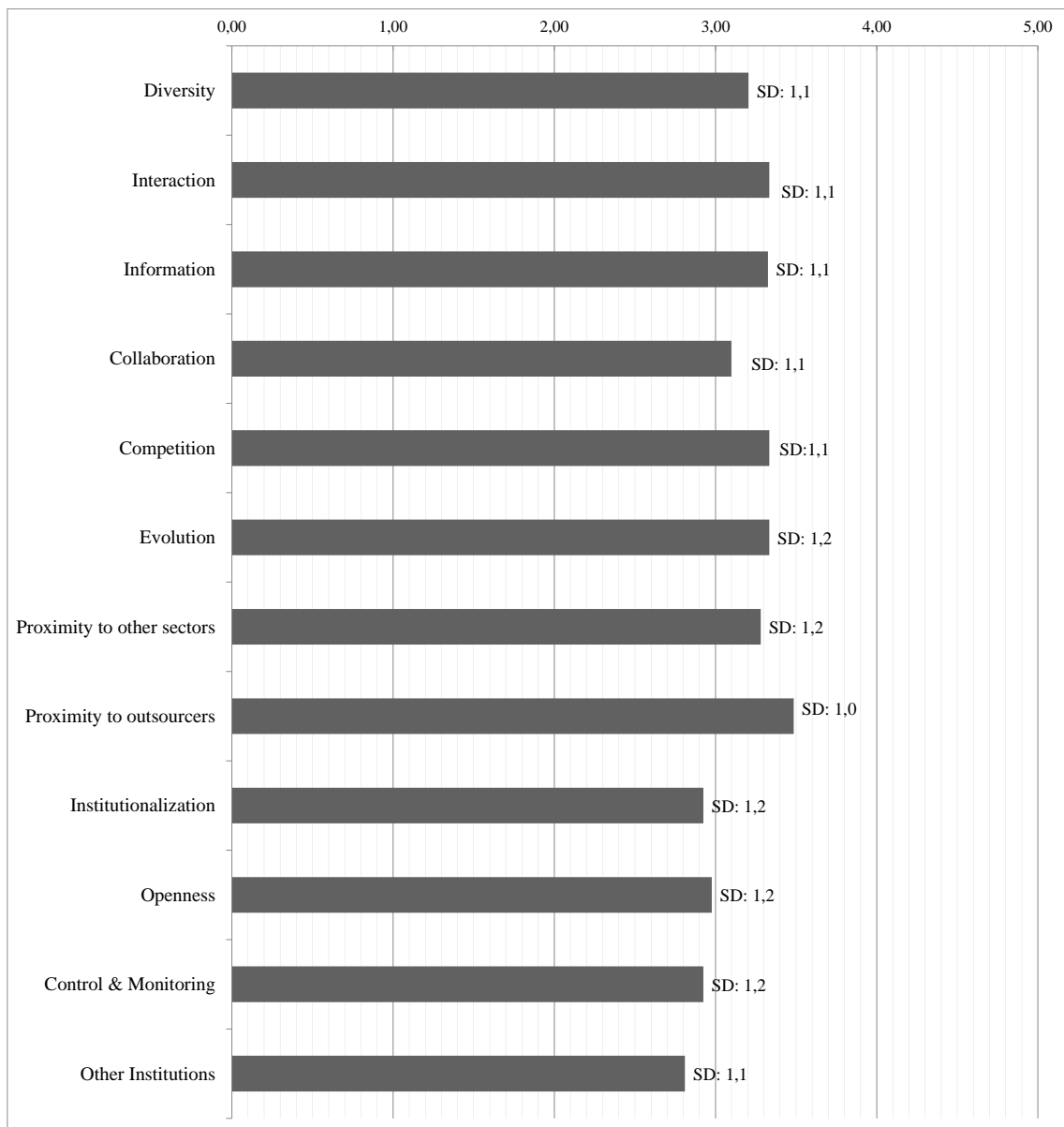


Figure 6.52. Rationale of Sectoral Clustering

On the other hand, the rationale of such clustering occurred particularly in Mimar Kemalettin Fashion District has been found related to several geographical proximities. Almost all the firms are agreed on with the same standard deviation of 0.9 the reason of the proximity of the area to the Izmir International Fair, and to other wedding wear firms within the area. They also are agreed on the role of the fashion district as competitive advantage in the sector. Besides, most of the respondent firms are agreed on that many leisure activities are available within the city due to its central location of the cluster. The least advantages of such clustering in this given environment are its proximity to the bus terminal and to the airport since they are reported as only fair by the respondents (Figure 6.53).



Figure 6.53. Rationale of Physical Clustering

The spatiality of this ecosystem that concerns the planning of the environment and its architectural assets has been investigated in relation to the customer retention, needs and creative atmosphere. According to the survey results firms, almost many firms are agreed on the attractiveness of the environment to grasp the customer attention. Following, most of them are however undecided about that the physical environment on the site contribute to the creativity of the wedding wear firms and their workers (Figure 6.54). Lastly, in terms of the current obstacles related to the spatial environment in this cluster, the major problem appears as parking, the lack of green

space, the inadequate infrastructure and the lack of leisure time activities and spaces. The survey results illustrate that the waste, security and the cleaning are the least issues among others (Figure 5.55).

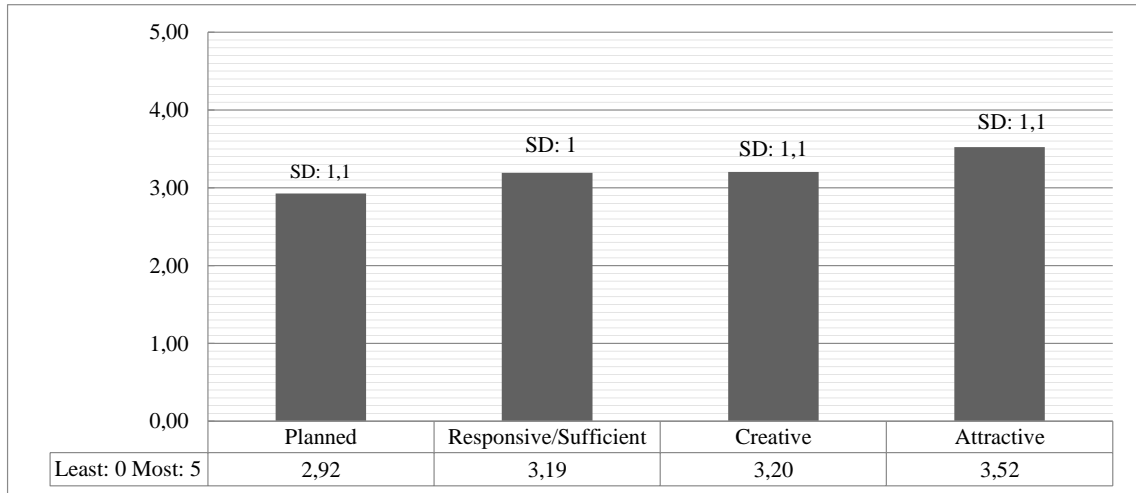


Figure 6.54. Planning of the Spatial Environment

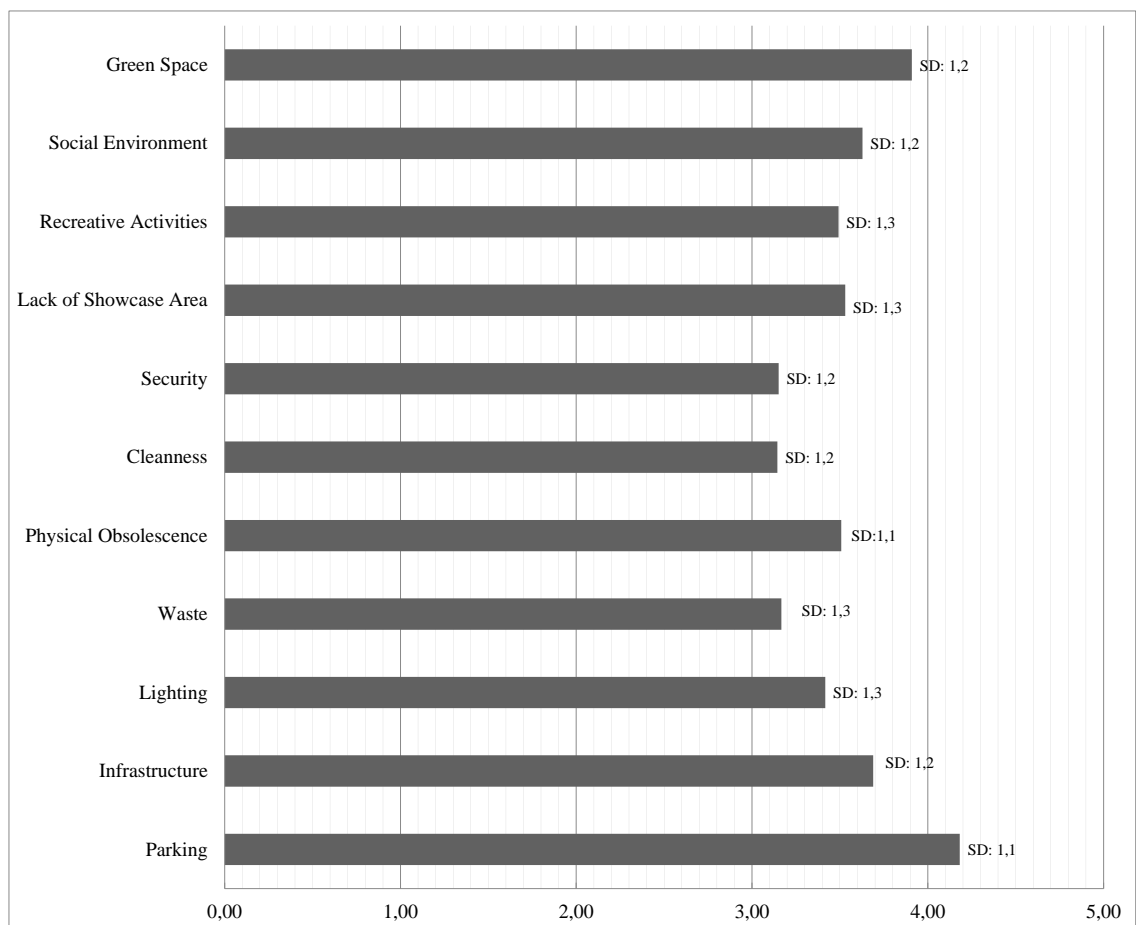


Figure 6.55. Obstacles of the Spatial Environment

6.4. Regression Analysis for the Ecosystem

In order to understand the relations in the DICE model components that has been employed for investigating the ecosystem of wedding wear cluster in Mimar Kemalettin Fashion District, the following general regression model has been considered;

$$Y_i = \alpha + \beta_1 X_{1,i} + \beta_2 X_{2,i} + \dots + \beta_n X_{n,i} + e_i$$

And Y represents the dependent variable and set of $\{X_1, X_2 \dots X_n\}$ denotes a class of independent variables. In the regression equation, e represents the error terms which are assumed as normally, identically and independently distributed residuals. i represents the index of firms in the regression, $i=1, \dots, 132$. *R-squared* represents to what extent the model explains the variability of the response data around its mean. The number of observations (N) is 132. We regress the dependent variables on the set of independent variables. Hence, we estimate 7 regressions in total.

Their definitions and units of measure are provided as follows (Table 6.2);

Table 6.2. Regression Analysis for the Relations of the DICE Components

Dependent Variables	Definition	Unit of Measure
Int_1	Internal interaction	Likert scale 1 to 5
Int_2	External interaction	Likert scale 1 to 5
Comp_1	Collaborative competition	Likert scale 1 to 5
Comp_8	Conflictive competition	Likert scale 1 to 5
(Evol_11 ... Evol_17) Average	Mutation	Likert scale 1 to 5
(Evol_18 ... Evol_23) Average	Cross-over from the cluster	Likert scale 1 to 5
(Evol_24 ... Evol_29) Average	Cross-over from outside the cluster	Likert scale 1 to 5
Independent Variables		
Designer Employment Outsourced Design Consultancy	The role of design	Likert scale 1 to 5
Org_3 Org_4	Firm characteristics	1-0
Org_1 Org_5 Org_6		Nr.
Int_1 Int_3 Int_4 Int_5		Scales of interaction
Int_6	Geographical proximity	Likert scale 1 to 5
Int_32 Int_33	Mediums of interaction	Likert scale 1 to 5
Comp_1 Comp_3 Comp_4	Scales of collaboration for competition	Likert scale 1 to 5
(Evol_1 ... Evol_10) Total	Attempts for evolution	1-0

(cont. on next page)

Table 6.2. Regression Analysis for the Relations of the DICE Components (cont.)

Independent Variables	Definition	Unit of Measure
Cluster_1 Cluster_2 Cluster_3 Cluster_5 Cluster_6 Cluster_7 Cluster_8	Benefits of sectoral clustering	Likert scale 1 to 5
MK_1	Spatial clustering for proximity	Likert scale 1 to 5

The results of the first one, which attempts to explain the determinants of internal interaction of firms, are summarized in the table below;

Table 6.3. Regression Analysis for the Internal Interaction

Independent Variables	β Coefficients	P-value
constant	2,788***	0,000
Designer_Employment	-0,003	0,980
Outsourced_Design_Consultancy	-0,495***	0,008
Org_1	-0,001	0,914
Org_3	0,129	0,304
Org_5	0,001	0,679
Org_6	-0,375	0,227
Org_7	0,901***	0,007
Int_2	0,073	0,365
Int_3	0,127	0,166
Int_4	0,176*	0,075
Int_5	0,112*	0,067
Int_6	-0,077	0,216
Int_32	0,005	0,929
Int_33	0,134*	0,070
Comp_1	-0,059	0,343
Comp_3	-0,162*	0,095
Comp_4	0,108	0,227
Evol_Attempts	-0,011	0,560
Cluster_1	0,092	0,252
Cluster_2	0,253**	0,020
Cluster_3	-0,159	0,112
Cluster_5	-0,238***	0,007
Cluster_6	0,169*	0,054
Cluster_7	-0,036	0,688
Cluster_8	-0,039	0,625
MK_1	-0,063	0,364
N=130		
R_Squared	0.56	

*** represents significance at 1%, ** at 5 %, * at 10 %

Several variables are found to affect the internal interaction of firms significantly. First, Outsourced_Design_Consultancy variable has a negative and significant coefficient at 1% significance level. It means that the firms which outsource

the external designer or acquire design consultancy outside the organization are likely to have less internal interaction within the firm. Second, the variable Org_7 has a positive coefficient as well. The ones which have higher rate of designer employment include more internal interaction inside their firms.

On the other hand, Cluster_5 variable has a negative and significant coefficient at 1% significance level. The firms of those see the competitiveness as an advantage of the sectoral clustering in this ecosystem are likely to have less internal interaction inside their organizations. Forth, Cluster_2 variable has a positive and significant coefficient at 5% significance level. It represents that for those who consider the information network as an advantage of the sectoral clustering here have relatively higher internal interaction. Furthermore, Int_4, Int_5 and Int_33 variables have a positive and significant coefficient at 10% significance level. So, the firms of those existing interactions are higher with the other wedding wear firms in Turkey contain better internal interactions in-house. The same situation applies to those ones that have higher interactions with the other firms in abroad as well. Also, the firms which stay up to date inside the cluster through other firms indicate better internal interactions inside their organizations. Eighth, Cluster_6 variable has a positive and significant coefficient at 10% significance level. The firms of those see the development opportunities in a cluster as an advantage of the sectoral clustering in this ecosystem are likely to have more internal interaction inside their organizations.

Lastly, Comp_3 variable has a negative and significant coefficient at 10% significance level. This refers to that the firms which demand collaborations with other firms in Turkey to compete in the wedding wear sector are likely to have less internal interactions among their employees.

The results of the second one, which attempts to explain the determinants of external interaction of firms, are summarized in the table below;

Table 6.4. Regression Analysis for the External Interaction

Independent Variables	β Coefficients	P-value
Constant	0,013	0,983
Designer_Employment	0,096	0,517
Outsourced_Design_Consultancy	-0,014	0,951
Org_1	0,000	0,947
Org_3	-0,018	0,906
Org_5	-0,002	0,332
Org_6	0,124	0,744
Org_7	-0,444	0,285
Int_2	0,109	0,365
Int_3	0,477***	0,000
Int_4	0,106	0,384
Int_5	0,073	0,331
Int_6	0,006	0,934
Int_32	0,004	0,954
Int_33	0,211*	0,019
Comp_1	-0,096	0,205
Comp_3	0,068	0,569
Comp_4	0,068	0,536
Evol_Attempts	-0,001	0,977
Cluster_1	0,051	0,600
Cluster_2	-0,194	0,146
Cluster_3	0,210	0,085
Cluster_5	-0,237*	0,030
Cluster_6	-0,029	0,791
Cluster_7	0,287**	0,008
Cluster_8	-0,012	0,905
MK_1	-0,061	0,473
N=132		
R_Squared	0.64	

*** represents significance at 1%, ** at 5 %, * at 10 %

Several variables are found to affect the external interaction of firms significantly. First, Int_3 variable has a positive and significant coefficient at 1% significance level. It basically means that the firms which have more intensive relations with other wedding wear firms outside the cluster in Izmir are likely to have more external interactions in this ecosystem. Second, Cluster_7 variable has a positive and significant coefficient at 5% significance level. This represents that for those who consider the proximity to the related sectors as an advantage of the sectoral clustering here have relatively higher external interactions with other wedding wear firms. Third, Int_33 variable has a positive and significant coefficient at 10% significance level. It basically means that the firms which stay up to date inside the cluster through other

firms indicate better external interactions. Forth, Cluster_5 variable has a negative and significant coefficient at 10% significance level. So, the firms of those see the competitiveness as an advantage of the sectoral clustering in this ecosystem are likely to have less external interactions with others.

The results of the third one, which attempts to explain the determinants of collaborative competitions of firms, are summarized in the table below;

Table 6.5. Regression Analysis for the Collaborative Competition

Independent Variables	β Coefficients	P-value
Constant	0,850	0,275
Designer_Employment	-0,164	0,414
Outsourced_Design_Consultancy	0,847**	0,006
Org_1	-0,004	0,606
Org_3	0,126	0,551
Org_5	-0,001	0,606
Org_6	-0,759	0,129
Org_7	0,833	0,128
Int_1	-0,198	0,220
Int_3	-0,059	0,667
Int_4	-0,130	0,433
Int_5	0,135	0,176
Int_6	0,019	0,855
Int_32	-0,007	0,940
Int_33	0,531**	0,000
Evol_Attempts	0,046	0,143
Cluster_1	0,257	0,051
Cluster_2	-0,120	0,508
Cluster_3	0,163	0,324
Cluster_5	0,044	0,766
Cluster_6	-0,084	0,566
Cluster_7	0,053	0,707
Cluster_8	0,104	0,441
MK_1	-0,073	0,526
N=132		
R_Squared	0.42	

*** represents significance at 1%, ** at 5 %, * at 10 %

Some variables are found to affect the collaborative competition of firms significantly. First, Int_33 variable has a positive and significant coefficient at 5% significance level. It basically means that the firms which stay up to date inside the cluster through other firms more likely to be in favor of the idea that the collaborations with other wedding wear firms are required to be competitive in this sector. Second significant variable is Outsourced_Design_Consultancy which has a positive and at the significant coefficient at 5% significance level. It represents that the firms which

outsource the external designer or acquire design consultancy outside the organization are more depended on the collaborations with others to compete in this ecosystem.

The results of the fourth one, which attempts to explain the determinants of conflictive competitions of firms, are summarized in the table below;

Table 6.6. Regression Analysis for the Conflictive Competition

Independent Variables	β Coefficients	P-value
Constant	3,492	0,000
Designer_Employment	0,260	0,291
Outsourced_Design_Consultancy	-1,024**	0,007
Org_1	-0,002	0,850
Org_3	0,223	0,386
Org_5	-0,006	0,069
Org_6	-0,694	0,255
Org_7	0,862	0,196
Int_1	-0,300	0,128
Int_3	0,093	0,579
Int_4	-0,028	0,890
Int_5	0,058	0,634
Int_6	-0,035	0,783
Int_32	0,026	0,820
Int_33	0,024	0,860
Evol_Attempts	-0,037	0,336
Cluster_1	0,367*	0,023
Cluster_2	-0,149	0,501
Cluster_3	-0,044	0,825
Cluster_5	-0,006	0,973
Cluster_6	-0,163	0,362
Cluster_7	-0,030	0,862
Cluster_8	0,092	0,573
MK_1	0,230	0,104
N=132		
R_Squared	0.25	

*** represents significance at 1%, ** at 5 %, * at 10 %

Similar to the collaborative competition, only some variables are found to affect the collaborative competition of firms significantly. Outsourced_Design_Consultancy variable has a negative and significant coefficient at 5% significance level. It simply means that the firms which outsource the external designer or acquire design consultancy outside the organization are less likely to evaluate the existing competition as the win-lose situation in the cluster. Second, Cluster_1 variable has a positive and significant coefficient at 10% significance level. So, the firms of those see the existing variety of wedding wear manufacturers on the site as an advantage of the sectoral clustering in this ecosystem compete more conflictively with others.

The results of the fifth one, which attempts to explain the determinants of mutation within firms as a way of evolution of the ecosystem, are summarized in the table below;

Table 6.7. Regression Analysis for the Mutation

Independent Variables	β Coefficients	P-value
Constant	0,200	0,780
Designer_Employment	0,153	0,404
Outsourced_Design_Consultancy	0,003	0,991
Org_1	0,004	0,543
Org_3	-0,052	0,784
Org_5	0,000	0,964
Org_6	0,058	0,902
Org_7	0,001	0,999
Int_1	0,168	0,258
Int_3	0,021	0,869
Int_4	0,285	0,060
Int_5	0,083	0,372
Int_6	-0,046	0,623
Int_32	0,120	0,186
Int_33	0,004	0,971
Comp_1	-0,044	0,637
Comp_3	-0,189	0,204
Comp_4	0,098	0,470
Evol_Attempts	0,193***	0,000
Cluster_1	-0,074	0,539
Cluster_2	-0,215	0,192
Cluster_3	0,045	0,765
Cluster_5	0,152	0,257
Cluster_6	-0,051	0,705
Cluster_7	0,001	0,996
Cluster_8	0,151	0,218
MK_1	0,038	0,715
N=132		
R_Squared	0.51	

*** represents significance at 1%, ** at 5 %, * at 10 %

For the mutation within firms in this ecosystem, only the Evol_Attempts variable is found to affect positively with significant coefficient at 1% significance level. It signifies that the more firms provide its employees with particular education opportunities, technical trainings and individual development chances through sector tours in Turkey and in abroad, the more firms are more likely to generate knowledge mutation among employers and benefit from the outcomes of the these development efforts within their own organizations.

The results of the sixth one, which attempts to explain the determinants of crossover from the cluster as a way of evolution of the ecosystem, are summarized in the table below;

Table 6.8. Regression Analysis for the Crossover from the Cluster

Independent Variables	β Coefficients	P-value
Constant	1,640	0,007
Designer_Employment	-0,090	0,553
Outsourced_Design_Consultancy	0,226	0,343
Org_1	-0,010	0,108
Org_3	-0,013	0,935
Org_5	0,004	0,058
Org_6	-0,171	0,552
Int_1	-0,027	0,824
Int_3	-0,070	0,487
Int_4	0,058	0,625
Int_5	0,155*	0,041
Int_6	0,026	0,739
Int_32	0,055	0,466
Int_33	0,268**	0,004
Comp_1	0,014	0,860
Comp_3	0,270*	0,025
Comp_4	-0,239*	0,032
Evol_Attempts	0,018	0,458
Cluster_1	-0,160	0,097
Cluster_2	0,090	0,508
Cluster_3	0,060	0,627
Cluster_5	0,013	0,907
Cluster_6	0,159	0,156
Cluster_7	0,062	0,571
Cluster_8	-0,153	0,133
MK_1	-0,073	0,401
N=132		
R_Squared	0.45	

*** represents significance at 1%, ** at 5 %, * at 10 %

Several variables are found to affect the crossover within firms from the cluster significantly. First, Int_33 variable has a positive and significant coefficient at 5% significance level. It basically refers to that the firms which employ other wedding wear firms in order to stay up to date about the sector are more likely to generate crossover from the other firms located inside the same ecosystem. Second, Int_5 variable have a positive and significant coefficient at 10% significance level. Thus, the firms of those existing interactions are higher with the other wedding wear firms in Turkey perform more knowledge crossover through hiring workers from the other firms. Third, Comp_3 has a positive and significant coefficient at 10% significance level. It refers to that the firms which need to have collaborations with other firms in Turkey to compete in the

wedding wear sector are likely to indicate more crossover from the cluster. Lastly, Compt_4 has a negative and significant coefficient at 10% significance level. So, the firms which need collaborations with other firms in abroad to compete in the wedding wear sector are likely to have less crossover from the cluster.

The results of the last one, which attempts to explain the determinants of crossover from outside the cluster as a way of evolution of the ecosystem, are summarized in the table below;

Table 6.9. Regression Analysis for the Crossover from Outside the Cluster

Independent Variables	β Coefficients	P-value
Constant	2,197	0,004
Designer_Employment	-0,197	0,313
Outsourced_Design_Consultancy	-0,511	0,096
Org_1	-0,007	0,375
Org_3	-0,098	0,627
Org_5	0,004	0,118
Org_6	-1,055*	0,036
Org_7	0,914	0,095
Int_1	-0,274	0,083
Int_3	-0,150	0,265
Int_4	0,407*	0,012
Int_5	-0,010	0,918
Int_6	0,119	0,233
Int_32	-0,067	0,484
Int_33	0,164	0,161
Comp_1	0,021	0,836
Comp_3	0,076	0,627
Comp_4	-0,131	0,364
Evol_Attempts	0,066*	0,033
Cluster_1	-0,054	0,677
Cluster_2	0,143	0,411
Cluster_3	-0,120	0,449
Cluster_5	0,041	0,774
Cluster_6	0,380**	0,008
Cluster_7	-0,190	0,176
Cluster_8	-0,155	0,231
MK_1	-0,006	0,960
N=132		
R_Squared	0.39	

*** represents significance at 1%, ** at 5 %, * at 10 %

Several variables are found to affect the crossover within firms from the cluster significantly. First, the Cluster_6 variable has a positive and significant coefficient at 5% significance level. It basically means that the firms of those see the development opportunities as an advantage of the sectoral clustering in this ecosystem are more likely to hire workers from outside the existing ecosystem. Second, the Int_4 variable has a

positive and significant coefficient at 10% significance level. So, the firms of those existing interactions are higher with the other wedding wear firms in Turkey enable more knowledge crossover through hiring workers outside the ecosystem. Third, the *Evol_Attempts* variable has a positive and significant coefficient at 10% significance level. It can be inferred as the more firms provide its employees with particular education opportunities, technical trainings and individual development chances through sector tours in Turkey and in abroad, the more firms are more likely to generate knowledge crossover from outside the cluster. Lastly, the *Org_6* variable has a negative and significant coefficient at 10% significance level. It signifies that the more university graduate the firms have inside their organizations the less these firms are likely to hire from outside the ecosystem.

6.5. Evaluation of the Ecosystem of the Wedding Wear Cluster

Diversity

The ecosystem of wedding wear cluster in Mimar Kemalettin Fashion District is mostly represented by the wedding wear manufacturers. These manufacturing activities are carried out within this cluster by two-third of the firms. Only small number of firms locates their manufacturing processes in other parts of the city, particularly at the MTK Manufacturers Zone in the east part of Izmir. Relative to the locational choices of the manufacturing, almost all the retailing activities of existing firms are currently being conducted within Mimar Kemalettin Fashion District, rather than in other place outside the cluster. Considering the rate of return in the field survey, the total number of workers currently employed in the wedding wear sector on the site is estimated approximately 3050 total. There are almost 50 mature firms of which experiences vary between 20-65 years in this ecosystem while the average age of the existing manufacturers is only 11 years.

Almost half of the firms in this ecosystem do not have registrations for export and patents for their own brands, yet still able to maintain the daily export activities through utilizing the other companies sources or in informal ways. The additional interviews also help us to reveal that many of these manufacturers do exporting of their manufactured wedding wears especially to the so-called dollar zone in the Middle East, however, half of these export activities is being carried out by help of the others which

deploy their own export registrations. So, there is also a different sort of business understanding and cooperation among the firms in this respect.

Comparing to firm sizes to each other, it is possible to say that large companies are the ones who employ 40-80 workers in their organizations. The average size of firms is estimated as with 12 employees. For the variability among the employees, the overall occupational distribution in firms has been investigated. The collective process of wedding wear manufacturing is depended on 16 different occupations in this system. Diversity of individuals based on their occupations indicates in different proportions are mostly from pattern making, cutting, mechanist, ironer and craftsmen. However, only half of the firms hire designers. Also, it is important to note that the designer employee rate derived from the survey does not necessarily mean they are all certified. Designer in this distribution can be described as only the operational in the survey responds rather than having an educational background.

For two divisions of the concept of diversity in the inner organizations of firms derived from the theoretical discussions, first, as primary dimensions that includes unchangeable varieties, the ecosystem contains a great number of female workers. Second, as the secondary dimension, the varieties that can be changed, the firms contain a very limited numbers of university graduates. Only less than one third of the existing employees in firms have been found as university graduate. Especially, for the design background of workers hired as designers, the proportion of graduate designers is only 10 per cent in this ecosystem.

Furthermore, the product and manufacturing range that signifies the consumer culture, abilities of firms for creation variety have been explored. First, half of the firms currently produce for the customers with different socio-economic backgrounds. Second, the taste and ideology of customer choices for manufactured wedding wears also vary considerably. Again, almost half of the firms manufacture wedding wears for customers with diverse tastes and choices. On the other hand, the firms of this ecosystem believe that their current wedding wear designs and collections do not differentiate from the ones operating in other parts of Izmir, i.e. Alsancak and Karsiyaka.

Considering the entire sectoral value chain, the ecosystem does not contain different firms engaged in different processes of one. Almost all of the firms produce for their own brands and conduct their own process and engaged in only limited number of outsourced services. Only but excessively the photoshooting services including staff

and equipment are being demanded and outsourced by the firms, particularly for catalogs and advertisement. The other possible services such as design consultancy and trend research which are indeed very crucial remain very minor.

Lastly, the variety of entertainment and leisure activities such as pubs, cafes, restaurants, galleries and retail outlets, book and music stores are absent in this ecosystem. This can also be inferred from the results of the limited interaction in leisure times among both the workers and firms of the cluster. Still, there is a certain degree of attraction of the environment based on its history and locational advantages as inner city spot to grasp the customer attention.

Internal Interaction

Initially, for different scales of interaction of firms in this ecosystem of wedding wear cluster, internal interaction within firms are more excessive comparing to the current interactions with others within the ecosystem. On the other hand, internal interaction is comparably higher than the external interaction outside the cluster. The outcomes of the internal interactions among workers within firms which have been found in the improvements in design quality and increased number of design variety of wedding wear products. These outcomes of internal interaction are relatively much higher than the outcomes of external relations of firms within the same ecosystem. The results also show that only the sectoral conditions are shared and discussed among the firms.

The contribution of the presence of the institutions such as several NGOs related to the sector and Mimar Kemalettin Association engaged in this sector are also limited to the ecosystem in terms of communications. Specifically for the internal interactions, face-to-face relations are employed the most in order to keep up to date and be informed about the recent sectoral developments in the cluster. However, these sorts of interactions are based on mutual trust. Despite the firms are open to other within the cluster; mutual trust, as an element of collaborative culture appears is quite problematic.

Regarding the dimensions that affect the internal interaction of firms the most, the employment of a designer within the organization appears crucial; the higher designer employment rate, the better internal interaction in firms. However, when the design activities are outsourced the internal interaction decreases in organizations. On the other hand, the advantages of the sectoral clustering in Mimar Kemalettin as building information and knowledge network for firms and for available development

platform as advantages of this cluster enable to grow inner interactions inside firms. Correspondingly, first, the firms are able to stay up to date to the sector through these networks, and second, firms have better internal interactions inside their organizations as they have well established contacts with other wedding wear manufacturers nationally and internationally. On the other hand, firms' internal interactions are affected from the competitive characteristic of this ecosystem. For those firms which regard the competition as an advantage of this cluster, the internal interactions and seek for collaborations in order to compete in the sector, the internal interactions are relatively weak due to their disinterest towards their internal structure.

External Interaction

Among the external interactions, relations with other wedding wear companies in different cities are strong in this ecosystem. That is comparatively more significant than the external relations with the international firms. Knowledge sharing through external interactions, the knowledge, particularly the manufacturing techniques unique to this ecosystem, is not shared with others outside the cluster. For mediums of external interaction, the IF Wedding organization and relations with other firms provide information flow and keep the ecosystem up to date. The accessory sector appears as the major actor with which almost all the firms have constant daily businesses with. Also, the magazines and journals which are considered as necessary for publicity of the sector as well as photographers and fashion designers are currently being in good connections with the ecosystem.

Specifically, the fairs are seen as a crucial medium of external interactions outside the cluster, due to their roles to create the new business relations and new contacts. The fairs also enable to emerge new sales and trading opportunities for firms. However the role of firms in creating design awareness among each other's through external interaction and knowledge transfer is comparatively minor for the sector.

The relationship of the some dimensions with the external interaction is significant. The most importantly, proximity does matter for the external interaction. The proximity to the related sectors as an advantage of the sectoral clustering contributes to better external interactions of the ecosystem. In addition to that the firms that contain the well-established external interaction with other wedding wear firms in Turkey perform more knowledge crossover through hiring workers from the other firms. On the other hand, similar to the internal interaction, the firms that see the

competition as an advantage of this cluster, have relatively weak external relations due to their disinterest towards the collaborations through external interactions.

Collaborative Competition

For the collaborative competition, the advertisement and promotion wedding wear firms in wedding wear shows, fairs and fashion weeks appear as the major strength. Annual IF Wedding organization in Izmir, other national and international fairs organized and arranged by different and competing private sector actors enable opportunities for this ecosystem to build collaborations with other firms in the competitive market while competing. However, the ecosystem does not perform knowledge sharing with their competitors as following each other's. The collaborations based on the design by different firms in this cluster are very rare. In the district, many firms regard the co-locating with others as a major competitive advantage in the sector.

For particular relations with other dimensions of the ecosystem research, the collaborations with other wedding wear firms which are required to be competitive in this sector correlates with the fact that through these collaborations firms also attempt to stay up to date inside the cluster. Additionally, they are more likely to indicate crossover from the cluster. Also, the firms which outsource the external designer or acquire design consultancy outside the organization are more depended on the collaborations with others to compete in this ecosystem.

Conflictive Competition

The conflictive behaviors in the ecosystem, collaborations with other wedding wear firms through mutual interdependencies are less matter for this ecosystem. There is a direct confrontation for common resources or values so that they compete in a win-lose situation in the cluster. The competition outside the cluster is portrayed as win-lose situation by firms. The relations are also described is very fragile in this respect. None of the firms holding a powerful position in the sector is willing to cooperate or collaborate with others.

On the other hand, for those who see the competitive environment of the cluster as the win-lose situation, outsourcing the external designer or acquire design consultancy outside the organization is not preferable. In addition to that, the existing variety of wedding wear manufacturers on the site that is seen as an advantage of the

sectoral clustering enable more conflictive competitive environment among wedding wear manufacturers in this ecosystem.

Evolution (Mutation)

In the evolution of such ecosystem, two major forces are effective in transformation and affect the evolutionary patterns and development; mutation as an internal force to improve its environment and overall performance, and crossover that is initiated by forces outside a community.

For mutation, the investment in the education and training activities and facilitation of learning and communicating among in-house manufacturing of firms and other workers provide long-term benefits for the ecosystem. The findings suggest that more than half of the firms have enabled their employees to take the pattern maker and design training. Besides, regular sectoral visits and participations to the fashion and wedding wear fairs as well as sectoral tours to the other manufacturing firms in Turkey are also substantial among firms in order to observe the changing environment and as a key for firm's evolution and adaptation to that change. The major outcomes of these attempts and the in-house developments achieved by firms of this ecosystem are the enhanced national new networks, competitiveness, and increased sales, knowledge mutation among workers with share and exchange, knowledge accumulation within firms. In addition to that, such particular education opportunities, technical trainings and individual development chances through sector tours in Turkey and in abroad enable firms to be more likely to generate knowledge mutation among employers and benefit from the outcomes of the these development efforts within their own organizations. Yet, international attempts for development are relatively immature. Also, the technical operative trainings are uncommon. However, the technical improvements affect considerably the present wedding wear manufacturing as transforming the entire production process, and packaging, communication and distribution to a solid fashion industry model.

Evolution (Crossover)

The crossover is here expressed as the flow of one employee to others to trigger a firm's process of change and adaptation to the evolutionary market. In this respect, there is a different degree of benefits coming from inside and outside the cluster. To keep track of external enhancements in certain process of the sector is much related to

the entire process of the development as well as promotion. That also responds to the regression analysis results that the firms which employ other wedding wear firms in order to stay up to date about the sector are more likely to generate crossover from the other firms located inside the same ecosystem. Not only the technical and fabric research, but also the market research, retail, information gathering is vital to the evolution. In this ecosystem, new technologies and developments in products and materials such as new fabrics and textiles as well as through market and trend research for demands and forecasting are carried out. However, new mediums of distributions especially the e-commerce opportunities that are widely available to customers nowadays do not exist. Considering the international relations built to compete in the wedding wear sector, the ecosystem is likely to have less internal crossover from the cluster. Additionally, some dimensions of the ecosystem have been found to affect the crossover particularly from the cluster. The firms of those existing connections are higher with the other wedding wear firms, especially with the national firms; hire more employees outside the existing ecosystem. Also, the firms which provide particular education opportunities, technical trainings and individual development chances through sector tours in Turkey and in abroad to their employees are more open to new comers from outside the cluster and more likely to show knowledge crossover. However, if firms currently employ more university graduate inside their organizations they comparatively hire less from outside the ecosystem.

To sum up, qualities of the ecosystem in Mimar Kemalettin Fashion District investigated through the ecosystem measures are briefly summarized as below;

Table 6.10. Summary of the Qualities of the Existing Ecosystem

	Measures	Sub-measures	Qualities
ORGANIZATIONAL	DIVERSITY		<ul style="list-style-type: none"> ▪ Presence of an emerging and relatively young ecosystem ▪ Distribution of many diverse types of knowledge within firms coming from various professions
	INTERACTION	<i>Internal</i>	<ul style="list-style-type: none"> ▪ Strong and intense in-house interaction ▪ Relatively better outcomes of the internal interactions ▪ Relatively better knowledge exchange inside the cluster ▪ Excessive face-to-face relations ▪ Strong local-buzz
		<i>External</i>	<ul style="list-style-type: none"> ▪ Presence of fairs as mediums of external interactions ▪ Strong social proximity among firms inside the cluster
	COMPETITION	<i>Collaborative</i>	<ul style="list-style-type: none"> ▪ Available collaborations only for keeping track of each other's businesses
		<i>Conflictive</i>	<ul style="list-style-type: none"> ▪ Variety of wedding wear manufacturers on the site
	EVOLUTION	<i>Mutation</i>	<ul style="list-style-type: none"> ▪ Sectoral development attempts and in-house performance enhancement efforts ▪ Shared skills in-house and workers through new knowledge ▪ Enhanced national new networks, competitiveness, and increased sales, knowledge mutation among workers with share and exchange, knowledge accumulation
		<i>Cross-over</i>	<ul style="list-style-type: none"> ▪ More intense knowledge cross-over from inside the cluster
SPATIAL	MIMAR KEMALETTIN FASHION DISTRICT		<ul style="list-style-type: none"> ▪ Integration to the branding efforts as a Fashion District ▪ Attachment to the place ▪ Co-location and visibility of firms ▪ Use-of spatial proximity for daily activities ▪ Strong geographical proximity ▪ Lower transaction costs and the business expenses ▪ Historically attractive spatial environment ▪ Locational advantages for diversity as an inner city spot

On the other hand, constraints of the existing ecosystem along with the measures and the physical environment are reviewed as below for reconsideration in the possible policy implications and further studies:

Table 6.10. Summary of the Constraints of the Existing Ecosystem

	Measures	Sub-measures	Constraints
ORGANIZATIONAL	DIVERSITY		<ul style="list-style-type: none"> ▪ Limited diversity in the wedding wear manufacturing and products as well as customer preferences ▪ Very limited number of fashion designers and design consultancy ▪ The short lifespan of newcomers due to the knowledge-based business characteristics ▪ Lack of variety of creative input and design intervention in the existing value chain ▪ Lack of uniqueness and deficiency of diversity ▪ The lack of distribution intermediaries and facilities
	INTERACTION	<i>Internal</i>	<ul style="list-style-type: none"> ▪ Disintegrated local-buzz to the pipelines ▪ Self-orientation of firms
		<i>External</i>	<ul style="list-style-type: none"> ▪ A presence of a closed system to the externalities ▪ Weak external interactions outside the cluster ▪ A resistance to the external environment ▪ Limited external knowledge and creativity flow and exchange ▪ Lack of global pipelines of the ecosystem in the international level ▪ Loose institutional proximity and relations
	COMPETITION	<i>Collaborative</i>	<ul style="list-style-type: none"> ▪ Disinterest (inside and outside the cluster) towards the collaborative culture
		<i>Conflictive</i>	<ul style="list-style-type: none"> ▪ A conflictive competition described as win-lose situation ▪ Confrontations among firms within the ecosystem for customer retention
	EVOLUTION	<i>Mutation</i>	<ul style="list-style-type: none"> ▪ international attempts for development are relatively immature. ▪ Technical operative trainings are uncommon
<i>Cross-over</i>		<ul style="list-style-type: none"> ▪ Only partially taken new ideas and practices from outside the cluster ▪ Lack of trend research in the sector 	
SPATIAL	MIMAR KEMALETTIN FASHION DISTRICT		<ul style="list-style-type: none"> ▪ The labor mobility is localized ▪ Limited space for parking and green spaces ▪ Inadequate soft and hard infrastructure ▪ Lack of leisure time activities and spaces ▪ Limited number of available sufficient properties and amenities for a creative industry cluster development

CHAPTER 7

CONCLUSION

This dissertation has explored the very nature of creative industry clusters, fashion industry in particular. It aimed at evaluating the organizational and spatial structures of creative industry clusters from an ecosystem perspective. Through a case study, it has attempted to investigate the wedding wear sector as a sub-sector of fashion industry that is clustered in Mimar Kemalettin Fashion District in Izmir. This investigation has been based on the research question of how the cluster of wedding wear sector operate as an ecosystem in terms of the diversity, interaction, competition and evolution measures. The need for such study has taken its base from the existing gaps in the literature where comparably to the international research arena, the studies on the creative industries and their accumulations in cities are new in Turkey and limited in numbers. Considering the case of Izmir where the fashion industry as a creative industry has been one of the core businesses, not for excessive fashion production, but for the wedding wear manufacturing which is currently clustered in the inner city, it has been essential to provide adequate information for understanding its ecosystem and discuss necessary policy implications for future planning directions within the external environment due to its current major role as a sectoral driver of Turkey and its place in the global trade market.

The recent researches in Turkey has mostly based on either the relationship between economic structure and urban development (e.g. Aksoy & Enlil, 2011; Guran & Secilmis, 2013; Lazzeretti et al., 2014) or on the physical formations and structures of creative industries (e.g. Gulcan and Akgungor, 2008; Durmaz et al., 2008; Ozkan, 2009; Ozturk, 2009; Durmaz et al., 2010; Uckan, 2011; Dogan, 2011; Enlil et al., 2011; Evren, 2011; Cetindamar and Gonsel, 2012; Incekara et al., 2013; Lazzeretti et al., 2014). Additionally, the approaches of other previous studies (e.g. Hamamcioglu, 2000; Sayar, 2010) concentrated on Mimar Kemalettin Fashion District have engaged with solely physical environment and spatial settings. Similarly, the researches for the wedding wear sector specific to Izmir have generally carried out more with economic concerns. All of the research reports previously engaged with the wedding wear sector has mainly

discussed the economic and financial aspects of the sector. Izmir Development Agency (IZKA 2009; 2010; 2013) has focused on the sectoral clusters in Izmir along with their development, potentials and needs for economic development, and the research group from Izmir University of Economics in 2013 concentrating on the international competitiveness of the wedding wear sector. However, these recent studies have been found rather conventional, restricted to economic and physical sphere of analysis. Specific to the concentration of this dissertation, the present study has approached to the creative industry clusters from organizational structure in relation to the spatial environment. Its objectives and findings have been associated with organizational and physical spheres of analysis in in the creative industries literature in Turkey (Figure 7.1).

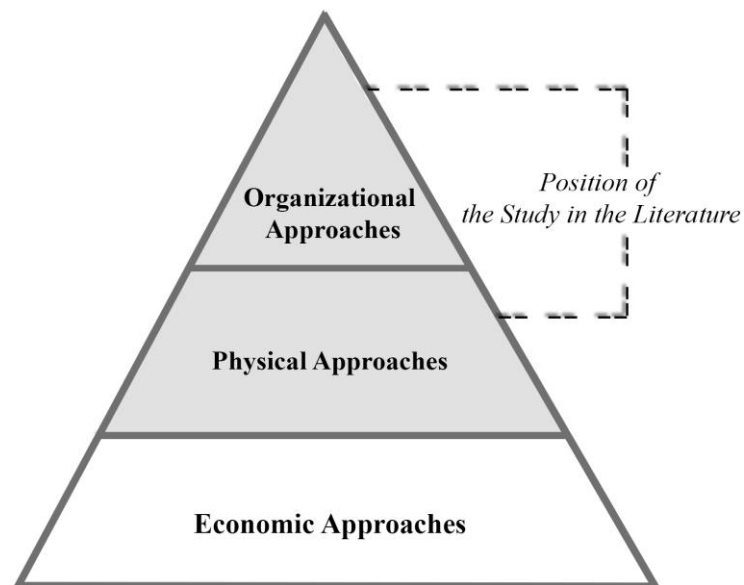


Figure 7.1. The Position of the Study

The structure of methodology has been built on various literature reviews, preliminary study, development of the approach and model, pilot study, case study and presentation of the limitations and shortcoming of this present study. The chapter flow has also been constructed in accordance with the conceptual illustration of layers of our ecosystem approach. Through several chapters, various theoretical discussions, investigations of recent researches in the related fields and the recent developments on the subject and various field studies have been given. Firstly, the conception and formation of creative industries; secondly, spatial and non-spatial forms of clustering of creative industries, and the diffuse of creative industries clusters, particularly fashion

industry in certain districts; thirdly, the external environment which has considerably influenced the creative industry cluster formations, the recent developments of the creative industries practice and particularly the evolving fashion system in Turkey, and more essentially the current conditions of wedding wear sector in Izmir; and fourthly, the construction of the ecosystem approach and development of the DICE model as a research method in the urban planning discipline have been presented.

Particular to the methodology, the ecosystem approach undertaken as a research perspective of this dissertation appears as a tool that encapsulates emerging understandings of how the creative industries operate in certain environments. The approach here has considerably contributed to the existing analyses of creative industry clusters, and blended insights mainly from the business ecosystem, ecosystem management studies and creative ecology with urban studies (see. Moore, 1993; Pirot et al., 2000; Argote et al., 2003; Dvir & Pasher, 2004; Shorthose, 2004; Iansiti & Levien, 2004a; 2004b; Teece, 2007; Hearn et al., 2007; Duxbury & Murray, 2010; Chen et al., 2010; Chan, 2012; Winden et al., 2012; Kannangara & Ugucioni, 2013) (Figure 7.2).

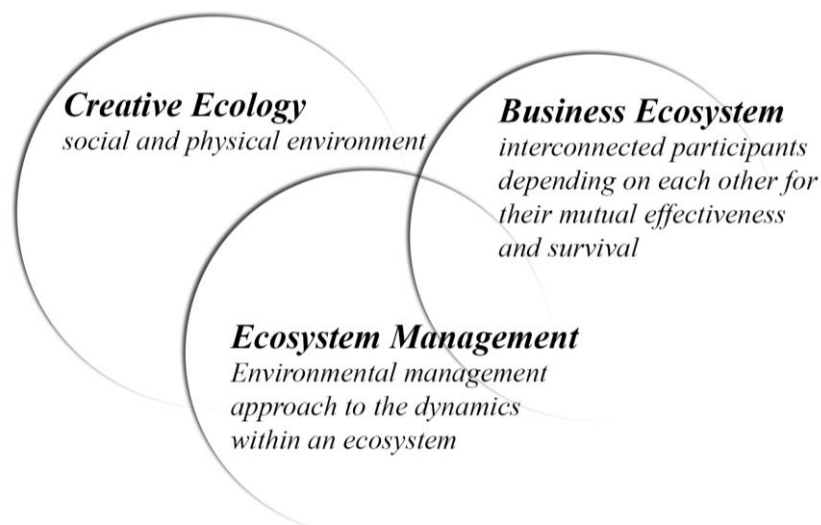


Figure 7.2. The Foundation of the Research Approach of the Study

Regarding the concept of ecosystem as the representation of creative activities through the organizational level, the DICE Model have been utilized, adjusted and associated with the fashion industry dynamics, then applied for the investigations in the case study. Most importantly, the DICE Model contains a spatial dimension as a basis for the ecosystem operations taking place in particular urban environment. As a concluding remark, it should necessarily be mentioned that; this study does not take into

account the question of to what extent creativity and/or knowledge is intensive. Rather, the creativity is taken for granted within the conception of creative industries. However, the urban environment here is under focus and regarded as a habitus that indicate the ecosystem of the activities and experiences in the contextual environment of wedding wear sector. The DICE Model is rather a descriptive approach itself without the necessary analysis and statistical techniques and processes. Thus, regression analyses have been applied to the model findings to process the data for the objectives of the study. Still, as a tool, it has enabled this research to explore and understand the ecosystem at the organizational level. Possible extensions and modifications of the model are described in the further studies section.

For field studies, initially, a preliminary study to investigate how the fashion industry operates in Izmir has been carried out based on the snowball sampling method. After having constructed the preliminary research and the model, a pilot study has been conducted with 12 wedding wear firms located in Mimar Kemalettin Fashion District Izmir, and the collected data has been processed and evaluated via the DICE model measures. Following, the first part of the case study has been carried out. In total 331 wedding wear firms including manufacturers, retailers and wholesalers of wedding dresses, wedding suits and evening gowns, and 31 suppliers associated with the sector has been explored on the site. After having tested the DICE model with the chosen wedding wear firms, all the wedding wear firms on the site has been reached and the final field study has been realized as the case study. However, only 132 wedding wear firms have been accepted to be respondents to the questionnaire out of 238 manufacturers with the approximate rate of return of 55%. The results of these studies along with the concluding remarks are given at the following section.

7.1. General Conclusion on the Research Findings

The term creative industries, role of creativity and necessity of human capital for creative industry formation, and the organizational structures of creative industries through value chain analyses, particularly the fashion industry, have enabled us to understand the details of the firm-based operations of creative industry clusters. The review of the global perspectives of fashion system and evolution of the fashion industry as a creative industry have provided a massive knowledge for such urban

research which mostly acknowledged that the fashion industry is more than raw materials transformed and designed, reproduced in large quantities and exchanged in the market. It is also an ideological entity and signifier of our cultures and urban living where people in need for expressing their own personality or personal values. In this regard, the transition of fashion industry from the apparel or clothing industry to design represents a perfect instance of profit making from the creative industry framework in the context of the new economy. Various definition and classifications of creative industries applicable in different circumstances, have illustrated a common sense that the commercialization and profit making through intellectual property or copyright aspect of the creative industries, the creative or cultural origin of the goods or services and the commercialization or wealth and job creation are at the core of the creative industries. Especially for the focus of this dissertation, the approach of the DCMS model has enabled us consider the wedding wear sector including bridal wear, night wear and groom sections as included in the fashion creative industry as a core activity.

Additionally, the conception of creative industries clusters has suggested different scales of concentration of economic activity. It has been found that the geographical proximity is alone neither necessary nor sufficient to meet the conditions of clusters. Non-spatial proximity conceptualized by the School of Neo-regionalism has considerable directed the content of the DICE survey and data processing stages. Majority of the previously conducted studies has also showed that creative industries in general gain benefits from being located close by each other since such closeness enables diversity, interaction, competition, evolution. While interactions and sharing can purposely be planned they can also be spontaneous and the clusters often emerge organically with unique ecosystem characteristics.

On the other hand, the accumulation of creative industries in the form of clusters in the inner city has been found one of the major outcomes of such urban restructuring realized by the new economy. Particularly, the review of the previously emerged fashion industry clusters have suggested us that the fashion industry clusters emerge through the evolution of conventional garment manufacturing processes into creative industries with necessary services and institutions. Almost all of the fashion industry clusters have illustrated a spontaneous emergence at its roots, and predominant interventions of the institutional efforts, public and private partnership to promote the fashion industry. Many fashion districts in the world including Istanbul from Turkey,

have spontaneously emerged but strategically and physically planned and exposed to the several regeneration phases that indicate urban design tools and planning interventions.

The limited researches of creative industries in Turkey has revealed that the developments in creative industries along with the cultural and creative industries have been growing interest among the scholar in Turkey for a decade. Yet, many of these researches have focused the creative industries and clusters in Istanbul. Despite the results of many of these researchers that Turkey demonstrates a great potential in creative industries, the formations of creative industries have been found not well-established and mal-coordinated in Turkey. Particularly, the wedding wear sector has been found a growing industry in Izmir and currently trying to evolve in terms of efficient production, fashion design, fashion marketing and branding, yet still lacks of creativity and design, marketing and advertisement, and fashion branding. Despite the recent researches conducted by certain non-governmental organizations in Izmir, best to our knowledge, there has not been any comprehensive research in the creative industries in Izmir, especially from the spatial as well as organizational viewpoints.

The case study of the wedding wear cluster in the Mimar Kemalettin Fashion District in Izmir, Turkey, which has been carried out through several site visits, field studies, the DICE survey and additional interviews with the wedding wear manufacturers, and its findings derived from the descriptive analysis of its ecosystem and the regression analysis among the selected components of the DICE Model, has brought about the following conclusions to answer the research question of this study;

Diversity of the Ecosystem

The wedding wear cluster in Mimar Kemalettin Fashion District appears as an emergent and relatively young ecosystem. Over the recent years, through particular arrangements, mostly the physical revitalizations, the area has become a place where the mostly production and wholesaling spaces developed by the wedding wear manufacturers consisting of from small to medium-sized family-businesses. Similar to previously emerged clusters, our case suggests an atomistic scale market, which is made up of hundreds of very small wedding wear manufacturer firms, where the local economy mostly benefit from the place-specifications. Despite the cost of first investment in this sector is relatively low, the lifespan of newcomers is short; especially, unless they are knowledgeable and experienced enough in the sector. Hence, the more

experienced and mature the firms are as businesses the more resilient they are in this ecosystem.

Since the wedding wear production is portrayed as craftsmanship-led and mostly by female workers, the production chain requires a particular composition. There is a distribution of many diverse types of knowledge coming from various professions and job descriptions, and mainly from the craftsmanship. However, the diverse experiences, cultural backgrounds, professions, academic background of these workers that necessarily contribute to the creation of products, processes and relations based on multiple perspectives as in the fashion industry do not apply to the diversity characteristics of our case. Unfortunately, there is a lack of variety of creative input and design intervention in the existing value chain of wedding wear production. Also, many intermediaries that lead the industry and create the diversity within the system, and the variety of leisure activities and facilities in the ecosystem are currently lacking. Therefore, the production process is less design-oriented and the existing ecosystem does not suggest particular properties of creative clusters.

The case study suggests that the rate of designer employment within firms intensifies the existing internal interactions of firms. Designers, in this respect, contribute to continuous creativity and knowledge exchanges and much cooperation with other designers and related sectors. However, there is also a small number of design graduates and very limited indication of the designers involved in the process. This situation echoes in the lack of uniqueness and deficiency of diversity in the given ecosystem.

On the other hand, the physical structure of the environment of the district does not make major contribution to the diversification of the ecosystem. Daily recreational activities are not integrated to the system as service and vibrant socialization opportunities do not even exist. Yet, there is still a certain degree of attraction of the environment based on its history and locational advantages that bring diversity as an inner city spot to grasp the customer attention.

Interaction of the Ecosystem

The internal interaction in this ecosystem is comparably higher than the external interaction with other wedding wear businesses outside the cluster. Along with the face-to-face interactions, wedding wear firms are able to build crucial, yet internal relationships that entail communications of individual ability, skills, tastes as well as

sectoral knowledge, customer portfolio inside the ecosystem. Such co-locational advantage of firms in Mimar Kemalettin Fashion District suggests that the geographical proximities and their externally benefit-oriented place choices of the clustering firms considerably matter. Especially, regarding the strong relations inside the cluster and relatively weak relations with the other firms outside the cluster suggest the role of the spatial clustering and the importance of the geographical proximity for this ecosystem. In this respect, the intensity of face-to-face relations and being up to date through following other firms thus illustrate that there is a considerable local buzz in this ecosystem. Being in close proximity, co-location and visibility of firms to each other inside the cluster carry great potentials for the ecosystem operations in terms of inter-personal translation of important news and information as well as mutation and crossover within the cluster. The advantages of the sectoral clustering in such concentration here are based on constructing information and knowledge network for firms and for available development platform that mainly facilitate internal interactions and enable the sharing culture in individual companies. However, the level of competitive character of the ecosystem lowers the internal organizations of firms in terms of internal interactions.

The present ecosystem is rather a closed system. External knowledge and creativity flow and exchange do not occur very much. Nevertheless, the proximity to the related sectors to the wedding contributes to better external interactions of this ecosystem. External interactions show that the pipelines of the ecosystem are relatively weak comparing to the existing intensive local buzz. The constructions of pipelines are more obvious as in the planned ecosystems; and this given ecosystem has naturally been emerged and unorganized in many respects. Thus, the current pipelines reaching outside the ecosystem are very limited. Only the existing fairs, e.g. IF Wedding Izmir, which very recently the entire sector has been willing to get involved, are considered as pipelines of this ecosystem. Besides, the institutional proximity is relatively loose due to the firms' weak interactions with the related non-governmental organizations. They are not willing to consider the project funding and incentives available through the NGOs for their developments.

Internal interactions within the ecosystem and the relative geographical proximity to the adjacent sectors are the most significant factor behind the rationale of the present sectoral clustering of this ecosystem. The interactions of this ecosystem

suggesting the place and geographical proximity is still matter, yet, it is not necessarily sufficient to meet the conditions of the creative industry clusters.

Competition of the Ecosystem

The competitive behavior of firms generally affects their abilities to manage their creative knowledge effectively. The competition of this ecosystem is portrayed as a win-lose situation where they confront with each other, with the present customers, pricings as well as existing resources. Regarding the dynamism in the sector as a sub-set of fashion industry, the confrontation about being competitive has also recently been turned out to be reaching higher levels and firms are in competition for attracting consumers which have already many choices due to the accumulations of firms in very close proximities to each other. Also, the diversity of wedding wear manufacturers and their presence co-located each other trigger a relatively conflictive competition. Thus, the competition in the business is currently described as the cheaper you sell the more customers you attract in this ecosystem.

To certain extent, competition between firms is beneficial to ecosystem to operate effectively. In this ecosystem, such collaborations are mainly built primarily to keep track of each other's businesses, to hire employees from the other firms inside the ecosystem as well as to reach the available design consultancy and designer opportunities. Other than the certain fairs, organizations and fashion shows, the disinterest of given ecosystem inside and outside towards the collaborative culture, may later restrict this cluster to be sustained as a healthier ecosystem in the future. There is a need for collaboration-based competitive environments where they know each other through a constant process of reciprocal monitoring and collaborations in ecosystems. The self-orientation of firms may lead to malfunctioning of the ecosystem. On the other hand, despite the firms are open to the others in the district; mutual trust, an element of collaborative culture emerge as an issue and that brings about the strong social proximity among firms inside the cluster but weak with others outside the Mimar Kemalettin Fashion District. That creates a more introverted arrangement for the ecosystem in terms competition.

Evolution of the Ecosystem

For evolution of this ecosystem, the mutation is, to certain extent, enabled through the development attempts by firms themselves. In other words, the workers in

the same organization share their skills with the others and transfer their new knowledge they previously gain from the trainings and courses provided to them. That enables some further improvements, such as openness to the new comers from other organizations, enhanced national new networks, competitiveness, and increased sales, with share and exchange, knowledge accumulation as a chain reaction.

The presence of crossover is greater within the cognitive boundaries of the present ecosystem. Predominantly hiring new employees in this ecosystem is rather internal since the firms are spatially proximate to each other and the labor mobility is localized. In this respect, the ecosystem benefits from the close proximity of businesses to each other to feed different skills to each other. By means of such acquisition, knowledge and creativity flow and exchange can also be stimulated considerably within the ecosystem and this also provides the exchange of employees within the same ecosystem among workers for knowledge sharing and distribution. Additionally, external interactions with other wedding wear firms in Turkey enables more knowledge crossover from outside the ecosystem. So, the existing firms which interact outside the ecosystem and experience different knowledge of others are more likely to hire from outside the cluster. However, the knowledge and creativity available outside the cluster is not much involved in the current ecosystem operations. Considering the existing external interactions, the given area does not grow based on new ideas and practices coming from outside; but only incrementally, through the individual development attempts within firms.

Considering the spatiality of the wedding wear sector cluster in Mimar Kemalettin Fashion District, the ecosystem operations are very attached to the place due to the geographical proximity of firms to many adjacent places and its central locations in inner city. For the sector, not of the distribution and promotion value chain but the sales in terms of fashion the production and wholesaling parts necessitates being in notable and central spots where the clients can easily access. The firms regard their transaction costs and try to lower the expenses in their value chains through making businesses with relatively adjacent related sectors and suppliers for wedding wear production. The proximity of the outsourcing companies and wholesalers is advantageous for this ecosystem. The current situation enables us to consider, on one hand, the enthusiasm of given wedding wear firms to be located in such physically planned fashion district, and on the other, their resistance to the external environment and intentions to keep their naturally emerged characteristics. Thus, some challenges

might be likely to occur due to possible replacement in future. In case of top-down intervention for possible replacement of this cluster, the ecosystem may not adapt to new places and may not survive unless the related sectors wedding wear firms are replaced with them as well.

Ultimately, the case study findings of this dissertation allow us to observe some crucial facts regarding the cluster of wedding wear sector as an ecosystem which has been investigated along with the creative industries and creative industry clusters theory and practice as well as the ecosystem management, creative ecology and business ecosystem literatures. The findings present some generalized facts. This research has considered the case study of wedding wear sector through the lenses of the available creative industry classifications reviewed in different contexts and it has been found out that wedding wear manufacturing can possibly be counted as a sub-set of fashion industry under the design as a creative industry. Despite, this consideration has illustrated rather a top-down and literature review-driven approach to the present sector in our case. Furthermore, the DICE method as a tool of ecosystem approach to the wedding wear sector has been applied in order to investigate the relations at the firm level in Mimar Kemalettin Fashion District and its very nature of the sector. Consequently, it has been found that the existing structure of the wedding wear sector and its cluster are quite different than the conventional creative industry and creative industry cluster formations in the world. This fact is prominently associated with the other crucial fact investigated in our case; the Mimar Kemalettin Fashion District has happened to be as only a given name to the wedding wear sectoral clustering in particular space. The given name to the district has been a major outcome of the branding attempts and the current physical settings that imposed after the partial beautification interventions in the early 2000s. Regarding the current state of this ecosystem, it is indeed obvious that Mimar Kemalettin Fashion District is a very vital wedding wear manufacturing site for Turkey and benefits from its name considerably. However, looking at the fashion industry clusters recently emerged in the world and fashion systems and its processes as well as the structure of the sector; Mimar Kemalettin Fashion District appears as an imitated identity given to a manufacturing site of the wedding wear sector, which was built with the intention of stimulating the area and potential of the sector.

All in all, the case study of the wedding wear cluster in Izmir regarding its ecosystem operations, despite it is difficult to be generalized for other industry clusters,

illustrates some general concerns that can be relevant to the possible policy implications. These implications are discussed from different perspectives in the next section.

7.2. Policy Implications for Ecosystem of Creative Industry Clusters

The ecosystem approach that has been included by many previous creative ecology, business ecosystem and ecosystem management literature is widespread in the international research arena regarding the vast literature reviewed, the implications for policy thinking in creative industry clusters as ecosystems have not been developed in details, and have not considered from such perspective at all within the Turkey context. Building on the general conclusions, this study intends to suggest there are a number of focuses that flow from the ecology metaphor and ecosystem approach to creative industry clusters. Within such context, ecosystem of creative clusters in general as well as the wedding wear cluster in our case particularly, must more adequately be incorporated along with the issues of system design for vitality of ecosystem, its sustainability and the issues diversity, redevelopment and evolution dynamics, enabled networks, possible interactions and collaborations for competitive global market, investment of diverse human capital for a better value chain production, particular urban planning interventions based on organic approaches to clusters, and realizing a creative environment specific to our case. These key policy implications can crucially be suggested since the ecosystem approach to investigate creative industry clusters within given urban places of any scale is comprehensive, unique and related to both physical and organizational structure.

The focus of the case study has been on articulating an emerging research approach for describing the ecosystem of creative industries. Our attention to descriptions should not be read as an implication for other localities. In claiming the concept ecosystem of wedding wear sector is not suggested that such ecologies of fashion industry sub-sets are the same. Indeed on the contrary, one strength of the ecosystem approach is that it recognizes the importance of internal dynamics of the wedding wear sector, and hence the need for various forms of policy implications for planning of the sector both spatially and organizationally in Izmir. The framework of

the ecosystem as an outcome provide a novel frame of reference in planning about emerging and long term issues for such clusters in cities.

In the case of wedding wear cluster, necessary policy implications should derive uncritically from other industry sectors which have different dynamics due to their nature and own ecosystems. Or at the other end of the spectrum, policy thinking is influenced by manufacturing characteristics of the sector that should not be considered in isolation from considerations of the market. Yet, due to the operations very internal and unique to this sector, the social, physical and economic aspects in which it thrives, are crucial to the local culture, certain values of current structure of the sector that should necessarily be considered as a system of its ecosystem from the policy side.

Need for System Design for Vitality of the Ecosystem

More recently, policy-based implications have encouraged a holistic, systems-based planning approach, frequently including cultural, economic, environmental, and social dimensions for enabling the vitality. The fundamental role for policy makers is to shape and create contexts in which creative industry clusters can grow and evolve with regard to its value chain. In this respect, policy-makers can establish the drivers to create a pattern of operation for different stages that is sustainable such as educational investment, attracting relatively large companies to the district, on other occasions they may need to overcome the sectoral obstacles to perform better such as research incentives for the distribution, or grant programs through NGOs while taking into consideration the sectoral long-term effects on the entire ecosystem. The key principle here is to regard the ecosystem a system-based perspective facilitating the vitality and development of the wedding wear sector in the long run. Adequate establishment of the global pipelines that connect the clusters non-spatially to further geographies should also be matter of the design of this system.

Sustainability of the Ecosystem and the Issue of Diversity

As the concept of sustainability for systems has matured, growing emphasis has been given to the interconnection to social dimension with economy in the framework of creative industries. In most sustainable thinking, diversity becomes crucial and as a major component of this ecosystem both as an input and output is the ultimate point of fashion production. Since the wedding wear sector its sub-set, the same is applicable, where diversity is lacking yet increasingly recognized as a means of achieving success

for such ecosystem as a whole. Diversity of the inner organizations of industries and the occupational distributions, also diversity of the cluster itself that consisting of these firms and also containing the physical variety, human diversity and product variety is regarded vital to the environments. Nevertheless it is noted that carefully designed socio-economic urban spaces like the sectoral cluster from the vitality perspective can contribute to integrating creative workers and craftsmanship with everyday culture and to addressing wider development dimensions, and other challenges of clusters. The planned creative industry clusters, as a cornerstone component of broader revitalization initiatives in practice due to the recent efforts all over the world, without the mediation between an array of concerns for individuals within clusters and economic benefits bring about different economic, social, and cultural dimensions into consideration. Therefore, urban regeneration projects proposed for economic vitality are reconsidered from perspectives of particular interests. However, the extent of the possible policies for the district along with growing interest in the creative industry based development, especially considering the uniqueness of the sector, should be balanced in the future interventions.

Physical improvement can take many forms through such projects and gentrification most often takes place. In such case, gentrification may involve the introduction of purpose-built spaces to provide revitalization while it may displace the existing workers, customers and uncompetitive firms by boiling real estate markets. That contains has a risk to the existing diversities with the ecosystem. The principal barrier against excessive gentrification should be indicated spatially integrated urban policy; encouraging mixed-use developments, recreational activities with workers and customers access, maintaining and renewing building stock over time and preventing speculative exploding of publicly subsidized particular renewals, long-term rent controls, public investment funds for cultural-creative space development and micro-financing for creative entrepreneurs in such clusters.

Besides, at the firm level, the workers affiliated with individual functional units can grow very fast and performed while employing their primary knowledge at processes. Also, a proper distribution of knowledge populations is important to the success of ecosystem. Without adequate strength of their knowledge or necessary and required knowledge such ecosystems would not survive. Yet, the failure of members of ecosystem should not affect the overall effectiveness and operations of the ecosystem.

The loss of diversity decreases the probability of recovery after a significant disturbance, or adaptation to changing conditions.

Resilience and Viability of the Ecosystem

Resilience describes a given system responds to the demands and pressures of external conditions; both physical and non-physical. In order to acknowledge the resilience of the ecosystem, possible investigations need to be done from different aspects. First, for resistance, the amount of change that a system can undergo while retaining the same controls on structure and function should be assessed. Second, to what extend the system is capable of organizing itself without disorganization or force from external environment should be controlled. Third, the adaptive capability of ecosystem to prepare for unexpected events, responds to disruptions, and recovers from them by sustaining its operations operations at the desired level should be examined as well (Figure 7.3).

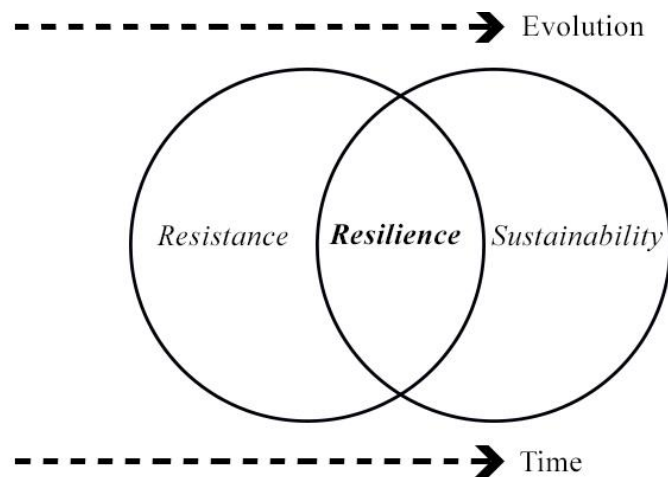


Figure 7.3. Viability of the Ecosystem

The faster a system returns to steadiness, the greater its viability. There is an implicit assumption of resilience in the system; without resistance there would be no presumed return to the pre-disturbance state, but rather with the help of resilience an adjustment to some new equilibrium level that could be better or worse than the previous state. To attain long-term sustainability, the ecosystem must be resilient and be prepared to respond to those changes that producing disturbances while enabling evolution over time.

Development and Evolution Dynamics

For evolution of the sector towards more creative and fashion-based industry, new business models should be introduced which create and capture creative and cultural value together. Such creative industry policy should encourage research and development for the sector in a broad sense. Research and development under the possible cooperation with universities with the fashion design departments can be a frame breaker in this regard. That togetherness also brings vitality and promotion to the district as well. Besides, a particular focus on how the relationships between publicly funded associations, universities and the private sector of the creative industries can have an effect on a more planned development of the sector. However, resilience becomes matters within such development efforts, especially which occurs around the ecosystem. In this respect, the amount of change that the ecosystem can undertake as maintaining the structure and function, and the extent to which the ecosystem is capable of operating itself without excessive external forces, and the degree to which the ecosystem develops the capacity to learn and adapt in response to disturbances should all be taken into account.

Ecosystem evolves over time through new knowledge emerged by mutation of internal populations or its combination with new knowledge and creativity pollinated from outside sources. For policy implications it is crucial to take into consideration how and when evolution relies on outside knowledge crossover. Creativity and knowledge are vital, and their diffusion among firms through spinoff creation, labor mobility and cooperation networks suggest strategic opportunities for creative industry clusters.

Enabled Organic Networks

In this context, networks create a form of community and identification. They are also a form of validation and legitimation of protection and vitality within which ecosystems can keep their survival.

Creative industries clusters tend to provide different types of network. In addition to the specific formal organizations as one level of networks which considered useful but too structured, ecosystems contains a social element and link their members to more informal, shared experiences with other in different scales. Also, it is not arguable that within large ecosystems, members form smaller and closer networks of their own as an outcome of their social interactions. These are relatively organic networks that satisfy more directly to the needs of ecosystem and more close to the

others. Especially, for the creative industries formal networks are very difficult to grasp, and informal ones are portrayed as contrasting with formally planned networks. Therefore, a top-to-down approach may not work in constructing such organic network-based ecosystems of creative clusters.

Interactions and Collaborations

Connectedness and interdependence realized through interactions and collaborations are key operating principles of this sort of ecosystems. Creative industry clusters benefit by understanding their existing place conditions, specifically, their links both internal and external to ecosystem and interdependence of firms to others outside the district and related sectors of their environment. Export capability of this ecosystem provides a place in the global creative ecology. Policy implications should also address an emphasis on mutual interdependence and interconnectedness in an attempt to make wedding wear manufacturing at regional and national level as well as build relationships to other industrial ecologies nationally or globally. For instance, the internal interaction at firm and district level and external interactions with the related sectors within the creative industries, and collaborations with the services and cultural sectors opens up development opportunities. In terms of services, of particular relevance here are creative services with creative value added services that combine creative class including professional, technical and creative knowledge skill sets from the design, information technologies, engineering field. On the other hand, promotion and commercialization strategies to add to these interactions require management capacity in various disciplines, as well as a capacity to combine these disciplines in collaborative ways. It is already acknowledged that creative and design professionals are highly embedded in all industry sectors and are needed in the wedding wear sector too. Collaborations among public-private partnerships and associations as well as external interactions are also crucial drivers for such implications. Lastly, the social relationships based on trust can build local cultures of production as part of collaborative business relations, even while competing, and support longer term individual and collective cognitive image of ecosystems.

Investment in Human Capital

The new economy that has triggered the urban restructuring has also enabled a competitive arena which is global, and that arena has become a place where human

capital is the core component with creativity, know-how and/or tacit knowledge. As mentioned in the vast literature, human capital is one major driver of the creative industry formations that is called creative class.

Along with the policy implications, it has been underlined that the education and training activities, and facilitation of learning and communicating among key actors can create long-term benefits for the vitality of such ecosystems. Above all, creative class is the essential player. Event tough the present research do not cover the issue of creativity, the possible implications should be the investigation and investment in the creative workers which are lacking in our case. Therefore, policy implications should consider the creative workers as central to success and acknowledge its capacity in producing and absorbing new ideas that is an outcome of their particular educations and trainings with creative essence, which is one of the underlying mechanisms of growth of ecosystem of creative clusters. Policy should therefore address how to foster creative human capital within the expanding creative workforce within creative industry clusters.

More Organic Planning for Creative Industry Clusters

The stage in the cycle of cluster appears vital and need to be taken into consideration through evaluating the existing structure of creative clusters. The strengths and potentials of clustering of creative industries associate with the degree of their development stage. Among the levels of their developments as dependent, aspirational, emergent and mature, the given ecosystem of this cluster can be said emerging due to the existing infrastructural investment from the public sector and rapidly developing local and regional markets around the area where demand becomes noticeable and the market try to reach at the international levels. Understanding the emerging characteristics of the ecosystem requires a long-term visioning and the creative and cultural factors should be considered as grounded in the urban context, rather than as an additive to urban discourses through a less mechanistic approach. There are no fast-track solutions in the development of ecosystems. However, it should be acknowledged that the integration of organizational and spatial dimensions to the ecosystem approach in terms of management is still more conceptual than practically orientated in urban planning. Instead of the pure organizational ecosystem management, appropriate protocols and mechanisms of planning should be determined and, to a certain extent, be incorporated with the ecosystem management tools.

Inner-city developments similar to the industry clusters in our case generally suggest a spontaneous type of clustering. While all over the world the rise of efforts to plan and design creative environments among policy makers has been taken up most intensely, the structures of these spaces, internal dynamics, organizational cultures, shortly their ecosystems, often face with top-down policy implications. In practice and literature, replacing such top-down approach with more organic is being widely discussed. Therefore, the planning approach to creative industry clusters should also be carefully evaluated. After having investigated the ecosystem of certain creative clusters and comprehend the internal structure, it is better to develop a multi-layered approach including all the actors in relation the space a more sensitive stand to the changing needs of the existing activities which shape the physical environment and eventually the ecosystem itself in order to creative environment development. In addition, a comprehensive planning framework is needed which enables necessary conditions based on the ecosystem components by vitality and capacity. Following, the rigidity of necessary prescriptions for creative environments should be softened, balanced and transformed into more flexible guidelines that create less resistance at the space and catch long-term investments. Many possible challenges here mostly bring about the discussions between the planned and the organic, top-down and bottom-up planning interventions.

Creative Environment for Mimar Kemalettin Fashion District

As a part of the overall creative environment, the system design mechanisms for the ecosystem in our case must be designed to encourage interactions across the individuals and firms both inside and outside the organization. In our case, allocating resources for wedding wear clusters and underlining the process of unique manufacturing process by craftsmanship may contribute more on social sustainability of this ecosystem while producing economic return for city. The previous planning efforts for the district implemented in 2000 resulted in better performing cluster of the wedding sector and did not entirely change the sociality of the district. Developing a sharing culture is important for better creative and knowledge transfer and exchange. A certain degree of competition kept among firms is beneficial for development and evolving survival skills. However, it is useful to keep collaborative competition on track and limit the conflictive competition to a certain limit for the vitality of the ecosystem.

Efforts for planning creative environments, in particular to Mimar Kemalettin Fashion District may indicate more intentional basis for actions in comparison to a top-down approach. That is based on the participatory planning and priority-setting, integrated planning, and horizontal coordination across municipalities and other NGOs related to the area. A certain degree of proximity between the ecosystem and the related sectors should be kept to enable effective external interactions within this ecosystem. That also adds to a greater competence to derive and adapt innovations from similar sectors through cross-over and also internally mutation through the flow and exchange of creativity, knowledge and innovations

Urban environments that carry a unique historical value, that attract the fashion designers to work and live, and that provide high accessibility, low transaction costs as well as high quality of the built environment with a certain social mix and alternative, creative atmosphere have enabled the creative industries to take advantages of all these properties and accumulated in certain places. A particular atmosphere is also excessively underlined in the theory of creative cities that involves aesthetic attributes, which provoke visual attraction, unexpectedness and spontaneity, and place which brings co-location, clustering as well as attachment, comfort and authenticity, and social life with enabled networks and with individual and physical diversity. The presence of the historical and cultural content available around the Mimar Kemalettin Fashion District should also be stimulated as strengths of this spatial environment. Its identity need also be sustained in any of the policy making decisions.

Mimar Kemalettin Fashion District already entails full of history, meaning and local knowledge for wedding wear production. Spatial imaginaries are already powerful, yet amenities are lacking. Thus, the interventions for restoration or rehabilitation of spaces for repurposed uses would overcome such deficits. While some projects are proposed for public uses some others can be more profit oriented. On the other hand, the given district is unique environment with full of architectural significance and locational opportunities to promote, yet many possible development scenarios on creative space making such as marketing, theming, creation of facilities aimed at costumers all carry the risk of shifting this area into an artificial one. Thus, the decisions towards promoting the local assets and dynamics should become the key to unlocking global markets for the ecosystem to compete.

Planning interventions based on organic approach to such cluster should necessarily assist value creation chain of firms and provide urban services including

hard and soft infrastructure because the infrastructure appears as an important strategy to provide mobility and access from major connecting roads, airports and ports both to production, products, human capital and other resources of the given ecosystem. The interventions should also concern with the physical environment and amenity, enable access to human capital, access to broad networks and markets across Izmir and Turkey. They should allow a diversified industrial structure since creative industry clusters regardless the sectoral indication are interconnected with other creative sectors, and build diversity of skills for different stages of value chain of fashion production. Additionally, such interventions need to enable openness to flow and exchange of creative ideas and know-how through the existing local buzz of the Mimar Kemalettin Fashion District. Besides, zoning in relation to adjacent land uses in city and other urban policies that promote recreational and entertainment are needed. The least advantages of such clustering are its proximity to the bus terminal and airport. Also its proximity to the Izmir International Fair has lost importance due to recent developments and replacement of the fair to another place outside the city center. Therefore, these should be considered in the future planning of this district in case of any replacement would be proposed.

It is essential to add the human creativity as an integral part to this existing ecosystem as well. Thus, the ultimate goal of creative environment interventions must address strategies for planning, designing and the required physicalities in where creativity can be attracted, retained, grown, shared and exchanged in and around the district. In order to affirm that, policy making process need to involve careful observations who will be part of the ecosystem as creative and how they will be associated with which processes of wedding wear manufacturing as a sub-set. The branding efforts also need to be elaborated with the physical planning of this ecosystem. Respectively, sustainability through social content of this ecosystem is more likely to be successful by long term functioning of creative value accumulation through workers.

The careful examination of the existing ecosystem brings about the instability of markets, the need for distinction as a competitive advantage, the issue of product differentiation for the niche market as a wedding wear sector. Otherwise, any creative industry formation dissolves in the long run without well-planned production, distribution and consumption and more importantly without creativity and good design as competitive advantages. Creative and cultural essence in such sector is, however, no doubly anything but purely embedded in existing socio-cultural and institutional

structures. Therefore, the wedding wear sectoral cluster in Mimar Kemalettin Fashion District should be different from other business clusters in city due to its inherited knowledge and know-how, on the one hand, with creative and aesthetic considerations, and on the other, seeking promotion, advertisement and cost-effective returns.

Development of MK Creative Incubator and Its Operational Management

As a part of such intended creative environment of the wedding wear sector, a possible creative incubator in Mimar Kemalettin Fashion District would be developed. The operations of this incubator could be designed as a system within a four-leg structure.

First, the structure of the incubator would consist of multiple actors. To begin with, this incubator might be operated by the Izmir Metropolitan Municipality or by non-profit cooperative, or a combination of public and profit-based organizations. The non-profit actor might be the Aegean Clothing Manufacturers Association (EGSD) in collaboration with Izmir Chamber of Commerce (ITO) and Aegean Exporters Association (EIB) which are already involved with the sector. Considering the current situation of the wedding wear production in Izmir, other than its cluster in Mimar Kemalettin Fashion District, there are further actors likely to be part of the operations of the incubators. Additionally, the independent designer boutique owners located in Karsiyaka and Alsancak which currently produce wedding wears on demand and relatively larger size firms of which their manufacturing processes take place in the MTK (Textile Manufacturers Site in Izmir) might be incorporated as additional actors. Such multi-actor based structure would also diminish the further monitoring and any performance indicator requirements for maintenance of the creative environment.

Second, collaborations with education centers, institutions and more importantly with the relevant design and engineering departments of universities could provide benefits through shared specializations via such platform. Particularly, such structure becomes a major mechanism for the recognition of talent and professionalism. In order to be perceived and recognized at the right spot, to interact with professionals, fashion designers, and the social environment becomes the attraction itself through the incubator. With the additional help of the independent designers, the talent management could be carried out. Regarding, the constant and continuous creativity and knowledge exchanges and much cooperation with designers that the sector currently lacks of would be achieved. Such center can also serve as a node where the education, research,

archiving and displaying of wedding wear designs can be carried out, and encourage the new comers to the ecosystem.

Third, the proposed incubator might serve as a hub to the wedding wear manufacturing that has currently unstable regional conditionals for evolving into a more organized structure with a creative value chain. That covers not only its production but also distribution and marketing considerations. The incubator works as a showcase where established and emerging wedding wear brands display their products, promote themselves and participate to the competition with higher chances of collaboration. On the other hand, for marketing, it overcomes the readjustment of the existing ecosystem with new location of Fair Izmir and function as a new center for fairs, exhibitions, corporate events, conferences and provides with all the necessary equipment. That eventually would lead to construction of a more comprehensive identity of the cluster.

Fourth, the necessary pipelines could also be built both regionally and nationally through such incubator. This incubator may function as a pump functioning through the established pipelines. The current networks do not create sufficient global pipelines through only the good and product transfer of the sector. Rather, that should be combined with the knowledge and creativity as well as experience flow in order to build better pipelines and reach non-spatially to other geographies. Also, that needs to be operating in both ways; the flow both from and to outside (Figure 7.4). This might also offer a platform of non-spatial links for creators and enable connection, production, and networking among non-creative and creative workers. The more trans-local pipelines brings more information and news about products, industries, markets and technologies through internal networks and, boost the already existing local buzz in Mimar Kemalettin Fashion District.

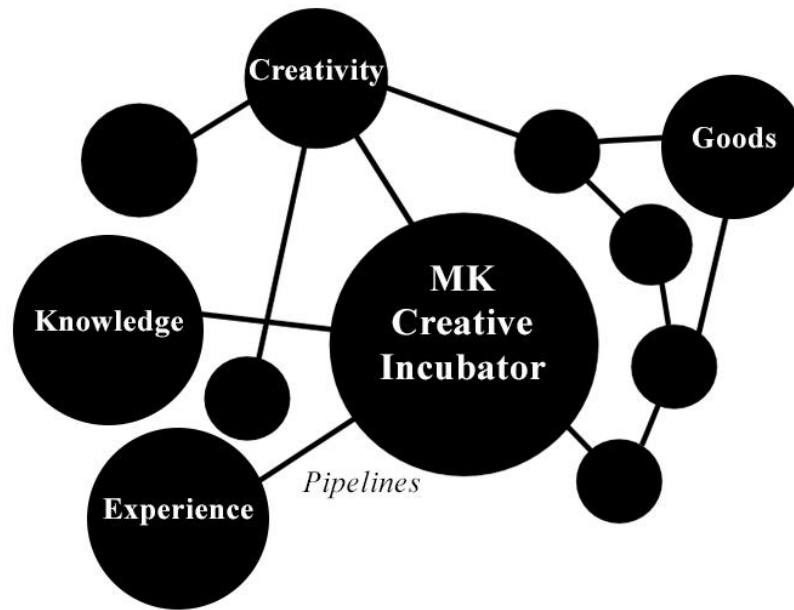


Figure 7.4. Content of the Possible Pipelines

Ultimately, that four-leg structure helps for the development of the sector both physically and organizationally while maintaining the health of the existing ecosystem. All in all, the incubator would be a driver of the possible creative environment created for Mimar Kemalettin Fashion District through various policy implications.

To sum up, the eventual point of this study has been reached suggests that there is a unique spatial and organizational structures of creative industry clusters which includes many aspects ranging from products to externalities that all takes place in the habitus of creative industry clusters should carefully be approached and evaluated by the possible planning interventions.

7.3. Suggestions for Future Research

The taken approach of this study explores the operations of creative clusters through the ecosystem approach that with a grounded understanding of the structures arising from the individuals to external environment engaged in the sector. While this study has focused predominantly on the dominant measures of the ecosystem there are certainly other factors for not only creative industries but other types of economic activity as well. Therefore, new findings from the same or connected cases may be

integrated to provide a better understanding of how the ecosystem of creative clusters operates in different contexts. So, the present research may be furthered with some extended objectives and methodologies. For instance, comparative studies with similar sub-sectors of fashion industry would be carried out.

Not only the fashion industry or its sub-sectors but also similar industrial clusters would be explored through the DICE model presented here. The model would be replicated; its content and the research quires particularly complimented with the fashion industry can be reconsidered, adjusted and combined with the internal dynamics of other particular sectors under focus. In this respect, regardless the geography and the type of the existing industry, the model would still work. The initial case studies may be the jewelry sector or furniture industry clusters situated in other regions of Izmir.

In addition, it would be interesting to examine whether and how creativity affect the ecosystem of creative industries. While data analysis and data evaluation improve the current literature, especially with a new approach, another possibility still remains for future researchers in the interpretation of the data related to the creativity, specifically regarding the individuals and actors involved in the creative industry value chain. This should be the new challenge for researchers willing to investigate the particular role of creativity at the individual level within the ecosystem of creative clusters.

Moreover, while underlining the weaknesses of the current global the pipelines of the wedding wear ecosystem located in Mimar Kemalettin Fashion District this study suggests a more in-depth research for this sector which particularly focuses on the structure of these pipelines. In this regard, the existing hard and soft structural systems can be analyzed in terms of their sufficiency to enable global pipelines. The transportation links, existing or potential fairs, goods and product networks can be taken as the hard systems whereas the cultural relations and establishments, social interactions, business networks of the so-called Dollar and Euro zones that bridges the districts to other geographies in distance, and peer relationships with international companies can be regarded as soft systems in such analysis in the further studies.

Furthermore, besides the taken components those were the most significant at the ecosystem research and practice, the resilience as an extended component would be studied separately or added to the utilized ecosystem measures in this research. The present DICE model focuses on the relational aspects of the ecosystem that neither contains a check-list nor assessment as criteria. However, adding the resilience measure

to the model would enable us to assess the health of the given ecosystem. The conceptual model presented in this study illustrates one of the possible arrays of components. Further researches would contribute to the existing body of literature of creative industry ecosystems by summarizing several existing perspectives on the phenomena of resilience and would take it as an index with possible indicators. If the business sectors face with frequent and significant external disruptions in the operation, the ecosystem may become vulnerable. Thus, the resilience could be taken as the capacity of the ecosystem to absorb and engage the sudden external disturbance while undergoing change to still attain the same essential operation. The indicators of resilience would not only be derived from the durability, robustness and recovery but also to the unique ability of the ecosystem to adapt as a result of adaptive capacity. In order to identify the indicators, a similar significant factor analysis can be carried out through the existing ecosystem literature. Later, these factors can be considered as the health-check indicators to assess the health of the ecosystem through the resilience measure. The mature wedding wear firms, the reasons behind their survival in this district particularly and the resilience of the entire ecosystem in general might be the preliminary case study subjects to such investigation. On the other hand, from the urban economics perspective, it would also be beneficial to further such study towards collecting, or even producing if possible, more economy-based data and analyze them with necessary methodologies on the wedding wear sector or/and comparatively the other fashion related sectors relationship to regional economic development in Izmir.

Above all, it should be noted that there is no single or unique ecosystem approach. The approach may be applied over a wide range of scales. This research approach to creative industry clusters opens many new research opportunities for further investigations. The approach may be implemented, tested and evaluated on many other creative industries accumulated in different geographies in order to explore whether different creative industry structures would affect the overall performance or operations.

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APPENDIX A

THE DICE SURVEY (Questionnaire)

Anket No: _____
Üretim yeri : _____ / MKMM ise, üretim katı(ları): _____
Satış (Showroom) yeri: _____ / MKMM ise, satış katı(ları): _____
Görüşmeye Katılan (üretici) Firma Adı: _____

Merhaba. Bu görüşme İzmir Yüksek Teknoloji Enstitüsü, Şehir ve Bölge Planlama Bölümü Doktora tezi kapsamında gelinlik ve abiye kıyafet sektörüne ilişkin bilgi edinme amacıyla yürütülmektedir. Amacı ise sektörün mevcut durumunun analizini çıkarmak ve beklentileri araştırmaktır. SORULARI KENDİ FİRMANIZ ÖZELİNDE CEVAPLAMAYA GAYRET GÖSTERİNİZ.

Bu süreçte paylaştığınız fikirler kesinlikle proje grubu dışında kimseyle paylaşılmayacak ve gizli tutulacaktır. Görüşleriniz raporda yer alacak ancak firma isminiz kesinlikle geçmeyecektir.

Teşekkürler,

Onur Mengi, Email: onur.mengi@gmail.com

A. ÇEŞİTLİLİK GÖSTERME

1. Firmanız kaç yıldır hizmet veriyor?

.....

2. Kendi markanıza mı üretim yapıyorsunuz?

Evet Hayır

a. Evet ise, markanız patentli mi?

Evet Hayır

3. Firmanıza ait ihracat belgesi var mı?

Evet Hayır

4. Firmanızda toplam kaç kişi çalışıyor?

.....

5. Firma içerisinde kaç kadın çalışıyor?

.....

6. Firmanızdaki üniversite mezunu sayısı kaçtır?

.....

7. Firmanızda çalışan üniversitelerin Tasarım bölümünden mezun sayısı kaçtır?

.....

8. Firma içerisinde çalışanların uzman oldukları/sorumluluk alanları nelerdir?

<input type="checkbox"/> Tasarımcı <input type="checkbox"/> Stilist <input type="checkbox"/> Kalıpcı <input type="checkbox"/> Kesimci <input type="checkbox"/> Araştırma & Geliştirme <input type="checkbox"/> Stajyer <input type="checkbox"/> Üretim/Atölye Şefi	<input type="checkbox"/> Makinacı <input type="checkbox"/> Ütücü <input type="checkbox"/> El İşçisi <input type="checkbox"/> CAD/CAM Operatörü <input type="checkbox"/> Satış Elemanı <input type="checkbox"/> Web sorumlusu/ SosyalMedya	<input type="checkbox"/> Muhasebeci/ Finansman <input type="checkbox"/> Sevkiyat (Lojistik) <input type="checkbox"/> Tanıtım/Pazarlama <input type="checkbox"/> Diğer
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9. Dışarıdan aldığınız hizmetler var ise nelerdir?

<input type="checkbox"/> Giysi tasarımı danışmanlığı <input type="checkbox"/> Fotoğrafçılık <input type="checkbox"/> Fotoğraf çekimi için ekip ve ekipmanlar (makyöz, kuaför, model, mekan seçimi vb.)	<input type="checkbox"/> Trend araştırmaları <input type="checkbox"/> Reklam şirketi (Pazarlama) <input type="checkbox"/> Web Yönetimi (Web sayfası) <input type="checkbox"/> Fuar katılımı/organizasyon	<input type="checkbox"/> Sosyal medya hizmetleri <input type="checkbox"/> Diğer
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10. Firmanızın üretim çeşitliliğini nasıl değerlendiriyorsunuz?

	Kesinlikle katılmıyorum	Katılmıyorum	Kararsızım	Katılıyorum	Kesinlikle katılıyorum
Farklı gelir düzeylerindeki birçok tüketiciye hitap ediyor.	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Farklı tarzlardaki birçok tüketiciye hitap ediyor.	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İzmirdeki (Alsancak, Karşıyaka vb) diğer firmalardan daha farklı ve her yerde bulunmayan kıyafetler yapıyoruz.	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

B. ETKİLEŞİMDE OLMA

1. Firmanızın farklı ölçeklerdeki iletişimini nasıl değerlendiriyorsunuz?

	Yok	Zayıf	Orta	İyi	Çok iyi
Firma çalışanları arasındaki iletişim	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
MKMM'deki diğer gelinlik ve abiye firmaları ile iletişimi	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İzmir'deki diğer gelinlik ve abiye firmaları ile iletişimi	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Türkiye'deki gelinlik ve abiye firmaları ile iletişimi	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yurtdışındaki gelinlik ve abiye firmaları ile iletişimi	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

2. Firmanızın, MKMM içerisindeki diğer gelinlik ve abiye firmaları ile iletişimini nasıl değerlendiriyorsunuz?

	Yok	Zayıf	Orta	İyi	Çok iyi
Yüz yüze iletişim sıklığı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Telefon ve/veya internet ile iletişim sıklığı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

3. Firmanız içerisinde çalışanlar arasındaki iletişim sonucu firmanızda nasıl bir iyileştirme sağladığınız?

	Hiç	Az	Orta	Çok	En çok
Daha iyi tasarımlar	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Daha farklı modeller	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Daha yaratıcı bir çalışma ortamı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Daha etkin (ucuz, hızlı) üretim	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

4. MKMM alanı ve yakın çevredeki diğer gelinlik ve abiye firmaları ile iletişim sonucu firmanızda nasıl bir iyileştirme sağladığımız?					
	Hiç	Az	Orta	Çok	En çok
Daha iyi tasarımlar	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Daha farklı modeller	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Daha yaratıcı bir çalışma ortamı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Daha etkin (ucuz, hızlı) üretim	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Piyasanın talebine daha uygun üretim	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
5. MKMM içerisindeki gelinlik ve abiye firmalarının bilgilerinden ne ölçüde yararlanıyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
Tasarım ve koleksiyonlarından	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yaratıcı fikirlerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Üretim bilgilerinden (hammadde, makine, malzeme vb.)	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Pazarlama/Satış bilgilerinden (alıcılar, fiyatlar, perakende vb.)	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İhracat bilgilerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Fuarlar ve organizasyonlar hakkında bilgilerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Sektörün durumu hakkındaki bilgilerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
6. MKMM alanı dışında yer alan diğer gelinlik ve abiye firmalarının bilgilerinden ne ölçüde yararlanıyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
Tasarım fikirlerinden (koleksiyonlarından)	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yaratıcı fikirlerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Üretim bilgilerinden (hammadde, makine, malzeme vb.)	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Pazarlama/Satış bilgilerinden (alıcılar, fiyatlar, perakende vb.)	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İhracat bilgilerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Fuarlar ve organizasyonlar hakkında bilgilerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Sektörün durumu hakkındaki bilgilerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
7. MKMM içerisindeki güncel konuları nasıl takip ediyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
MKMM Derneği aracılığıyla	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yüz yüze ilişkiler ile	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Başka firmalar aracılığıyla	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
TV ve gazeteler	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İnternet üzerinden	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Fuarlar sayesinde	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yemek ve çay saatlerinde	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Odalar ve Birlikler aracılığıyla	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
8. Diğer yardımcı sektörler ile iş ilişkilerinizin yoğunluğunu nasıl değerlendiriyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
Aksesuarcular (takı-boncuk)	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Ayakkabıcılar	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Fotoğrafçılar	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Dergi ve/veya Magazinler	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Televizyon	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

Reklam şirketleri	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Web yönetimi firmaları	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Grafik tasarımcıları	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Moda tasarımcıları	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İç mekan (vitrin) tasarımcıları	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Blog yazarı ve sosyal medya paylaşımcıları	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
9. Gelinlik fuarlarını, firmanıza olumlu katkıları açısından nasıl değerlendiriyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
Tanıtım yapmak	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İş ilişkileri kurmak	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Satış yapmak	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Diğer modelleri görmek	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
10. Müşterilerinize nasıl ulaşıyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
İnternet	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Reklam, Pano ve Billboardlar ile	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Çevirmenler/Tur şirketleri	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Dış ticaret şirketleri	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Başka firmalar aracılığıyla	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Fuarlar	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Odalar ve Birlikler aracılığıyla	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Gayri-resmi araçlar	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

C. REKABET ETME

1. Bu sektörde rekabet edebilmek için nerelere ihtiyaç duyuyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
MKMM içerisindeki firmalar ile işbirliğine	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
MKMM içerisindeki diğer firmaların tasarımlarını takip etmeye	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yurtiçindeki diğer firmalar ile işbirliğine	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yurtdışındaki firmalar ile işbirliğine	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Reklam yapmaya	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yurtiçi fuarlara	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yurtdışı fuarlara	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
2. Rekabeti farklı açılardan nasıl değerlendiriyorsunuz?					
	Kesinlikle katılmıyorum	Katılmıyorum	Kararsızım	Katılıyorum	Kesinlikle katılıyorum
MKMM içerisindeki firmalar bu rekabette yalnızca kendisinin kazanmasını ister.	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İzmir genelinde firmalar bu rekabette yalnızca kendisinin kazanmasını ister.	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
3. MKMM içinde firmalar arasında güven ve açıklık var mı?					
	Kesinlikle katılmıyorum	Katılmıyorum	Kararsızım	Katılıyorum	Kesinlikle katılıyorum
Firmamız diğer firmalara güvenir.	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Firmamız diğer firmalar ile bilgi paylaşımına açıktır.	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

D. EVRİLME

1. Çalışanlarınızın ya da kendinizin mesleki gelişimini ve bilgisini attırarak bir girişimde hiç buldunuz mu?					
Tasarım eğitimi		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
Kalıp eğitimi		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
CAD/CAM ekipmanı eğitimi		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
Yabancı dil eğitimi		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
Pazarlama eğitimi		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
İhracat eğitimi		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
Bilgisayar programı eğitimi		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
Fuar katılımları		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
Yurtdışı sektörel gezi ve turlar		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
Yurtiçi sektörel gezi ve turlar		Evet <input type="checkbox"/>		Hayır <input type="checkbox"/>	
Bu girişim, çalışanlarınıza ya da firmanıza nasıl bir katkı sağladı?					
	Hiç	Az	Orta	Çok	En çok
Çalışanların kişisel bilgi birikimi	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Firma içinde bilgi transferi/paylaşımı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Diğer firmalardan daha farklı tasarımlar/koleksiyonlar	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yeni Yurtiçi bağlantıları	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yeni Yurtdışı bağlantıları	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Satış miktarı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İhracat hacmi	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
2. MKMM içerisindeki gelinlik ve abiye firmalarında çalışma deneyimi olan birini işe aldığınızda firmanız nasıl bir gelişim gösterdiniz?					
	Hiç	Az	Orta	Çok	En çok
Sektör bilgisi arttı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
MKMM'deki diğer firmalar hakkındaki bilgi arttı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Üretim hızlandı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Müşteri arttı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İhracat arttı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Tasarım/Koleksiyonlar iyileşti	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
3. MKMM dışındaki gelinlik ve abiye firmalarında çalışma deneyimi olan birini işe aldığınızda firmanız nasıl bir gelişim gösterdiniz?					
	Hiç	Az	Orta	Çok	En çok
Sektör bilgisi arttı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
MKMM diğer firmalar hakkındaki bilgisi arttı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Üretim hızlandı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Müşteri arttı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İhracat arttı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Tasarım/Koleksiyonlar iyileşti	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
4. MKMM içerisindeki firmaların yeni bir yere taşınması gündeme gelirse, bu yeni yere uyumunu adaptasyonunuzu nasıl değerlendiriyorsunuz?					
	Kesinlikle katılmıyorum	Katılmıyorum	Kararsızım	Katılıyorum	Kesinlikle katılıyorum
İzmir'de başka hiçbir yere adapte olamayız	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Berber çalıştığımız yardımcı sektörler de gelirse yeni bir yere adapte olabiliriz	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
5. Mimar Kemalettin alanının moda merkezi olarak tanımlanmasını nasıl değerlendiriyorsunuz?					
	Kesinlikle katılmıyorum	Katılmıyorum	Kararsızım	Katılıyorum	Kesinlikle katılıyorum
Buranın moda merkezi olması fikrine	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

kolayca alıştık					
Mimar Kemalettin alanının moda merkezi olarak yeniden planlanmasının firmamıza olumlu katkıları oldu	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
6. Bu sektördeki gelişmeleri nasıl takip ediyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
Piyasa araştırması ile	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Trend araştırması ile	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Teknolojik gelişmeleri (üretimdeki, dağıtımdaki vb.) takip ederek	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Kumaşlardaki yeni teknolojileri ve gelişmeleri takip ederek	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
On-line satış hizmeti ile (halihazırdaki sitelere - markafoni, limango vb. sitelerde satış yapıyoruz)	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

E. KÜMELENME ÖZELLİKLERİ

1. Diğer gelinlik ve abiye firmaları ile küme oluşturmak firmanıza ne tür avantajlar sağlıyor?					
	Hiç	Az	Orta	Çok	En çok
Sektörel çeşitlilik	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İletişim ağı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Haber alma	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
İşbirliği ortamı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Rekabet etme	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Gelişme gösterme	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yardımcı sektörlerle kolay erişim	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Tedarikçilere ve perakendecilere kolay erişim	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Dernekleşme imkanı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Firmalar arası güven ve açıklık	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Belirli aralıklarla yapılan düzenleme ve kontroller	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Odaların/ kurumların küme desteği	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
2. MKMM içerisinde bulunmayı avantajları bakımından nasıl değerlendiriyorsunuz?					
	Kesinlikle katılmıyorum	Katılmıyorum	Kararsızım	Katılıyorum	Kesinlikle katılıyorum
Diğer firmalara mesafe (yakınlık) önemli	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
MKMM'deki fiziksel ortam rekabet üstünlüğü sağlıyor	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Altyapı yatırım masraflarımız düşük	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Aranan niteliklere sahip çalışan bulmak kolay	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Sektördeki değişimler hemen gözlemlenebiliyor	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Bu sektörde iş deneyimi olan çalışan bulmak kolay	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Şehir merkezindeki olanaklara kolay erişiliyor (yeme içme, kafe, restoran, eğlence vb.)	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Çevredeki tedarikçilere kolay ve maliyetsiz erişim imkânı var	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Fuara yakın	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Otogara yakın	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

Havaalanına yakın	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Çevredeki tarihi değerlere yakın	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
3. MKMM çevre planı ve mimarisi hakkında ne düşünüyorsunuz?					
	Kesinlikle katılmıyorum	Katılmıyorum	Kararsızım	Katılıyorum	Kesinlikle katılıyorum
Planlı	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Bu sektörün ihtiyaçlarına cevap veriyor	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Firmaların yaratıcılığını olumlu etkiliyor	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Müşterilerin ilgisi çekiyor	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
4. MKMM ve çevresinde ne gibi çevre sorunları yaşıyorsunuz?					
	Hiç	Az	Orta	Çok	En çok
Otopark eksikliği	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Altyapı eksikliği	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yeterli aydınlatma	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Atık/çöp toplama	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yapılarda yıpranma	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Temizlik	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Güvenlik	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Defile için bir yer ayrılmamış olması	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Toplanılabilecek bir açık bir alanın ayrılmamış olması	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Sosyal alan bulunmaması	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>
Yeşil alan eksikliği	1. <input type="checkbox"/>	2. <input type="checkbox"/>	3. <input type="checkbox"/>	4. <input type="checkbox"/>	5. <input type="checkbox"/>

APPENDIX B

DATA DESCRIPTIONS FOR ANALYSES

Table B.1. Data Description

DICE SURVEY - QUESTIONNAIRE (In Turkish)	NAME OF VARIABLES	Descriptive DATA SET	DATA TYPE	EXPLANATION OF DATA (USE OF DATA)
Anket No				Nr of firms
Üretim Yeri	Manufac_MK	DATA SET 4	1-0	vertical and horizontal
MKMM ise katları	Manufac_floors	DATA SET 4	Nr.	locational distribution of
Satış Yeri	Retail_MK	DATA SET 4	1-0	manufacturing and retailing
MKMM ise katları	Retail_floors	DATA SET 4	Nr.	activities on site
Firma Adı				Existing firm names
A.ÇEŞİTLİLİK GÖSTERİMİ				
1. Firmanız kaç yıldır hizmet veriyorsünüz?	Org_1	DATA SET 8	Nr.	Experience
2. Kendi markanıza mı üretim yapıyorsunuz?	Org_2	DATA SET 8	1-0	Branding
a. Evet ise markanız patentli mi?	Org_3	DATA SET 8	1-0	Patent
3. Firmanıza ait ihracat belgesi var mı?	Org_4	DATA SET 8	1-0	Export registration
4. Firmanızda toplam kaç kişi çalışıyor?	Org_5	DATA SET 8	Nr.	Capacity
5. Firma içerisinde kaç kadın çalışıyor?	Div_1	DATA SET 1	Nr.	Gender diversity
6. Firmanızdaki üniversite mezunu sayısı kaçtır?	Org_6	DATA SET 8	Nr.	Graduation Rate
7. Firmanızda çalışan üniversitelerin tasarım bölümünden mezun sayısı kaçtır?	Org_7	DATA SET 8	Nr.	Designer Rate
8. Firma içinde çalışanların uzman oldukları/sorumluluk alanları nelerdir?	Div_2	DATA SET 1	Nr.	Occupational diversity
Designer, Stylist, Dress Pattern, Cutter, R&D, Intern, Atelier Supervisor, Mechanist, Ironer, Craftsmen, CAD/CAM Operator, Salesman, WEB & Social Media, Account & Finance, Logistics, Marketing & Promotion		DATA SET 5	Nr.	Particular occupational distribution in manufacturing firms
9. Dışarıdan aldığınız hizmetler var ise nelerdir?	Int_62	DATA SET 1	Nr.	External interaction through outsourced services
Design Consultancy, Photography, Photoshooting staff and equipment, Trend Research, Marketing, WEB, Fair organizations, Social Media		DATA SET 6	Nr.	
10. Firmanızın üretim çeşitliliğini nasıl değerlendiriyorsunuz?				
Farklı gelir düzeyindeki birçok tüketiciye hitap ediyor.	Div_3	DATA SET 1	Likert Scale	manufacturing for diverse customers (income)
Farklı tarzdaki birçok tüketiciye hitap ediyor.	Div_4	DATA SET 1	Likert Scale	manufacturing for diverse customers (style&needs)
İzmirdeki (Alsancak,Karşıyaka vb.) diğer firmalardan daha farklı ve her yerde bulunmayan kıyafetler yapıyoruz.	Div_5	DATA SET 1	Likert Scale	manufacturing unique style
B.ETKİLEŞİMDE MODA				
1. Firmanızın farklı ölçeklerdeki iletişimini nasıl değerlendiriyorsunuz?				
Firma çalışanları arasındaki iletişim.	Int_1	DATA SET 1	Likert Scale	Different scales of interaction (internal and external to firms and cluster)
MKMM'deki diğer gelinlik ve abiye firmaları ile iletişim.	Int_2	DATA SET 1	Likert Scale	
İzmir'deki diğer gelinlik ve abiye firmaları ile iletişim	Int_3	DATA SET 1	Likert Scale	
Türkiye'deki gelinlik ve abiye firmalarıyla iletişim	Int_4	DATA SET 1	Likert Scale	
Yurtdışındaki gelinlik ve abiye firmaları ile iletişim	Int_5	DATA SET 1	Likert Scale	
2. Firmanızın, MKMM içerisindeki diğer gelinlik ve abiye firmaları ile iletişimini nasıl değerlendiriyorsunuz?				
Yüz yüze iletişim sıklığı.	Int_6	DATA SET 1	Likert Scale	Face-to-face interaction
Telefon ve/veya internet ile iletişim sıklığı.	Int_7	DATA SET 1	Likert Scale	(matter of geographical
3. Firmanız içerisinde çalışanlar arasındaki iletişim sonucu firmanızda nasıl bir iyileştirme sağladığınız?				
Daha iyi tasarımlar.	Int_8	DATA SET 1	Likert Scale	Outcomes of internal interaction in firms
Daha farklı tasarımlar.	Int_9	DATA SET 1	Likert Scale	
Daha yaratıcı bir çalışma ortamı	Int_10	DATA SET 1	Likert Scale	
Daha etkin (ucuz,hızlı) üretim	Int_11	DATA SET 1	Likert Scale	
4. MKMM alanı ve yakın çevredeki diğer gelinlik ve abiye firmaları ile iletişim sonucu firmanızda nasıl bir iyileştirme sağladığınız?				
Daha iyi tasarımlar.	Int_12	DATA SET 1	Likert Scale	Outcomes of external interaction among firms
Daha farklı tasarımlar.	Int_13	DATA SET 1	Likert Scale	
Daha yaratıcı bir çalışma ortamı	Int_14	DATA SET 1	Likert Scale	
Daha etkin (ucuz,hızlı) üretim	Int_15	DATA SET 1	Likert Scale	
Piyasanın talebine daha uygun	Int_16	DATA SET 1	Likert Scale	

(cont. on next page)

Table B.1. (cont.)

5. MKMM içerisindeki gelinlik ve abiye firmalarının bilgilerinden ne ölçüde yararlanıyorsunuz?				
Tasarım ve koleksiyonlarından	Int_17	DATA SET 1	Likert Scale	Focus and subject of knowledge sharing and exchange among firms inside the cluster (internal to cluster)
Yaratıcı fikirlerinden	Int_18	DATA SET 1	Likert Scale	
Üretim bilgilerinden(hammadde, makine, malzeme vb.)	Int_19	DATA SET 1	Likert Scale	
Pazarlama/satış bilgilerinden (alıcılar,fiyatlar,perakende vb.)	Int_20	DATA SET 1	Likert Scale	
İhracat bilgilerinden	Int_21	DATA SET 1	Likert Scale	
Fuar ve organizasyon hakkında bilgilerinden	Int_22	DATA SET 1	Likert Scale	
Sektörün durumu hakkındaki bilgilerinden	Int_23	DATA SET 1	Likert Scale	
6. MKMM alanı dışında yer alan diğer gelinlik ve abiye firmalarının bilgilerinden ne ölçüde yararlanıyorsunuz				
Tasarım fikirlerinden (koleksiyonlarından)	Int_24	DATA SET 1	Likert Scale	Focus and subject of knowledge sharing and exchange among firms outside the cluster (external to cluster)
Yaratıcı fikirlerinden	Int_25	DATA SET 1	Likert Scale	
Üretim bilgilerinden(hammadde, makine, malzeme vb.)	Int_26	DATA SET 1	Likert Scale	
Pazarlama/satış bilgilerinden (alıcılar,fiyatlar,perakende vb.)	Int_27	DATA SET 1	Likert Scale	
İhracat bilgilerinden	Int_28	DATA SET 1	Likert Scale	
Fuar ve organizasyon hakkında bilgilerinden	Int_29	DATA SET 1	Likert Scale	
Sektörün durumu hakkındaki bilgilerinden	Int_30	DATA SET 1	Likert Scale	
7. MKMM içerisindeki güncel konuları nasıl takip ediyorsunuz?				
MKMM derneği aracılığıyla	Int_31	DATA SET 1	Likert Scale	Mediums of interaction to stay up to date inside the cluster (internal to cluster)
Yüz yüze ilişkiler ile	Int_32	DATA SET 1	Likert Scale	
Başka firmalar aracılığıyla	Int_33	DATA SET 1	Likert Scale	
TV ve gazeteler	Int_34	DATA SET 1	Likert Scale	
İnternet üzerinden	Int_35	DATA SET 1	Likert Scale	
Fuarlar sayesinde	Int_36	DATA SET 1	Likert Scale	
Yemek ve çay saatlerinde	Int_37	DATA SET 1	Likert Scale	
Odalar ve birlikler aracılığıyla	Int_38	DATA SET 1	Likert Scale	
8. Diğer yardımcı sektörler ile iş ilişkilerinizin yoğunluğunu nasıl değerlendiriyorsunuz				
Aksesuarcular(takı-boncuk)	Int_39	DATA SET 1	Likert Scale	External interaction with other related (creative) industries
Ayakkabıcılar	Int_40	DATA SET 1	Likert Scale	
Fotoğrafçılar	Int_41	DATA SET 1	Likert Scale	
Dergi ve/veya magazinler	Int_42	DATA SET 1	Likert Scale	
Televizyon	Int_43	DATA SET 1	Likert Scale	
Reklam şirketleri	Int_44	DATA SET 1	Likert Scale	
Web yönetimi firmaları	Int_45	DATA SET 1	Likert Scale	
Grafik tasarımcıları	Int_46	DATA SET 1	Likert Scale	
Moda tasarımcıları	Int_47	DATA SET 1	Likert Scale	
İç mekan (vitrin) tasarımcıları	Int_48	DATA SET 1	Likert Scale	
Blog yazarı ve sosyal medya paylaşımcıları	Int_49	DATA SET 1	Likert Scale	
9. Gelinlik fuarlarını, firmanıza olumlu katkılan açısından nasıl değerlendiriyorsunuz?				
Tanıtım yapmak	Int_50	DATA SET 1	Likert Scale	Contributions of external interactions through fairs
İş ilişkileri kurmak	Int_51	DATA SET 1	Likert Scale	
Satış yapmak	Int_52	DATA SET 1	Likert Scale	
Diğer modelleri görmek	Int_53	DATA SET 1	Likert Scale	
10. Müşterilerinize nasıl ulaşıyorsunuz				
İnternet	Int_54	DATA SET 1	Likert Scale	Interaction with customers (external needs for reaching to customers)
Reklam, pano ve billboardlar ile	Int_55	DATA SET 1	Likert Scale	
Çevirmenler/tur şirketleri	Int_56	DATA SET 1	Likert Scale	
Dış ticaret şirketleri	Int_57	DATA SET 1	Likert Scale	
Başka firmalar aracılığıyla	Int_58	DATA SET 1	Likert Scale	
Fuarlar	Int_59	DATA SET 1	Likert Scale	
Odalar ve birlikler aracılığıyla	Int_60	DATA SET 1	Likert Scale	
Gayri-resmi araçlar	Int_61	DATA SET 1	Likert Scale	

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Table B.1. (cont.)

C. REKABET ETME				
1. Bu sektörde rekabet edebilmek için nerelere ihtiyaç duyuyorsunuz?				
MKMM içerisindeki firmalar ile işbirliği	Comp_1	DATA SET 1	Likert Scale	Collaborations inside the cluster (internal to cluster)
MKMM içerisindeki diğer firmaların tasarımlarını takip etmeye	Comp_2	DATA SET 1	Likert Scale	Collaborations outside the cluster (external to cluster)
Yurtiçindeki diğer firmalar ile işbirliğine	Comp_3	DATA SET 1	Likert Scale	Collaborations outside the cluster (international)
Yurtdışındaki firmalar ile işbirliğine	Comp_4	DATA SET 1	Likert Scale	Need for fairs and advertisements for competition
Reklam yapmaya	Comp_5	DATA SET 1	Likert Scale	
Yurtiçi fuarlara	Comp_6	DATA SET 1	Likert Scale	
Yurtdışı fuarlara	Comp_7	DATA SET 1	Likert Scale	
2. Rekabeti farklı açılardan nasıl değerlendiriyorsunuz?				
MKMM içerisindeki firmalara bu rekabeti yalnızca kendisinin kazanmasını ister.	Comp_8	DATA SET 1	Likert Scale	Conflicting competition in cluster (Win-lose)
İzmir genelinde firmalar bu rekabette yalnızca kendisinin kazanmasını ister.	Comp_9	DATA SET 1	Likert Scale	Conflicting competition in sector (Win-lose)
3. MKMM içinde firmalar arasında güven ve açıklık var mı?				
Firmamız diğer firmalara güvenir	Comp_10	DATA SET 1	Likert Scale	Trust and openness (related to interaction&collaboration)
Firmamız diğer firmalar ile bilgi paylaşımına açıktır	Comp_11	DATA SET 1	Likert Scale	
D. EVRİLME				
1. Çalışanlarınızın ya da kendinizin mesleki gelişimini ve bilgisini arttıracak bir girişimde hiç bulundunuz mu?				
Tasarım eğitimi	Evol_1	DATA SET 1	1-0	Mediums of evolution and firm-based development
Kalip eğitimi	Evol_2	DATA SET 1	1-0	
CAD/CAM ekipmanı eğitimi	Evol_3	DATA SET 1	1-0	
Yabancı dil eğitimi	Evol_4	DATA SET 1	1-0	
Pazarlama eğitimi	Evol_5	DATA SET 1	1-0	
İhracat eğitimi	Evol_6	DATA SET 1	1-0	
Bilgisayar programı eğitimi	Evol_7	DATA SET 1	1-0	
Fuar katılımları	Evol_8	DATA SET 1	1-0	
Yurtdışı sektörel gezi ve turlar	Evol_9	DATA SET 1	1-0	
Yurtiçi sektörel gezi ve turlar	Evol_10	DATA SET 1	1-0	
Bu girişim çalışanlarınıza ya da firmanıza nasıl bir katkı sağladı?				
Çalışanların kişisel bilgi birikimi	Evol_11	DATA SET 1	Likert Scale	Knowledge-mutation and outcomes of the development efforts and mutation
Firma içinde bilgi transferi/paylaşımı	Evol_12	DATA SET 1	Likert Scale	
Diğer firmalardan daha farklı tasarımlar/koleksiyonlar	Evol_13	DATA SET 1	Likert Scale	
Yeni yurtiçi bağlantıları	Evol_14	DATA SET 1	Likert Scale	
Yeni yurtdışı bağlantıları	Evol_15	DATA SET 1	Likert Scale	
Satıl miktarı	Evol_16	DATA SET 1	Likert Scale	
İhracat hacmi	Evol_17	DATA SET 1	Likert Scale	
2. MKMM içerisindeki gelinlik ve abiye firmalarında çalışma deneyimi olan birini işe aldığınızda firmanız nasıl firmanız nasıl bir gelişim gösterdiniz?				
Sektör bilgisi arttı	Evol_18	DATA SET 1	Likert Scale	Knowledge-crossover (internal to the cluster) and outcomes of the crossover
MKMM'deki diğer firmalar hakkında bilgi arttı	Evol_19	DATA SET 1	Likert Scale	
Üretim hızlandı	Evol_20	DATA SET 1	Likert Scale	
Müşteri arttı	Evol_21	DATA SET 1	Likert Scale	
İhracat arttı	Evol_22	DATA SET 1	Likert Scale	
Tasarım/Koleksiyonlar iyileşti.	Evol_23	DATA SET 1	Likert Scale	
3. MKMM dışındaki gelinlik ve abiye firmalarında çalışma deneyimi olan birini işe aldığınızda firmanız nasıl firmanız nasıl bir gelişim gösterdiniz?				
Sektör bilgisi arttı	Evol_24	DATA SET 1	Likert Scale	Knowledge-crossover (external to the cluster) and outcomes of the crossover
MKMM'deki diğer firmalar hakkında bilgi arttı	Evol_25	DATA SET 1	Likert Scale	
Üretim hızlandı	Evol_26	DATA SET 1	Likert Scale	
Müşteri arttı	Evol_27	DATA SET 1	Likert Scale	
İhracat arttı	Evol_28	DATA SET 1	Likert Scale	
Tasarım/Koleksiyonlar iyileşti.	Evol_29	DATA SET 1	Likert Scale	
4. MKMM içerisindeki firmaların yeni bir yere taşınması gündeme gelirse, bu yeni yer uyumunu adaptasyonunu nasıl değerlendiriyorsunuz?				
İzmir'de başka bir yere adapte olamayız	Evol_30	DATA SET 1	Likert Scale	Adaptation to new places
Berber çalıştığımız yardımcı sektörler de gelirse yeni bir yere adapte olabiliriz.	Evol_31	DATA SET 1	Likert Scale	Sectoral clustering outside MKMM

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Table B.1. (cont.)

5. Mimar Kemalettin alanının moda merkezi olarak tanımlanmasını nasıl değerlendiriyorsunuz?				
Buranın moda merkezi olması fikrine kolayca alıştık	Evol_32	DATA SET 1	Likert Scale	Adaptation to rebranding
Mimar Kemalettin alanının moda merkezi olarak yeniden planlanmasının firmamıza olumlu katkıları oldu	Evol_33	DATA SET 1	Likert Scale	Adaptation to emergence of the formal district
6. Bu sektördeki gelişmeleri nasıl takip ediyorsunuz?				
Piyasa araştırması ile	Evol_34	DATA SET 1	Likert Scale	R&D and recent sectoral development follow-ups.
Trend araştırması ile	Evol_35	DATA SET 1	Likert Scale	
Teknolojik gelişmeleri(üretimdeki, dağıtımdaki vb.) takip ederek	Evol_36	DATA SET 1	Likert Scale	
Kumaşlardaki yeni teknolojileri ve gelişmeleri takip ederek	Evol_37	DATA SET 1	Likert Scale	
On-line satış hizmetleri ile (halihazırdaki sitelere-markafon,limango vb. Sitelerde satış yapıyoruz)	Evol_38	DATA SET 1	Likert Scale	
E. KÜMELENME ÖZELLİKLERİ				
1. Diğer gelinlik ve abiye firmaları ile küme oluşturmak firmanıza ne tür avantajlar sağlıyor?				
Sektörel çeşitlilik	Cluster_1	DATA SET 2	Likert Scale	Diversity
İletişim ağı	Cluster_2	DATA SET 2	Likert Scale	Interaction
Haber alma	Cluster_3	DATA SET 2	Likert Scale	
İşbirliği ortamı	Cluster_4	DATA SET 2	Likert Scale	Competition
Rekabet etme	Cluster_5	DATA SET 2	Likert Scale	
Gelişme gösterme	Cluster_6	DATA SET 2	Likert Scale	Evolution
Yardımcı sektörlerle kolay erişim	Cluster_7	DATA SET 2	Likert Scale	Proximity to related sectors
Tedarikçilere ve perakendecilere kolay erişim	Cluster_8	DATA SET 2	Likert Scale	
Dernekleşme imkanı	Cluster_9	DATA SET 2	Likert Scale	Institutionalization
Firmalar arası güven ve açıklık	Cluster_10	DATA SET 2	Likert Scale	Openness
Belirli aralıklarla yapılan düzenleme ve kontroller	Cluster_11	DATA SET 2	Likert Scale	Control and monitoring
Odaların/kurumların küme desteği	Cluster_12	DATA SET 2	Likert Scale	Other Institutions
2. MKMM içerisinde bulunmayı avantajları bakımından nasıl değerlendiriyorsunuz?				
Diğer firmalara mesafe (yakınlık) önemli	MK_1	DATA SET 3	Likert Scale	Proximity to other firms
MKMM'deki fiziksel ortam rekabet üstünlüğü sağlıyor	MK_2	DATA SET 3	Likert Scale	Role of the district for competitive advantage
Altyapı yatırım masraflarımız düşük	MK_3	DATA SET 3	Likert Scale	Low-cost investment
Aranan niteliklere sahip çalışan bulmak kolay	MK_4	DATA SET 3	Likert Scale	High demand supply on site
Sektördeki değişimler hemen gözlemlenebiliyor	MK_5	DATA SET 3	Likert Scale	Sectoral scanning and follow-up
Bu sektörde iş deneyimi olan çalışan bulmak kolay	MK_6	DATA SET 3	Likert Scale	Knowledge Cross-over
Şehir merkezindeki olanaklara kolay erişiliyor (yeme içme, kafe, restoran, eğlence vb.)	MK_7	DATA SET 3	Likert Scale	Proximity to other activities
Çevredeki tedarikçilere kolay ve maliyetsiz erişim imkanı var	MK_8	DATA SET 3	Likert Scale	Proximity to related sectors
Fuara yakın	MK_9	DATA SET 3	Likert Scale	Proximity to the Fair İzmir
Otogara yakın	MK_10	DATA SET 3	Likert Scale	Proximity to the Bus Terminal
Havaalanına yakın	MK_11	DATA SET 3	Likert Scale	Proximity to the Airport
Çevredeki tarihi değerlere yakın	MK_12	DATA SET 3	Likert Scale	Proximity to the Historical Assets around the site
3. MKMM çevre planı ve mimarisi hakkında ne düşünüyorsunuz?				
Planlı	Spt_1	DATA SET 9	Likert Scale	Role of urban settings and architecture and contribution to the cluster in terms of customer retention, needs
Bu sektörün ihtiyaçlarına cevap veriyor	Spt_2	DATA SET 9	Likert Scale	
Firmaların yaratıcılığını olumlu etkiliyor	Spt_3	DATA SET 9	Likert Scale	
Müşterilerin ilgisi çekiyor	Spt_4	DATA SET 9	Likert Scale	
4. MKMM ve çevresinde ne gibi çevre sorunları yaşıyorsunuz?				
Otopark eksikliği	Spt_5	DATA SET 7	Likert Scale	Environmental problems around the district
Altyapı eksikliği	Spt_6	DATA SET 7	Likert Scale	
Yeterli aydınlatma	Spt_7	DATA SET 7	Likert Scale	
Atık/çöp toplama	Spt_8	DATA SET 7	Likert Scale	
Yapılarda yıpranma	Spt_9	DATA SET 7	Likert Scale	
Temizlik	Spt_10	DATA SET 7	Likert Scale	
Güvenlik	Spt_11	DATA SET 7	Likert Scale	
Defile için bir yer ayrılmamış olması	Spt_12	DATA SET 7	Likert Scale	
Toplanabilecek açık bir alanın ayrılmamış olması	Spt_13	DATA SET 7	Likert Scale	
Sosyal alan bulunmaması	Spt_14	DATA SET 7	Likert Scale	
Yeşil alan eksikliği	Spt_15	DATA SET 7	Likert Scale	

VITA

Personal

Date and Place of Birth: October 21, 1984, İzmir, Turkey

Education

- 2010 - 2015 İzmir Institute of Technology, İzmir/Turkey
Doctor of Philosophy in City Planning
- 2008 - 2009* University of Amsterdam, Amsterdam/Netherlands
Research Master's Program in Metropolitan Studies
*Graduate Exchange Student
- 2006 - 2009 İzmir Institute of Technology, İzmir/Turkey
Master of Science in Urban Design
- 2002 - 2006 Dokuz Eylül University, İzmir/Turkey
Bachelor of Science in City and Regional Planning

Work Experience

- 2014 - Present Lecturer / Department of Industrial Design, Faculty of Fine Arts and Design, İzmir University of Economics, İzmir/Turkey
- 2010 - 2014 Research Assistant / Department of Industrial Design, Faculty of Fine Arts and Design, İzmir University of Economics, İzmir/Turkey

Research Experience and Funds

- 2015 - Present Design-Based Development Model for the Cultural Industries to Restructure: A Case of Menemen Pottery / funded by İzmir University of Economics, Project Nr: A1501001/BAP-A026-K
- 2013 - 2014 Spatial and Organizational Ecosystem Mapping Project for the Emerging Wedding Wear Cluster in İzmir / funded by İzmir Institute of Technology, Project Nr: 2013İYTE36
- 2009 - 2010 Proposing Climate Sensitive Design Principles for Large Scale Projects in Different Climates / funded by İzmir Institute of Technology, Project Nr: 2009İYTE38