

Styling the City: The municipality, fashion and identity in Dunedin, New Zealand

Introduction

In optimistic moments Dunedin might be considered by some to be a place on the periphery with an experimental edge (for location see Figures 1 and 2). Nevertheless, the long-term trend has been for both Dunedin's and Otago's (the surrounding region) economic growth to lag behind that of the other major centres and regions in New Zealand, although each has picked up significantly this century (Campbell-Hunt 2007). Despite the recent upturn, the situation remains tenuous, hence the region spends almost twice the national average on its economic development efforts (Campbell-Hunt 2007). Some of that effort has been directed at the local fashion industry.

At the beginning of this century, New Zealand identified designer fashion as a 'transforming industry', with potential to achieve export earnings and generate employment (Larner 2003). Currently, New Zealand Trade and Enterprise (the government's economic development agency) identifies the creative industries (which include fashion) as one of eight sectors that they prioritise engaging with to build capability and develop projects. In particular, their focus on such industries has the purpose of branding the country as innovative and creative, but also the aim of using the sector as a driver in global competitiveness (New Zealand Trade and Enterprise 2006).

The first genuine recognition of the wider contribution of designer fashion slowly emerged in New Zealand through the 1990s, and arguably crystallised with the 'NZ Four' show at London Fashion Week in March 1999, championed by Trade New Zealand (a predecessor to New Zealand Trade and Enterprise). At this show, four key designers, World, NOM*d (a Dunedin label), Zambesi and Karen Walker, made a group appearance, gaining an enthusiastic response from the international audience (Gregg 2003) and significantly raising the profile of New Zealand fashion (Blomfield 2002). The *Brand New Zealand* campaign offered support for the continuance of the alliance as part of its efforts 'to promote a richer understanding of New Zealand in the global marketplace to enhance New Zealand's national brand [and] to better differentiate New Zealand internationally' (Ministry of Economic Development 2006). In parallel timing, Dunedin City was quick to harness the success of Dunedin's fashion industry to its own local marketing advantage. In particular the Council recognised the potential for the sector to help with the re-working of the city's somewhat jaded image.

The research reported in the present article aimed to explore the advantages being sought by the Dunedin local authority, via its fashion sector, for the purpose of urban economic regeneration and city promotion. The first step in that work was recognising the importance of the concepts of clustering and branding to that local body endeavour.

The Broader Cluster and Branding Context

Dunedin and New Zealand are not by any means alone in advancing instruments to improve their place in global and sub-global markets. Kotler et al. (Kotler, Haider et al. 1993) argue that we live in a period of 'place wars', each locality competing regionally, nationally and internationally for economic survival. In recent years, local governments have turned to entrepreneurial tools that offer inexpensive and immediately responsive mechanisms for such

development (Rantisi and Leslie 2006). In this vying for success, one particularly popular local body strategy has been to try to cultivate 'place competitiveness' (Porter 2002; Hall 2007), making the latter a fundamental policy goal. In such toil, places are commonly regarded as parallel to firms in how they contribute to the economy. The discourse is not strongly developed in terms 'of how regions compete, prosper and grow in economic terms' (Bristow, 2005: 291)(Bristow 2005). Nevertheless, a recent proliferation of local government strategies aimed at industry clustering and place re-imaging to enhance competitiveness is in clear evidence (Peck and Tickell 2002).

Clustering

General agreement over the definition of the cluster does not exist. Attempts at providing definitions tend to result in only vague constructs, enabling different users to employ the term in divergent ways. As a result, networks labelled as clusters can 'vary considerably in type, origin, structure, organization, dynamics and developmental trajectory' (Martin and Sunley, 2003: 15). For the purposes of the present paper, where debating the specific parameters of clusters is not an intent a cluster is a community of firms and related service providers, located in close proximity to each other in a city or region, in which the firms have strong business links to one another, and in which their interconnection provides advantages over companies isolated outside the cluster (Campbell and Campbell-Hunt 2007).

Common characteristics of a functioning cluster include supportive local demand, vertical interdependence between member firms, knowledge and innovation spill-overs between members, institutional thickness (in terms of supporting services), collaborative efforts between firms, social embeddedness, internationalisation of activities, and a collective identity. These characteristics will be used to structure the discussion of the results from the current research in Dunedin.

Many argue clusters can have a central role in nurturing the international competitiveness of their members. That might occur by firms learning from those members already successful internationally. It might result from firms gradually evolving specialised roles within the cluster network. It may come about via the expansion of local resources that differentiate cluster firms from external competitors (Campbell and Campbell-Hunt 2007). However, the value of clusters remains keenly debated in the literature.

Clusters can form in several different ways. For example, they may form organically in response to local demand. But in recent years, the concept has gained popularity via a more strongly engineered approach – the cluster-based policies of local authorities. There is a general perception among policy-makers worldwide that clusters can form the basis of a successful economic strategy by supporting regional innovation, encouraging technological spillovers, producing economies of scale and scope, and enhancing self sustaining local economic development (Raines 2002).

The approach is one taken up by Dunedin City:

We are creating an environment for firms to flourish within our city.... our whole focus has been on core competence and identifying what we're good at here, what's already located here, and then building on that grow-your-own basis. And then using the City Council's resources and the things it has influence over to create an environment that is conducive for those firms to grow and help to make them better than the internationals.
(Interview with linker 1, 2005)

In 1997 the Dunedin City Council chose to begin fostering various industry clusters (including engineering and IT) as part of such a development approach – spurred by central funding for such activity (from the then *Trade New Zealand* organisation). So, part of the City Economic Development Unit's strategy has been 'to focus on specific sectors within the city that have got the potential to grow [...] In 2000 that [strategy] identified ... fashion as one of those sectors' (interview with linker 2, 2005). Hence work on developing an identifiable fashion cluster in Dunedin began. Linked to that venture, there is also the potential to use the various sector clusters as part of a re-imaging and branding strategy for the city.

Branding

Place branding facilitates a particular interpretation of a place for a specific purpose. The activity is acknowledged as an old practice of civic governments which aims to craft 'a specifically-designed place identity and promote it to identified markets, whether external or internal' (Kavaratzis and Ashworth 2005: 506). Contemporary usage of the term 'branding' is derived from the practice of product branding, that is, developing 'a name, term, design, symbol, or any other feature that identifies one seller's good or service as distinct from those of other sellers' (American Marketing Association 2007). Naturally, with its extended utility, the concept of branding has complicated. In the field of city making, '[p]lace branding centres on people's perceptions and images and puts them at the heart of orchestrated activities, designed to shape the place and its future' (Kavaratzis and Ashworth 2005: 507). It is applied for a range of different purposes including attracting development, luring new residents, protecting local business, encouraging tourists, enticing tertiary students, and transforming negative impressions.

In July 2001, Dunedin City Council launched its own branding campaign with the city and the nation: *I Am Dunedin*. The campaign targeted people who lived outside Dunedin city, specifically business people, homeowners and students within the North Island of New Zealand and potential immigrants. In its aim to increase positive perceptions of Dunedin, the *I Am Dunedin* campaign portrayed a series of images and stories of people, personifying the many faces of Dunedin (Hooker, 2007). As part of that crusade, the local fashion sector was formally recognised as an important component in turning around existing understandings of Dunedin by demonstrating the vitality and creativity of the place. The present research sought to decipher the various strands of local government and fashion industry interaction, and review the development outcomes for the sector and the city.

The Study's Methods

The research reported in this article is one component of a much larger project examining regional development processes in Dunedin and Christchurch, and still broader development processes relating to New Zealand as a whole in an international context. The research approach used in the particular study reported here is qualitative in nature, based on analysis and interpretation of policy and promotional texts, intensive interviews, observation, detailed firm case histories, and news articles. In this way, the meanings of the marketing and development endeavours linked with the fashion industry in Dunedin city can be explored and debated. The taped and fully transcribed key informant interviews are of particular importance. An unstandardised format of open-ended questions was used. The semi-structured interview is particularly useful for questioning professionals, business people and community representatives in order to discover their involvement in and interpretations of particular practices and undertakings. The results allow the positions and understandings of the key actors to be identified and their interaction with others involved in the broad fashion and development network to be traced and analysed. They also enable a meaningful reconstruction

(cross-checked via other interviews, observations and documentation) of the processes involved in this particular iteration of city development and branding.

The interviews have involved two groups of informants. First, there were eight 'linker' interviews, that is, dialogues with resource and infrastructure providers such as key personnel from the local authority, business incubator, the city's fashion school, and local fashion week organisers. Second, there were twelve interviews with firms, including fashion houses, clothing manufacturers and designer tour businesses. Topics covered in these interviews traversed informant characterisations of the Dunedin fashion sector; the regional bases of competitive advantage; geographic markets; personal and business ties to Dunedin; the edge derived from a Dunedin location and the challenges; the extent and nature of collaborative relationships; and the roles and effect of the local authority's strategies in terms of the fashion cluster, fashion week, the fashion incubator, and city marketing. The following sections elaborate on the findings and analysis of this material.

Dunedin's Fashion Ties

The apparel industry in Dunedin has a long history. By the 1870s the city was producing woollen yarn, cloth and hosiery, then by the 1880s worsted and clothing via mass production methods. Early in the 20th Century Dunedin was known as the 'City of Style'. The industry presence has been continuous ever since, but dynamic in form. There was a significant downturn in the late 1980s and a number of apparel firms closed down. Then, in the mid 1990s, a run of successes by rising talents in the high-end fashion market saw an increase in sector related activities in the city. By 2005, the Dunedin City Council (Dunedin City Council 2006) indicated the fashion industry was worth about NZ \$27 million annually to Dunedin and provided about 560 full time equivalent jobs. This made the sector the 6th most significant in the city, behind Primary Production (worth NZ \$286m), International Education, Engineering, Tourism, and Forestry. That unbroken clothing industry heritage has offered a foundation and resource for the present day fashion sector in Dunedin. It has made easy a build up of industry knowledge, support and networks in the relatively compact setting of the small city (current urban population of approximately 115,000). So much so that by the late 1990s, the contemporary fashion sector had organically developed an informal 'cluster' of sorts, involving joint initiatives like an annual local fashion show (now known as the *id Fashion Week*) and a fashion business incubator, prior to the City Council electing to pursue the cluster idea for strategic purposes.

In fact, the most significant early connection between the local authority and the fashion sector was an informal marketing opportunity taken up from 1999:

I had personal friends who were fashion designers and they were organising fashion shows of commercial product.... and I thought 'oh this is a very good opportunity to promote Dunedin city for its creative type of people'.... So basically I exploited my friends' desire to promote their product as a method of promoting the city. So I took out the overseas product of their equation, focussed entirely on the local product, and then focussed entirely on getting international magazine coverage to highlight what was happening in the city with a bit of a city theme.... To improve the profile of the city was my primary objective. Secondary objective was to assist the fashion designers by giving them a high profile.... It was promoting the city in general, but creativity is one of our shining stars in Dunedin city, and music had since weakened, and fashion was strengthening so fashion was our shining star.... it was fashion facilitating Dunedin's

image 100 per cent. The driving force was very much my desire to exploit the fashion designers to promote the city. (Interview with linker 3, 2005)

Via this informal networking within the sector, the industry as a collective gained a degree of political sway that was not evident when they acted as individual firms:

They were now within a network that would listen to their ideas. [One designer] came up with the idea of a fashion incubator. She'd heard about one in Auckland and wanted one for Dunedin. Because the fashion show had brought everyone together, and she had my support, we were very easily able to lobby for that idea to become mechanically put in place. It became extremely easy to put that in place which was excellent. (Interview with linker 3, 2005)

The notion of formally establishing a cluster (by the Dunedin City Council) came about several years after this joint activity began and had by now helped to place the fashion sector more prominently in the sights of the wider Dunedin community. Hence the cluster provided a label for a network that was already in its infancy. Some literature would suggest that capitalising on the existence of an embryonic cluster is essential to the success of the policy (Schmitz and Nadvi 1999). But according to key instigators in Dunedin that timing had some implications for the way the efforts of the cluster have been understood:

Clusters emerge and things like the *id Fashion Show* might come out of that or the Incubator might come out of that. What's happened in Dunedin is those two initiatives were happening and then the cluster has come. So in a lot of ways it's a timing issue. If nothing existed the cluster may have seen those things come and then we would've been sitting here talking about this fantastic cluster that's spawned this and this, but it's actually just that these two things have got up and running and it's happened because of the co-operation within the industry and then we've come along and tried to tack a cluster umbrella on the top of that which doesn't necessarily fit. (Interview with linker 2, 2005)

Related to this is a widely held belief that - unlike the more technical clusters such as IT, biotechnology and medical services - matching the often individualistic 'creative industries and clustering is quite hard work [...] You end up with people doing their individual projects, and working out how they can cluster and stuff like that can be quite difficult' (interview with linker 2, 2005). So there are acknowledged disappointments in relation to the fashion cluster. To what extent then does Dunedin's fashion sector actually display the characteristics of a cluster? Eight key characteristics (based primarily on Campbell and Campbell-Hunt, 2007) are briefly assessed below.

Local demand

Typical clusters as described in the literature are said to be bolstered by a supportive local demand. For Dunedin's fashion industry, the local demand is limited. It is sufficient to back the initial development of small enterprises, but firms outgrow the market if they develop, 'there is a market here.... even though it's not a huge market it's been something that has afforded us to perhaps grow slowly' (interview with firm 1, 2005).

Vertical interdependence

A second feature of clusters involves the development of a vertical interdependence between firms within the cluster. However, there is very limited evidence that this occurs in the Dunedin fashion sector. In some cases, a degree of vertical interdependence has existed initially, but

over time, many firms have looked beyond the region for cheaper or better suited input or manufacturing requirements:

We actually started off doing knitwear. One of the reasons for doing knitwear was because we could access the yarn from ... over the hill ... and also there was a knitwear factory here in Dunedin ... who were capable of producing what we wanted, so that was really the sort of catalyst for us to do this thing.... But needless to say the relationship with [the manufacturer] really only lasted one season because we found ... a few stipulations that they placed on us, one of them was they wanted access to our designs the following season after we'd used them and we didn't have any choice on yarns or colours or things like that, ... and one of the comments that they had ... was that the machinists were only just warming up when they'd actually finished a run for [us], and they weren't making any bonus on it. They weren't really interested in doing our production because the quantities weren't high enough. (Interview with firm 1, 2005)

In addition the recognised current lack of Cut Make and Trim businesses and sewing machinists, for example, has added to the drift away from the local resources.

Knowledge and innovation spill-over

A key by-product of clustering includes the spillover of knowledge and innovation as a result of the sharing of workers, the moving of workers between local firms, the exchanging of a pool of industry knowledge. In the Dunedin research there was scant evidence of the existence of any of these factors. To some degree a pooling of certain aspects of start-up knowledge has occurred via the existence of the business incubator, but little more as a direct result of cluster activity, according to most firms interviewed:

I do think it's a good sounding board, just to see what everyone's doing. I'm not sure how the fashion cluster can actually make you money. I've seen a lot of people get up there and feel very important for spouting their wisdom, but I don't know why... So go along to this cluster meeting and it seems to be just a big session of standing in a circle and patting each other on the back (Interview with firm 4, 2005)

Service and support activity

The fourth goal of achieving institutional thickness relates to the building up of a range of service and support activity in order to provide an advantage to cluster members. In Dunedin some effort has been focussed in this direction, particularly in response to the machinist skill shortage and the business incubator priorities. However, overall most informants' judge success in this area to have been partial. For example:

One of the key issues was staff shortages, so that's what they wanted us to concentrate on as a cluster.... So we got a little subgroup together, started working away.... The thing that I've learnt since is that you take on projects that you can deliver. The problem with the skill shortage is that that's actually a systematic industry problem. It's not actually something that a cluster can really deal with because what you're dealing with is a perception of conditions of employment, perception of pay rates and sometimes the reality of those as well.... But in terms of attacking an issue like that, we chose the wrong issue. I can see that now so clearly. You choose an issue that you know you can deliver in two months, so everyone goes 'Oh shit, we did that, wasn't that easy' and then you build up from there. So while the biggest need was clear, we shouldn't have bitten off that particular issue. (Interview with linker 2, 2005)

Collaboration

A typical cluster also demonstrates collaborative efforts between firms, for example in response to shared problems and the pooling of resources. The example above of the cluster working with training providers to address the local skills shortage is a classic example. While that effort was not entirely successful, other cooperative ventures have been, in particular the strengthening of the business incubator and the blossoming of the *id Fashion Week*. Although the latter endeavours began prior to the cluster designation, they can be understood as ongoing, albeit semi-autonomous, activities of the cluster. Their benefit to cluster members is not evenly distributed though. Many long-established firms are sceptical of the incubator and contribute to the fashion week out of a sense of loyalty to the city rather than any expectation of economic gain. The collaboration achieved in the fashion sector has clearly resulted in some positive promotion of the city and of the industry in the city. However, evidence of it resulting in competitive advantage, over and above the autonomous activities of firms, is hard to find.

Social embeddedness

Another key feature of clusters is the way they can promote the social embeddedness of the industry. The belief is that the strong social ties a cluster facilitates will help reduce transaction costs for member firms. In Dunedin, the small size of the city actually helps this process in a physical sense, making it logically easy for members to meet with each other formally or simply bump into each other fortuitously. The cluster has augmented this by providing a forum where relationships can be cultivated. There is no doubt that additional opportunities for the transmission of tacit knowledge, often almost by osmosis, are provided courtesy of the cluster efforts. Again, the gain is weighted in the direction of the new and fledgling firms, but overall the social interaction appears guarded:

Everyone's so secretive and not willing to share anything and not wanting to let anyone know where you get things from ... no one's going "oh actually look, my maker's got two weeks spare so do you want to put them in there". So ... it's a really secretive industry and everyone's really paranoid about who's turning over this and everyone quotes retail figures instead of wholesale figures to make themselves look better.... I don't know how you're going to get everyone together to go happy families with it. I just think it's quite a paranoid industry because you're making a new product every six months. I mean if the young ones come and ask me and talk to me I give them information. (Interview with firm 2, 2005)

Internationalisation

A further key aim of clustering is the fostering of internationalisation within the industry. There is no evidence in Dunedin that there has been a commitment to this aspect of a cluster approach. Those fashion firms that are operating with some international success have achieved that by means of their own firm-based efforts, rather than any fostering from the cluster.

Collective identity

Finally, the eighth characteristic of a typical cluster is the securing of a collective identity for the industry, involving collective marketing that is usually linked to place marketing – in the present case, raising the profile of the fashion sector and the city at the same time. This has been the most notable accomplishment of the pre- and post-cluster activity. Dunedin fashion designers are well-known for the way they represent their national and regional identity (Figure 3).

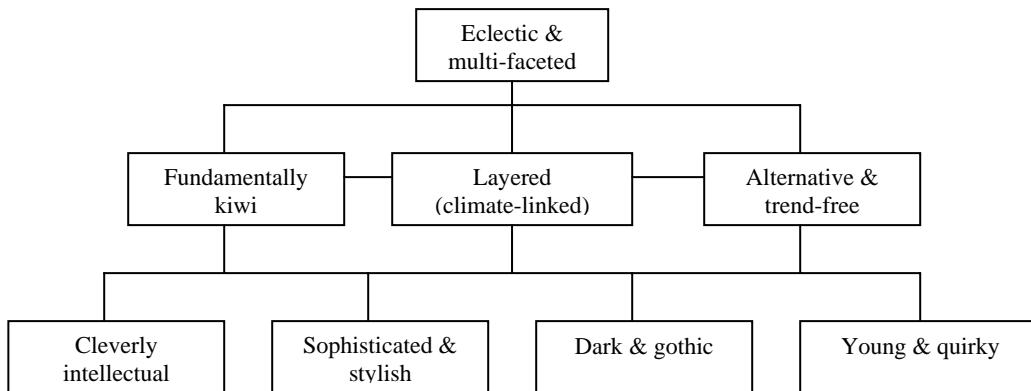


Figure 3 Industry characterisations of Dunedin fashion sector

They reiterate deep-rooted motifs such as the freedom of distance, inspiration of the wild landscapes and weather, brooding sensibilities, and the Number-8-wire mentality – the latter being a symbol of Kiwi adaptability and innovation: the belief that you can fix anything with a length of Number-8 fencing wire. At the same time they espouse more worldly notions of urbanity, sophistication, intellectualism and wit in the interpretation of their work. What is more, they frequently attribute at least some of their creativity to their Dunedin location. This is all good fodder for the positive marketing of the city and such representations are not lost on the City Council's marketing unit. The Council's current *I am Dunedin* campaign makes use of such assets in its mission to grow business activity, increase visitor numbers and attract new residents. Of course, there is still the question of whether it is 'reality' or just well rehearsed rhetoric that is reflected in such narratives of the identity and work of firms in the fashion industry. Nevertheless, this is one aspect of the clustering exercise that received unanimous support from the informants involved in the research:

The cluster thing of branding us all together is good because it's easy for the media to understand, so it's easier for them to write a story about it if there's others. (Interview with firm 2, 2005)

The City [Council] ... wanted to pull up the fashion flag which makes the city look ... progressive, fashionable and cutting edge, stuff like that. That's quite right and I think the *id* fashion parade is fantastic for that. (Interview with firm 3, 2005)

I think that the whole Dunedin fashion thing is a great thing. And it's amazing that the [City] Council are actually supporting it in such a way. Often I think that it's also a bit scary. They're making a few broad statements that if someone wanted to challenge them about from outside Dunedin [it] could be slightly embarrassing.... I don't know that Dunedin's got any more of a fashion presence than any other city, to be honest. I actually think it's a marketing ploy. (Interview with firm 1, 2005)

Dunedin has a lot of creative talent, we all instinctively know that, but to celebrate that and to make that tangible to the world it needs to be mechanically marketed. It doesn't just happen on its own. (Interview with linker 3, 2005)

If the primary return from the investment in the cluster relates to collective identity and the re-branding of the city, it might be asked if that is sufficient justification for the wider effort

expended. For example, Martin and Sunley (2003) argue 'there is no real reason why place marketing and the advertising of industrial specialisms really needs to be tied to a "cluster" label' (p. 26). Hence, does the cluster-based approach for Dunedin need to be revisited?

Conclusions: Rethinking the Styling of Dunedin

While the Dunedin fashion cluster clearly has benefits in terms of nurturing local 'buzz' and solidifying the Dunedin brand for example, by and large it does not contribute to the competitive advantage of the sector in the way that is traditionally anticipated and demonstrated in the literature. Tellingly, for the most part, this analysis mirrors the outcome of the research undertaken into Dunedin's engineering cluster as part of the broader study on regional development that the fashion case reported here is a part of. Hence, it is not simply a result of the individualised, very small size of most of the firms in the fashion industry, but may be related to wider issues, perhaps even the size and isolation of the city. Furthermore, there was no empirical verification that the clustering increased local economic prosperity in any way. Martin and Sunley (2003) 'argue for a much more cautious and circumspect use of the notion, especially within a policy context' (p.5). The results manifest in the present study would confirm the wisdom of their advice. Often, as in the fashion case, clusters are more 'aspirational' than actual, that is 'what are claimed to be clusters often turn out, on closer empirical inspection, to be small and only loosely connected collections of similar or related firms, and sometimes have more to do with local policy aspirations than with realities on the ground' (Martin and Sunley, 2003:21). In this regard, it could be asked has implementing a cluster framework in fact offered an improved and efficacious outcome over what was being achieved in the fashion industry anyway? And in terms of the wider local government policy, has a cluster approach enhanced or in fact detracted from a more holistic approach to regional development?

Then, in terms of Dunedin's re-branding exercise, how appropriate has the use of the fashion sector been in contributing to a revamped city identity? Massey (2006) suggests that we need to 'rethink the notion of identity of place' now. In a contemporary urban setting, an identity of place should not rely on a romantic, somehow inherent, understanding of a place, but should acknowledge the meeting place that a city now provides, a dynamic yet distinctive mix of different stories, histories, cultures, networks - not seamless, not coherent, not singular (Massey 1994). So, rather than promoting the place as a static, bounded 'product', policy makers might focus on weaving together the richness of multiple identities derived from layers of history; emerging cultural diversity, local and global connectivity, differentiation and innovation - consequently avoiding the homogenisation evident in past efforts at urban entrepreneurialism. In some ways Dunedin has moved in this direction via its *I am Dunedin* branding, where interpretations are unlimited, versatile and can personify the many faces of Dunedin, for example, *I am Fashion Dunedin*, *I am Learning Dunedin* (reflecting the city's 'excellence' in education), *I am Alive Dunedin* (highlighting the vibrant nightlife and café scene), *I am Wild Dunedin* (alluding to the city's unique proximity to abundant wildlife and wilderness), and many more (Hooker 2007).

Nevertheless, there is no doubt Dunedin has developed a place-based politics of competition: a kind of entrepreneurial localisation. How useful is that really? It has not offered competitive advantage to date. Has it improved economic development? Has it met the demands of the global market place? The attempt at clustering fashion in the city and the sector's use in city imagineering point to potential outcomes other than those originally conceived via the local authority's policy. Better in terms of effectively contributing to the city's economic health, as well as community development, social justice, collaboration and coalition building might be quite different alternatives to the entrepreneurial governance orientation - perhaps fostering a slow

city type of model (Knox 2005) or a flow city model (Doel and Hubbard 2002). The present research tends to indicate that Dunedin should think again. The low-cost, instant-fix route may not be low cost and clearly is not an instant-fix.

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Figure 1: Location of Dunedin in New Zealand

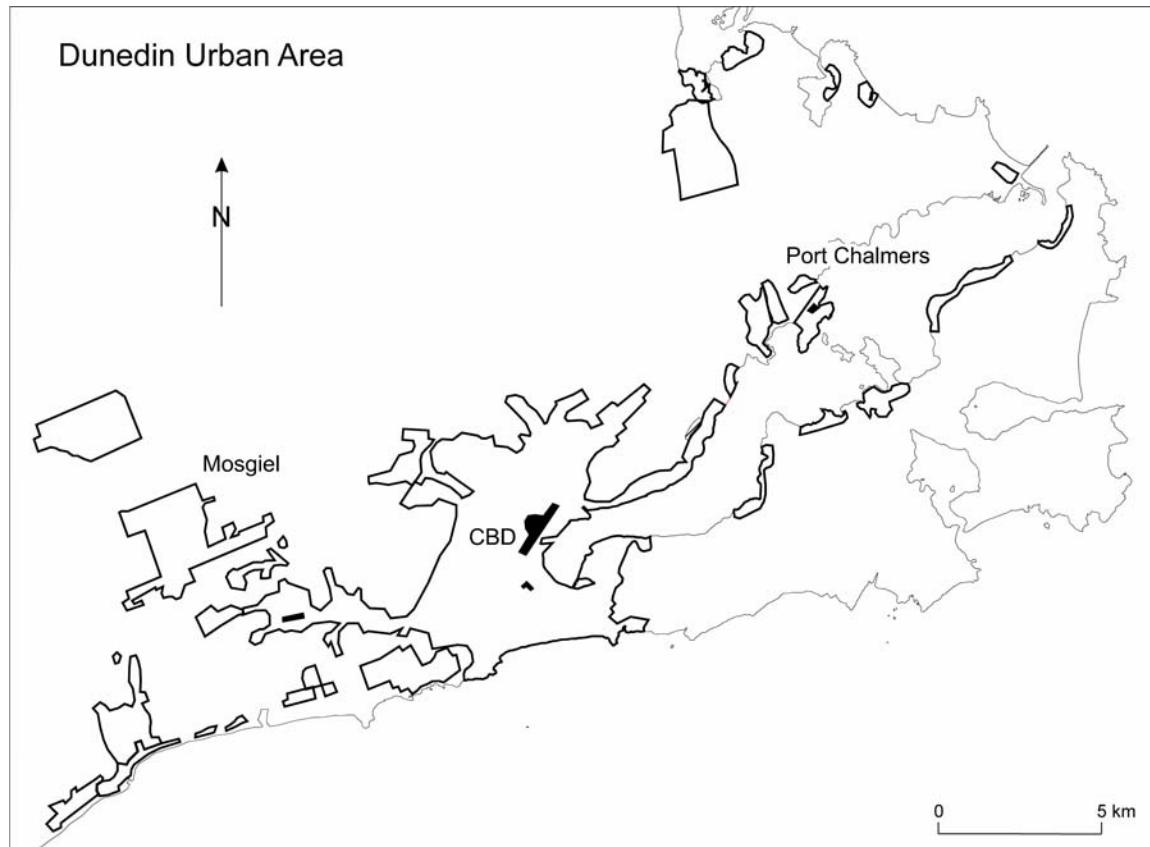


Figure 2: The Dunedin Urban Area

Michelle Thompson-Fawcett
University of Otago, AOTEAROA / NEW ZEALAND