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URBAN FASHION POLICIES: LESSONS FROM THE BARCELONA CATWALKS

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Urban fashion policies: lessons from the Barcelona catwalks

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Abstract

Since at least a decade, Barcelona is on the world map of fashion: Antonio Mirò, Mango, Desigual, Agatha Ruiz de la Prada are famous Barcelona-based stylists teaming up with other large Spanish fashion firms, like Zara, and commercial outlets, like El Corte Ingles, to attract a large interest on local fashion and fashion-based events. Thus, Barcelona has become a straightforward “shopping destination” for millions of international visitors, developing a shopping-related image, various specialised “fashion clusters” for different market targets, and a number of fashion-related events attracting both professionals and a dedicated general audience, like the 080 Barcelona and Bread & Butter. Barcelona’s liberal and leisure-related image can be easily associated with fashion, so if the national capital Madrid retains its role of business capital of the country even in relation to fashion, Barcelona could be considered the emergent “catwalk” of the Mediterranean, challenging other fashion capitals of Europe like Milan and Paris. The article analyses the urban strategy to foster the fashion industry in Barcelona through a redefinition of the “soft” factors establishing the substance of a fashion capital: image, place qualities, events, connectedness and social embeddedness. Tourism, unsurprisingly, is an important component of such strategy. The growth of Barcelona to the stardom of international leisure and cultural tourism is mostly about the “liminal” nature and the symbolically-charged activities of visitors that can be easily extended to fashion and fashion buying behaviour. Through a number of interviews and the analysis of strategy documents and reports, the authors unravel this relationship and assess the effectiveness of this strategy face to other factors playing against a more enduring rooting of fashion industries in the city, like the volatility of the sector, the insufficient international connectedness of the city and its business orientation, and the reorientation of the tourist supply towards low-cost visitors segments.

1. Introduction

The main goal of the paper is to identify what are the main characteristics of a contemporary fashion cluster, especially in relation to cities, and what are the strategies which may bring to its development or enhancement, possibly making a scale jump from an emergent fashion city to an established fashion world capital. We therefore reflect on fashion as a creative industry, in between the globalisation of production systems and the specific local embedding of creative talent; and on

the increasing importance acquired by fashion events, which could be both tools to strengthen the cluster and increase its international orientation, and opportunities to tie more closely the sector with the city brand, and vice versa, in an effort to establish an image of fashion city.

In this context, we propose a policy framework for “fashion cities”, based on the assumption that as any other knowledge-based sector, there are cluster-specific conditions that may be reinforced through targeted policy initiatives, but also place specific conditions which tie fashion development to the broader agenda of urban development in the global, post-industrial economy, thus emphasising the role of city marketing and events as “accelerators” of fashion strategies.

This framework is tested through a case study of Barcelona, where the traditional strengths of its textile and fashion industry are being remapped into the post-industrial environment of one of the world’s leading tourism cities and creative hubs. Barcelona has developed in the last year a “fashion city” brand of sorts, specifically tied to some fashion houses, large distribution outlets, and especially the staging of renowned events. However, our research – based on the existing literature, the analysis of policy documents, and a number of interviews with key stakeholders of the sector – evidences a number of weak points in the Catalan government policy approach, which not only hinders the development of a strong fashion cluster in the city, but also threatens to short-circuit the viability of the event strategy. The case of Barcelona could be used as an indication that cities with potential to become fashion capitals should have a consistent, integral policy approach which considers the whole structure of the sector and its embedding with place, rather than merely “marketing” the brand.

The paper is organised as follows. In the next section, we ground our analysis of fashion systems in more general theories of the cultural economy, introducing the specific characteristics of the fashion industry and analysing its relationship with places. In the third section, we propose our original framework for policy, which is used in the fourth section to analyse the potential and the developments of Barcelona as a fashion capital. Section Five concludes.

2. Fashion as a Creative Industry

2.1 The context: foundations of the cultural and creative economy

The “cultural economy” is, increasingly, a common-use term, due to the widespread recognition that culture is emerging as a fundamental element of contemporary economic landscapes, especially with regard to cities. In the last few years it has been analysed from within economics (Caves, 2000; Howkins, 2001; Throsby, 2001), economic and cultural geography (Brown, *et al.*, 2000; Coe, 2000; Crewe & Forster, 1993; Kong, 2000; Pratt, 1997, 2000; Bassett, *et al.*, 2002; Gibson & Kong, 2005; Leyshon, 2001; Scott, 2000), sociology (Du Gay, 1997; Du Gay & Pryke, 2002; Stevenson, 2004; Zukin, 1995), media and communications studies (Cunningham, 2002; Hesmondhalgh, 2002), urban planning (Landry, 2000) among other disciplines.

According to that, trying to provide a univocal definition of cultural economy could be difficult: indeed, in the literature what emerges is the multiplicity of ways in which the term ‘cultural economy’ can be considered and analysed (Gibson & Kong, 2005). Yet the presence of different definitions does not make the term a buzzword or a chaotic concept, on the contrary it reflects a habit in the new economic geography to use a multiple-perspective approach or, quoting Barnes (2001, p. 546) an ‘hermeneutic theorising’.

It is worth underlining that the term ‘cultural economy’ is often used in connection with other

concepts. Indeed, culture has become an essential foundation of the cultural or creative industries¹. These include the media, design, architecture, fashion, the arts and similar sectors characterised by strong idiosyncratic and aesthetic content, which have been growing at a very fast pace in the last decades following the rising demand for cultural goods and service driven by current social and economic trends, such as a more culturally aware society and the interconnection of art and technology, among others.

The cultural economy has indeed risen to be an important sector of the international economy both in term of occupation and value added; in particular, cultural and creative industries are a major economic and social driver of post-industrial economies and especially urban Europe (paper Paolo). Yet, the convergence between the cultural and the economic has a deeper connotation than the financial (Pilotti & Rinaldin, 2004). Indeed, the members of a community refer to culture as a capital asset to define and communicate their identity, and at the same time this cultural capital enters the production of material and immaterial culture-based goods that represent a ‘new wave of economic progress based on *glocalism* (localised globalism) which has been made possible through information and communication technologies, conditions of increasing return and new creative economics’ (Santagata, 2002, p. 9).

This notion hints at the importance of the relation between culture and place in contemporary discourses on culture. Culture can be strictly related with the space in which it is produced and this relationship has been object of numerous studies of a large body of literature. The focus on the bond between culture and place has changed the vision of cultural and art cities from *attractiveness* to *incubation* of new activities and values (Lazzeretti & Nencioni, 2005, p. 6)².

It is thus not surprising that the major cities of the industrialized west, as well as the ones in the fast developing transition countries, invest more and more in culture and creativity and to foster their capacity in heritage management and preservation (Grefe, 2004), art production, events and infrastructure, public space and education.

In fact, as it is argued by Scott (2000), cities are the spaces where more than anywhere the ‘cultural’ and the ‘economic’ converge, because they have been co-shaped by their cultural and economic identity, and thus they represent the critical loci of the generation of public goods from this proximity. Cities generate culture in the form of art, ideas, styles and attitudes, and represent a natural concentration of culturally-oriented consumers seduced by the new symbols and languages introduced by creative mediators.

The economic behaviour of consumers and producers can be analysed to better reveal the original, theoretical and social role of creativity and creativity-based goods (Beaudoin, *et al.*, 2003; Goldsmith, *et al.*, 1999). The consumers’ attitude in their choices of attributing greater value to creative and symbolic factors than to functional characteristic has been considered a sort of change of the customers’ behaviour in the last few years (Crewe & Beaverstock, 1998; Featherstone, 1991; Hirsch, 1972).

At the same time, the city is transformed from a production to a consumption space with high

¹ Sometimes in the literature the concept of creativity is also related to culture, contrasted with innovation or considered and economic good produced by the human mind: to go into more depth see Santagata (2004) where the concept of creativity is also defined following three conventional models (*The creative genius; Creativity as problem solving; Mind and Brain; Body and Emotions*).

² Moreover, according to Lazzeretti & Nencioni (2005, p. 2), the relationship between culture and space has been articulated into two distinct models: the Cultural Districtualisation model and the model of the Creative Economy.

symbolic value, where its image is utilised to attract resources, people and capital (Richards, 1996) in a competition of increasing intensity.

The connection between culture, culture-based products and place engenders an interdependence that in the literature is analysed as “districtualisation” or “clustering”. Indeed, numerous studies have focused on the spatial organization and geography of specific forms of cultural production in particular localities (Crewe, 1996; Crewe & Forster, 1993; Driver & Gillespie, 1993; Hirsch, 1972; Power & Hallencreutz, 2002; Power & Scott, 2004; Becattini, 1991; Camagni, 1991; Scott, 1999); spatial clustering is believed to facilitate face-to-face contacts in the cultural economy as well as enabling a more intense networking between key competitors. However, a fundamental distinction can be introduced between the current use of the terms “districts”, which remains associated to the agglomeration effects and structures typical of manufacturing, and “clusters”, which characterises a new economic geography of concentration based on “production landscapes” and their social-informational textures. In fact, Pratt (2004) claims that the creative cluster model used in the literature is not suitable to describe creative production systems. The different nature of creative cluster asks to move the focus from individual firm preferences toward non-economic relationships and factors, situated temporal and spatial variables (Pratt, 2004, p. 50).

The discussion around clusters puts ‘culture’ on the map of local economic policy: networks, systems, clusters and districts ‘have become not only descriptive images of special economic contexts, but also an eloquent indication of economic policy, also within the cultural field’ (Santagata, 2002, p. 13). Especially during the last 10-15 years, the creation of cultural clusters has been increasingly considered and taken up as ‘a new, alternative source for urban cultural development’ (Mommaas, 2004, p. 507), building on the success of flagship projects, such as the emblematic Guggenheim Museum in Bilbao or the Grand Projects in Paris, just to cite two well-known examples (Mommaas, 2004, p. 508). The new role of culture and creativity in the physical and economic revitalisation of cities is trusted to liberate new potential for the regeneration of whole cities or specific areas, and is thus integrated in economic strategies. Economic development agencies, urban planners and private developers have started to collaborate in the development of a functional interaction between their activities, allowing more fine-tuned cultural clustering strategies.

More recently, a shift is noticed from “spectacular consumption” towards the “softer” planning of ‘spaces, quarters and milieus for cultural production and creativity’ (Mommaas, 2004, p. 508). This view is consistent with the cultural turn in the geography, which conceives cultural capital as the hyper-mobile resource of social and economic dynamism in cities. The work of Florida (2002; 2003), to be discussed below, is crucial in understanding the necessary shift in the urban planning model for culture.

On the other hand, the cultural clustering model represents an interesting “spatial” turn in urban cultural policy where ‘cultural and/or leisure functions are grouped together in a great variety of spatial forms and programmes’ (Mommaas, 2004, p. 530). Such programmes serve a wide variety of objectives depending on the spaces where they are promoted: for example, they can help to promote a specific place and its amenities, to revitalise its arts and the culture and preserve its architectural heritage, or to stimulate local cultural democracy, inclusion and diversity.

The “cultural clustering” model of urban development has become so widespread that in the urban policy discourse, cultural and urban planning are often considered as inseparable (Landry, 2000; Worpole & Greenhalgh, 1999).

2.2 The “fashion system” as a creative production sector and its characteristics

Creative products have been defined as the inextricably linked to the culture of a place, its community and its history. Indeed, the world of fashion represents a good backdrop to discuss the structure and the idiosyncratic characteristics of creative production sectors. The essential characteristic of fashion is that of embodying symbolic values (Santagata, 2004), which are undoubtedly influenced by culture and by the place where it is localised (Bjorkegren, 1996; Bourdieu & Johnson, 1993; Crewe & Beaverstock, 1998; Drake, 2003). The workshop-atelier is the place where designers decipher their working environment through, their fantasy and imagination, but also their view of society and history, realizing a unique link (Maramotti, 2000). Fashion products are thus described as having idiosyncratic character and affecting economic behaviour in two ways (Santagata, 2004, p. 79): ‘by means of involvement in a community or social group’; and ‘by immersion in the productive atmosphere of the cultural industrial districts’.

The term fashion has a broader meaning than clothing: it typically includes any product or market characterised by an element of style that is likely to be short-lived. Thus, being able to create responsiveness in the market becomes a vital ability for organisations’ commercial success instead of failure: they must be able to scale up (or down) quickly and incorporate rapidly the consumer preferences into the design process (Christopher *et al.*, 2004)³.

It is clear that the consequences of the high competition in the today’s fashion market place have to be clearly stated in mind especially for supply chain management issues. In the same way that the behaviour of consumers and producers has changed to respond to the accelerated dynamism of post-modern cultural landscapes, fashion, as a lifestyle marker, is also subject to strong internal dynamics.

Although creativity is largely affected by time and space, its waves have non-linear trajectories. Specific reasons are quoted by Santagata (2004) for the emergence of successive waves:

- An increase in trademark value. For example, Chanel is one of the first houses to survive its creator; ‘reputation thus becomes an immaterial asset which merits investment’ (p. 87);
- Change in the governance structure. The ownership of the great *maisons* is characterized by diminished control by the founder’s family’ in order to advantage the dissemination of ownership shares; ‘there is no longer a financial identification between *couturier*-founder and ownership’ (p. 88);
- Cosmopolitan projection. Paris has always been considered a cosmopolitan sanctuary of famous stylists from all over the world, such as Charles Frederic Worth, Christobal Balenciaga, Elsa Schiapparelli, Nina Ricci, Pierre Cardin, Emanuel Ungaro and Karl Lagerfeld.

More importantly, in the last twenty years the fashion industry has undergone thorough evolution in

³ As noted by these authors, fashion market is defined as typically exhibiting the following characteristics: *Short life-cycles* (the ‘fashion’ product is created to capture the mood of the moment so that “the period in which it will be saleable is likely to be very short and seasonal, measured in months or even weeks”); *High volatility* (the vagaries of weather, films, or even pop stars and footballers may influence the fashion products’ demand that is rarely stable and linear); *Low predictability* (“because of the volatility of demand it is extremely difficult to forecast with any accuracy even total demand within a period, let alone week-by-week or item-by-item demand”); *High impulse purchasing* (the shopper is stimulated to buy the product as much as he confronted with the fashion product, hence the need for ‘availability’) (Christopher *et al.*, 2004, p. 2).

its industrial structure (Kawamura, 2005), and namely substantial changes in its labour organization. The creation, development and success of new models of fashion systems is attributed to the power shift from manufacturers to distributors, engendering ‘a new hierarchical model of subordination/domination’ (Abdecassis-Moedas & Benghozi, 2005, p. 210). Today the creation of a product and its design has come to lead the entire production and marketing processes (Agin, 1999), integrating the design of innovative goods and services to various other stages of the production process (production, marketing, distribution, etc.).

As far as the main features of the fashion production system are concerned, we first discuss the organisational structure (see also Burns & Bryant, 1997; Dickerson, 2003; Jarnow & Judelle, 1965; Sproles, 1981; White & Griffiths, 2000).

First of all, the fashion industry is obviously closely related to the clothing industry, but it must be specified that they are not synonymous. The fashion industry does not include the manufacturing of basic material (such as tanning, panoply, or seaming), but the design and production of goods of high cultural or symbolic content. According to Kawamura (2005, p. 1) ‘fashion as a belief is manifested through clothing, and as such fashion can not be understood without referring to clothes and designers’. The end-product of the clothing industry is the actual garment but, in the fashion industry, this is just one of the main inputs that lead to a symbolically and aesthetically charged product for end consumers. The more important “industrial characteristics” of fashion are, according to Abdecassis-Moedas (2006, p. 413): i) a short shelf-life; ii) difficult-to-forecast demand; iii) a high level of impulse purchase; and iv) strong value chain interdependence.

More substantially, fashion can be understood as a hybrid concept, both ‘an industry which particular relations of production and consumption and a discursive arena on such topics as identity, gender and sexuality’ (Entwistle, 2000, p. 208): the “fashion experience” is thus the result of a complex process of interaction (Braham, 1997; Simmel, 1904), involving the work of various agents, institutions and practices – fashion designers, journalists and magazine editors, fashion buyers and retailers, to name but a few. For that reason, fashion products are defined as a ‘hybrid industrial product’ based on creative assets, similarly to other cultural industries (performing or visual arts, industrial design, communication arts including film, TV, the publishing sector and advertising). Accordingly, a part of the literature within the creative industries prefers talking about ‘fashion system’ instead of using the term ‘fashion industry’ (Barthes, 1983; Sciuccati & Capello, 1999; Entwistle, 2000). The fashion system combines three different components (Birindelli, 2004):

1. *The fashion industries*: they are composed by a series of different industries that focus on for example the textile or leather weaving factories;
2. *The services for fashion*: they are all the activities strictly related to the geographical space where the fashion industries are based in, that contribute to create the fashion goods’ value. Usually the most important fashion districts and also the main capitals of fashion cited in the literature are Milan and Florence in Italy, and New York and Paris. The services for fashion can be further classified along two dimensions: the services’ purpose; and the services’ contents. The former considers the services specialized in fashion, and the people who supply such services: showrooms, casting director for models, drivers, stylist/fashion editors, bookers, etc., as well as those that are used also by other sectors (“cool hunters”, photographers, press staff, event organizers, concept labs that analyse cultural trends, etc.), and finally those that are considered ‘general’, being based in every city or region (location, logistic and transports’ systems, consulting, etc.). The latter includes the creative and technical services to the products’ design, communication and publishing industries, the activities link to the customers’ relation, and finally the services in consultancy.

3. *The trade of fashion*: shops and showrooms are considered spaces where trade and communication are mixed together to emphasize and increase the fashion-based goods (Brioschi, 2000; Donvito & Aiello, 2006). According to that, for example the visual designer, the visual merchandiser and the store designer are considered relevant characters that are responsible for giving a creative space to creative-based products (Grana & Ottaviano, 2002).

Now that the main characteristics of fashion markets and the nature of fashion systems have been presented, it is possible to analyse in further detail the relationships between creative designers, manufacturers and distributors in the fashion design sectors, which constitute an important component of the fashion cluster.

As it has been already pointed out, the central role of creation and design has led to modify the organization of the products' production and commercialization (Walsh et al., 1988). Indeed, the importance of design in the performance of a product has been already underlined in the literature (Clark, 1989; Midler, 1993). However, the clothing (or fashion) industry is an interesting case, seeing that 'apparel is subject to change more than any other consumer good' (Abdecassis-Moedas, 2006, p. 413). For example when a product is trivialised through widespread diffusion, the only way to compete on the market is through pricing and cost management. Moreover, customers' behaviour is most of the time largely influenced by the brand phenomena (Abdecassis-Moedas & Benghozi, 2005).

Initially the fashion system was characterised by the traditional 'model of the creator' (C. Abdecassis-Moedas & Benghozi, 2005, p. 212): this was the model of the *haute couture* and of the major tailors. The tailor produced an artisan creation for his clients and he was in direct contact with them to satisfy their requirements. This model was adopted for example by Yves Saint Laurent and by the majority of the *couturiers* who had their own *maison*. However, this model was fast overcome and creators and designers from outside the *maison* were looked for.⁴

To conclude, the fashion designers' role is not any more just giving a nice image to a bad product. All the people, resources and services, that are part of the fashion-based creative process, have to collaborate closely in a 'fashion district' or cluster of sorts.

2.3 "Fashion cities" and urbanity as a cluster determinant

The global network of cities that allows interlinking flows of goods, people, ideas and images, are an important part of the fashion industry. Generally, the most cited cities of fashion are Paris, London, Milan, New York and sometimes Tokyo. These are considered 'the fashion capitals of the world' (Breward & Gilbert, 2006), although other cities like Kuala Lumpur, Rio de Janeiro, Moscow, Barcelona and Athens are regularly cited in the magazines as the new emergent fashion cities in the world.

These cities have an already global status in the geographies of fashion culture so that they lead a sort of urban hierarchy of fashion, following the global city concept of Friedman (1986). According to this, the largest and most influential fashion companies consider these cities as vital, aesthetically challenging, entrepreneurial and central to business. This does not mean that these are the only cities in which the fashion industries take place: indeed, the top cities are followed by less

⁴ Cf. the six alternative models (*The fashion designer-creator*, *The anonymous designer-creator*, *The distributor's brand*, *The dispenser's (retails') brand*, *The industrial manufacturing model*, *The designer's brand*) proposed by C. Abdecassis-Moedas & Benghozi (2005).

influenced cities that are part of global networks (Power & Hauge, 2006). However, the global cities of fashion appear to be ‘fashion capitals’ for two mainly reasons:

1. Many of the trends are started and developed there;
2. They are representatives of an industrial system.

Paris is an example of a city that has always been considered a fashion capital and still holds a dominant position in the fashion market. Paris’ history as city of fashion started at least two centuries ago when it became a centre of style because of the clustering of elite designers (Christian Dior, Hubert de Givenchy, Pierre Cardin, Yves Saint Laurent, ...), the structure of the couture system, and the capacity of its fashion industry to dictate style all around the world.

The connection between the fashion system and a city is seen as based on two important statements:

- ‘fashion feeds off association with particular places’; in fact, fashion cities exist both as ‘actual site[s] of elite fashion consumption and as an imagined space[s] of fashion fantasy’ (Gilbert, 2000, p. 18);
- ‘those places are branded by their connection to fashion’. Many fashion capitals use to be connected with the fashion brands, using place based names (such as DKNY) or associations (Paris Fashion) ‘in an attempt to incorporate positive city images into their brands; investment in flagship stores on certain streets in certain cities are also symptomatic of this’ (Power & Hauge, 2006, p. 16).

Furthermore, global cities use ‘fashion events’ to exhibit and demonstrate their consolidated image and reputation within the fashion system: in fact, all of these cities have their fashion weeks that take place at the same time every year, involving most of the leading fashion houses. The reasons that encourage people to attend these special events are that ‘most of the main fashion firms are there to sell their collection’; and ‘to gather information on what is going on with their colleagues and competitors’ (Power & Hauge, 2006, p. 11). According to Gilbert (2006, p. 27) ‘a new infrastructure of regionally based but intentionally recognized publicity and promotional vehicles’, such as the development of the fashion media, major fashion shows and other fashion events are, is considered one of cities’ vital and key characteristics to compete with the biggest fashion capitals of the world.

The present tendency of cities to include and market their fashion events into their cultural supply portfolio has been already pointed out in the literature (Getz, 1990, 2005), who attributes this to the perception that tourists and investments are attracted into cities by the high-status, dynamic, sexy image of fashion, and pointing especially on events as factors of differentiation in the increasing competitive tourism market (Russo & van der Borg, 2002). Indeed, much research into city marketing and tourism highlighted the increasing use of events in place marketing, especially with regard to major cities (Law, 1993; Robertson & Guerrier, 1999; Schuster, 2001; Waitt, 1999, 2003; Richards, 2001).

In any case, a subject that is under-investigated in the fashion cities literature is the great importance today attributed to “informal” cluster elements which are magnified in large, dynamic and accessible cities, shifting the importance of fashion systems from design and production routines to the characteristic of labour force. The input for this reflection come from Richard Florida’s works on the “creative class” concept: cities today attract the best creative talents to the extent that the structure of their social networks is sufficiently open and culturally accessible to integrate different cultures and citizenships in the local, and that the city projects and image of high standards of quality of life and education, vibrancy, diversity. Once this cultural capital is attracted

and integrated, albeit temporarily, the place gains in its innovative and competitive edge, as social networks and cultural impulses get richer from the intensified exchanges between “symbolic mediators” and creative workers.

Thus, fashion cities, and those that can be considered fashion capitals in particular, are attractive not just because of their primacy and their reputation in the world hierarchies of fashion, but also because they are “cities”, and the more “creative” (according to the ranking exercises inspired by the works of Florida and rapidly imitated by many global consulting agencies) the greater capacity to capture and root the hyper-mobile talent of designers and marketers.

This however brings a dramatic rupture in the functioning of the fashion system. First, because “second rank” fashion cities, which are however attractive, may expect to bridge the gap that separates them from the traditional fashion capital in a relatively short time, also through an acceleration of the “waves of creativity” which could be ascribed the contemporary models of “acceleration” in social processes typical of globalisation; thus establish hierarchies are today under relevant pressure. Secondly, because the relation of place and design is today more blurred, embodying the contradictions of “glocalisation”: more and more of the designer culture is imported, though to some extent it articulates and adapt to the local. But today it is hardly possible to distinguish a typical, say, “Milan” fashion product from a “New York” one, as the degree of connectedness and fluidity between fashion hubs skyrocketed with the mobility of the global workforce in the two cities’ fashion clusters.

The above observations inevitably highlight that presently “place-specific policies”, like city marketing, cultural planning and urban design are as important as traditional “industrial” policies to influence the status of local fashion clusters – or even more important, considering that large parts of the production chain, e.g. supply networks, are delocalising. The capacity to attract, nurture and “connect” talent and so defend the competitiveness and relevance of local fashion houses is only partly in the hands of the *maison* managers and increasingly an element of the city’s political agenda.

2.5 Analytical framework

This section proposes an original analytical policy framework for the development or enhancement of “fashion cities”, identifying the differential status and relevance of various development tools which are likely to affect or influence local fashion clusters.

Elaborating on the concepts discussed in the literature, presented in the previous section, we conceptualise the fashion clusters as involving different components that are sketched in the diagram of Fig. 1. These may from structural elements regarding the cluster structure and evolution, to attributes of the place where such clusters develop and the marketing strategy which is adopted by the fashion cluster in order to brand itself and connect to international customers and distribution channels. Our research will mainly focus on the second two, arguing that “place cultures” and “place images” matter, and that cities can invest in “place qualities” to build on their cluster endowments and accelerate their positioning in the international map of fashion hubs.

First we take into consideration the “production” elements of the cluster, the widely studied “territorial” spatial structure of traditional fashion systems. In the top-right box of Fig. 1, we highlight that the “production function” of the cluster, or its “districtualisation”, encompasses a wide supply network catering for the variety of products, technologies and materials. The structure of this network can be divided into different elements according to which part of the production cycle they belong to.

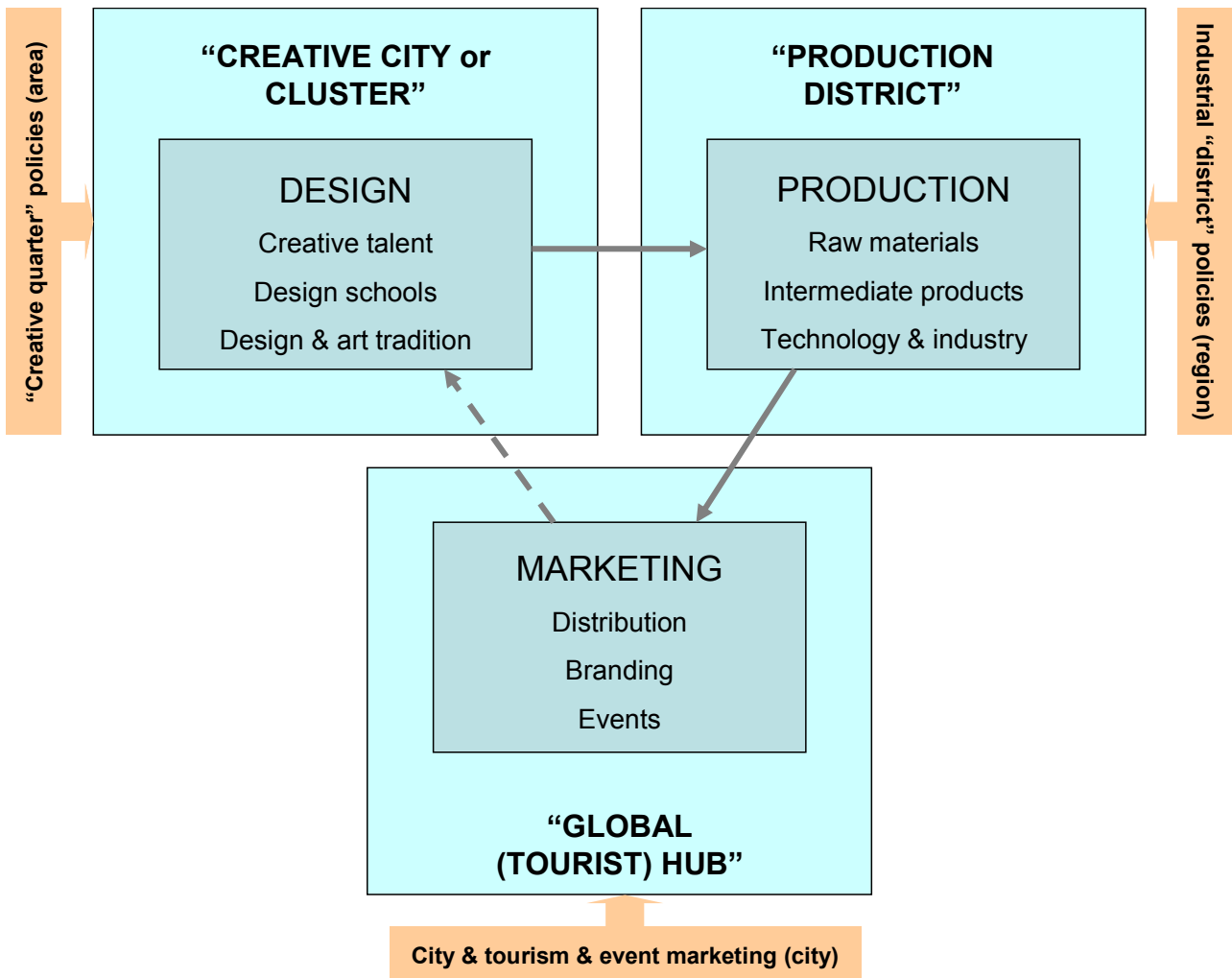


Figure 1: Analytical framework of the fashion cluster and policy.

Traditionally, production chains have a regional articulation, generally involving textile regions where raw materials are treated in plants, suburban sewing warehouses, central city showrooms and ateliers, and, again suburban logistic centres catering for distribution and shipping, bound together by the traditional Marshallian geographies of localisation. This is for instance the traditional structure of Catalan fashion, which extends from the fashion houses of the capital Barcelona to the mills and textile plants of the counties of Anoia and Bages. The same regional articulation may be observed in other historical “fashion cities” like Florence, Manchester, Milan, etc., sometimes only reduced to a pallid display of industrial heritage undergoing refurbishment after deindustrialisation, while central “service” functions have rejuvenated and acquired a new international relevance under the paradigm of “global fashion”. Thus, at this level, the policy for the development of fashion district has a regional scale, and often an “industrial nature”, which is infrequently in the portfolio of local government, but left to national industrial strategies. The case of Barcelona is an exception in which, as we will see in the next section, the decentralisation of power to the Autonomous Communities in Spain does endow the Catalan government with tools to support and revive declining industrial functions, favouring the uptake of technology and innovative process of production and organisation. Yet, in most cases, the regional or national policies to sustain production chain has turned in the last decades to the development of commercial connections, the automatised of logistics, and the exploration of new supply markets, reserving a different present for the abandoned production plants. Obviously, regions that do not rely on a tradition of *haute*

couture in the developed west would hardly develop production functions in the present times, however they may focus on the distribution functions, exploiting an optimal accessibility (it is the case, for instance, of Lille, which positioned itself at the centre of a large multimodal transport network connecting London, Paris, Brussels, Frankfurt and Amsterdam). In any case, countries in their industrial infancy and exploiting large pools of cheap labour do tend to develop this “districtual model” around the main markets (in Brasil, Mexico, China, India), providing transport services and cheap housing as the key conditions to accompany this development.

In our scheme, we kept conceptually separated the “production” function from the “design” function (top-left box in Fig. 1), marking a difference in the nature of capital inputs and in the geographical structure of this cluster element. Clearly, intellectual capital inputs are unmediated – only higher education and training being relevant in the process to bring creative talent to be “usable” by the local firms. Moreover, the cultural landscape of design, especially in the last decades, is eminently urban and culturally rather than economically driven, for the reasons mentioned in 2.4. Cities, and trendy neighbourhoods in city centres or regenerated suburban areas, attract, nurture and build unprecedented relations between creative workers, functioning as in incubator or talent and innovation.

Policies for the attraction and integration of talented designers to a fashion cluster range from straightforward “attraction campaigns” more or less targeting specific segments of the job market, housing schemes for the high-end of the market but also for young starters, the leadership or participation in higher education projects, to “softer” initiatives aiming at the enhancement of the quality of life of the city and its image, the democratisation of culture, and the civic support to multiculturalism and tolerance. In any case, it is expected that the local government takes the initiatives in this policy agenda, building interest partnership or real joint ventures with local fashion leaders and designers’ association.

As noted in the scheme of Fig. 1, design functions “feed” the production process – and increasingly so – so that fashion production districts that lose out or cannot establish an enthralling fashion designer sector, are doomed to short life cycles as fashion cities, and will become merely specialised in second-order operations of the chain, like sewing and distribution, but the real valuable jobs would be lost to the few world known-creative hubs and the emergent ones.

Similarly, it is clear that designed production has to be marketed and sold; retaining the marketing function in a creative and productive environment is important to guarantee continuity, leadership and economic perspective to the local fashion cluster. Cities which do not appear, regularly, on the map of international fashion business and trade risk losing out their creative and industrial patrimony to places that are better positioned to compete globally. Hence cities may foster the “marketing” functions of the cluster (bottom box in Fig. 1), like the organisation of events, trade fairs, sponsorships, the establishment of bilateral cultural relations with foreign countries, so as to enhance the international projection and exposure of its fashion brand. Once again, while marketing and selling is integral to the production process of fashion clothing, this stage is conceptually different in terms of characterising elements and spatial structures. Accessibility, capacity, the size of the market, and the regional or global catch are now the basic elements which determine the position of a city in the world market of fashion. It must be noted that this latter stream of policies has large overlapping areas with contemporary conceptions of marketing the city as a global tourist hub: branding “place” and its cultural highlights to attract and establish long-lasting ties with the best customers, the more empathic with the local cultural environment, who will become ambassadors of the city worldwide. In this light, tourism development strategies and fashion branding intertwine ideally: on one hand, a “trendy” tourist city, appearing in fashion and lifestyle magazines, has higher chances to be also attractive for young talents, specialised firms, and even ateliers enjoying the place brand; on the other, tourism experiences include luxury shopping,

cultural and creative activities, the admiration and participation of local lifestyles, which result in a higher awareness of the city's cultural brand and fashion identity.

It must be noted that to a large extent, city marketing policies are the less controversial, as they are normally in the portfolio of active urban areas around the world, although the strategic orientation to fashion may vary. Yet, and more importantly, marketing alone cannot make for deficiencies in the regional production structure of fashion, and, especially, for a poor capacity to attract and retain creative talent; it might even be claimed that an exclusive orientation to city marketing, which in most cities goes together with trends toward the "securisation" and "corporatisation" of public space (Muñoz, 2000), risks to play against the capacity of the city to open up to the difference and multiplicity of post-modern landscapes of creativity (Russo & Arias Sans, 2008).

Taking all this into account, it becomes apparent that fashion policy can only be successful in the long term if the three policy streams are taken up simultaneously and in a coordinated way by the local stakeholders. While a fashion city can be such, today, without a thoroughly developed production sector (or at least the least valuable and capital-intensive production stages, which are normally delocalised), it cannot survive without talented human capital and hardly without an international marketing orientation, and these latter two elements are linked in an important way, as the marketing strategy of the city could either interfere with, or reinforce, the attractiveness of the city for creative talent.

It is very important, therefore, to analyse what cities are doing to sustain the marketing strategy for fashion, and how these efforts are endogenously reflected into an enhancement of the two remaining cluster elements. To some extent, the "fashion city" that will be analysed as a case in point, Barcelona, has attained an indisputable position in the last year as a major hub for fashion-related events and business fairs. It also presents some elements of a fashion production cluster, derived from its role as the heart of Catalonia's textile industrial tradition, and from recent developments as the favourite destination of young creative fashion designers and an international hub for the creative class. It remains to be seen how other actions concerning the spheres of production and design connect and gain with this position, and to understand whether the city is gaining at all from its fashion city brand, or is somewhat underutilising its potential and missing opportunities as a consequence of a misplaced or incomplete policy strategy.

3. Case study of Barcelona as a fashion capital in the making

3.1 Case study methodology

Following Stake (1994), the kind of case study that is presented in this paper is an 'intrinsic case study' where 'the study is undertaken because the researchers want a better understanding of a particular case' (Punch, 1998; p. 152), so the focus is within the case and it is not the intention of such a study to generalize (Silverman, 2001, Punch, 2000, Fisher, 2004). Therefore, this case study is only descriptive, yet we are convinced that important indications could follow for cities which are in a similar position to Barcelona or even consider Barcelona as a "best practice" for fashion.

Evidence for case study may come from different sources (Yin, 2003): in this research the most interesting information comes from the existing documentation and a number of direct interviews to key stakeholders of the fashion system, both in the sector and in policymaking. As far as the documentation considered is concerned, the authors collected and analysed a variety of different documents: this included newspaper clippings and other articles appearing in the media, as well as public policy reports and the available published or unpublished publications on Barcelona's

policies for the fashion system. Most of these documents, supplied by the interviewees with the clause that their use is strictly limited to this research, concerned the history and the development of the industrial sector in Catalonia; the present policies about fashion events and local prizes awarded to firms and professionals within the fashion system of Barcelona; the private and public institutions who have responsibilities and vested interests in various aspects of the fashion system.

The interviewees have been chosen among opinion leaders within the local fashion system, especially to people who have been (or still are) part of the decision-making process regarding fashion events in Barcelona. The interviews were semi-structured questionnaires (see Annex) of the duration of 45-90 min.

3.2 Facts about Barcelona

Barcelona is the capital of the Autonomous Community of Catalonia and the largest urban agglomeration after Madrid; it is thus considered the second city of Spain and one of the largest and more dynamic cities of the Mediterranean. Its noble industrial history, its cultural heritage, its central role in the social and cultural rebirth of Catalonia and Spain after a civil war and 40 years of dictatorship, and the renewed, world-class urban landscape following the 1992 Olympics, coalesce to give Barcelona a special position in the map of European cities; today it is considered one of the “hottest” urban destinations worldwide, a cultural capital, an emerging business and knowledge centre, and a leisure hub with few equals.

The quality of life, the level of public services, the civic participation, the multicultural vibe, the relaxed atmosphere associated with its proximity to the sea, are pillars of its successful image; apart from an engrossing flow of visitors, this attracts a steady flow of new residents and the headquarters of important firms. Indeed, Barcelona is actually considered a “creative city” in different fields (architecture, fashion, audiovisual media, gastronomy and design).

While in the last few years Barcelona has been focusing especially on personal, scientific and cultural services, in the awareness that as far as business and financial services are concerned, the competition with Madrid is too strong, the “creative city” buzz is relentlessly promoted and strengthened with regeneration projects, new infrastructure – like the high speed train connection which puts it at 3 hours from the centre of Spain’s capital Madrid – and, notably, an intense programme of cultural, sports and trade events. In fact, Barcelona has recently surpassed Madrid as a congress-organising city and it now ranks 5th worldwide according to the International Congress and Conventions Association (<http://www.iccaworld.com/>, last consulted: 18th August 2008). Among these, are renowned fashion events, like *Bread & Butter*, *080 Barcelona*, and *Pasarela Gaudi*. To keep up with its position, brand new congress and fair facilities are being developed in two peripheral areas of the city.

As far as the fashion sector is concerned, Barcelona can be defined as an emergent “fashion city”, with a strong city brand, which is promoted especially through the organisation of sector events and shopping tourism; and is channelling considerable public investment in specific initiatives that are meant to help the Catalan fashion industries to develop into a strong “fashion cluster”. It remains to see if, in the light of our theoretical framework, these efforts are consistent and are likely to be successful.

3.3 From the Catalan textile tradition to the present fashion industry

In order to better understand Barcelona’s ambitions, a brief reference should be done to its textile

tradition. The Arabs brought silk, cotton and the Byzantine textile tradition to Spain, opening the way for the growth of the Spanish textile manufacturing industry in the 12th and 13th centuries, mainly in Andalusian cities such as Almeria, Granada, and Sevilla; the latter remained the most important Spanish city for textiles until the 16th century. By the mid-12th century Catalonia had started to print materials of foreign origin. Yet at the end of the 16th century there were already 5,000 textile mills in Barcelona, and the city was the principal location for cotton manufacture. Since then and until the first half of the 19th century, the British technological breakthroughs were transferred to the Spanish textile sector. The new industry grew steadily, especially in Catalonia and Malaga. By 1861, most of the cotton-spinning sector was mechanised, although Spain was lacking in raw materials like cotton and coal. The legacy of the textile history of Spain can be admired in the ancient fabric collections of textile museums such as those of Burgos and Terrassa, as well as in the impressive industrial heritage related with the textile tradition of Catalan cities.

The prosperous phase for the Spanish and Catalan textiles industries lasted until 1885; later, during the years of the Civil War (1936-1939), the whole sector started to face the competition of artificial fibres. The main textile industries remained in Catalonia, especially in the Llobregat and Ter valleys, the mid-size cities of Sabadell, Terrassa in the ring of the Barcelona region, in the coastal city of Mataró and in the nearby villages, and in the industrial areas of Barcelona, like the Poble Nou. In the last four decades, economic restructuring affected significantly the Catalan textile sector. The main effect has been industrial delocalisation, which, on one side, led to an increase in the efficiency of the production process, but, on the other, to an increasing internationalisation of the value chain and a model of competition based on cutting process, engendering even shorter product life cycles and a higher volatility of the market. In this context, hard-branding became the only way to be distinguished in the wide and diversified supply presented in the market, building customer loyalty. Presently, the fashion sector is still considered a vital part of the Catalan economy, both for commercial production and distribution: although the main part of textile manufacturing dismantled during the 1960-1970s, Catalonia still is a vital centre as far as the textile design and fashion are concerned.

Industry	Number of firms	Percentage over firms in the Community (%)
Textile Industry	2,956	0.64
Sewing Industry	335	0.07
Manufacture of boots, shoes and other articles of leather	6,637	1.44
Manufacture of jewellery and related articles	1,168	0.25
Manufacture of perfumes and toilet preparations	235	0.05
Wholesale of textile, clothing and footwear	3,384	0.73
Wholesale of perfumes and toilet preparations	1,538	0.33
Wholesale of jewellery and related articles	421	0.09
Retail sale of textile, clothing and footwear	20,335	4.41
Retail sale of perfumes and toilet preparations	1,910	0.41
Retail sale of jewellery and related articles	2,421	0.53
TOTAL. Firms in fashion industry	41,340	8.97
TOTAL. Firms in Catalunya	460,997	100.00

Table 1: Firms in fashion industry in Catalunya in 2006 (Cambra Comerç de Barcelona, 2007).

The Catalan fashion sector includes many sub-sectors, such as young style, children clothing, shoes, leather apparels, fashion accessories and many others. Table 1 counts the number of Catalan firms in all production sectors which are associated with the fashion industry. Moreover, it is known that the textile and clothing industry is one of the biggest economic productive sectors of Catalonia (Cambra Comerç de Barcelona, 2007, p.6), representing the 17% of the total turnover of the Catalan industry. The textile, tailoring and leather sectors in Catalonia are organised in a constellation of productive local systems – some traditional ones and some other of recent origin –, mostly localised in the province of Barcelona, hosting approximately 1,200 firms and employing 23,000; their turnover approximates € 4,000 millions (Cambra de Comerç de Barcelona, 2007, p. 6). The productive local systems are represented in the map of Fig. 2.

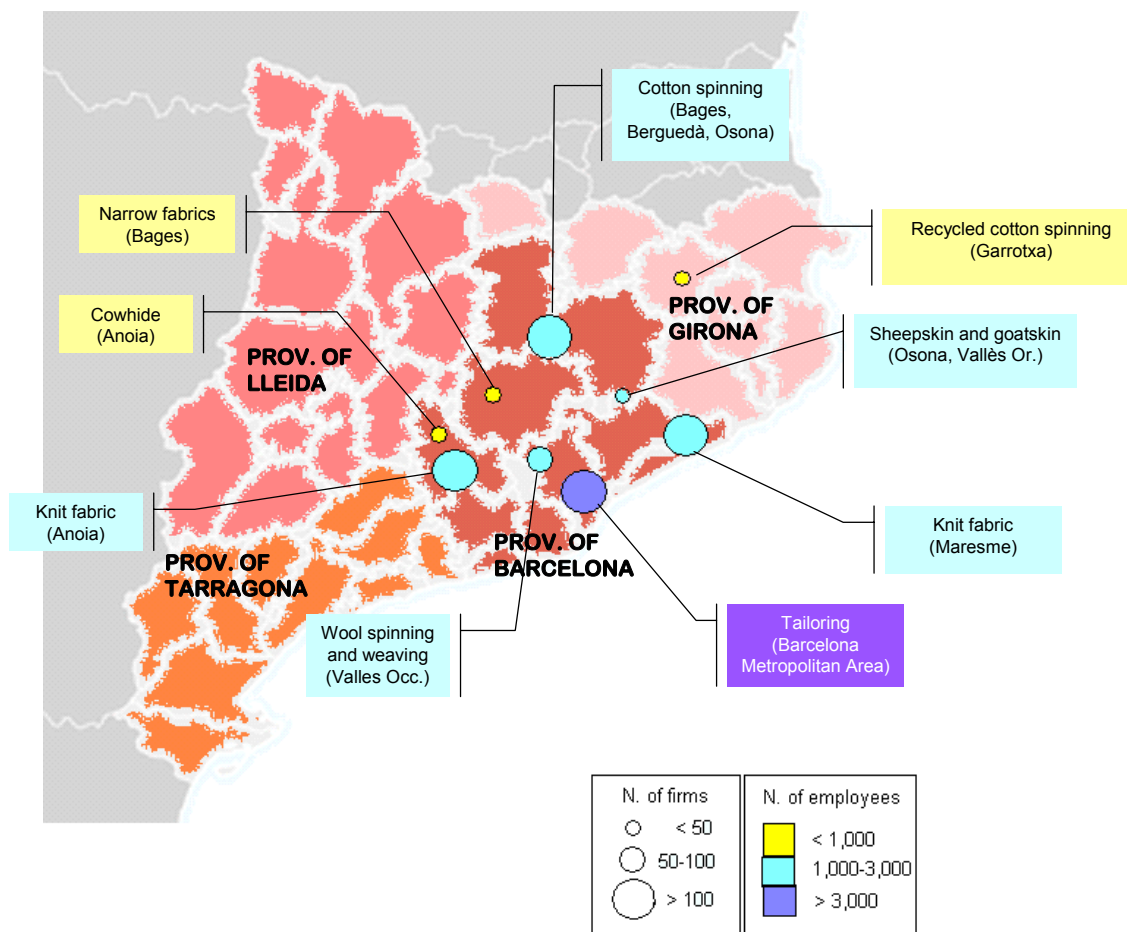


Figure 2: Catalan local production systems of textile, tailoring and leather products (Cambra Comerç de Barcelona, 2007).

The textile industry – and in general the fashion sector – has faced a downturn of 11% in 2005, while the import of clothing has increased from January till September compared to the previous year. Furthermore, in 2004, the textile industry was the one among all Catalan industrial sectors with the worse performance. As a consequence, there was a widespread perception that the Catalan fashion system needed a reorganisation, and in particular new creation, distribution and retailing strategies, to cope with the challenges of an increasingly competitive market and be able to anticipate future trends.

3.4 The fashion cluster of Barcelona

The analysis of the fashion cluster of Barcelona starts with an insight on its brand and its main actors. Presently, Barcelona may be identified as a city of large retail shops, such as Zara – the most internationally known, but notably not original from Barcelona –, and many other local retailers such as Mango, Desigual, Custo Barcelona, Camper, Antonio Miró and so many others. Some of these are just retailers such as for example *Desigual* (whose one of its fashion designers is the emergent José Castro), *Miró* (whose fashion designers are Josep and Armand Basi) and *Camper*. Instead *Mango* and *Custo Barcelona* (whose fashion designer is Custo Dalmau), are both retailers and fashion designers.

Furthermore, Barcelona can also be considered a hub of new young designers (such as for example the emergent José Castro who works for *Desigual* or Lluís Juste de Nin for *Armand Basi*), and the “international capital of bridal fashion”⁵, with Pronovias and Rosa Clara as market leaders.

According to the interviews, there is no special relation between all the fashion retailers and designers: every one works independently although Mango has been cited as the most recognized Catalan fashion designer, while *Desigual* is seen as the local emergent brand.

3.5 Governance of the cluster and public policy

Policymakers and stakeholders

Different public and private institutions have responsibilities and vested interests in various aspects of the fashion system: sector development, employment, events and trade fairs, marketing and internationalisation, funding, etcetera. The government responsibilities have recently (end-2007) being reorganised so that the fashion system in Barcelona is presently an exclusive responsibility of the Catalan Government (*Generalitat de Catalunya*) and namely of its Department of Innovation, University and Enterprise (DIUE). The DIUE includes a specific management team that is in charge of managing and directing anything related with the fashion system and events. This team produced a “Dynamisation Plan of the Catalan Fashion 2007-2010”, and advocacy document proposing different policy initiatives for the sector, which are mentioned below.

A central role for the development of the fashion cluster of Barcelona is also played by its City Council (*Ayuntamiento de Barcelona*). As will be seen below, the Council has developed some of the most important policies to establish Barcelona as an international star tourism destination and a cultural capital, and is keeping up with this vision by investing further in congress and fair facilities. Furthermore, it is currently leading – especially through its development agency, *Barcelona Activa* – a number of other initiatives and projects that aim at strengthening the local knowledge economy, like “Barcelona City of Knowledge” and “22@”.

The private sector interests are mainly defended by the Chamber of Commerce (*Cambra Oficial de Comerç, Indústria i Navegació de Barcelona*). The Chamber is in charge of supporting the operations of all local firms, improving the business climate of the city, enhancing cooperation and networking in the various sectors, and improving the international orientation and relationships of the firms; its Department of Commerce, Tourism and Services is responsible for the “*Barcelona es moda*” project described below.

⁵ According to the *Barcelona Bridal Week*'s web page (<http://www.moda-barcelona.com/ca/index.asp>).

Other private institutions, such as sector associations, consulting agencies, and private schools (such as Demo Fashion, Sofoco Media, Moda FAD, and many others) are important stakeholders of the fashion cluster; they have different roles and strategies, but they likewise share the vision that, in Barcelona, fashion is a sector with high development potential.

Cluster-specific policies

The Dynamisation Plan of the Catalan Fashion elaborated by DIUE is mainly oriented to promote and support emergent Catalan designers through public investment, enabling them to:

- attend major international fashion trade fairs and events;
- take part to the most important local event, *080 Barcelona Fashion*;
- open new shops abroad;
- create and produce new fashion collections;
- be part of the 22@, and specifically of a fashion incubator in the developing “knowledge district” of Poble Nou;
- take part to *Projecte Physic*, a production milieu oriented to independent designers, designed in such a way that every designer becomes part of a network so that he/she can be supported in the different phases of the fashion collection: from the creation to the distribution. The project is co-financed by the Government but mainly the property of the private sector.

The amount of funding dedicated to these initiatives is considerable. Just to have an idea, according to the Generalitat, promoting *080 Barcelona Fashion* this year is costing about 1.3 millions of euros: € 400,000 are financed by the Generalitat, € 200,000 by the City Council, while the remaining amount of money would be paid by broad private institutions (Armora, 2007) only for the *080 Barcelona Fashion* event.

Apparently this is not sufficient for the Catalan independent designers, who insist for having the production of their collections and their national and international presentation at fashion events funded: *‘they did not (and still do not) accept to pay even half of the total amount of money that could be necessary, nor to produce and exhibit their collection in Barcelona, or to go and present their creation in Paris at the Showroom Barcelona’*, said one of our interviewees. It is clear, though, that public funds would not be endlessly available for emergent fashion designers: what is more, *‘public money could not be used to subsidize catwalks’*- declared Mr. Mustarós (Muelas, 2007).

Presently the Catalan Government publicly supports just one private institution in Barcelona: the ModaFAD. This is affiliated to a wider organisation, the FAD (*Foment de les Arts i del Disseny*, Arts and Design Development) that has been in existence since 1903 to support the arts and the cultural industries of Barcelona (such as fashion, industrial and interior design, architecture, contemporary crafts and jewellery). Within FAD, ModaFAD is responsible for launching young Catalan fashion designers at international level: fashion events are organised (MerkaFAD and PasaFAD), in which young designers are selected by a jury to exhibit their collection at the *Barcelona Fashion Week* in the section “independent designers”. According to the vice-president of ModaFAD, *‘... the Generalitat is investing a little amount of money that is giving us the opportunity to help and promote our young fashion designers but they would have to give us more:*

it is not right that the young fashion designers have to use their own finance to promote themselves’.

The Chamber of Commerce’s sector strategy is mainly based on two initiatives:

- the creation and management of the web page www.barcelonaesmoda.com, a portal to all the initiatives, products, services and events related to fashion in Barcelona, which is considered a way to connect all the local operators and reinforce the image of Barcelona as an emergent “fashion city”;
- the organisation, with the help of City Council, of the initiative “*Barcelona es Moda*”, now at its third edition. At this event, prizes are awarded to firms and professionals within the fashion system that have identified and promoted Barcelona as a leading city in fashion.

Both initiatives are in line with the stated objective of reinforcing the fashion cluster of Barcelona, although it has not been demonstrated whether they had some success in this sense; on the contrary, the interviews conducted pointed out how the level of collaboration within the sector is still rather low. Nor has been the *Generalitat* any more successful with its Dynamisation Plan: in the last few years the amount of public funds invested to promote fashion events did not lead to any increase in sales locally, or to the launch of any young Catalan designer within an international outlook. Indeed, a case is often quoted of an emergent and gifted young designer who works for a large firm but has not been able to open his own shop in Barcelona (or abroad), and produce a collection with his own brand.

Marketing and events policies

Barcelona has started to be seriously engaged with fashion events since 1985, but only in 1994 was the first important fashion event *Pasarela Gaudí* created, the result of a fusion between *Pasarela Gaudí Mujer* (started in 1985) and *Pasarela Gaudí Hombre* (started in 1986).

Presently, the most important fashion events in Barcelona are: *080 Barcelona*, *Barcelona Bridal Week* (including the *Pasarela Gaudí Novias*), and *Bread & Butter*; in addition, *Showroom Barcelona* should be quoted as an event that takes place in Paris but showcases the Catalan emergent fashion designers.

080 Barcelona Fashion first appeared in July 2007: ‘its aim is to provide a platform increase the visibility of independent designers and to become a point of reference for cutting-edge design and fashion on an international level’ (<http://www.080barcelonafashion.com/080.php>, last consulted: 18th August 2008). It takes place twice a year, and gives to young local fashion designers the opportunity to present their creations: in the last editions young designers such as Martin Lamothe, Teresa Helbig, Txell Miras, and many others have presented their collection in it.

Barcelona Bridal Week-Noviaespaña has established itself as ‘the world’s largest wedding fashion business centre: the increased of 8,2% in the number of foreign visitors in the last edition (the 18th from the 30th of May to the 1st of June 2008) evidenced the growing interest of buyers from around the world in this fully consolidated professional trade fair’ (11,550 visitors from more than 50 countries in the latest event; 51.8% national, 8.2% international⁶). It usually takes place once a year, hosting the collections of many local and some international wedding fashion designers, such as

⁶ <http://www.moda-barcelona.com/ca/index.asp>, last consulted: 18th August 2008

Rosa Clará, Anna Torres, Manuel Mota – Pronovias, Novia D'Art, Christian Lacroix, Antonio Miró, Pepe Botella.

The *Bread&Butter Barcelona* represents a 'marketing and communication platform for brands, labels and designers from the areas of Denim, Sportwear, Street Fashion, Function Wear and Casual Dressed Up, as well as for suppliers from the preliminary stage of the textile industry'⁷. This "tradeshow for selected brands", started to take place in Barcelona in July 2005, although its original location was Berlin. Presently it is considered one of the most important fashion events in Barcelona: indeed, last July, 'the fashion professionals who visited the seventh edition of B&B in Barcelona were 89,168, therewith, the attendance record of summer 2007 could almost be retained with a decrease of merely 2.5%'⁸. It was claimed that this event 'moves into Barcelona a considerable amount of money' (Armora, 2007)).

In any case, right from the beginning positioning Barcelona as a fashion city through an aggressive event strategy was not an easy challenge, proof is that many events created in that period have been suppressed after a few years (Urrea, 2007) and the government policy officers responsible for fashion events have changed rather frequently. For instance, *Pasarela Gaudí* was suppressed after the 2005 edition, after the turn in the Government policy for the fashion sector, and was replaced first with *Pasarel·la Barcelona* in 2006, and then by the pilot edition of *080 Barcelona Fashion is Everywhere*. Even before November 2007, the *Generalitat* was involved in the organisation of fashion events, but that was done through external contractors: for instance, in 2006 the Demo Fashion agency was contracted to replace and manage the old *Pasarel·la Barcelona* with a new fashion event in Barcelona.

The original *080 Barcelona Fashion is Everywhere* project was mainly oriented to give real international prominence to the local fashion cluster, and tie independent designers more closely to the local community, by staging every edition in a different area of the city (the pilot edition was organized in the Raval). In October 2006, the same enterprise also managed with unexpected success the *Showroom Barcelona*: 'the most important opportunity to present the best Catalan fashion designers at international level, in "the" worldwide fashion capital' in the words of one of our interviewees.

However, that did not prevent the agency from being dismissed after the pilot, when they were already preparing the first edition expected for July 2008, gaining to the government the resentment of many an opinion leader in the sector: 'Every time that in Barcelona a fashion event "crashes", it is because of the awkward union between politic and fashion [...] In this way, Barcelona will never be an international fashion city' (Muelas, 2007), and a lawsuit for the intellectual property over the project: indeed, this project was taken over by the *Generalitat* and promoted with another, although very similar, name (*080 Barcelona Fashion*), although the "itinerating event" concept was dropped.

Place-specific policies

Barcelona is undoubtedly an attractive city for the creatives of the world and an incubator of talent, given the international relevance of its cultural industries and the high level of its cultural life, the

⁷ <http://www.breadandbutter.com/summer2008/en/about-bread-butter/concept/>, last consulted: 18th August 2008.

⁸ <http://www.breadandbutter.com/summer2008/en/press/press-releases/archive/bbbarcelona-july-2008/>, last consulted: 18th August 2008.

high ranking that it gets in specialised magazines as “a place to live in” or to “make business in”, and the width and diversity of its educational offer. This situation is partly the result of a vanguard cultural tradition that has transfused in the best of ways to the contemporary tones of “liquid modernity”, and partly the result of a enormous success in reconstructing the image and the landscape of the city after the end of Franco’s dictatorship, with well-known regeneration projects, some of them coinciding with the 1992 Olympics and mainly focusing on the physical and economic rehabilitation of declined industrial areas and waterfront, and some pre-dating it and focusing on the social revitalisation of the Old City and the Raval neighbourhood in particular.

Russo and Capel-Tatjer (2007) describe how the city has used cultural planning and in particular the location of higher education facilities and flagship cultural institutions and infrastructure (like the MACBA/CCCB complex and the new Rambla in the Raval) to breathe new life and vibrancy into the Old City, and how this vision is currently being picked up again after that the peripheral city campuses, conceived in the sixties, have become insufficient and most importantly failed to connect with their surrounding environment in fruitful ways. This process has eventually spread in an expected way turning parts of the Old City in a straightforward cultural quarter, including the residence and leisure habitats of international students and young professionals, creatively-designed public space and refurbished heritage, and cultural business, including design, architecture, music recording and fashion, in areas like the Raval and Born which were plagued by marginality and crime until a few years ago. In the former, the “regeneration frontier” is still shifting and new parts of the old city are trusted to undergo the same process in the next few years (S.Catarina, Barceloneta).

Apart from the conventional instruments of physical and social regeneration, which nevertheless Barcelona has pioneered and managed to practice without the social resistance met in other circumstances, the success of this process is due to its integration with an original approach to cultural planning and public space development. The City of Barcelona and its public and private partners have used this success to push the accelerator on the construction of a creative city, with a strong policy for the development of the creative industries such as the new media and design, with the relocation of university faculties, the attraction of international schools and corporate headquarters, and a program for the subsidised rent of working space to starting professionals both in the old city and in the Poblenou area, which is hosting the largest Europe regeneration project based on knowledge-intensive functions, the 22@. The very progressive social policy of Barcelona in terms of favouring multi-culturalism, celebrating difference and enabling access and participation, as well as the high quality of social and educational services, make for the “soft” elements of a creative city identified, among others, by Florida (2002).

Yet Barcelona is also, as pointed out earlier, a favourite leisure and entertainment destination, resulting attractive for both ends of the tourism market, the high spending cultural tourists and congress attendants, who are most likely to engage in the “global brands shopping” of Gracia’s and Diagonal’s avenues boutiques and *grand magazines*, and to young travellers on a low-cost short break, who are nevertheless attracted to the small independent ateliers and the urban fashion shops of the Old City. To some extent, tourism development and cultural development in the city have been synergic: tourism and events makes the city, its culture, its brand and lifestyle known and appreciated internationally, and in turn this attracts new residents and cultural agents, increasing its cultural capital constantly. The Raval is the exemplary illustration of this evolution: once (and in part still) a poverty-ridden quarter for immigrants, it has maintained a multicultural identity but has become more complex and sophisticated, accommodating new young skilled residents from the whole world, and becoming an open air stage of fringe cultural programming in occasion of events like the SONAR festival of electronic music, the Asian cinema festival, and several fashion weeks, which thrive side-by-side with the folkloric celebrations of the numerous ethnic groups of the

neighbourhood, generating a unique post-modern, *glocal* landscape.

However, it has been pointed out (Russo and Capel-Tatjer, 2007; Delgado, 2004; Degen, 2003; Marrero Guillamón, 2005) that the connivance between tourism and cultural development is not without problems, and is likely to turn into a conflict in the near future: the inner dynamics of the tourism market, in a now mature destination for low-cost travellers, is such that the landscape quality could be affected downwards and that low-cost tourism would out-compete residential functions for young creatives, leading to a dissipation both of the cluster strength, and of the original civic texture that engendered it. The signs are already evident: large parts of the Old City, like the Ramblas, completely given up to mass tourism, rising prices and pressuring speculation on the real estate market, and the mushrooming of “black market” rentals for tourism, subtracting opportunities to long-stay tenants. Although the Raval and other parts of the Old City are still strong in terms of cultural atmosphere, one is led to wonder who is actually benefiting, and whether this will last after the most recent controversial development of top-end hotels and renovation schemes in socially sensible areas.

Most importantly for the scope of this paper, the local government (and the Catalan government *in primis*) currently does not seem to have a proper follow-up strategy to target, attract and retain young professionals in the “creative quarters” that were so cleverly constructed; housing prices and rentals controls are bland, access to work careers suffers from the general economic downturn of Spain and further inhibited by language barriers, and an increasing portion of city landscape is “securitised” for tourism – the most recent episode, singular but revelatory, is of Plaça dels Angels, the flagship core of the new “cultural” Raval, patrolled by armed police to prevent the activity of skaters in what was formerly appreciated as the result of an open-ended approach to public-space planning.

Arguably, all this may have future relevance for the development of the fashion cluster. In the first place, it is today now so easy for starting fashion designers to find working space and keep up with the rising rents in the Old City, where they are likely to have more contacts with their customers, local residents and tourists. Secondly, some of them are discouraged by the “narrowing” environment of Barcelona and migrate to more celebrated and internationally-oriented fashion hubs as soon as they achieve some success. If this process continues, the cycle that leads from young creative talent to the large successful fashion houses and retailers could be hampered. Moreover, though cultural education in Barcelona is strong, this is not the case for fashion design and management, which is offered as a master specialisation only by one public university but does not have a solid structure of research and primary education in dedicated schools; thus, the capacity to “nurture” local creative talent is somewhat deficient compared to the opportunities offered in other established or emergent fashion cities.

3.6 Barcelona as a “fashion capital”?

The general result of our analysis, in relation to the framework presented in Section Three, is that the policy approach of both *Generalitat* and private sector associations with regard to fashion in Barcelona is mainly focused on the “marketing” block (the promotion of fashion events, and to a lesser degree on internationalisation), and on the “production” block (the creation and support of platforms to strengthen the fashion cluster). However, results for the moment are not encouraging. The reasons may effectively stand in the almost total absence of “place” policies, aimed at attracting and retaining the necessary talent to feed the cluster, and by a general lack of coordination between the various policy initiatives.

Shortcomings are also found at the level of governance. According to the information collected,

there is hardly any shared perception on how the policies regarding fashion in Barcelona would have to be organised and managed, a point of controversy that, if anything, has accentuated after the change in policy by the Catalan Government in 2007. Indeed, the Dynamisation Plan endorsed by the Government, as well as its takeover of the two most important fashion events (*Showroom Barcelona* and *080*), have been widely criticised not only by the operators in the sector, but also by the media and the leading Catalan designers. The main object of these criticisms is the direct public management of fashion events and the choice of funding them largely with public money. In any case, it is revelatory that any discussion on fashion with the local operators, policymakers and stakeholders comes up as a controversial subject.

These problems are without doubt opening a gap between the world of politics and the leading fashion designers. These regard with scepticism the future of fashion in Catalonia, and the image of Barcelona promoted by the *Generalitat*. Antonio Miró recently declared to *La Vanguardia*: ‘I decided to leave Barcelona and come back to Paris to present my new collection, seeing that fashion in Barcelona has lost his impact on the media: the press is not interested in it any more and this is just a fault of the *Generalitat*’ (“La Vanguardia”, 2008a). The distancing of this designer from the initiatives of the *Generalitat* has been followed by others: in the last edition of *080 Barcelona Fashion* (March 2008), neither Armand Basi, nor any other well-known Catalan fashion designer, have participated. This may be a hint that Barcelona is currently losing its capacity to attract and retain established fashion leaders and emergent talents. This descending parabola may have started some years ago, when many local designers started to prefer Madrid’s events, like the *Paserela Cibeles*, to present their collections, like in the case of Sita Murt and Lydia Delgado (Armora, 2007) or in Paris as in the case of Miró (“La Vanguardia”, 2008b). Other cluster actors are making similar choices: the director of Demo Fashion admits to be wary of Barcelona and its fashion system, and to be involved in fashion development in ‘a real fashion city as Antwerp, where political interests do not hinder its potential and actual implementation’.

In short, policymaking style appears to be mainly top-down oriented (Hassink, 2005; Morgan, 1997). It appears that fashion is still managed according to the traditional manufacturing-and-export concept of 19th century Catalonia, while the fashion system is today increasingly framed along the lines of a symbolic production milieu characterised by strong “place” qualities and flexible alliances. Proof is the absence of fashion from the list of creative industries that are the object of the Catalan Government policy through its Institute for Creative Industries – whereas the above concerns for new systems of governance are fully acknowledged. The need to shift to a bottom-up approach, committing all the actors of the Catalan fashion system, is made evident by the outflow of local fashion designers. Also, the shortcomings of its “place” policies call for a higher level involvement of the City Council and Barcelona’s civic society associations in fashion policy.

Once restructured its governance system, Barcelona would have to invest simultaneously, and in a coordinated way, on all three levels (fashion events and trades, textile and fashion cluster, and creative talents) that the authors have identified in their analytical proposal for the enhancement of the emergent fashion cluster to the status of a leading “fashion capital”.

In conclusion, it could be claimed that Barcelona’s stated policy ambitions with regard to its fashion cluster are presently somewhat flawed. The fashion policy of Barcelona could easily be seen as a mere component of a wider strategy deployed in the last decade to become a leisure and tourism capital, as it concentrates on marketing Barcelona as a fashion-themed event city, with an impressive shopping supply and recognisable “local” brands, ranging from luxury shopping in the central tourist areas to small designers’ boutiques.

Even so, it is questionable whether this objective is reached, for two important reasons. Firstly, the global convergence of commercial landscapes is eroding Barcelona’s advantage as a luxury

shopping city. Why travel to Barcelona for the purpose of shopping, if the brands that once were only Catalan or Spanish, like Zara, Mango, or Camper, are by now present in any other important origin market? On the other hand, the designer boutiques, which could offer such local idiosyncrasy, did not reach sufficient mass and solidity to be structurally integrated in the inner city economy. While the regenerated old city of Barcelona is increasingly getting oriented to a young and competent demand, but travelling on low budgets, independent designers have to push up prices to deal with increasing rents, and as soon as they achieve success, they flee to cities where market opportunities are wider and the creative environment is more dynamic. Secondly, the fashion events alone have a limited tourist resonance; if they do contribute to establish an “event city” image for Barcelona, they hardly justify the level public investment that they need to operate.

Also in order to redress the relationship between tourism and fashion, the fashion cluster needs more consistent, integral policing. Once the appropriate social and economic conditions would be established, it could truly become a lever for a more competitive and sustainable tourism in Barcelona, and benefit further from this development.

4. Final Remarks

As pointed out by Power and Scott (2004, pp. 9-10), research on cultural economy has identified three important recommendations for places seeking to develop their cultural economy: the building of collaborative inter-firm relations in order to mobilize latent synergies; the organization of efficient, high-skilled labour markets; and finally the empowerment of local industrial creativity and innovation. The government should consider the cultural industries as a priority growth cluster within the contemporary knowledge-based economy, using planning concepts such as ‘centres on innovation and creativity, planning for cultural clusters or districts through mixed land use and/or taxation incentives, and grants for networking between firms’ (Gibson & Kong, 2005, p. 547). Obviously fashion, as a culture-based industry based on the creative work of designers and a collaborative – and to a large extent “anarchist” – environment, is one such industries.

This paper has organised the insight from the literature in an original policy framework for the fashion cluster, which has been used to put to scrutiny what Barcelona, an emergent fashion city, is trying to achieve and the instruments that it is deploying.

Barcelona has been described as an “exemplar cultural city” with a pioneering approach to cultural planning and the development of creative quarters (Evans, 2005) and as a “top model fighting on a global catwalk” (Degen, 2003). The seemingly contrasting tones reveal frictions between past cultural development strategies and the capacity to embed such strengths in a solid social and economic foundation. The former have undoubtedly been very successful to regenerate a socially divided city and establish a cultural capital with few equals in Europe, but today they face the contradictions of post-modernity: the emergence of stereotyped landscapes under the pull of global power coalitions, the conflict between community ambitions and the “staged” city of tourists, the erosion of embedded local knowledge and social structures.

The actual capacity to bring itself to be a “fashion capital”, as written down in policy document, is an illustration of the difficulty for cities to move in the new competitive arena of creative industries. Barcelona needs to make a scale jump in the world of fashion to overcome its lost primacy in textile production and reaffirm its brand, which is perfectly possible under the new conditions of the “glocal” economy; but it does so with blunt instruments, a narrowly designed top-down system of governance of the sector, a conception of industrial relations still geared on the old manufacturing model, and an excessive reliance on tourism as the catalyst for the sector, together with little care of the intangible factors which today attract and retrain the hyper-mobile talent.

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