

## **Renewing Tonsley, Regenerating Adelaide – The making of Australia’s most competitive city**

Megan Antcliff, Ingo Kumic

**Abstract:** The Tonsley Redevelopment Project in Adelaide is arguably the most ambitious urban renewal initiative in Australia today. Tonsley is viewed as an integral investment in the future of Adelaide ensuring that it is more resilient in the face of high cost operating environments for industry, finite natural resources, demographic shifts, and competing value systems while enabling new systems of representation, new modes of communication, and potential new forms of capital.

Using the Tonsley Redevelopment Project as a new case study, this paper seeks to contribute to the current discussion on urban renewal and the making of competitive cities through a critical examination of the role of ‘innovation clusters’ and the intersection of place and productive processes as the basis to renewal strategy.

### **Introduction**

This paper studies the role of ‘innovation clusters’ and the intersection of place and productive processes as the basis to renewal strategy and in turn the making of competitive cities. In so doing, this paper will broadly locate itself in the literature which characterises spatial political economy (Cuthbert 2006) while specifically it will explore the competitive cities phenomenon (Dobbs et al 2001, Gospodini 2002, Smith 2002, Gleeson and Darbas 2004, Sassen 2006, Cuthbert 2006), city brands (Baudrillard 1970, 1981, Patteeuw 2002, Kumic 2008, Muratovski 2012, Saez et al 2013), the importance of place to global competitiveness (Sassen 2006, Katz 2013), and economic geography and innovation clusters (Smith 2012).

Academic discussion on urban renewal and competitive cities brings together the disciplines of strategic management, economic geography, urban planning and design, city branding, and urban sociology. This qualitative paper uses hermeneutic analysis of information gathered across these disciplines to analyse the Tonsley Redevelopment as case study from an historical and theoretical perspective.

Contemporary city strategy aimed at making the city more competitive seeks to ‘restructure [the] economy from one focused inward and characterised by excessive consumption and debt to one globally engaged and driven by production and innovation’ (Katz 2013). Accordingly, the formation of a ‘new production complex’ (Sassen, pg 95) at the local level becomes critical to the reshaping of national policy and practices required to drive ‘wealth-generating, trade-able sectors of the economy’ (Katz 2103).

### **The competitive city, urban entrepreneurialism, and city brands**

In 2011, the McKinsey Global Institute released a Report titled ‘Urban world: Mapping the economic power of cities’. The Report focussed specifically on the top 600 cities around the world which will drive global growth over the next 15 years. The Report (Dobbs et al 2011 pg 7) notes that the ‘City 600 Group’, which includes Adelaide, Canberra, Perth, Melbourne, Sydney and Brisbane, will contribute just over 60% to global growth by 2026. This compares with the next 400 cities which are expected to only contribute a further 6% to global growth in the same time. The influence of these cities on global growth is not only understood in terms of capital flows but critically is also understood in terms of the shifting landscape in global governance and foreign policy.

All in all, comparative analysis such as these are a statement of a city’s competitive stature and in turn directly address the contemporary phenomenon of cities competing for volatile global capital. Competition is in itself a fairly straightforward concept requiring competitors, whether cities or otherwise to be fit [for purpose] (Gleeson and Darbas, 2004). That is, a city must have the *capital* with which to compete for capital. (PWC, 2006)

Gleeson and Darbas, (2004), note that competition amongst cities for volatile global capital has resulted in numerous considerations a city must take into account when preparing productive strategies.

Some of these considerations include coming to terms with the fact that the 'global city' has become 'decoupled' from the national economy, instead seeking a place in a global system of 'fierce inter-city competition and weak regulation' (Gleeson and Darbas, 2004). Amongst other things, this desire to compete with other cities has brought into sharper focus the image of the city and ultimately its brand perception.

The competitive characteristics of cities have to a large extent usurped the competitive characteristics of a nation in so far as cities, especially in highly urbanized countries, are centres of new service-based economies. A report developed by the UK's Office of the Deputy Prime Minister (ODPM, 2004) set out six categories in which a city must develop in order to be competitive or 'fit'. These include developing a diverse economic base, ensuring a skilled workforce is able to service this base, securing connections – both internal and external, having the strategic capacity to mobilize and implement long-term development strategies, promote innovation in firms and organizations, and ensure that the material basis to life is capable of nurturing quality lifestyle – social, cultural and environmental.

This challenge requires two key shifts in order to be competitive across all of these criteria. Porter notes that on the one hand the productive strategies of cities must focus on the 'strategic manipulation of local assets' (Porter cited in Doel and Hubbard, 2002:359) while on the other, the task of coordinating this 'strategic manipulation' requires city government to become increasingly entrepreneurial (Harvey, 1989, Sassen 2003). Since the late 1960s and early 1970s, a reorientation of the attitude of urban governance has taken place in advanced capitalist countries. 'Put simply, the managerial approach so typical of the 1960s has steadily given way to initiatory and entrepreneurial forms of action' (Harvey, 1989:4). Harvey (1989:5) notes, the real power to organize lies within a broader coalition of forces; government and its administration simply facilitate a process typical of devolved public-private partnerships, alliances and coalitions. However, this does not make government subservient in the relationship, far from it. Urban entrepreneurialism is concerned with building political capital through the deployment of 'urban growth strategies' (Harvey, 1989) or 'productive strategies' (Scott, 1997) aimed at 'place-making', a process which critically relies on the aestheticization of politics (Harvey, 1990:305) as its main driver.

This in turn seems to align with emerging strategic (city) management practices which, in an age of consumer capitalism where the city itself has become invested with symbolic meaning and where it, as 'brand' circulates within an abstract code (Baudrillard 1970) of city indices, competes for attention and a share of global capital (Anholt 2006, Patteeuw 2002, Kumic 2008, Muratovski 2012, Karavatsis and Ashworth 2006).

To this end governments are therefore tasked with designing systems and 'productive strategies' (Katz 2013) that 'can absorb difficulties and adapt quickly and effectively to new challenges and opportunities in a global, highly dynamic environment in which they will compete to attract anything that might generate wealth' (Darchen and Tremblay in Saez et al 2013 p121).

### **Power in place - innovation economics and innovation clusters**

There is a prevailing view that 'the local' in a globalised network of capital exchange needs to be reconceptualised so that it is no longer simply seen as a passive form of collateral waiting to be employed and/ or deployed for the purposes of capital accumulation outside its control. (Logan and Molotch 1987, Sassen 2003, Peter Smith 2005, Glaesser 2001, Porter ). Michael Peter Smith (ed Lin et al, 2005) for example, notes that localities do not exist outside the logic of globalisation arguing that new conceptions of 'the local' should firmly position place as the site where 'localised struggles, and alternative discourse on the meanings of global conditions are played out' (p241). This notion that

place 'localises' the global is fundamental to the success of city's competitive posturing and in turn the development of its productive strategies (Sassen 2003, Katz 2013).

To this end, it can be said that the 'city' (as technical infrastructure) carries the impact of 'place' rather than 'place' simply being the passive outcome of the city. In a recent article by the Australian Department of Industry, Innovation, Science, Research and Tertiary Education (DIISTRE), Smith (2013), for example, reinforced the apparent contradiction of an increased importance of place and proximity in economic activity, this despite the advent of cheap, globally connected communications technology.

Smith's reflections are consistent with the view that place has become or is characterised by a 'new production complex' (Sassen 2003). Sassen (p95) notes that 'according to standard conceptions about information [-based] industries, the rapid growth and disproportionate concentration of many of the producer services in central cities should not have happened'. Sassen goes on to note that 'the growing complexity, diversity and specialisation of services' means that larger businesses which sought to contain key parts of its own value chain have become smaller and more agile, opting instead to outsource a higher proportion of their work. This means that highly specialised services have become 'economically viable in cities' (pg 95) in turn benefitting from the close proximity of other specialised advanced business services which in turn enable greater innovation of both the industries they operate in but also of their own business models.

Increasingly the work being done in the area of economic geography and innovation economics not only examines the spatialisation of economic activity and in particular the dynamics behind industry, it specifically focuses on [place-based clustering of] service agglomeration (Porter in Smith 2012 p.8) as a means by which innovation is enabled,

*Clusters are an antidote to the problems of scale experienced by small economies such as South Australia. They help accelerate the application of new knowledge and innovation. There are many definitions of clusters, but most share the concepts of proximity, networking and specialisation.*" South Australian Government's *Manufacturing Works*, 2012

According to The Cluster Initiative Greenbook (Sölvell et al 2003), a successful cluster is, apart from a concerted and well-focussed inward investment program, characterised by clear policies to promote innovation, stable and predictable government policy, company's trust in government initiatives, sufficient budget for significant projects and by a recognisable and wealth managed brand.

*"Strong clusters emerge in open markets where intense rivalry and cooperation within and between clusters coexists. Clusters emerge where competition across regions enables companies, entrepreneurs and financial actors to choose a location based on the attractiveness of regions, rather than in response to artificial barriers. Globalisation has increased the need to combine strong internal dynamics within clusters with solid linkages to cluster and markets located elsewhere"*

Michael Porter, (Roos 2012), further explains the promotion and development of clusters of economic activity are largely undertaken to foster innovation, entrepreneurialism and increased productivity via the achievement of agglomeration economies. Roos (2012) draws attention to the value of cluster agglomeration and states that a group of linked actors gain a sustainable competitive advantage by capitalising on the resources (i.e. physical, organisational and monetary) that are linked to a particular location. Clusters provide an environment that is conducive to both innovation and knowledge creation. And, even as supply chains become more geographically diverse, manufacturers are becoming more reliant on certain clusters of local suppliers and technology.

Clusters do not rely entirely on the physical proximity of firms and partners, however the co-location of firms and partners can lead to increased productivity through increased access to specialised skill sets, services and other inputs, through enhanced communication and special relationships, fostering collaboration and a sense of community, through greater access to public goods and institutions such as research and funding bodies, and indeed through a certain level of 'peer pressure' whereby a

business community creates internal incentives to engage, innovate, compete and excel in what can be characterised as a 'race to the top'.

The Tonsley Redevelopment Project states it is firmly grounded in the strategies of cluster development, recognising the importance of people focused development in attracting and retaining the knowledge worker of the future, the pools of highly talented, skilled and creative labour driving productivity and growth (Florida, 2002) and companies able to generate ideas and convert them to something of value, be it product, service, methodology or technology.

### **Case Study: Tonsley Redevelopment Project**

*Tonsley: an overview of the history of the site and its role in the fortunes of Adelaide (Stephensen and Gore, 2012)*

The area in which Tonsley is situated forms part of the traditional lands of the Kaurna people. Tonsley's post-settlement history from 1839 to 1955 was mixed farming activity, representative of the early settlement patterns of the region, and held for the period by the Ragless family who named the estate *Tonsley*.

In 1955, Sir Thomas Playford's State Government, seeking to encourage the development of industry in a post war South Australia sold Tonsley to Chrysler Australia Limited (CAL) to establish car manufacturing. During this industrialisation period both Holden and Chrysler established themselves in South Australia and were key to the State's economic development and its 'manufacturing state' image. Holden remains an important part of the manufacturing fabric in South Australia today.

Tonsley provided invaluable manufacturing skills that fed into other major industries in SA including defence and mining, at the same time as it contributed to the internationalisation of South Australia through the export of cars to overseas markets. Car manufacture at Tonsley provided the first job for many immigrants to the State, and the site's multi-cultural heritage (over 52 nationalities working on site over its lifetime) is remembered fondly by ex-workers today:

*"We both learned off of them as they learned off of us. So it was good that way. ...they had a lot of ideas that we could utilise, because they'd come from industry within their own countries and this information was brought out here to Australia."* (Stevenson, S; Gore, Q, 2012 [interview with Rob Dale, 9 July 2012])

At its peak activity under Chrysler in 1979, Tonsley employed 7,500 people. The manufacturing facility was sold to Mitsubishi Motors Australia Limited (MMAL) in 1980 and continued manufacturing operations until 2008.

Over 50 years of manufacture on site engrains a productive site in the social and economic fabric of a region. It was not uncommon for multiple generations of families to be working on site and social, sporting and cultural activities on site and off became powerful structuring elements in the lives of those involved.

The Tonsley site and the Main Assembly Building in particular (61 hectares and 11 hectares in area respectively) has a scale and physical presence which has marked the southern Adelaide urban region. As such it was both the historic connections to the productive history of the site and indeed the sheer physical scale of the site and its built form infrastructure which led to an early design direction in site planning. The Main Assembly Building was to be retained and repurposed to accommodate a mixed use urban fabric and a contemporary business and operating environment for a manufacturing cohort.

The adaptive reuse of the Main Assembly Building was seen as a mechanism for bridging the scale of the large brownfield site and creating a focus for the public sector investment on site. It was also seen as a mechanism for value creation across the site, an innovation in urban regeneration strategy in the Australian context, and an important gesture to sustainable redevelopment with an estimated 80,000 tonnes CO<sup>2</sup> embodied in the existing structure.

Having guided the site master plan, principles of retaining site heritage, bridging scale, creating destination and focus, along with sustainability and innovation remain important through detailed site design and delivery, including urban design strategies and art and place making.

Capturing and reflecting the site's heritage enables former workers and the surrounding communities to be part of the site's ongoing development and provides a "sense of place" that respectfully reflects manufacturing, agricultural and indigenous heritages whilst providing a clear picture for Tonsley's future.

Through the site's redevelopment, community engagement has been most consistent around how the site's future offerings meet community values with respect to employment, productive activity, manufacture, education and aspirations for the future, as well as connectivity, sustainability and inclusion.

*Tonsley: the agenda and the challenge of competing in a 'global economy'*

Manufacturing is a critical component of any advanced economy in large part because of the employment creation and technology adoption multiplier effects manufacturing generates. High value manufacturing involves high skill jobs and attracts related services. In fact, the distinction between manufacturing products and services is becoming increasingly blurred (Roos 2011) as business 'servitisation' is more understood as a means of value creation.

Several factors including the impact of resources boom, the high cost operating environment and highly valued currency, as well as increasing globalisation of markets and international competition have affected traditional manufacturing in Australia. Necessarily, South Australia's economy is an economy in transition, moving from traditional labour intensive manufacturing and a heavy reliance on 'wine, wheat and wool' to a knowledge-based economy built around smart industries; high value manufacturing, mining technologies and services, clean technology, renewable energy and defence.

Advanced manufacturing is an essential element of South Australia's transition to an innovative, knowledge based economy. Tonsley seeks to support business creating value in one of two ways. Through value creation (technology based innovation integrated with design based innovation, complemented with innovations that increase efficiencies), or value appropriation (innovative business models and improvements in efficiency that maximise the share of this created value so it can be captured or appropriated by the firm)

To gain a competitive advantage and ensure Tonsley and in turn Adelaide accumulates the capital necessary to secure its own future it is creating a more compelling value-proposition than its competitors, developing a brand capital and building human capital through the city making process with a particular focus on Place, People and Partnerships and Ideas and Innovation;

- Place: The unique built environment supports and enables access to networks, both spatial and social, and adaptive uses that are fuelled by the talent and ingenuity of people who live, work and play at Tonsley.
- People and Partnerships: It is a mindset that invites and enables businesses, from small start-ups to large multi-nationals to realise their potential, supported by Tonsley's favourable context and its culture of production, value creation and facilitated exchange.
- Ideas and Innovation: Tonsley will be developed as a precinct based on a mindset of openness, participation and commitment to creating something new. This paper will elaborate further on the Tonsley journey thus far. It will begin with an *overview of the history of the site and its role in the fortunes of Adelaide*. This will be followed by a *discussion about the agenda the project has set itself and the challenge of competing in a 'global economy'*. Following this will be a *discussion about the type of urban governance, approach to strategy and 'tools'* employed by the State Government in the making of Tonsley.

Regional economic growth is said to require both depth and breadth (Smith, 2013). If breadth comes from the diversity of people engaged in a productive endeavour, and the open mindedness they required to accept, generate and convert new ideas, then depth comes from specialisation and deep experience a region holds in certain industry fields.

The redevelopment of Tonsley is driven by an economic development agenda and more specifically by the transforming manufacturing agenda embedded in the State's Advanced Manufacturing Strategy (DMITRE, 2012). The requirement to attract investment, create a platform for advanced manufacturing to grow, to generate employment and indeed create a return on state Government investment in the redevelopment requires leveraging market sectors where South Australia has such depth.

Tonsley aims to establish industry clusters within four target industry sectors that capitalise on the natural advantages that Tonsley, and South Australia more broadly, have to offer.

Firstly in the mining and resources sector, this will include mining-related services such as engineering and design, fabrication, mining equipment, training, simulation and Information and communication technologies.

Secondly, clean technologies including energy generation and demand management, water technologies, renewable construction materials, recycling and environmental testing. To this end Tonsley has formalised a number of partnerships with cooperative research centres which will contribute to the impact and reach of the clean technologies market sector.

Thirdly, drawing on future market opportunities as well as the on-site presence of TAFE SA's Sustainable Industries Education Centre, Tonsley will focus on green building products and services including design, engineering and manufacture of specialised materials, new building products and services, and multi-disciplinary capabilities including modelling and simulation.

Finally, medical devices and assistive technologies are based on developing local and national expertise in medical technologies, particularly through Flinders University's Medical Devices Research Institute and the nearby Flinders Medical Centre. The location of Flinders' new School of Computer Science, Engineering and Mathematics at Tonsley will support efforts across these and other sectors.

Critically, the approach to Tonsley's investment and development reflects a sound understanding of the challenge that competing for global capital implies.

Interestingly, this question of what it is about cities that have, and will continue to make them pivotal in the way in which we grow and what constitutes sound growth, is far less well understood than what would happen if we ignored their influence.

As the lead agency and major economic development partner for Tonsley, DMITRE is driving the activity that will forge the creation and development of the industry clusters that will flourish at Tonsley over the long term. One aspect of cities which seems undeniably critical to their ability to be influential is the extent to which they are well served by infrastructure. Prior to his retirement as Secretary of the Treasury, Dr Ken Henry (COAG 2012) noted that:

*...Getting it right with cities and infrastructure has significant potential, not just from a pure economic perspective, but also from a social and environmentally sustainable perspective. Getting it wrong is likely to be very costly socially and environmentally.*

However the debate, particularly in Australia often estranges discussions *about* infrastructure from discussions *in and of* infrastructure. That is to say that good infrastructure is an enabler rather than and end in itself. Neil Smith (pg 435) notes that 'many well meaning planners indict the lack of suitable infrastructure...yet, chaotic and arduous commutes have not yet led to economic breakdown'. Instead, it can be better argued, as Saskia Sassen (pg 95) does, that despite the locational options enabled by complex information technologies to bypass the high cost and congestion of major cities,

increased specialisation of services and its outsourcing means that productive place-based business are smaller and as such disconnected from what was once an internal value supply chain. For this reason, they seek greater physical proximity to one another for not only commercially productive reasons but critically, for socially productive reasons as well.

The idea of 'place as producer' as distinct from the value of 'place as commodity' sits at the heart of Tonsley's Economic Development Framework and in turn its cluster strategy. Tonsley's strategy firmly positions 'place' at the centre of its ambitions but importantly it seeks to subordinate the consumption of place, as is usually the driver of regeneration, to the production of place. This is a crucial distinction as it prioritises wealth generating, tradable services over and above those non-tradable services such as retail, property and hospitality which have typically been cast as the lead-investment.

Related to the ideas previously explored of 'place as producer' as distinct from the value of 'place as commodity', the lead investors at Tonsley have been identified as those 'anchor tenants' which not only possess 'attraction' qualities but are seen as critical to the free flow of ideas and collaboration rather than assertion and domination (Allen Consulting 2013 p 16). The Economic Development Plan for Tonsley 2012-2030 (Allen Consulting 2013) notes that Tonsley needs to be clear about its value proposition in order to attract those anchor tenants required to generate enough leverage to draw in other related business within the service value chain. While current commitments from Flinders University, SIEC (SA TAFE's Sustainable Industries Education Centre) and Tier 5 total in the order of \$350 million, they are in themselves not sufficient in terms of internationally recognised tenants to induce the desired brand for Tonsley and in turn Adelaide and South Australia.

#### *Tonsley: urban governance, strategy and 'tools' in the making of an industry cluster*

The South Australian Government arguably reflects one of the most advanced conditions of strategic city management in the Country today. Guiding the Tonsley initiative is the South Australian Government's commitment to advanced manufacturing, a commitment born out in its 2012 report titled 'Manufacturing Works-a strategy for driving high-value manufacturing in South Australia'. While the document provides 'clear policies to promote innovation' it is the role which it articulates for Government which is of particular interest.

According to the 2012 Australian Innovation System Report, "government actions and investments account for 35% of GDP in Australia." which means that governments must "be innovative in the development of policy and the delivery of services that provide better quality of life for the community". It also highlights the role of government procurement in the spheres of economic development and productivity.

At Tonsley Government procurement is leveraged to bridge the infrastructure and policy gaps apparent to the manufacturing sector in South Australia. A key strategy in alleviating such infrastructure gaps is through the development of industry clusters.

If the role of Government in an enterprise such as Tonsley is as catalyst for smart specialisation or industry cluster development, a number of strategies are brought to bear in the making of 'place' including the development of both 'hard' and 'soft' infrastructure, the focus on the human experience and quality of place; in the development of 'people and partnerships', the origin of smart specialisation anchored in sectors of existing market depth; and in fostering 'ideas and innovation' including a clear focus on site brand and image development.

An additional focus of the Tonsley Redevelopment has been in building brand and identity in parallel to the physical development of place. Brand is conceived as one of the key unifying elements for smart specialisation at Tonsley.

Brand archetype 'Creator' established Tonsley as symbolising innovation and creativity, shows new ways of doing something or creating something new to do. Tonsley breaks conventions through disruptive innovation and changes people's lives in a positive but disruptive way, allowing people and partners to do things that have not been possible before.

As a 'creator brand', Tonsley will differentiate itself as a connected, adaptable and talent-driven place of work, adaptable and responsive to what the people who are there make of it. At its core, Tonsley is talent-driven and therefore welcomes businesses and investors that understand the value of its people.

Grounded in the idea of 'innovation economics' government is positioned as an enabler of innovation or change. The notion of 'innovation economics' is a growing economic doctrine that reformulates conventional economics theory so that knowledge, technology, entrepreneurship, and innovation are positioned at the centre of the regeneration model rather than seen as independent forces that are largely unaffected by policy. Innovation economics is based on two fundamental tenets: that the central goal of economic policy should be to spur higher productivity through greater innovation, and that markets relying on input resources and price signals alone will not always be as effective in spurring higher productivity, and thereby economic growth.

In this context, and as demonstrated through the Tonsley redevelopment, the South Australian Government sees its role as innovation facilitator.

Firstly as an informed client setting the strategic direction for site development both 'hard infrastructure' and 'soft infrastructure', leveraging public sector procurement and investment and grounded in solid economic development policy.

Secondly, as master developer and strategic direction setter whereby community, partners and relationships are established and structures for them to flourish developed, including through cluster development.

And finally as a timely 'exiter' from an ambitious city making program in support of advanced and innovative industry activity, driven ultimately and into its future by private sector self interest for a collective good.

## **Conclusion**

Tonsley's approach demonstrates an understanding that it is in the long term interest of Adelaide to not only *not* reduce the idea of 'the city', but to ensure its 'regeneration strategy' subordinates the consumption of the city, and its associated industries such as property development, retail, entertainment and hospitality to its production and in turn those industries which create wealth. Furthermore Tonsley's grounding in a form of entrepreneurial governance appears to contradict claims that 'entrepreneurialism' reduces, erodes and instead can be employed to ensure that 'return on investment' is understood in terms of all manner of capital, not simply financial. This is not so much a case of business hi-jacking society and its cultural production but rather of the city, its government, and its cultural machinery appropriating the language and framework of 'business' in order to revise the terms or rules which dictate global flows of capital.

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