

**THE ROLE OF DESIGN IN THE CREATIVE
ECONOMY IN ISTANBUL: A STUDY IN
CERAMICS-GLASSWARE INDUSTRY**



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THE ROLE OF DESIGN IN THE CREATIVE ECONOMY IN ISTANBUL: A STUDY IN CERAMICS-GLASSWARE INDUSTRY

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To my dear family



DECLARATION OF ORIGINALITY

I hereby declare that I am the sole author of this thesis and that this is the true copy of my thesis, including the final revisions, approved by my thesis committee. All data and information have been obtained, produced, and presented in accordance with the rules of research ethics and principles of academic honesty. As required by these rules, to the best of my knowledge, I have acknowledged ideas, thoughts, and any copyrighted material in accordance with the standard referencing rules. I certify that any part of this thesis has not been submitted for a degree or diploma in another educational institution.

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ABSTRACT

This thesis explores the role of design in the creative economy since the cultural aspect of design in value creation has been overlooked in previous design ecosystem studies, despite the rise of the role of culture in the new economy since the 1990s. The study attempts to offer a new approach to explore the functioning of the design ecosystem, presenting theoretical foundations to identify the actors and their relationships, reveals the seminal role design plays among them, and highlights their interdependencies to work as an ecosystem, presenting insights for policy intervention. In order to carry out this research, a combined approach of interdisciplinary literature review, interviews, and a mapping tool was adopted. The field study was carried out in Istanbul, a design city of UNESCO Cities Network, and the ceramics and glassware industry was selected as the sector of focus. Major conclusions include: (1) Design binds the cultural industries, the creative industries, and the wider economy to work as an ecosystem, to form ‘interconnected meanings’ leading to the distinctiveness of productions in the city. (2) Design ecosystem and the creative economy are intertwined; hence, the creative and cultural industries and non-design NGOs are also actors of the design ecosystem. (3) Design is a project business, where the collaborations among designer entrepreneurs and major producers encourage innovation in the city. In light of these conclusions, cultural and creative industries and non-design NGOs were included as actors in the design ecosystem, and the interdependencies among the actors of the design ecosystem were revealed in order to inform policy-making.

Keywords: Design, innovation, design ecosystem, creative economy, business models

ÖZET

Tez, tasarımın değer yaratımındaki rolünü, kültürel boyutu da dikkate alarak yaratıcı ekonomi bağlamında araştırmaktadır. Tasarımın kültürel yönü, kültürün 1990'lardan bu yana yeni ekonomide artan önemine rağmen, önceki tasarım ekosistemi araştırmalarında ıskalanmıştır. Çalışma, tasarım ekosistemindeki aktörler ve aralarındaki ilişkileri belirleyebilmek için teorik temellere dayalı yeni bir yaklaşım sunmaktadır. Bununla birlikte, yaratıcı ekonomi aktörlerinin değer üretiminde bir sistem olarak çalışabilmesi için karşılıklı bağımlılıklarını ve tasarımın bu işleyişteki öncül rolünü ortaya koymakta ve politika müdahalesi için içgörüler sunmaktadır. Araştırma yöntemi olarak, disiplinler arası literatür incelemesi, görüşmeler ve haritalama aracı kullanılmıştır. Alan çalışması için, UNESCO Şehirler Ağı'nın tasarım şehirlerinden biri olan İstanbul ve seramik ve cam eşya sektörü seçilmiştir. Elde edilen başlıca sonuçlar şunlardır: (1) Tasarım; kültür endüstrilerini, yaratıcı endüstrileri ve bunların dışında kalan ekonomi aktörlerini, üretimlerine özgünlük kazandıran 'birbirine bağlı anlamlar' yaratan bir ekosistem gibi çalışmak üzere birbirine bağlar. (2) Tasarım ekosistemi ve yaratıcı ekonomi iç içedir; buna bağlı olarak, kültür endüstrileri ile tasarım dışı STK'lar da tasarım ekosisteminin aktörleridir. (3) Tasarım projesi etrafında, tasarımcı girişimciler ve büyük üreticiler arasında geliştirilen iş birlikleri şehirdeki özgün üretimi teşvik eder. Bu sonuçlar ışığında, kültür endüstrileri ve yaratıcı endüstri aktörleri ile tasarım dışı STK'lar tasarım ekosistemi aktörleri arasında dahil edilerek aktörler arasındaki karşılıklı bağımlılıklar politika yapıcılara içgörü vermesi amacıyla ortaya konmuştur.

Anahtar Kelimeler: Tasarım, inovasyon, tasarım ekosistemi, yaratıcı ekonomi, iş modelleri

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LIST OF ACRONYMS AND ABBREVIATIONS

2D:	Two-Dimensional
3D:	Three-Dimensional
ARED:	Outdoor and Industrial Advertisers Association
B2B:	Business To Business
B2C:	Business To Customer
BIROY MO:	Cinema Actors' Professional Association
BJK:	Besiktas Gymnastic Club
BMYP:	Independent Music Producers Association
BP:	British Petroleum Company
CAS:	Complex Adaptive System
CITF:	Creative Industries Task Force
DCMS:	Department for Digital, Culture, Media & Sport
DISAD:	Digital Art Association
ENTAK:	Industrial Design Accreditation Board
ETMK:	Industrial Designers' Society of Turkey
EU:	European Union
FILMYAP:	Film and Visual Effects Producers Association
GDP:	Gross Domestic Product
GMK:	Graphic Designers Professional Association
HORECA:	Hotel Restaurant Cafe
IBB:	Istanbul Metropolitan Municipality
IDA:	Communication Consultancies Association of Türkiye
IDEALIST:	Interior Designers Derneği
IGOGRADA:	International Council of Design
IJPM:	International Journal of Project Management
IKSV:	Istanbul Foundation for Culture and Arts
IMMIB:	Istanbul Mineral and Metals Exporters Association
IMOS:	Inegol Furniture Manufacturers Association
INSEAD:	Institut Prive D'enseignement Superieur
IPA:	Istanbul Planning Agency

IPR: Intellectual Property Registration
IRD: İzmir Advertisers Association
ISO: Istanbul Chamber of Industry
ISTAV: Istanbul Art Promotion and Research Foundation
ISTKA: Istanbul Development Agency
ISTOC: Istanbul Wholesalers' Market
ITO: Istanbul Chamber of Commerce
ITU: Istanbul Technical University
KOSGEB: Small and Medium-Sized Enterprises Development and Support Administration
KOTISIS: Kocaeli Theatre and Cinema Artists Association
KTSM: Kale Design and Art Center
LA: Los Angeles
LQ: Location Quotient
MARKA KONSEYİ: Brand Council
METU: Middle East Technical University
MoMA: Museum of Modern Art
MSA: The Culinary Arts Academy
MTD: Fashion Designers Association
MÜYORBİR: Music Performers' Professional Association
NDS: National Design Systems
NGO: Non Governmental Organization
NIS: National Innovation System
O&P: Osterwalder and Pigneur
OECD: The Organization for Economic Co-Operation and Development
OEM: Original Equipment Manufacturer
P&L: Profit and Loss
PID: Marketing Communications Association
PMJ: Project Management Journal
PR : Public Relations
R&D: Research and Development
RYD: Advertising Creators Association

SENARISTBIR : Screenplay and Dialogue Writers' Association of Film Copyright Holders

SIC: Standard Industrial Classification Code

SKU: Stock Keeping Unit

SM : Small Medium

SME: Small Medium Enterprises

SSTD: Exhibition and Stand Designers Association

TDKSSV: Turkish World Culture, Art and Cinema Foundation

TEV: Turkish Education Foundation

TIM: Turkish Exporters Assembly

TOBB: The Union of Chambers and Commodity Exchanges of Türkiye

TUBITAK: The Scientific and Technological Research Council of Türkiye

TUHID: Turkish Public Relations Association

UK: United Kingdom

UNCTAD: The United Nations Conference on Trade and Development

UNESCO: The United Nations Educational, Scientific and Cultural Organization

USA: United States of America

UX: User Experience

WF: Work Foundation

WIPO: World Intellectual Property Organization

YEKON: Council of Creative Industries Association

YEPUD: Creative Activities Planning and Implementation Association

ZUCDER: Glassware Manufacturers Association

ZUCHEX: Home and Kitchenwares Fair

1. INTRODUCTION

The creative economy remains an attractive topic for policymakers, business leaders, and academics worldwide since it entered the public domain by the British Labor Government in the UK in 1998 (DCMS, 1998). Introduced as a prominent solution to overcome the problems of the UK's post-industrial economy, this new concept resonated not only in the developed but also in the developing world, where it was presented as a 'feasible development option' by UNCTAD (Barrowclough & Kozul-Wright, 2008; UNCTAD, 2008, 2010). The current data confirms that creative industries are a significant driver of regional growth, employment, and global competitiveness, especially for the Global South, and will continue to be so in the future (Deloitte, 2021). Although we gather statistics periodically on the overall employment and output in certain areas of the creative economy (UNCTAD, 2024), our knowledge of the specific mechanisms of development and organization within the sector is still uncovered. The same is true for the role of design as a distinctive sector in the creative economy and its relationship with innovation.

The rise of creative industries coincided with digitalisation, globalisation, and the new media, associated with discourses of technological convergence, the information society, and the 'new economy' (Flew, 2002; Flew & Cunningham, 2010). These important trends had groundbreaking consequences in the organization and understanding of the economy. The 'new economy' characteristics, which are informational, global, and networked (Castells, 2000), are also evident in the creative industries. The new information and communication technologies increase production flexibility, also affecting the consumption side, where customers use commodities to construct their identity. This phenomenon was termed 'semiotisation of consumption' by Lash and Urry

(S. Lash & Urry, 1994a, p. 61) and 'aestheticization of everyday life' by Featherstone (Featherstone, 1991), pointing out the diminishing boundaries among art, aesthetics, and popular culture. These trends increased the need and capacity to 'creatively understand and respond to cultural symbols' for 'knowledge-intensive production' in the new economy (S. Lash & Urry, 1994a, p. 60). These were followed by structural changes throughout the economy. As in the new economy, creative industries were also organized around the alignment of micro-businesses and SMEs in content creation with large cultural organizations in national and international distribution for the commercial value realization of creativity (Leadbeater, 1999). The rise and the usage of digital technologies also gave rise to entrepreneurship and emergent business models, fostering innovation in the new economy.

The creative economy builds on the national and international interactions of the creative industries and lives in the cities (Amin & Thrift, 2007; Florida, 2002b; Landry & Bianchini, 1995; UNCTAD, 2010). There is an ongoing competition between the world cities to be a 'creative city'; however, it is fair to presume that every city is unique in its cultural and creative resources, economic policies, technological and design capabilities, forming its 'competitive advantage' (Florida, 2002a, 2003, 2012; Jeffcutt, 2004; M. E. Porter, 1990; Pratt, 2004a, 2004a; Pratt & Hutton, 2013; Scott, 1997, 1999a; Scott & Storper, 1992). The dominant modality of relationship between the creative economy and the city has been expressed through the lens of 'creative city' (Florida 2002). For Florida, the availability of the creative class is the essential and sufficient factor for innovation to occur in a city. However, the perspective is challenged by economic geographers, stating that the production side should not be neglected in the conceptualization of creative cities,

where the cities operate as creative fields in producing cultural and technological innovations (Scott, 2001a).

Creative industries, as the focal point of creativity, are assumed to play an important role in driving innovation (Andari et al., 2007; Gordon & H. Belly-Orrin, 2007; Potts, 2007). Even though there is extensive research on the types and sources of innovation, the studies on creative industries in the context of innovation are scarce. Those few studies aimed to shed light on the role of creative industries in innovation to develop policies for their growth and productivity. Some important quantitative research sought to enclose the links between the creative industries and the wider economy, focusing on the knowledge transfers through supply chain linkages, and found evidence that creative industries stimulate and support innovation (Bakhshi, 2009). Other studies proposed seminal conceptual frameworks mapping the relations among the creative industries as well as their relations with the wider economy (Andari et al., 2007; Potts et al., 2008; Throsby, 2008). Although the Work Foundation (WF) (2007) model was built on the concentric circles model of Throsby (2007), the two models had important differences in recognizing the place of design as a creative industry. Throsby (2007) stated that the concentric circles model offered a 'static snapshot' of the cultural production, yet was unable to represent its dynamic nature, like in value chain analysis. Since it was not possible to allocate design in only one circle of the model, due to its both creative and utilitarian nature, design was positioned at the outer circle as related industries. Differently, the WF model places products in the related circle following the share of expressive and functional value they possess. In this model, design is positioned at the creative industries circle between cultural industries and the wider economy. This model is important since it recognizes the significance of design for innovation (Cox,

2005), creating both expressive and functional value, and presents its mediating nature between cultural production for understanding innovation (Julier, 2000, Work Foundation, 2007; Sunley et al, 2008).

Understanding the relationship between innovation and design is crucial to researchers, business practitioners, and policymakers. This interest gained momentum as the European Commission recognized design as a driver of innovation and encouraged countries to include design in their innovation policies (European Commission, 2013). The government's involvement in national economies to support innovation is justified by the system failure theory by Freeman and Lundvall (Freeman, 1995, 2004; Lundvall, 1985, 1992). The theory's founders assert that the analysis of the National Innovation System (NIS) must serve as the foundation for innovation policy. Parallel to the understandings in NIS studies, design researchers directed their attention to understanding the functioning of the National Design Systems (NDS) to address the possible systemic failures to inform policy intervention for design innovation. Over time, through the work of scholars and policymakers, the concept of a NIS has evolved into an innovation ecosystem. Likewise, NDS studies evolved to design ecosystem studies.

Despite acknowledgments that state design as the driver of innovation, design ecosystem studies lack a systematic approach. There are several design ecosystem studies with differing approaches aiming to identify areas to support design through identifying the actors in the system and mapping the relationships between them on a national level (Love, 2007a, 2007b; Ministry of Employment and the Economy, 2013; Raulik-Murphy et al., 2010; Raulik-Murphy & Cawood, 2009; Sun, 2010; Whicher, 2017). Although it was not possible to map all the complex network of actors and relations, these studies disclosed different sets of elements, actors and stakeholders -named according to the

understanding of the system and ecosystem concept in the study- some of which were common, and proposed conceptual models on the functioning dynamics of a design ecosystem and policy intervention areas. The conceptualization of the ‘system’ or ‘ecosystem’ was different in all of those studies, which resulted in findings with different sets of actors, either named elements, components, or stakeholders. These design ecosystem models helped inform policymaking by providing an understanding of the actors and network of activities in design systems. However, they were also criticized for serving the design profession (Woodham, 2010) and being unable to frame the social and creative side of businesses (Hobday et al., 2011, 2012) and the design policy landscape (Mortati & Maffei, 2018). These critiques are important because they call for an understanding of the social context to understand the design-innovation relationship.

The present study draws upon the interdisciplinary literature on the dynamics of the creative economy (Andari et al., 2007; Grabher, 2001, 2002a; Massa et al., 2018; Midler, 1995; Molotch, 2002; Scott, 1999a, 2006b; Zott & Amit, 2010). This literature signifies the collective character of innovation in a geography and the interdependencies among the actors, opening important perspectives to unpack the complexity of the design ecosystem. This study utilizes two key concepts provided for the analysis of the creative economy to study the design ecosystem: the unit of analysis as the project (Grabher, 2002a; Midler, 1995) and the level of analysis as the city (Molotch, 2002; Scott, 1997, 1999b, 1999a). Borrowing these two key concepts from the creative economy research would serve important ends. Firstly, utilizing the project as the main unit of analysis will serve to disclose the actors in and around the design project, highlighting its collective and social character. Secondly, it would be possible to identify the actors of the creative economy utilizing the production system at the city as a creative field around the design

project. As a result of these two choices, it would be possible to present the mediation of design between cultural production and wider economy, which generates innovation as proposed in former studies of the Work Foundation, Julier, and Sunley.

The study would shed light on the distinctiveness of design as a creative industry, disclosing its role in the creative economy.

The scope of this study is limited to a particular city, Istanbul, a city of design, announced by UNESCO in 2017. Informing policy-making with valid directions for better utilization of design capabilities is crucial for the development of cities, regions, and nations, since innovation is the principal source of growth and prosperity in the contemporary economy. The scope of the study is limited to the ceramic and glassware sector in Istanbul.

With this background, the study aims;

- To gain a comprehensive understanding of the design ecosystem.
- To identify the actors of the design ecosystem and
- To map the relationships among those design ecosystem actors.
- To identify the interdependencies among those ecosystem actors in the field of the ceramic and glassware industry in the creative economy in Istanbul by utilizing design projects as the main unit of analysis.

Given the complex and social nature of the research topic and the absence of a framework to grasp the research questions, this research adopts an explorative study which consists of interdisciplinary literature survey, semi-structured in-depth interviews, and a mapping tool to achieve these objectives.

Structure of Thesis; The thesis starts with Chapter 2, which contains background information about the evolution of the concepts and definitions of the Creative Economy and the main structural frameworks used for its analysis and measurement. The chapter then presents the two seminal concepts by economic geographers and sociologists on the Creative Economy, which are selected to answer the research questions for the study: the project notion and the creative field. This background information is crucial to discuss the role of the design ecosystem in connection with other creative industries and the wider economy at the city level in the later stages of the study. The chapter continues with a critical discussion of the distinctiveness of design among other creative industries and reviews the earlier studies on the role of design in creating economic value, explaining its evolving mediating role between production and consumption within the digitalized and globalized world economy. The chapter then introduces the design ecosystem concept used by governments as a policy tool to enhance innovation in national economies. After looking at the previous design ecosystem studies at the national level, the chapter ends with a detailed look at design system studies in Istanbul.

Chapter 3 discusses the research methodology employed in the study. Also, presents the reasons behind the selection of the design project as the unit of analysis, the business models as a lens, and the ceramic and glassware as the specific sector, explaining their relevance for the research.

Chapter 4 presents the findings of the field research and discloses the design and creative economy ecosystem actors in the ceramic and glassware sector in Istanbul, presenting the maps of interdependencies among them.

Chapter 5 discusses the importance of the findings to previous research.

Chapter 6 Conclusion

1.1 Creative Economy

This chapter presents background information about the evolution of the conceptualizations of the creative economy and the main frameworks and concepts proposed for an understanding of its organization. The WF framework presented here is at the core of the study since it presents the mediation of design among creative and cultural industries and the wider economy as the source of innovation. The chapter then presents the two seminal concepts by economic geographers and sociologists on the creative economy, which are selected to answer the research questions for the study: the project notion and the creative field. This background information is crucial to discuss the role of the design ecosystem in connection with other creative industries and the wider economy at the city level in the later stages of the study.

1.1.1 Brief History and Conceptions

The creative economy discourse goes back to 'The Culture Industry,' a term coined by Adorno and Horkheimer. In their seminal essay, 'The Culture Industry: Enlightenment as Mass Deception,' they criticized the 'commodification of cultural products' as their production has been organized as an industry under capitalism. They claimed that this new mode of production would result in the alienation of the cultural producer as a wage laborer in large-scale corporations and the incorporation of art and culture by the economy (Adorno & Horkheimer, 1979). As capitalism continued its success, the culture industry grew enormously. After World War II, the work of Adorno found ground, especially in Europe, to protect the European cultural tradition against the threat of 'Americanization.' British cultural studies and the political economy school inquired about the work of Adorno as an important reference in the quest for new perspectives (O'Connor, 2010).

The first use of ‘creative industries’ as a term is seen in the cultural policy document of the Australian government, where culture was defined in broader terms than ever before, underlying its importance for a nation's identity and economy. However, in most of the literature, the new Labor government in the UK is presented as the founder of the concept since a series of actions were also taken by this government supporting the creative industries. The first of these actions was the renaming of the Department of National Heritage as the Department of Culture, Media and Sport (DCMS), and the introduction of the Creative Industries Task Force (CITF), which constituted important representatives from the related sectors. The most prominent action was the publication of the “mapping of creative industries” document by DCMS, after a year of its founding, in which the first definition of the creative industries was made. The definition was as follows:

(creative industries) ... those industries which have their origin in creativity, skill, and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property. (DCMS, 2001)

Intellectual property rights and creativity were at the core of this new definition, which referred to the following industries: advertising, architecture, art and antiques, handicrafts, design, fashion, film and video, music, performing arts, publishing, software, television and radio, video, and computer games (DCMS, 1998).

The mapping document is important for the history of the topic because it validated the creative industries as a ‘legitimate object of policy’ (DCMS, 2001). Inclusion of the statistical data in the document of the current and the prospective figures on the employment and the size of the new sector highlighted its potential. This gave solid reasons to local authorities, development agencies, and organizations to give priority to

the creative industries when developing their future cultural and economic policies (Taylor, 2006). The creative industries were started to be included at first in the local, then in the national cultural and economic policies in the UK. This trend continued both in the EU and around the world as many governments and cities were inspired by this dynamic connection between culture and economics (Kong et al., 2006; O'Connor, 2006; Wang, 2004).

Another significance of the mapping document was the change in terminology; 'creative industries' replacing 'cultural industries.' Many correspondents from cultural, economic, and technology circles debated this terminological change. O'Connor claims that the central argument behind those terminological changes is the 'tension between culture and economics' (O'Connor, 2010, p. 9). For some commentators, the change was a pragmatic move by DCMS. The word 'culture' reminded the 'arts', and the arts were considered outside the domain of the economy. Therefore, grouping 13 sectors and naming them creative industries would help DCMS to increase the share of the national budget allocated to this new sector (Cunningham, 2002; Hesmondhalgh & Pratt, 2005).

The rise of the creative economy discourse has historically coincided with the following events:

- Globalization
- Knowledge economy
- Shifts in understandings of the links between 'art, media, and applied creativity' with the emergence of new media technologies (Flew & Cunningham, 2010).

These three historical events had important consequences in the economy that brought new challenges to the governments and cities around the world. With

globalization, the production had shifted to developing countries where the labor was cheaper, opening the post-industrial era for the developed world cities. Pratt (2008) highlights this shift and claims that the interest in development and competition between the developed world cities lies behind this shift. Therefore, the presentation of the creative industries as a solution to overcome the problems post-industrial economy by the UK government echoed globally. Although some circles questioned the concept, the UK model inspired many countries and cities. Singapore and Hong Kong were the first of the many. EU countries hesitated to take the UK formula as it is; however, they continued using the former term 'cultural industries' in their research and policies. Scandinavian countries preferred to use both the terms 'creative industries' and 'experience economy' interchangeably. Local governments in the USA introduced marketing plans for the branding of their cities and regions as 'creative hubs' and offered incentives to the arts and entertainment industries. Finally, the developing countries followed the definitional frameworks of UNCTAD, which presented the creative industries as a development opportunity also for them (Flew & Cunningham, 2010).

This new phenomenon brought new economic realities, which were hard to deal with using the generic conceptual and theoretical frameworks of economic inquiry. In the globalized, information-based, post-industrial economy, 'the cultural' and 'the economic' – that used to be held as separate entities- started to be conceptualized as mutually constitutive (Amin & Thrift, 2007; P. S. M. Lash et al., 1993). The rise of the creative industries also gave rise to academic agendas in 'economic geography' and 'economic sociology' (Pratt, 2008). The economic geographers embraced the 'cultural turn,' enriching their fields with debates on new concepts and theories, new methods, and empirical studies to explore the cultural domain in the economy. The economic

sociologists, on the other hand, explored the distinctiveness of creative industries in the overall economic production, called the 'cultural economy.' In this second line of research, a wide range of methods was used, starting from regular economic analysis to analysis of cultural aspects of the cultural production in the economy (Anheier & Isar, 2008; Pratt, 2008).

The concept of creative industries was initially introduced in 1997 to cover all sectors of the British economy where creative intangible inputs have a substantial impact on economic and social value (Hearn et al., 2007). The most common and accepted definition of creative industries is:

Those activities which have their origin in individual creativity, skill, and talent and which have potential for wealth and job creation through the generation and exploitation of intellectual property. These sectors are: advertising, architecture, the art and antiques market, crafts, design, designer fashion, film, interactive leisure software, music, performing arts, publishing, software, and television and radio. (Andari et al., 2007; Gordon & H. Belly-Orrin, 2007; Potts, 2007)

The definition of the creative economy, just like creative industries, is an emerging research area. Since there are disputes on the conceptualization of these two terms, UNCTAD provided definitions for the creative economy for international recognition and coherence.

1.1.2 Creative Industries and Innovation

The first decade of the creative industries agenda was vibrant and full of debates, also on the conceptualizations and definitions, since it would determine the size and the contribution of the sector to the overall economy accordingly. The standard industrialization classification (SIC), which was constructed on the old agricultural and

manufacturing economy structure, was a vital constraint because it was not possible to frame the creative industries using the current statistical database (O'Connor, 2010). The growing body of research in creative industries has provided important understandings of their locational dynamics. However, the nature of those industries and their relationship with the rest of the economy were under-researched.

Creativity has become the most famous word in the knowledge economy. Innovation in products and services, termed as 'new competition,' was a strategic response taken by both governments and firms to stay ahead of the competition in the modern economy (Best, 1990a; Castells, 1998; M. E. Porter, 1990). The first definition of the creative industries by DCMS (1998) announced that creativity was the core activity for those industries; however, their relationship with innovation was missing from that definition. Some researchers started exploring the innovation in the creative industries (Rantisi et al., 2006) and the role of creative industries in innovation in the wider economy (Bakhshi et al., 2008; Miles & Green, n.d.; Müller et al., 2009). The main drive behind that research was to understand the activities that drive innovation in the creative economy, which were crucial for the long-term competitiveness in a globalized economy (Leslie & Rantisi, 2006). The creative industries shared some characteristics, like having new ideas at their core and aesthetic features in their products, however, they also had many differences, like the ways they relate to markets and the ways they distribute their products. Business in novelty was a key characteristic of the creative industries since they were working with novelty, living under heavy competition due to changes in market conditions, together with changes in technology (Hesmondhalgh, 2007; Scott, 2006a).

Creative industries, as the focal point of creativity, are assumed to play an important role in driving innovation in the wider economy (Andari et al., 2007; Gordon & H. Belly-Orrin, 2007; Potts, 2007).

Creativity and innovation are overlapping concepts. In the main, creativity is about the origination of new ideas – either new ways of looking at existing problems, or of seeing new opportunities, while innovation is about the successful exploitation of new ideas. It is the process that carries them through to new products and services or even new ways of doing business. Increasingly, both are important across the spectrum of economic activity. The creative industries can be conceived as a pioneer sector of the economy, trailblazing approaches, and fostering an attitude towards creativity and innovation from which the rest of the economy and society can benefit. This critically depends on whether ‘effective’ transmission mechanisms are in place. (Andari et al., 2007)

Although there is extensive research on the types and sources of innovation, the studies on creative industries in the context of innovation are scarce. Some important research sought to explore the linkages between the creative industries and the wider economy through a quantitative approach. NESTA (2008) focused on the knowledge transfers through supply chain linkages and found evidence that creative industries stimulate and support innovation in the wider economy. The study mentions the possibility of engagement in design-related activities in firms where the purchase of creative products is important for their production of new products, both to the firm and the market. Frontier (2023) revisited the research of NESTA (2008) with the available recent data and confirmed the previous results, stating that the connection with creative industries increases the innovation capacity of firms.

1.1.2.1 Concentric Circles Model

Some comprehensive studies sought to create conceptual frameworks mapping the relations that bond the creative industries together as well as their relations with the wider economy, aiming to support their growth and productivity for innovation. The framework proposed by the Work Foundation (WF) (2007) is a prominent study for understanding the nature of creative industries and their pioneering role in driving innovation in the economy. The framework is built on the previous work of Throsby (2001), in which the 'concentric circle model' of creative industries suggested a hierarchy between the creative industries, where the traditional forms of art were stated at the top. Throsby's definition was based on the traditional understanding, which presumed that art embodies the highest value in creativity, and that industries were only practitioners (O'Connor, 2010). According to Throsby, the grouping of the creative industries is as follows:

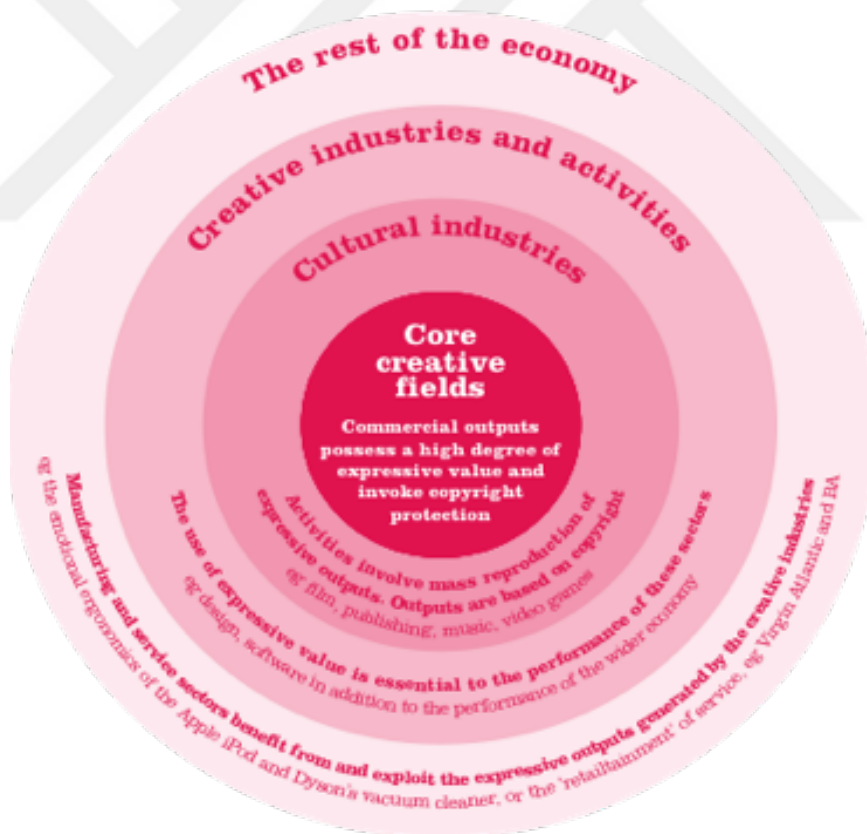
- “Core creative arts: Literature, Music, Performing arts, Visual arts.
- Other core cultural industries: Film, Museum, and libraries
- Wider cultural industries: Heritage services, Publishing, Sound recording, Television and Radio, Video and computer games
- Related industries: Advertising, architecture, Design, Fashion " (Throsby, 2001, 2008).

It is important to note that in Throsby's model, the design is located on the outermost wall of the creative industries because of the 'industrial' or functional use of creativity (Throsby, 2001, 2008).

In the WF framework as presented in Figure 1.1, there is also a 'creative core'; however, it is defined differently than Throsby's, where any form of 'original product' is

included in this core, not only 'the arts.' The next circle in the framework holds the 'cultural industries' where the creative products are commercialized, like the film, publishing, music, and video games sectors. At the third circle around the center comes the 'creative industries', where the commercialization of the 'original product' must also have a functional value to succeed in the market. To give an example for the case of fashion, a dress that cannot be worn has no chance in the market, even though it may look pretty. Outside the third circle is the rest of the economy, where the outputs of the creative industries are used as 'creative inputs' in their products or services (Andari et al., 2007).

Figure 1.1 *A Stylized Typology of the Creative Industries (Andari et al., 2007)*



The most important idea in the WF framework is the introduction of the concept of 'expressive value' instead of 'creativity' in defining the creative industries. With this new concept, the WF framework not only demonstrates the value created by the new

sectors in the knowledge economy but also states that the presence of expressive value exceeds the traditional art forms. This is an important argument because the model proposes a clear position for the place of ‘culture’ in creativity (O’Connor, 2010, p. 60). Expressive value is defined as any ‘original product’ which enlarges ‘cultural meaning and understanding’ in six dimensions, which are:

- “Aesthetic value
- Spiritual value
- Social value
- Historical value
- Symbolic value
- Authenticity value” (Andari et al., 2007, p. 96).

‘Original product’ having an expressive value in any of those dimensions introduces new experiences, insights, and knowledge to people, awakening their emotions, and enhancing their lives. Software programs and video games have expressive value since users derive meaning from them and appreciate the value created for them. Cultural content shared by users on the internet also has an expressive value since it represents a social value to the people in building their identities and relationships. This value is most dense in the core of the model, and becomes diluted when combined with functionality as it moves towards the periphery (Andari et al., 2007, p. 97).

The WF framework offers a model for the commercialization of culture while framing the relations between the creative industries and the rest of the economy. Therefore, the content created by the core is commercialized first by the cultural industries, where these firms usually accommodate most of the commercial functions, from content creation to distribution, in their organization. The business model of the core

and the cultural industries depend on the generation of expressive value under the protection of copyright. The creative industries, at the next concentric circle, act as a bridge between the cultural industries and the rest of the economy. Creative industries introduce input with expressive and functional values to their clients in the manufacturing and service sectors. The cultural zeitgeist in advertising material, the aesthetic in architecture, or the culture in design is 'expressive values' created by the creative industries, which also must pass the functionality tests to succeed in the market. It is important to note that the creative industries must work in close relationships both with the cultural industries and the rest of the economy, and they do not function in isolation (Andari et al., 2007).

The WF framework is important because it offers a map of the linkages between the creative industries and the other sectors, where those linkages disclose the possible intervention areas for policy implementation to support innovation and growth both in the creative industries and the rest of the economy. As the framework states, it is evident that creativity is created by the core. Therefore, to foster innovation in the wider economy, the core should be productive. However, it is important to note that the creative industries are the bridges between this core and the rest of the economy. Therefore, creative industries must also be productive and fulfill their role for the economy to benefit from creativity (The Work Foundation, 2007).

WF (2007) proposed to map the creative industries, deploying the notion of expressive value defined as 'every dimension which enlarges cultural meaning and understanding' (Andari et al., 2007, p. 96). Although the WF model was built on the concentric circles model of Throsby (2007), the two models had important differences in recognizing the place of design as a creative industry. Throsby (2007) stated that the

concentric circles model offered a ‘static snapshot’ of the cultural production, yet was unable to represent its dynamic nature, like in value chain analysis. Since it was not possible to allocate design in only one circle of the model, due to its both creative and utilitarian nature, design was positioned at the outer circle as related industries. Differently, the WF model places products in the related circle following the share of expressive and functional value they possess. The expressive value notion enabled all acts of origination that generate copyright protection to be positioned at the core of the model, which was previously confined to traditional arts. In this model, design is positioned at the creative industries circle between cultural industries and the wider economy.

This model is important since it recognizes the significance of design for innovation (Cox, 2005), creating both expressive and functional value, and presents its mediating nature between cultural production and wider economy for understanding innovation (Andari et al., 2007; Julier, 2000; Sunley et al., 2008).

1.1.2.2 Cultural Economy as a Value-Creating Ecology

The ‘project ecology’ concept highlights the connectedness of economies and cultural production after globalization. Utilizing the design project as the main unit of analysis, it would be possible to include the global connections between firms, networks, and cities, which were also disregarded in previous design ecosystem studies.

The dominant definition of creative industries by the UK government (DCMS, 1998) had shortcomings in providing an understanding of the ‘core dynamics of creative process in knowledge economies.’ However, understanding the relationships and networks that facilitate and nurture the creative process is necessary to understand the contemporary knowledge economies. Accordingly, there are some important contemporary studies on the ‘cultural economy’ which provide new perspectives on these

shortcomings (Jeffcutt, 2004). Indeed, the creative economy term has been internationally accepted after it was mentioned in the two important UNCTAD reports (UNCTAD, 2008, 2010).

According to Scott (1999, 2000, 2004), one of the most important scholars in this field, the growing significance of the cultural economy represents a new phase of global capitalism where goods and services are becoming "aestheticized" and culture and leisure are becoming "commodified":

The cultural economy comprises all those sectors in modern capitalism that cater to consumer demands for amusement, ornamentation, self-affirmation, social display, and so on. These sectors comprise various craft, fashion, media, entertainment, and service industries with outputs like jewelry, perfume, clothing, films, recorded music, or tourist services. (Scott, 1999a, p. 807)

According to Hesmondhalgh (2002), various contributors to the creative process articulate important knowledge relationships to achieve successful 'products and performances' in the cultural economy. These knowledge relationships are formed around 'complex value circuits of symbolic goods' where the owners of new ideas are connected with the consumers (Caves, 2000; Scott, 1999a, 2001b). Pratt (2002) recognizes the characteristics of these knowledge-intensive relationships as being 'situated' and 'networked', maintained by various communities of activity, ranging from project-based/hybrid/virtual organizations to cultural districts to digital media centers. Although they may not always be managed, these various relationships and networks are organized.

Building on an in-depth study done in Northern Ireland, Jeffcutt (2004) defines the creative economy as an ecosystem of 'creative space', which is composed of a diverse assortment of businesses that are arranged in a constantly shifting configuration of 'value

circuits' for creative goods and services. He claims that any analysis and intervention regarding the cultural economy must be both contextually grounded and strategically formulated. As he states;

... There is not one cultural economy, but many. Each cultural economy will be situated in a particular locale with distinctive layers, features, dimensions, knowledge relationships, and capabilities. (Jeffcutt, 2004, p. 80)

Jeffcutt (2004) defines the characteristics of the 'operational connectivity' of creative industries as 'trans-sectoral', 'trans-professional', and 'trans-governmental'. Jeffcutt (2004) recognizes this operational complexity and describes it as a landscape characterized by a diverse economic structure, ranging from freelancers and micro-enterprises to multinational corporations, including individual artists and global media firms. He points out the complex cycle of knowledge flows as the distinguishing factor of the creative process in these organizations. This cycle begins with the generation of original ideas and continues through their realization, whether it be in the form of products or performances.

Jeffcutt (2004) supports Scott and Best's views that the factors influencing a region's cultural economy extend beyond the traded and untraded relationships within any value circuit. He asserts that those factors are integrated within the material and social context from which these value circuits emerge and are maintained.

In his article, Jeffcutt proposes an ecosystem development framework that consists of five thematic areas: creative learning, creative opportunity, creative business, creative sector, and creative government.

Jeffcutt lists the organizational properties of creative processes as;

First, they are situated in communities and spaces, both local and global; second, they are networked through dense transactions and knowledge relationships which articulate both traded and untraded interdependencies; and third, they are temporal, in that infinite variety of highly differentiated symbolic goods juxtapose for attention in an interplay between producer and consumer through originality, identity and market opportunity. (Jeffcutt, 2004, p. 70)

Jeffcutt (2004) claims that the development strategy for creative industries should be generic and ‘ecological’, pointing out an approach of the ecosystem and the importance of understanding its key elements and dynamics. He states that the fundamental process for businesses in the cultural economy involves the development of intellectual property within a ‘value circuit’ for products and services, covering from the very first idea to the final customer. The term "value circuit" is favored over the more frequently utilized term "value chain" because it emphasizes the complexity and dynamism of these relationships in the knowledge-based economy, which are not necessarily linear (Jeffcutt, 2004). The value circuits range from simple examples from craft to more complicated examples as films, where the common phases include ‘content origination, production, reproduction, and exhibition’ (Pratt, 1997). Jeffcutt (2004) offers a conceptual model for the creative industries ecosystem constructed around the ‘value circuit’ concept.

A recent study by Deloitte (2021) also builds on the ecosystem view of the creative economy and draws attention to the ‘symbiotic relationships’ between the sectors of the creative economy. According to the study, the relationship types among the creative industries are: creative supply chains, shared IPs, and creative technology, which underlie the intensifying convergence between the digital and creative industries. The study of Deloitte draws on the conception of the creative economy developed by NESTA, whose

main claim is that creative occupations exist both in creative industries and the wider economy. The empirical framework in the study uses the occupational statistics data. However, this thesis builds on the proposition that the thing that drives innovation is the mediation of design, not the designer. Pratt and Hutton (2013) support the view that the creative economy is an ecosystem:

The concept of creative economy takes in a broader scope that includes not-for-profits, informal and public funded activities, as well as for-profit, formal and private sector activities; moreover, it includes the production systems and value chains necessary to sustain such products. (Pratt & Hutton, 2013, p. 3)

1.1.2.3 The Projectification of Production and the Project Notion

As Midler (1995) notes, starting in the 1970s, a great number of manufacturing companies started to introduce fundamental organizational changes to improve the effectiveness of their product development procedures to deal with the growth in the number and complexity of their products.

Grabher (2002) introduces a new perspective on the project concept, providing “analytical keys” to answer some important paradoxes in the organization of the contemporary economy and declares the project as the new unit of economic action.

Traditionally, a project means a suggested idea or product (Engwall, 1998, p. 32). The term “project” was associated with a draft or proposal, still used today by architects and investment bankers. However, the modern understanding of projects evolved in the mid-20th century, influenced by the US Department of Defense's new development and procurement philosophy. Development processes, which were formerly thought of as discrete operations, are now thought of as an integrated whole that is referred to as a "program," "system," or "project.". These programs were massive in financial and

scientific resources and ambitious in timing, making coordination and management difficult. The professionalization of the task of the "project manager" eventually came forth as a result of experiences with different types of organizational control (Lundin & Söderholm, 1998, p. 19). Replicated processes of organizational copying have resulted in the dissemination of projects across a variety of economic and societal domains. Professional associations such as the International Project Management Association and the Project Management Institute have been established in recent decades, indicating an increasing societal investment in the form of projects. The form is legitimized by these associations through conferences and trade periodicals, which codify the project as a unique form in manuals, textbooks, formulae, and forms. Journals such as IJPM and PMJ primarily concentrate on the technical enhancement of project organization and current best practices (Grabher, 2002a).

The idea that projects are "temporary systems" is connected to the earliest systematic analytical studies of the subject (Goodman, 1981/1981; Goodman & Goodman, 1976). Despite semantic differences, the concept of temporary systems itself indicates the central component of projects around which common definitions are constructed. Projects are characterized by their 'temporal limitation', rather than their duration, as sometimes implied in loosely applied interpretations of the term. Goodman and Goodman's research on theatre production defines temporary systems as 'a set of diversely skilled people working together on a complex task over a limited period of time' (Goodman & Goodman, 1976, p. 494).

There are three main contexts in which projects are located. The first context is industries that primarily consist of one-off activities, such as construction and engineering. Consulting services have emerged as a rapidly evolving and dynamic field,

characterized by an increasing number of projects as the acceptable practice. The second context is industries where projects are limited to research and development activities. Thirdly, in contrast to conventional methodologies, projects serve as a means of facilitating exceptional endeavors such as organizational restructuring or computerization (Grabher, 2002a).

Grabher (2002) describes the following five qualities of projects which could both serve as the foundation for a strong classification of defining properties, and be valid across many contexts and settings:

- Task: A project's legitimacy is determined by a certain goal, which could be simple and routine or more complicated and non-routine (Lundin & Söderholm, 1995, p. 440). In this perspective, it is suggested that a temporary system, as opposed to a permanent organization, is focused on action rather than goals. This approach shifts the focus from viewing a project as an idea to viewing it as a process.
- Interdependence is a key aspect of defining and accomplishing complex tasks. Grabher (2002) emphasizes that members must continually interact with each other to find viable solutions. "Members must keep interrelating with one another in trying to arrive at viable solutions," especially in situations where the task is complicated and cannot be broken down into detail independently (Goodman & Goodman, 1976, p. 495). The fact that projects are not only for a specific client but also, to some extent, with a client, demonstrates the strength of these interdependencies (Girard & Stark, 2002). According to Sahlin-Andersson (1992), "complexity and ambiguity... are not defined away

but they are emphasized" (p. 144) by highlighting that a project's trajectory cannot be programmed.

- The contractor or, depending on the specifics of the business setting, a project manager, integrator, broker, producer, impresario, etc., put together the project. In addition to their obvious function in project management, contractors may be thought of as the people who build trust. The less time project participants have to build individualized trust with each other, the more important this role is. The contractor has become a separate professional entity, especially when working on more intricate projects.
- The power relations between participating organizations are reflected in the role of the contractor in projects and the embeddedness of the projects. Power affects crucial project elements, including revenue, labor distribution, and timelines. Large-scale projects frequently have rigid internal hierarchies that resemble those of the armed forces. When newcomers are denied entry to initiatives, whether formally or implicitly through unwritten norms of conduct, power is also demonstrated (Ekinsmyth, 2002).
- Deadlines are an important criterion for assessing project performance (Wenger & Synder, 2000). According to (Lundin & Söderholm, 1995, p. 449) deadlines are a necessary component of projects since they are "temporary systems" with "institutionalized termination". Meeting deadlines and reaching project milestones seems to have the ability to operate as "globalizing" mechanisms, prohibiting participating individuals and organizations from being directed by excessively atomistic and localistic attitudes (Lindkvist et al., 1998, p. 948). Project timetables prevent conflicts between professional

and organizational cultures and their diversity from becoming a source of paralysis in collaboration.

- According to Grabher (2002), projects are embedded in various networks, localities, and institutions, which provide resources but also create tensions and conflicts due to different perceptions and loyalties of project members. This embeddedness in personal ties and social structures makes projects “political issues on the organizational agenda rather than closed activity systems” (Blomquist & Packendorff, 1998, p. 38).

1.1.3 Creative Economy and its Geography

The first framework that examined the reasons behind the co-location of industries in particular places is the cluster theory by the British economist Marshall. Analyzing the industrial zones in the late 19th century, Marshall stated that gathering related industries in ‘industrial districts’ creates multiple advantages to those companies, like lower costs, dependable suppliers, lower competition, and a steady customer portfolio (Marshall, 2009). The theory also had an important aspect, claiming that clustering may lead to a “winner takes all” outcome. However, this claim was not pronounced by economists since it challenged the classic ‘equilibrium model’ of neoclassical economics (Flew, 2010).

The cluster concept was revived later by Michael Porter in 1990, where he carried his ‘competitive advantage’ model (M. E. Porter, 2011, p. 122) from companies to the context of countries. The ‘competitive model’ on a firm scale states that the firm has to create more value than its competitors to survive in the market (M. E. Porter, 1990). In his new work, Porter, like Marshall, focused on the ‘positive externalities’ that appear for companies located in particular places. He suggested that the ‘competitive advantage’ in clustering came from the elements which encourage production, growth, and innovation

rather than low cost and efficiency gains (M. E. Porter, 2011). Therefore, Porter was claiming that the clusters had three main advantages for the companies, which were part of them: increased productivity, opportunities for innovation, and new businesses. As creativity and innovation were the champions in the knowledge economy, Porter's creative cluster concept was accepted as a way out of the globalization and post-industrial problems of cities all around the world. Hollywood (film and television), Silicon Valley (high-tech), London (design and advertising), Paris, and Milan (fashion and design) regions were claimed and perceived as solid examples of creative clusters (Flew, 2010). Similarly, in China and Singapore, governments embraced the concept of creative clusters readily. One of the reasons behind this was the proximity between the working culture in those countries and the values associated with the theory, like tacit knowledge and trust relationships (Keane, 2013; Kong, 2009).

1.1.3.1 Creative Cities

The creative economy lives in the cities. The concept of the creative city has been widely celebrated as the pinnacle of innovative urban regeneration, with Richard Florida being probably the most important defender of this idea (Florida, 2002b, 2002a, 2003, 2006, 2012). Charles Landry's research on innovative governance strategies and Allen Scott and Michael Storper's studies on the developmental trajectories of the creative sector suggest that the concentration of creative workers, labor market dynamics, and the cultural assets of urban regions are essential for fostering a mutually beneficial relationship between creative industries and urban development. These findings challenge Florida's concept of the 'three Ts' (talent, technology, and tolerance) as the sole drivers of urban growth.

The second important framework, which sets out the reasons why creative industries are located in city centers, was proposed by Richard Florida. In his seminal study, he coined the term creative class, suggesting that people are the main actors in the creative economy. The creative class members are distinguished by their occupations, where their work is to “create new meaningful forms” (Florida, 2012, p. 38). Florida proposed that, in the post-industrial age, the new economy needs talented people to survive. He stated that the old economy was 'corporate-centered,' meaning that the corporations made the place choices depending on their business plans, and the people who wanted to work in them had to move to those cities. However, since the mechanisms of production have changed in the new economy, the corporations could also change place, not only the people. Therefore, the cities that attract the creative class would attract the new economy and bring prosperity to the city. So, from his perspective, the new economy was a 'people-driven' one, where the corporations follow the choices of the creative class (Florida, 2012).

Florida suggested that the creativity of a city should embrace technology, talent, and tolerance, and created an index using the presence of these three factors. This is called the 3T model, where the Ts also signify the economic development in geography, and creative cities are the ones that embrace all of the Ts (Florida, 2012, p.112).

Florida’s creative class theory received many critiques in academia. However, the city administrations used his ideas in their initiatives and policy documents to become a creative city. This trend resulted in competition between the world’s cities, and in this competitive environment, many consulting firms, like Comedia from the UK, and policy entrepreneurs promoted Florida's ideas, offering policy recipes to the city administration. Pratt (2008) claimed that even the concept of the creative city and the competition created

between cities is an extension of the neoliberal perspective that sees cities and regions in a global competition. He called the process 'policy transfer' (Pratt, 2009), where creative city policies were disseminated around the world through consultants. Kate Oakley also criticized the uniform recipes given to developing the creative industries, which included "a university, some incubators, and a 'creative hub,' with or without café, galleries and fancy shops" and called it the "cookie-cutter" approach (Oakley, 2004, p. 73).

The theory of the creative class is based on the assumption that cultural consumption and lifestyle would attract the creative class to cities, then the emergent technology companies would choose to locate in those cities following the creative class, so that those cities would become a creative city (Florida, 2012). This proposition was vigorously criticized because it prioritized consumption in the conceptualization of the creative city, downplaying the production of culture (Pratt, 2004; Pratt & Hutton, 2013; Sunley et al., 2008, Peck, 2005). The understandings of economic geographers of cultural production were limited as they were mostly focused on the business systems and contracts moving through the networks, not recognizing the actual movement of cognitive products (A. B. Hargadon & Bechky, 2006). As Sunley et al. (2008) argue, the gathering of the creative class in a location cannot be the only required and adequate input needed for innovation. However, cultural consumption has been prioritized in most of the policies and research, like the branding of cities to pull tourists and migrants. The consumption-focused perspective was driven by for-profit motives, and it was the dominant approach. The not-for-profit and the social side of the phenomenon were under-researched (Pratt & Hutton, 2013).

1.1.3.2 City as a Creative Field

Much of the earlier work on the analysis of the creative economy has been concentrated on the consumption side. As a result of this, the 'production of culture' has been rarely recognized. However, some important scholars of economic geography took a more objective stand between the two sides – consumption and production- and offered seminal conceptualizations to understand the analytical dynamics of the creative economy.

The work of Peterson (1976) is a prominent one in the search for relationships between creativity and space because it approaches the 'production of culture' as a social phenomenon. His main proposition is that the content, in other words, the cultural product, is influenced by the organization producing it. This perspective is valuable because it proposes a relationship between the uniqueness of the cultural product and its organization, where this uniqueness is achieved through the 'collective innovations' (Pratt, 2004b, p. 118) created by the interactions between the various participants in that production web. In other words, to understand the cultural product, one should analyze its production through the complex organizational network and the way the interactions are made between the participants. Therefore, the creative ideas are not the only determinant in the cultural production but also the conditions where those ideas mediate, like 'the market, social institutions, or individual taste' (Pratt, 2004b, p. 118).

The spatial structure is a prominent quality in the conceptualization of the creative field, giving it its indigenous character. The strong relationship between the space and the cultural product was also presented in the works of Leyshon et al (1998) and Molotch (1996). The creative field perspective offers a different angle to understand the

association between the production and creative capacities that differ in various geographies and cities, which compete in world markets.

Cultural communities are an important feature of the creative field because they are depots of cultural capital. In these communities, the social norms, cultures, and learning patterns are accumulated. Cultural capital is also nurtured by the institutions where the current and prospective workers are educated, forming the ready input with the requested socialized character. Professional associations and guilds, like schools, support the fabric of the cultural communities. Museums, fairs, and other institutions hold the framework of the cultural community by presenting the memorable examples of the past and the successes of the present to the public. This notion of cultural community is in line with Marshall's (1919) 'industrial-atmosphere' concept, where he also highlighted the social assets in the industrial clusters, which enabled the innovative solutions by furnishing routines, problem-solving activities so on (Scott, 1999a).

The originality of a cultural product is usually associated with the success of the artist or the creator of the product. However, in the creative field approach, the culture that is created by the commodified cultural products is the result of the collaboration of the whole production system, where the cultural and economic history and geography also take an active role in its social construction. In other words, the production network as well as the social relationships that form the creative field form the culture, therefore the commodified cultural products. The cultural component of the ending product by this particular production system should be taken as an intrinsic product, embodying original modes of aesthetic and symbolic connotations (Scott, 1999a). As Scott proposes, the availability of skilled and socially active workers is not enough for a place to be a creative

field. The functioning of the production system and its relationship with its environment must be analyzed, transcending the early studies of Hirsch on the cultural industries.

In his significant work analyzing the functioning of cultural industries as a system, Hirsch (1972) builds his claims on the previous works of Parsons on 'structure and process in modern societies' and of Evans on 'inter-organizational relations'. Hirsch proposes that cultural products are goods marketed to consumers mostly for their expressive value, and any consumer good can be presented to the market on a scale ranging from cultural to functional. His notion is parallel to the framework proposed by the Work Foundation, with the concentric circles model derived from Throsby's. Hirsch introduces a term called 'cultural organization', pointing to the 'profit-seeking firms producing cultural products for national distribution'(Hirsch, 1972, p. 127). From his perspective, the functioning of the cultural industry system is likened to a filtering machine, in which the products either pass or get rejected as they move through the system (Hirsch, 1972, p. 128) . The 'creative' workers from the technical line to the managerial, institutional, and public levels of the organizations are actors in this filtering process, and the organizations holding these workers form the cultural industry system. Starting from the artist to the audience, there is a flow of events that happen in sequence. Firstly, the cultural product must be selected from among the many in the competition, and be promoted by an organization taking the business risk, most probably an entrepreneur/organization. Secondly, the cultural product must reach the masses through extensive media coverage, which can be in different forms, from editorial reviews to TV broadcasting. There should be retail places where the product can meet the customer, where it should be distributed. As Boskoff proposes in his functionalist model, the

‘gatekeepers’ in the media act as ‘institutional regulators’ especially in the process of innovation (Boskoff, 1964).

The cultural industry system can be analyzed in four levels.

- “Technical level
- Managerial level
- Institutional level
- Societal level” (Parsons, 1960).

The creatives and artists are at the technical level of the cultural industry system, where innovative ideas and products are generated. Cultural organizations, the profit-oriented firms that produce and distribute cultural products, are at the managerial level. The innovative products generated at the technical level are proposed to the managerial level. The firms in this level are bounded by two sides of activities: the product selection process as the input side, and the marketing process as the output side. The selection of the product to produce and promote from the huge set of creations is carried out by the administrators in the cultural organizations. The technical level personnel are responsible for creating acceptable products, meeting the budget constraints, and market expectations. Since there is no formula for market success, the selection of the cultural product involves many risks. The trust of the managers in the opinions of the selection personnel is of crucial importance in this process. The characteristics of the organization at the technical level are demand uncertainty and ‘cheap’ technology. The first reason behind the demand uncertainty is the changes in customers’ tastes. Legal commands and criteria applied by gatekeepers of mass media are also important factors affecting the demand uncertainty. The cheap technology increases the competition in the marketplace due to the low barriers to entry (Hirsch, 1972).

The uncertainties on the marketing side are at the output boundaries of the cultural organization. After the production, the products are delivered to customers through the promotion and distribution networks. The level of control that the cultural organization has on the distribution gives a competitive advantage to the organization and determines its ranking in the industry. The product range is wide for most of the cultural organizations, and the success depends on the accessibility of the products to a wide range of customers scattered around the world. Advertisement and promotion are also important to attract customers to the retail outlets – the societal level of the system. Large organizations may have their distribution systems and sales forces to reach the customer. The smaller organizations may use the distribution systems of the large organizations, pay fees, and accept their terms on the agreements. Cultural product novelties are also introduced by the mass media, through movies, books, newspapers, etc. The magnitude of coverage is crucial in reaching to public to make as many of them aware of the novelty put on the market. The independence of editors, radio broadcasters, and column writers is achieved by a common set of social norms and values, which restricts the power of cultural organizations on their work and judgments on the cultural products. There are experts and opinion leaders who work for mass media, acting as autonomous gatekeepers for the target customers (Hirsch, 1972).

The mass media are at the institutional level of the cultural industry system. The innovative products either become a hit and a fashion or get rejected at this strategic gate. The product generated in the technical system, produced and distributed by the managerial system to the public, passes through the filtering process of the media gatekeepers. Hirsch calls the mass media “institutional regulators of innovation” (Hirsch, 1972, p. 132). The feedback of these gatekeepers is very valuable for the cultural

organizations because the novelties that pass through their filters reach high coverage, which ends up in market success. For this reason, the cultural organizations follow the results in the media, and the copies are produced in high volumes until the fashion is replaced by the next one. The customer is assumed to be somewhat passive, making his decision from the 'preselected' list by the agents in the managerial and institutional subsystems. The model of the cultural industry system depends on the assumption that there is a productive core, raw material at the technical system, so the system works by filtering the products springing from this core. The model builds on the "value added" perspective since all the products should pass through each level to enter the societal level, which is at the end of the process (Hirsch, 1972).

Cultural organizations develop different solutions to overcome the constraints and risks at their boundaries. One of those solutions is to have a qualified smart 'contact man' at the boundaries of their operations. The organizational success depends on the appropriate selection and marketing of the cultural product; therefore, those actors at the boundaries perform a crucial job. This job is titled as the 'talent scout, promoter, press coordinator, or vice-president in charge of public relations' in different cultural organizations. The person who is responsible for selecting the raw material from the creative community for the organization. They work in the field most of the time, recruit artists, and bring intelligence to the firm from the field. Some contact men work at the marketing boundaries where the firm interrelates with the retail areas and the representative consumers in the media. Overproduction is another solution developed by cultural organizations where the manufacturing costs are low to overcome the uncertainty of demand. Like in books, music, the produced number is much more than the actual demand of customers for those items. The cultural organization may increase the

production volume; however, the promotion budget is limited. The products that the organization will support with higher promotion levels are selected by the company's policy makers at the managerial level. Assimilating the media gatekeepers is also a solution to increase the coverage and promotion of cultural products. However, this solution is problematic since the targets of gatekeepers and cultural organizations are contradictory. The independence of their judgement is requested by the gatekeepers both from the public by ethical standards and from their organization by job security. The gatekeeper's role is to increase the revenue of the mass media organization by bringing sponsors to give messages to their followers. Acting as a promotional device of a cultural organization ruins the image of both the media organization and the gatekeeper. However, the cultural organizations struggle to have control over the gatekeepers because their vitality depends on the success of the promoted cultural products (Hirsch, 1972).

As Scott points out, the work of Hirsch explains the functioning and filtering mechanisms of the creative economy; however, it does not demystify how the creative economy brings the intrinsic features to its final products. Scott analyzes the works of Hennion (1981, 1983, 1989) and Kealy (1979), where they elaborated the interactions in the studio while producing popular music, to answer this question and to proceed in his notion of the 'creative field'.

In his influential article, Hennion (1989) represents the production of music in the studio as similar to the scientific operations taking place in the laboratory. For Hennion, both of those places are organized social environments where specialized workers execute their work, interacting with each other, figuring out solutions to problems by testing different ideas to reach a final product to present to the public. All the workers in the recording studio, the composer, the singer, the producer, the sound engineer, and other

important professionals participate actively in the process of creation; however, none of them owns the definitive component of the final product (Kealy, 1979). Scott states that, like the music production in the recording studio, the cultural products in creative economies are generated by the collaborative work of numerous processes carried out by different people. He proposes to look out of the walls of the recording studio into the wider social environment to investigate the functioning of the creative economy, which he calls the 'creative field'. For Scott creative field is made up of the clustered production system and its proximate social environment, which he calls the spatiality of the creative field (Scott, 1999b).

The cultural economy may be defined as the whole set of transactions between the clustered firms in a geography that have horizontal and vertical linkages with other firms due to disintegration. The film industry is a typical example of this type of clustering. The firms are interdependent, where these transactions are both 'traded and untraded' by their nature. For this reason, face-to-face interaction is critical for the mediation of these transactions, which is time-consuming and requires effort. The clustering of the workforce in the cultural communities increases the efficiency of these transactions and, more importantly, increases the creativity in the system. The clustered workers solve problems and negotiate the characteristics of the products and services through those transactions as the products and services move through the value chains. In the work of Hennion, the producer in the recording studio resembles the innovator in the lab who mediates between production and consumption (Scott, 1999a).

The second characteristic of the creative field is temporality. The pioneering work of Peterson and Berger (1975) lightened the reasons behind the fluctuations in the number of creative outputs in a specific geography at different times. Peterson and Berger

analyzed the relationship between the diversity of music and the competitive interaction between the major and the independent record companies through Billboard's Hot 100 music charts between the 1950s to 1960s in the USA. According to their study, the diversity in music decreases as the majors own most of the recording companies in the market. And as the number of independent record companies increases, taking risks in creating new niches other than the mainstream, diversity in the music market increases. The majors track the economically favorable niches and take over the independents, which brings new mainstreams to market. However, after some time, the diversity again decreases in the music market. The temporal logic of the creative field is engraved into the geographies.

The works of Scott are the most influential ones in the field, supporting this view. In his seminal essay, Scott (1999) asserts that geographical foundations are essential to understanding innovation and creative processes in the cultural economy. As Scott notes, the majority of the contemporary cultural economy is centralized in global metropolises such as Los Angeles, New York, Paris, Milan, or Tokyo (Hall, 1998b; Scott, 1997). Likewise, he underlines the fact that all these locations depend on intricate local labor markets and have dense producer networks as a foundation for their engagement in cultural and economic activities. Scott (1999) also affirms that the products of the creative economy possess significant symbolic value in comparison to their utilitarian function (Bourdieu, n.d.; S. Lash & Urry, 1994b).

Scott (1999) supports the view that cultural production should be understood as a social phenomenon rather than as the expression of some 'transcendent personalized impulse', so culture must be understood only about larger systems of human relationships (Bordwell et al., 1985; Crane, 1992; Negus, 1998; Wolff, 1981). Building on the

sociological approaches to art, culture and science of the important scholars, such as Becker (1974,1976,1982), Bourdieu (1983), Barnes (1974), Barnes et al. (1996), Latour and Woolgar (1979), Mannheim (1952) or Mulkay (1972), Scott proposes that within the capitalist system, the cultural economy serves as a means of generating human culture. He also notes that this process does not generate culture randomly; rather, the resulting cultural outputs are influenced by the social circumstances under which they are produced. Correspondingly, Scott states that while individual cultural workers may have their talents and abilities, their work is ultimately shaped and influenced by the larger apparatus of commodified production. Indeed, Scott underlines that the skills of individual workers are activated and directed by the functioning of the commodified production apparatus, including the collaboration of specialized yet complementary workers in the process of cultural production (DiMaggio, 1977; DiMaggio & Hirsch, 1976). Scott notes that this statement applies to various sectors, such as film or music, where the identities of workers are displayed in the final product. Likewise, the statement applies to sectors like furniture or clothing, where the identities of workers tend to be 'hidden' from the consumer. As a conclusion, Scott asserts that the cultural content of cultural products should be considered as 'endogenous to the system of production' and as an 'authentic vehicle of aesthetic and semiotic expression' (Scott, 1999a, p. 809).

Scott (1999) argues that the relevance of this concept lies in the fact that contemporary cultural and economic systems typically consist of intricate networks of workers within companies, interconnected through well-established networks of transactions between firms, where these networks involve numerous individuals contributing to the various stages of product development, manufacturing, and final refinement. There are powerful economic forces that shape the characteristics of these

networks and, by extension, the final products; these forces typically take on one of two opposing forms in the cultural products industry. One kind comes from attempts to reduce expenses by standardizing production procedures, while the other aims to protect itself from competitors by consistently differentiating its products (Scott, 1999a). Which is also called the 'new competition' (Best, 1990b).

Cultural Communities: According to Scott (1999), communities of workers that are rooted in specific locations are the foundation of many different types of cultural production, regardless of whether the product is in the form of a commodity or not. These kinds of place-based communities are not only centers of cultural labor in the traditional sense; they are also centers of social reproduction, which means that they are responsible for the generation and circulation of critical cultural competencies. In addition, they act as magnets, drawing talented people from other parts of the world to these centers in their expectation of finding fulfillment in work (Denisoff & Bridges, 1982). Most human communities that have endured for a while have developed their own set of norms and practices that serve as a glue that holds these groups together. Communities are therefore the archives of an accumulated cultural capital, which is one of the defining characteristics of the creative field, although it is not the only factor (Scott, 1999a).

Scott (1999) asserts that another way in which cultural capital is maintained in this sense is through the institutional infrastructures that the majority of these communities are endowed with. In well-established communities of specialized workers, it is common to find specialized schools, training establishments, apprenticeship programs, and similar institutions. These institutions play a crucial role in producing a readily available pool of new workers who have been appropriately socialized for their respective fields. Workers' organizations, such as unions or professional associations,

play a significant role in upholding local standards of cultural and economic performance. Additionally, more distinctive establishments, such as museums or organizations dedicated to preserving the recollection of past achievements, as well as yearly festivals centered around honoring the accomplishments of the current time, also strengthen communal cultural structures (Scott, 1999a).

This assertion by Scott echoes the one claimed by Marshall (Marshall, 1919). Marshall (1919) introduced the term 'industrial atmosphere' to refer to the distinct social characteristics of manufacturing districts in 19th-century England. The atmosphere enables workers to adjust to employment routines, fosters creative activity, and promotes intra-community communication. Additionally, it functions as a shared platform for localized groups to address and resolve issues that arise during the workday. However, it can occasionally render specific choices imperceptible, resulting in premature cessation of the search for solutions. Every cultural worker community presents a distinct and intricate scenario, in which creativity and traditional limitations result in diverse results (Scott, 1999a).

Scott (1999) claims that place, community, and the cultural economy are intricately linked, resulting in outputs that are permanently connected to specific locations. As seen in London's theater, Paris's haute couture, and Italy's furniture, this reputation effect gives goods a guarantee (Molotch, 1996) comparable to the symbolic value of a fashion designer's label (Bourdieu & Delsaut, 1975).

Production system and milieu: Mobilization of communities of workers: More importantly, apart from their availability, Scott (1999) points to the challenge of mobilizing the communities of skilled and socialized cultural workers. The exploration of the production system and its surrounding environment is crucial to delve into the

fundamental principles governing the creative field. Scott (1999) posits the creative field as a conceptual framework that transcends conventional gatekeeping paradigms. The cultural economy has been described as a filtering process in ‘gatekeeping models’ of cultural production (Hirsch, 1969). However, these models do not address the question of how the cultural economy itself generates the essential characteristics of final outputs. In his 1989 article, Hennion compares the production of recorded music to scientific experiments, comparing the recording studio and laboratory as organized social milieux where workers seek results through trial and error. However, the results are often influenced by the social and often messy internal order of the laboratory or studio. The interactions between composers, performers, producers, sound engineers, and other critical individuals form an inherently collective sphere of artistic experimentation (Hennion, 1989). In the same manner, Scott claims that the finished products emerge from the cultural economy as the result of a collaborative labor process involving specialized operations by various individuals. The stars who occupy the pinnacle positions on the work ladder are an endogenous expression of the cultural economy's logic. From this perspective, the studio is only one element of a more extensive domain of activities in the cultural economy and creative field.

As a conclusion, Scott explores the role of creativity and innovation in the modern cultural economy, focusing on three main issues:

Scott (1999) offers a new perspective.

... a conception of the production system as a creative field within which changing forms and symbolic content of commodified culture are generated. (Scott, 1999b, p. 1965)

The creative field, those webs of association and interdependence that constitute the basic social framework of productive activity, and within which, together with the wider milieu (physical/social environment), exert strong influences on forms and rates of innovation. (Scott, 1999b, p. 1980)

A finished cultural product is always in profound ways an expression of the inventiveness and originality of its individual creator, but culture – and especially commodified culture – is never just that, for it is also an immanent social construction that originates within definite geographic and historical fields of cultural and economic labor. (Scott, 1999b, p. 1973)

Definition of creative field;

The creative field that undergirds the new economy is constituted as a constellation of workers, firms, institutions, infrastructures, communication channels, and other active ingredients stretched out at varying densities across geographic space. This network of forces is replete with synergistic interactions variously expresses as increasing returns effects, externalities, spillovers, socialization processes, evolving traditions, and so on, and it is above all a locus of extraordinarily complex learning processes and knowledge accumulation.....The atmospherics are the private property of none and in principle the collective property of all, although they frequently evade explicit appropriation by the collectivity as such. (Scott, 2006b, p. 21)

Molotch (2003) claims that products carry the ‘places of origin’ in the details of their production and the outcome. In other words, it is possible to understand the essence of the place by tracing the details of the product produced there. “Products depend just

on how expressive, the material, and the organizational elements connect in a given place at a given time.” (Molotch, 2003, p. 685)

Molotch states that the mechanisms through which such diverse elements combine into a local industrial atmosphere shape not just the competitive advantage of one place over another in producing a given artifact, but the nature of goods that can come into existence.

1.1.3.2.1 Creative Economy as Cultural Commodity Production

In his seminal study, Scott (1996) examines the economic dynamics and policy challenges faced by the craft, fashion, and cultural products industries in Los Angeles. Analyzing the phenomenon through the city of LA as a case, Scott highlights the significance of the interactions between the clustering of economic activities and the cultural significance of a location, which contribute to the increasing success of important sectors within the cultural-products industry and the city's reputation. Scott states that the regional ensemble of ‘craft-based, design-intensive industries’ and ‘entertainment industries’ in the city of LA constitutes a diverse and multifaceted ‘image-producing’ complex that generates images across various sectors. The term “image-producing” broadly encompasses economic activities such as clothing or jewelry manufacturing, film-making, and music recording. The success of these activities relies on the commercialization of objects and services that convey social and cultural messages, either as a primary or secondary function. The various industries comprising the complex have significant existing and potential interconnections in terms of their input-output structures, the types of labor pools they utilize, and the markets where they sell their products. Significantly, the products of each sector contain a substantial amount of

symbolic meaning, creating a complex network of interconnected meanings that have a profound impact on development and innovation (Scott, 1996).

The synergistic effects of these cultural-product sectors in Los Angeles are significantly amplified by the fact that they serve overlapping markets and audiences with comparable, but more varied, popular preferences. These sectors are additionally strengthened by the significant spatial clustering that defines the distribution of producers. The cultural products industries serve as a system that continuously generates and renews depictions of Los Angeles as a distinct and captivating location, encompassing various impressions, personalities, recollections, fashions, trends, and more. Simultaneously, these industries also consume the specific cultural elements of this place as essential resources. Undoubtedly, the success of these businesses relies, to some extent, on their ability to utilize and recreate, in increasingly innovative product designs, the distinctive characteristics of Los Angeles as a location. The concentration of influential film and television businesses in Los Angeles, which produce highly unique visual and auditory content with global reach, has a significant impact on other cultural product industries in the region (Scott, 1996)

Scott (1996) states that production activities in cultural products industries, such as fashion and clothing, are often characterized by flexible specialization (Piore & Sabel, 1984). This means that these industries focus on producing small batches of output for specialized market niches, rather than mass production. The competitive strategy in these industries involves constant product differentiation and customization (DiMaggio, 1977; Hirsch, 1972; Peterson & Berger, 1975). The element of fashion, style, and fad in these industries further emphasizes the need for flexible specialization. As a result, many segments of the cultural products industry resist mechanization and the search for

economies of scale, and instead rely on labor-intensive processes. In some cases, firms in these industries employ low-skilled workers in low-technology work environments. The cultural-product industries predominantly consist of small enterprises; however, there are also notable significant firms, especially in the distribution sector (Aksoy & Robins, 1992; S. Lash & Urry, 1994b; Storper, 1993). The production system is also highly vulnerable to vertical disintegration due to the ambiguities and volatility that arise from the competitive environment in which producers operate. These factors tend to emphasize the influence of external economies of scale and scope rather than internal ones. As a result, cultural-product industries frequently form clusters of specialized enterprises that engage in frequent transactions. The success of cultural-products industrial agglomerations varies, with some of them gaining enduring high reputations while others do not.

Scott (1996) states that there are multiple benefits to the concentration of economic activities in communities. First and foremost, it enhances the efficacy of transactions and the sharing of information among producers. Proximity between producers facilitates interaction and economic transactions. Furthermore, the establishment of long-lasting communities of workers within and near these clusters amplifies the effects of proximity. These communities offer employers a consistent source of specialized skills, awareness, and implicit information related to agglomeration. In the cultural-products industries, communities such as this are crucial due to the essential function of labor in connecting local culture with the production of final products. Scott lists the three essential requirements that the most productive cultural-products industrial agglomerations possess, which highlight the significance of place: an ensemble of production capabilities, competencies, and know-how, an inventory of marketable

cultural associations and images, and a group of localized 'political and quasi-political institutions (Scott, 1996).

Scott (1996) supports the view that industrial locales are not detached and isolated entities in modern capitalism. Instead, the world is where their market activities take place (Amin & Thrift, 1992; Scott & Storper, 1992). He points out the distribution firms, typically multinational, which act as intermediaries between centralized production systems in the cultural-products industry and worldwide marketplaces, emphasizing the growing interdependence of various sectors. He gives Benetton, IKEA, The Gap, the film and music distributors of Hollywood, and the U.S. television networks as notable examples. As he highlights, these distributors function in partnership with and in addition to the many 'agents, contractors, dealers, representatives, jobbers', and "impannatori" who operate inside certain clusters, taking advantage of gaps in information within those clusters.

Scott (1996) states that the classification of cultural products industries based on statistical data is artificial, with sectors typified by manufacturing and service functions. However, he describes the common features as carrying strong craft elements in production processes, rapid changes in consumer tastes and fashions in markets, and the incorporation of cultural references to enhance the appeal of products. Consequently, Scott recognizes the "LA look and feel" as a significant factor in the success of various industries and trades, which project these qualities in both original and nostalgic forms. As he points out, these industries are subject to complex inter-industry spillovers of cultural associations and imaginative energy, including set design, interior decoration, graphic arts, advertising, architecture, theme parks, movies, television shows, music, clothing, toys, publishing, and more. Indeed, according to Wasko et al. (1993),

Hollywood production companies now contract with large companies to display brand-name products in their films.

Scott (1996) notes that the entertainment industry, which includes the creation of movies, TV shows, and music recordings, is characterized by vertical disintegration. Consequently, the execution of different industrial tasks is delegated to specialist organizations and subcontractors. These specialized manufacturers establish complex networks and cooperate on projects and joint ventures. Although big film studios, TV networks, and music businesses are responsible for organizing financing and production, they often delegate the manufacturing process to independent firms. Contrary to certain assertions, these prominent corporations do not pose a danger to the vertically divided production model of Hollywood, but instead serve as a crucial resource. They have bolstered the expansion of Hollywood by globally disseminating and promoting its products, while also reinvesting funds into the local production system. Although there has been some dispersion of the business to other areas, the entertainment sector in Los Angeles continues to be one of the most rapidly expanding industries and is projected to maintain its ties to the region (Scott, 1996).

1.2 Design and Innovation

Chapter 3 first presents a critical discussion of the distinctiveness of design among other creative industries, its project-based nature, and reviews the early studies on the role of design in creating cultural and economic value, explaining its evolving mediating role between production and consumption within the digitalized and globalized world economy. The chapter also discusses the design innovation as a concept and presents the notion that will be utilized in the study. The chapter then introduces the design ecosystem concept used by governments as a policy tool to enhance innovation in national

economies. After looking at the previous design ecosystem studies at the national level, the chapter ends with a detailed look at design system studies and local manufacturing system studies in Italy, and examines a particular case - the design system in Milano.

1.2.1 Defining Design

Design is one of the most celebrated concepts of the contemporary economy. An indigenously creative activity, the design stands at the center of art, business, and technology, and is starting to be perceived as the pivotal input for goods and services both in the old and new economy (*The Place of Design*, 2009). The current statistical frameworks and measurements cannot present the added value created by design to the economy (Creative Economy Report, 2010). A great deal of previous work on design has assessed its importance in the innovation process, highlighting its role as the bridge between creativity and innovation in the rest of the economy (Andari et al., 2007; Cox, 2005; Creativity, Design and Business Performance, 2005; Er et al., 2014).

There are only a limited number of regular studies that provide data on the usage of design in innovation across the global economies (Vinodrai et al., 2007), which may be interpreted as the continuing negligence in understanding its strategic role for both the economy and society.

One of the important reasons behind the deficiency of data is the different interpretations of creativity, innovation, and design in different contexts, resulting in numerous different definitions of design. Heskett (2005), who is an authority in the area of design, presents the multi-usages of design in a sentence to highlight the different interpretations available for the term: “Design is when designers design a design to produce a design.” (Heskett, 2005).

As seen in the sentence of Heskett, design is a noun, design is a verb, design is a process, design is a result, design is a plan, which corresponds to different aspects of design in different contexts.

The design definition below, which is proposed by the European Commission to nations to include in their innovation policy documents, complements this statement:

(Design is) a multifaceted and broad concept with no commonly agreed-upon definition. There is agreement that design can be both a verb and a noun- an activity (to design) and the results of this activity (a design) – but the understanding of what the activity of design actually entails varies. (European Commission, 2009a)

The situation is not different from the management science's point of view, where the literature mostly with an engineering background and optimization perspective describes the project as; "a distinct, manageable activity system that, once having been designed using proper scheduling techniques, can be isolated from the environment." (Blomquist & Packendorff, 1998, p. 38)

This perspective is also misleading for the understanding of both 'the project notion' as well as the design project, excluding the ecology in which they operate. Based on this definition, design would be seen as an isolated activity taking place either in or out of the organization of a firm without connection with its environment. This is the second reason why the collective and social character of design is misunderstood.

Defining design in the context of Innovation: Innovation is the common ground for the practice of design and the theory of economics. However, due to the neglect of designers of the historical and theoretical background of this relationship, the role of design in innovation is misunderstood by academia, business, and policy spheres. While

the modern theory of innovation in economics acknowledges the connection between design and innovation and recognizes the importance of design in the innovation process, it falls short in fully explaining the concept of design innovation and its terminology (Mutlu & Er, 2003).

Design is not a uniform discipline. It encompasses a wide array of disciplines, hence lacking a unified definition that captures this extensive nature of design. Defining it from all angles in a singular definition becomes increasingly challenging due to its involvement in numerous processes and its manifestation in both tangible things and intangible services. As a result, there are many different ways to approach design, and different perspectives lead to different definitions.

Design activity, which is the fundamental phase of new product development, encompasses various concepts. The OECD (1992) defines these concepts as "initiating design," which refers to the creation of the original innovation, and "analytical design," which involves "the study of new combinations of existing products and components, re-arrangements of processes and designs of new equipment within the existing state of the art." According to Walsh et al. (1988), design can serve as a 'strategy' for achieving market success by enhancing the quality of a product through incremental improvements over a period of time. In addition, Er (1997) defines industrial/product design as a strategic process "containing that knowledge about a product from which it can be materialized and positioned in the marketplace, the answers to the basic 'why' and 'how' questions about a product."

According to the marketing literature, "design" is a tool that may be used to attain competitive strategies. According to Porter (1980), the conventional kinds of competitive strategy are categorized as 'pricing', 'focus', and 'differentiation'. Within this frame of

reference, a competitive strategy focused on 'price' seeks to minimize costs and suggest supplier participation in the product development process, along with competition by conducting lower costs. Meanwhile, a firm that adopts a 'focus' competitive strategy typically targets a specific segment of the market by responding to consumer preferences by specializing in that niche. Finally, "design" serves as a strategic instrument for product positioning within the targeted market segment in a competitive strategy that is founded on "differentiation." "Design" provides competitive advantages to the product by differentiating it in terms of 'quality, robustness, precision, ease of use, product appeal, and price' (M. Porter, 1980).

Design can be integrated into every stage of research and product development, including manufacturing processes, to minimize expenses. It can also be utilized in the design of office and retail spaces, as well as in the branding and marketing of products and services. This allows companies to distinguish themselves in both local and global markets.

According to ICSID (2002), design is “a creative activity whose aim is to establish the multi-faceted qualities of objects, processes, services and their systems in whole life-cycles” as “the central factor of innovative humanization of technologies and the crucial factor of cultural and economic exchange” (ICSID, 2002).

Mutlu and Er (2003) define design innovation generated through a design-oriented framework on the fundamentals of the theory of innovation, pointing to the crucial role of industrial design in design innovation: “Design innovation is attained through a design activity with the central role of industrial design and a contribution of a variety of particular design practices.” (Mutlu & Er, 2003)

They state that providing a clear and practical definition of 'design innovation' will equip design studies with the necessary framework to establish a new and more equitable model within the field of innovation theory. The reference to the industrial design signals the importance of the connection with the manufacturing industry. This is important as the current discourse is predominantly focused on engineering.

Defining design from a cultural perspective: Design is a tool to incorporate the intangible values in products and services, such as needs, image, and culture, so it serves as a competitive advantage to the companies (European Commission, 2009b). The designer is distinguished as a 'cultural mediator,' whose role exceeds the design of objects to design meanings by designing either products, services, or spaces (Frostig, 2005). Julier (2000) also asserts the new position of the designer as the nexus between production and consumption, underlining the 'interconnecting' and 'intersecting' nature of the three in the contemporary world (Julier, 2000, p. 5).

A sociological approach in analyzing the Design Economy is undertaken in a recent study done by the Design Council in 2021. Since the study was driven by the aim to build an understanding of design to analyze the design economy in the UK, it was built on the necessities of the UK's economy, where the service sector is dominant. The study sought to reveal the different understandings of design in different contexts – the design industry, businesses, public sector, and the public in general.

The report focuses on the definitions of design in the key documents that offer statistical data and measurements for the members of the OECD, the Frascati (R&D) and Oslo Manuals (innovation), which shape the data-gathering and give direction to particular categories and forms of data on design. The study points out the distinctions in the design definitions in the earlier versions of OECD reports, where design is

perceived as ‘being additive and associated with marketing’. Hence, in the Oslo Manual’s 3rd edition, design is defined as “i) one of the possible activities used by firms alongside activities such as capital investments and R&D, and broader development efforts, to assist the introduction of new products and processes. ii) within the category of marketing innovations, encompassing changes in design that only impact on the appearance, not the functional performance of products.” (Galindo-Rueda & Millot, 2015, pp. 14–15).

In the fourth edition of Oslo Manual (2018) the definition of design is expanded by including the design thinking into the definition. The definition of design in this manual is; “i) engineering design (including technical specifications, tooling up and prototype construction); ii) product design that determines the shape, color or pattern of objects, the interface between software and users, or the user experience of services, iii) design thinking, which is a systematic methodology for approaching the design of a good, service or system”. This definition is also unable to grasp the ‘integrative potential of design’, lacking the ‘visualization and materialization of the early-stage concepts’(BOP Consulting, 2021).

Design Council recommends the use of the combination of the three definitions of design presented below in the Design Economy Report 2021. The first recommended definition of design is by the Design Council (2021): ‘Design is combining ‘head’, ‘heart’ and ‘hand’’. (Kimbell et al., 2021)

The second recommended definition of design is the definition by the OECD’s Oslo Manual (2018) presented in the previous paragraphs.

The third recommended definition of design is the definition by Galindo-Rueda and Millot (2015): “Design is a systematic and deliberate business activity representing a formal relationship between the designer (in a broad or strict sense) and the customer,

possibly in the framework of projects and/or defined team roles.” (Galindo-Rueda & Millot, 2015)

This third definition is important since it points out the formal relationship between designer and customer, and the project nature of design as a business activity.

Despite those definitions, there is a fourth definition in the report ‘Measuring Design Value’. The study aimed to introduce the “fundamental pillars of guidelines on how to collect data and measure the role and economic contribution of design in the value added of nations, economic value creation of businesses, quality jobs”. This study was carried out by Barcelona Design Center, which was also considered in the work of Galindo-Rueda and Millot (2015), that is coherent with the current study’s approach to design. It is important to note that this definition approaches design “as an economic factor of production”, and underlies its integrator role in systemic innovation. According to the e-Design project framework; “To design is to integrate functional, emotional, and social utilities as a complex and systemic phenomenon.” (Nomen, 2014).

It is also noteworthy that this definition resonates with the Work Foundation's concentric circles model, in which design is presented in the creative industries circle, where its activities deliver both functional and expressive value. Therefore, the design definition of Nomen is utilized in the current study.

The study proposes that “design skills and design activity are multi-faceted, diffused throughout many economic sectors, and carried out by many people, not only those calling themselves professional designers or architects”.

UNCTAD Creative Economy Report (2010) is a guiding document for creative industries studies, where the definitions in the report are used for common global terminology and understanding. The definition of design in this report is as follows:

(design) is the result of creativity expressed as a knowledge-based economic activity, which produces goods or services with creative content, cultural and economic value, and market objectives. As such, the design industry is part of the creative economy given that it cuts across the artisan, manufacturing, and services components of the value chain, interacting with technology and qualifying for IPRs. (Creative Economy Report, 2010, p. 156),

This definition embraces important points, disclosing important attributes about the nature of design. UNCTAD (2010) defines design as a knowledge-based activity, adding value both in intangible and functional aspects, present through the value chain in the creative economy. Some important scholars support the view that suggests design as a distinctive creative industry. Pratt (2005) claims that the design sector recalls those business service sectors that operate with knowledge. Indeed, the knowledge in the design sector is unique, as it does not have commonalities with the pieces of knowledge in engineering or science-oriented sectors. Design knowledge depends on tacit knowledge, skills in craft, 'know-who,' and interactions full of give and take (Hansen et al., 2005).

There are a few studies on design in the context of the creative economy.

In their study, Sunley et al. (2008) acknowledge the role played by designers, who enable the knowledge exchange between key actors around design, where the knowledge flows readily reconnect to make new synthesis and new designs.

The rise of design coincides with the rise of the knowledge economy. One of the primary reasons behind this is the outsourcing of design activity after the post-Fordist mode of production (Sunley et al., 2008). In contemporary economy, firms can leverage design expertise through several different ways in the contemporary economy. Firstly, firms may have an internal design department or engage designers as members of

interdisciplinary teams across various areas of their businesses, in operations like product development and marketing. Secondly, firms may engage freelance designers on a contractual basis for particular projects. Thirdly, they may provide design services from design consultancy firms. A fourth option may be any combination of the three alternatives above (*The Place of Design*, 2009; Vinodrai & Gertler, 2007).

The design consultancy firms undertook the outsourced design activities and assembled competencies in their structure, which depended on the linkages and collaboration of people, knowledge, and skills. It is important to note that those interactions and synthesis of knowledge at different levels, 'social, analytical, and symbolic,' are crucial for design innovation (Sunley et al., 2008, p. 685).

The 'interactionist' body of work for creativity comprehends innovation as a social process that relies on the actual social norms, not on the outputs of creatives who act in isolation (Woodman et al., 1993). This interactionist approach may also shed light on the nature of design innovation as a social process. Indeed, the design agencies do not work in isolation but interact with many 'domains,' starting from the inner circle of the agency, like the project team, to the client, organizations where designers are part of, the market, and the governance frameworks where the products are born into (Sunley et al., 2008).

Sunley et al (2008) argue that designers act as 'creative brokers' between those key domains in the network, exchanging and synthesizing different knowledge to have design innovation. Broker is a commonly used word in management studies coined by Burt (1992) on knowledge networks, defining the people who gain an advantage due to the dissimilarities in the knowledge of actors in those networks. This brokering role is vital

in knowledge economies that operate in networks where there is frequently missing knowledges that need to be completed by the key actors (A. B. Hargadon, 1998).

More importantly, Julier highlights the change of design practice to design culture. Design is usually a project-based business (Batt et al., 2001; Christopherson, 2002). At the same time, project-based work shows considerable diversity in its organizational, temporal, and spatial attributes. A project may endure for a week or extend over several years. The designer may work on a project as an employee of the company or under contract for a customer (either in the design business or another sector)(*The Place of Design*, 2009). According to Vinodrai (2009), due to the project-based nature of the design business, designers may experience careers characterized by significant mobility within the labor market. The widespread use of flexible employment relations, such as the usage of freelancers and short-term contracts, accentuates this pattern of high labor market circulation. These types of employment are known to be notoriously risky and unstable. Likewise, there is a high rate of self-employment. Designers' capacity to land jobs is frequently dependent on the reputation they've cultivated over the years via notable projects, collaborations with other notable designers in the area, and 'star' designers and design firms (Vinodrai, 2006). Design work requires belonging to specific social and professional networks (Grabher, 2002a, 2002b), which can be challenging for designers to break into (*The Place of Design*, 2009). According to Vinodrai's studies in Ontario, the professional associations and educational institutions may facilitate network building and provide additional labor market support, however, they are not well-equipped to offer these services. Most Ontario's design-related professional associations operate under a monopolistic practitioner model, which may not be suitable for emerging occupations.

Instead, in some studies, there is evidence of decentralized and democratic professional associations that focus on actively intervening in the labor market (Batt et al., 2001).

Julier (2000) also states that the design discipline has become a ‘problem-processing’ activity, exceeding the previous ‘problem-solving’ one (Julier, 2000, p. 2). Designers act together with professionals from marketing, advertising, PR, and other necessary domains, which are responsible for the ‘production, mediation and control’ of the flow of ‘images, objects and information’ when a product or service is born (Julier, 2000, p. 2). Julier points to the heterogeneity of the design disciplines and lists them as - industrial design, interior design, architecture, event, exhibition design and graphics, and branding – which strengthen the design’s role.

In his seminal article, Julier (2006) argues that a new approach, as he named it Design Culture, is needed since two more established fields; Visual Culture - focus in images- and Material Culture - focus in things-, are not sufficient in their methods to develop an understanding of the ‘cultural role of contemporary design’ in today’s society. He proposes a conceptual model to structure the study of Design Culture underlying the need for such a framework to bring together Visual Culture and Material Culture disciplines, which interact ‘in a secure and complex way’. As Julier states, design appears in Visual Culture studies besides ‘fine art, photography, film, TV, and advertising’. The main interest of Visual Culture studies is the relationship between the ‘viewer and the viewed’. The periodization of visual culture suggests that visuals have become the dominant form of modernity, influenced by mass consumer markets and urbanization during the industrial revolution, and have become a key characteristic of modern social organization (Evans, 1999). Indeed, from a design perspective, starting with this era, it was necessary to make goods and services more ‘self-consciously visual’

to promote and advertise them to a large, anonymous audience. Julier describes this era as a spectacle built on the 'mediation of visual experience', which can be seen in the increase of department stores, mass tourism, and entertainment. This period was also characterized by the technologies around film, animation, and photography. Julier also proposes a second view of understanding this period, supporting the view of Mitchell, that any era can be characterized as the period where there is 'strict dominance of one cognitive form over another'. In line with this approach, Julier defines the visual culture not only as a medium of the era but as 'an intrinsic and important social and cultural expression' of that time (Julier, 2006, p. 66). As he suggests, when considering the cultural production of this period, visual takes the dominant position in 'cultural formation and representation'. Hence, images, pictures, and the visual as representations are the focus of production.

Julier (2006) refers to ideas of Scott Lash (2002) and asserts that the increasing acceptance of design as a purposeful differentiating characteristic in daily life broadens the foundation upon which visual values are established. As Scott Lash states; "Culture is now three-dimensional, as much tactile as visual or textual, all around us and inhabited, lived in rather than encountered in a separate realm as a representation." (S. Lash, 2002, p. 149)

Julier supports the view of Lash stating that;

Culture is no longer one of pure representation or narrative, where visual culture conveys messages. Instead, culture formulates, formats, channels, circulates, contains, and retrieves information. Design, therefore, is more than just the creation of visual artifacts to be used or 'read'. It is also about the structure of systems of encounter within the visual and material world. (Julier, 2006, p. 67)

1.2.2 Design as an Ecosystem and Policy Tool

Studies on innovation and the link between innovation and design attracted the attention of both policymakers and academics in the early 2000s. The innovation policy development studies were based on the Innovation Ecosystem as a framework. Design researchers adapted this approach in their studies for the design policy, building their analysis on the Design Ecosystem concept. The first country that developed its innovation policy was Finland in 1992. Finland adopted the Design Ecosystem concept and developed its design policy in 2013, again being the first among European countries. There was a huge encouragement from the European Commission to countries to develop policies and actions for design-driven innovation; however, there was no available method or consensus between policymakers or academicians. In 2015, the countries that included design in their national innovation policies were Belgium, the Czech Republic, Denmark, Estonia, Greece, Finland, France, Ireland, Italy, Latvia, Poland, Slovenia, Spain, Sweden, and the UK. However, the depth and method of inclusion of design in those country policy documents varied in many ways, from sentences to programs or promotion activities, disclosing the value given to design in those countries (Whicher, 2017).

In their seminal work, both Freeman (2004, 1995) and Lundvall (1988, 1992) stated that the innovation policy should be studied with a system approach, meaning that to develop the right policies to support innovation, the functioning of the National Innovation System (NIS) should be analyzed first. From their perspective, the malfunctioning of the innovation system may be fixed with government intervention, resulting in an innovative economy. This theory was called the system failure theory. Design is mentioned in many places as a driver of innovation; however, due to the

difficulties in presenting its impact and the absence of metrics, R&D became the primary player when evaluating the performance of NIS.

In 2010, the European Commission's ten-year agenda "Innovation Union" identified design as one of its top ten objectives for innovation:

Europe must also develop its own distinctive approach to innovation, which builds on its strengths and capitalises on its values by pursuing a broad concept of innovation, both research-driven innovation and innovation in business models, design, branding, and services that add value for users and where Europe has unique talents. [...] Design is of particular importance and is recognised as a key discipline and activity to bring ideas to the market, transforming them into user-friendly and appealing products (European Commission, 2009b)

In addition, the European Commission (2013) initiated its Action Plan for Design-driven Innovation, declaring:

A more systematic use of design as a tool for user-centred and market-driven innovation in all sectors of the economy, complementary to R&D, would improve European competitiveness. Analyses of the contribution of design show that companies that strategically invest in design tend to be more profitable and grow faster. (European Commission, 2013)

The European Commission's Action Plan for design-driven innovation promotes the integration of design into innovation policy and the development of design action plans across all European countries. As a result, the fundamental question of how the government can effectively establish a design policy is raised.

1.2.2.1 Former Design Ecosystem Studies

The idea behind modelling the design ecosystem is that governments need to determine the intervention areas to develop the right policies.

With a change in terminology, several important studies were done in different countries by design researchers on the design system:

- ‘Design Infrastructures’ by Love (2007)
- ‘National Design Systems’ by Moultrie and Livesey (2009), Raulik-Murphy and Cawood (2009), Sun (2010), Swann (2010), Hobday et al. (2012), Whicher and Cawood (2012)
- ‘Design Ecosystems’ by Ministry of Employment and the Economy of Finland (2013), Chisolm et al. (2013), and Whicher (2016).

The first study on design and system studies is the one by Love. Love (2007) investigated the role of national design infrastructures on socio-economic outcomes in 5 countries with different development trajectories, economic and technological backgrounds, which are: Australia, Finland, Korea, Norway, and the UK. The research in the long run aimed to develop a comprehensive quantitative system dynamic model that will help policymakers identify the best investment areas in design infrastructure needed for innovation to maximize socio-economic outcomes. The main aim of the research project was to enhance innovation processes in Australia during its transition to a knowledge-based economy.

The main argument put forward by Love (2007) is that design activity heavily relies on national design infrastructures, and the alignment between a country's design infrastructure and its development trajectory is the crucial factor for achieving innovation and socio-economic growth. Thus, deficiencies in design infrastructure would reduce

innovative outputs, thereby undermining socio-economic and technological development goals. Correspondingly, understanding the behavioral dynamics of design infrastructure is crucial to inform policy-making for development.

Love (2007) suggests that the national design infrastructures vary from country to country depending on the 'quantity, quality, and distribution' of their elements. Moreover, he claims that some countries have a rich design infrastructure that is appropriate for their needs, while other countries may have key elements of design infrastructure that are 'inappropriate, missing, or hidden'. Naming two successful countries with this alignment, Taiwan, focusing on computer chip manufacturing, and Finland, restructuring the design, economics, and technology studies at its universities, Love presents Australia as an unsuccessful case. According to previous studies by Love (2005, 2006) there is a lack of awareness of the role of design infrastructure in innovation in government, academia, research funding bodies, and industry in Australia, where some key components of the design infrastructure are 'missing' and 'hidden'; because they are named differently or unavailable in the 'normal' practices of data collection. Love describes this situation as 'a system failure' caused by 'management blindness'. Despite the poor support from government and institutions, Love points out the world-class engineering design activities carried out in some important oil & gas sectors and the awareness of the importance of designers in innovation in the art & craft sectors in the country. Love argues that Australia's history as a colony of the UK has influenced its development trajectory. He states that the United Kingdom impeded the progress of Australian design and innovation systems, while simultaneously making substantial investments in its own. According to Boardman (2001), the division of research on wool,

where the UK prioritized design-oriented development, while Australia concentrated on enhancing wool production, is an example of this situation.

In the study, Love recognizes design as an activity building on the design definition of Herbert Simon (1969): “[devise] courses of action aimed at changing existing situations into preferred ones.” (Simon, 1969)

Accordingly, Love (2007) notes that through design activity, ‘knowledge about the world’ is converted to real products, services, organizations, etc. He asserts that, in the noun phase, design should be understood not as the outcome but the ‘specification for making’ it. Love suggests that design activities are ‘extensive, embedded systemically and out of the public view’ and explains this claim through the example of an IKEA bookshelf. He lists the parts that made up the shelf and, through this list, discloses the set of designers and design fields involved in its production. Taking this list as the next starting point, he continues to disclose other design fields needed for the IKEA bookshelf to ‘exist and provide social and economic benefits’, which are embedded in logistics systems, accounting for business processes, even in software, leveling up to environmental policy. Eventually, based on this generous final list the design infrastructure is defined as:

design resources needed for specifying the activities, machines, and other objects and processes needed for the creation and use of those IKEA shelves... design infrastructure provides the bridge between new knowledge generated by research and the actualisation of designed products, systems, services, processes, and organizations by governments, institutions, and individuals (Love, 2007b, p. 4)

Love (2007) recognizes the design infrastructure as a ‘production system’ (p.7) for innovation in products, systems, services, and organizations and highlights its

relationship with other systems and users at the national scale. As he notes; "...the elements of design infrastructure comprise a system shaped by the relationship between design infrastructure elements and with other national systems and subsystems, and users." (Love, 2007b, p. 4)

Love (2007) claims that the establishment of design infrastructure holds greater significance than the intellectual property (IP) from research in generating tangible innovative outcomes, since knowledge from research requires design and the actualization processes to become alive. Likewise, he theorizes design infrastructure as a 'bridge between new knowledge generated by research and the actualization of designed products, systems, services, processes, and organizations by governments, institutions, and individuals.

Love (2007), asserting the complexity of design infrastructure as a system, points out that its elements are situated inside several interconnected systems, which retain elevated levels of complexity. Love claims that a lack of understanding of the role and functioning of design infrastructure, a system with its dynamics, would lead to a simplistic understanding of design activity, where observed problems would be considered singular cases without connections. Thus, overlooking the complex 'causal loops and feedback relationships' associated with design infrastructure may result in wrong policies.

Love (2007) challenged to investigate this extremely complicated system, composed of 'interactions between large numbers of causal factors, intermediate processes and outcomes' (p. 7), by utilizing system dynamics modelling to grasp a dynamic overview of the relationships between design infrastructure and socio-economic development. The system dynamics method is known for its capability to handle

complicated complexity, numerous feedback loops, and insufficient data. Indeed, Love incorporated morphological analysis to better understand the system's complexity.

Love (2007) states that the connections and causes between various elements in a system can be visually represented and understood through the use of causal loop models. These models facilitate the discovery of feedback and feed-forward loops, consequently differentiating between components that produce or reduce consequences. Through causal loop models, it is possible to detect 'counter-intuitive' system outcomes. Love highlighted the importance of identifying counterintuitive aspects of complex systems, as has been demonstrated by Sterman (2002) with fifty years of experience modeling complex phenomena internationally. According to Forrester (1975), human intuition frequently misinterprets how systems operate in complicated feedback scenarios, leading to management decisions that eventually have the opposite effect from what was intended. An illustration of counterintuitive system behaviors and poor intuitive reasoning is the belief that investing in current design education programs is a straightforward and efficient solution to enhance national innovation outcomes in resource-based countries like Australia. The root of this poor model of reasoning is as follows: an increase in design leads to an increase in innovative products. However, in reality, the focus of most of the design activity is on the commercialization of imported products and services.

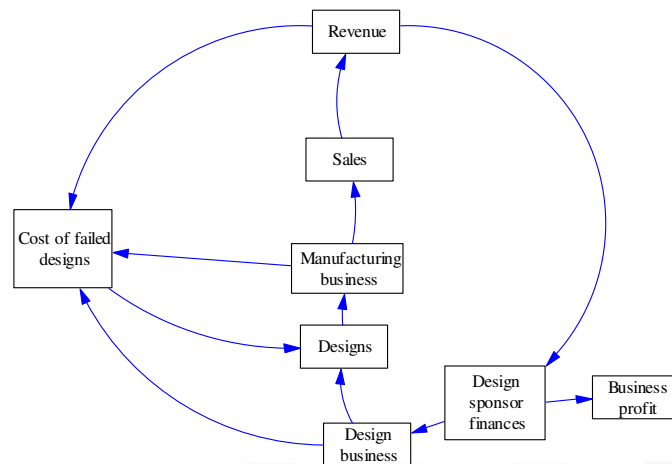
The study is based on empirical data collected from semi-structured interviews with design experts from government, business, and academia, and desk research about the five nations, gathered to establish a basis for modeling. South Korea was excluded from the study during the desk research phase due to significant disparities in culture and development trajectory compared to Australia.

Love proposed applying the following steps to create a system dynamics model of design infrastructures:

- Use empirical data to map out the relationships between elements in subsystems in terms of qualitative causal loop diagrams
- Identify typical behavior patterns and potential counterintuitive behaviors
- Develop and calibrate quantitative sub-system dynamic models
- Integrate the sub-system models together. (Love, 2007a, p. 7)

Accordingly, in the study design, infrastructure has been broken down into ‘typical’ sub-systems that make it easier to understand their complex roles in the overall system and discover the anticipated counter-intuitiveness. Empirical data from interviews were utilized to create visual representation diagrams of the connections between parts within sub-systems in terms of qualitative causal loops, using Vensim system dynamics software. Love stated that the primary advantages of systems diagrams are to identify the factors that influence the situation. Indeed, the system diagram presents resources and actions of key factors through ‘causal feedback loops’, which can be either positive or negative for the analyzed sub-system outcomes. In addition, they also function as an initial representation in discovering counterintuitive system outcomes as the elements and relationships are revealed. As Love claims, from a policy-making perspective, the system diagram indicates that it is possible to increase the impact of the factors on the left and reduce the impact of the elements on the right to achieve the goals. Figure 1.2 is an example of the systems diagrams drawn by Love with the Vensim software.

Figure 1.2 *Model of Business Process for Product Design* (Love, 2007a, p. 13)



The findings presented to the public were only the preliminary modeling of the following ‘typical’ sub-systems: design knowledge, design education, and the role of design in social and economic development.

Love demonstrating the system dynamics of the above sub-systems reports the prompt increase in complexity as new elements and time as a variable are included in the analysis. Another important finding of Love’s study is the taxonomy of design centers as an archetypical sub-type system element, which are: promotional design center, design services center, design advice center, and design research center. Love presents the model of relationships around these four different design centers. Examining their complex role in the infrastructure, Love claims that design centers play a crucial role in the development of established methods for building national design economies. Indeed, the existence of design centers and government design policy units can serve as a distinguishing factor between well-established first-tier knowledge economies with a focus on design and developing second-tier design economies.

Love’s study is the first which challenged to analyze the role of design in socio-economic development as a system. Love, through the definition of design of Herbert

Simon, conceptualized design infrastructures as a production system in relationship with other national and local systems and users. Utilizing the system dynamics method for mapping and analyzing the relationships in the system, Love listed a set of actors in a national design infrastructure, and presented a mapping of some preliminary sub-systems with elements and causal loops and a taxonomy for design centers. The visual presentation, found useful in studying and discussing complex interrelations, was taken as an approach by following researchers, but in an easy fashion.

The second important study on design and innovation relationships is the International Design Scoreboard by Moultrie and Livesey. Moultrie and Livesey (2009) developed the National Design System Framework to measure the design capacity at the national level and consequently constructed the International Design Scoreboard to enable international comparison. With globalization, the production of low-value goods moved to developing countries. The UK supported globalization with the expectation that high-value activities such as R&D, technology, innovation, and design would stay in the country. As reported by Sir George Cox (2005), emerging economies Singapore, Taiwan, China, Brazil, Russia, and especially Korea started developing their 'indigenous design capabilities' and positioning themselves as 'new design and creativity hubs'. The UK, like other developed countries, would like to be present in the high-value activities in the international competition.

This study presents the ranking based on the best available data on 12 countries using the proposed International Design Scoreboard: USA, Korea, Japan, UK, Canada, Singapore, Sweden, Hong Kong, Norway, Denmark, Finland, and Iceland. Researchers acknowledged the lack of reliable, consistent, and up-to-date information in the research

area. Hence, China, Spain, France, Germany, and Taiwan were excluded from the detailed study due to the absence of data.

To propose a design system framework, Moultrie and Livesey (2009) examined the existing well-known frameworks for measuring R&D and Innovation performance at the national level that were also used in setting targets for development and policymaking: European Innovation Scoreboard, Value Added Scoreboard, and R&D Scoreboard. After their analysis, they concluded that the significance of design in fostering innovation and creating new products and services was not adequately acknowledged in these scoreboards and guidelines, and often treated as ‘a sub-set of R&D or innovation’. They point out that design was commonly perceived as solely the aesthetic aspect of creating new products. Moultrie and Livesey (2009) argue besides technology development and exploitation, innovation is achievable through the creation of profitable and valuable products and services, building on functional and aesthetic values as well as experiences. Consequently, they highlight that creating new brands and experiences is more important than technology and R&D development for innovation in sectors such as furniture, clothing, retail, hotels, and leisure. Thus, they acknowledge the value-adding role of design at the firm level through design fields such as:

- ‘Technical design’ is utilized in the development of new products and services.
- ‘User-focused design’ is utilized in user experience in products and services.
- Design is utilized in the promotion and communication materials around new products and services
- Design is utilized in corporate identity and the promotion of business.

Moultrie and Livesey (2009) proposed a 'national design system' framework, borrowing perspectives from the concept of 'national innovation system'. As in a 'national innovation system', they aimed to identify a range of indicators to describe the overall system to measure performance for comparison. Consequently, they developed the generic 'national design system' framework as a model to identify such indicators. In this framework, design is conceived as 'a system consisting of enabling conditions, inputs, outputs, and outcomes' at the national level. The elements of the system are described as;

- Enabling conditions: including national policies, strategies, institutions, and endowments. Many national governments are actively involved in design promotion through programs that promote design to both businesses, particularly small and medium-sized firms, and the general public.
- Inputs/capabilities: the development of human capital relating to design, including design graduates, designers in the workforce, and those working in the design sector.
- Outputs: intellectual capital generated as a result of design activity, including design registrations, trademarks, and receipt of design awards.
- Outcomes: reflecting the impact of the outputs on the overall economy. A significant indicator here is the overall strength of the design services sector in terms of turnover, employment, and exports (Moultrie & Livesey, 2009).

The design fields included in the framework are 'architecture, product/industrial design, clothing/fashion design, digital/multimedia design, and graphical/communication design' (Moultrie & Livesey, 2009).

Moultrie and Livesey (2009) state that the identified a set of indicators, when taken together, allow for an assessment of the national design capability, both in terms of its absolute value and compared to others. The 'relative' indicators, such as the number of design graduates per million population, provide a measure of the comparative strength of design capabilities within a country. The 'absolute' indicators, such as the total number of design graduates, provide a measure of the overall magnitude of design capability in each country. Evaluating the design system framework, the following seven key indicators were identified to assess the design capability, out of the initial list of 45 potential indicators, based on their relative importance and the availability of data at the time.

Moultrie and Livesey (2009) state that collecting and comparing data on design between different countries is inherently difficult for two reasons. Firstly, design falls between different government bodies, making it challenging to gather specific statistics on design. Secondly, the broad definition of design further complicates data collection as it encompasses a wide range of activities, from the creation of new technology through to the generation of individual works using craft skills.' As they mention, each indicator had different complexities in reaching comparable data. As pointed out, design promotion and support were achieved not only through national governmental organizations but also through regional organizations as well as professional organizations. Design education classification systems were also defined differently in different countries, which made it hard to arrive at a comparable design graduate number. The availability of different tracks in registering trademarks and design registrations, such as national, European, or WIPO, made it difficult to gather a single indicator for the scoreboard. Last but not least, the

design services sector was not present in any national statistical data, but was present under the ‘other business activities’ SIC code.

The potential indicators for the design scoreboard were explored in a workshop utilizing the ‘design system model’ as a template. At the workshop, 20 participants, from government, the design services sector, academia, and industry, were involved as ‘experts’ in the sector and stakeholders of the design scoreboard.

In utilizing the International Design Scoreboard, data were gathered for 40 countries through national statistics, published surveys, and reports on the design sector and national design bodies. The list of countries included the top 20 nations from the World Economic Forum’s Global Competitiveness Index and ‘innovative nations’ from the INSEAD global innovation index. However, the ranking report presents only 12 countries due to the limited availability of data for the set of indicators.

Moultrie and Livesey (2009) presented two alternative rankings utilizing the proposed design scoreboard, claiming that the two rankings together paint a more ‘complete picture’ for the international comparison of the design capabilities. The study concentrated on the indicators, since measuring design capability at the national level and international comparison were the main aims of the study. The design system framework mentioned some actors in the system. However, the lack of data also undermined the long-term objective of the study, which was to understand the linkages between national design capabilities and economic performance.

The study provided a framework and indicators for international comparison of national design capabilities, which served both to paint an initial picture of the panorama and support future data collection and comparison. The data on key indicators of design were collected for the first time at the national level, which enabled comparison.

Korea has been highlighted as an emerging ‘a future design powerhouse’ in the report. The public investments in Korea and Singapore were presented as successful, showing the positive results in design education and international registration of trademarks as evidence for the success of both countries.

The study emphasized the need for consistent terminology for collecting data on design; however, it did not propose one, neither conceptually nor pragmatically. Consequently, a set of revised indicators was proposed for future studies.

The third study, which investigated and compared the National Design Systems of several countries, is the study by Raulik-Murphy & Cawood. The study aimed to provide a tool for the identification and analysis of systemic failures in a national design system to guide policy making. To identify the systemic failures, the study focused on the identification of the stakeholders and their roles in the development and promotion of design at the national level and the representation of the complex formal and informal relationships among them. Utilizing the proposed tool, the study presents the schematic representations of the national design systems of four countries with contrasting contexts: Finland, Korea, Brazil, and India.

Murphy and Cawood (2009) point out statements that acknowledge the importance of design for competitiveness and socio-economic growth at the micro (firm) and the macro (national) levels and underline the lack of understanding of design at both. The study does not propose a definition to clarify the definitional confusion; however, it focuses on the design promotion policies utilized at the national level. Murphy and Cawood support the view that the poor use of design by the private and public sectors is a systemic failure rather than a market failure. Market failure is the hypothesis that companies, especially SMEs, are hesitant to invest in innovation due to a lack of

understanding, interest, and investment in design. Hence, market failure was the primary rationale behind the government's intervention through design programs (Amir, 2002; Cox, 2005; DTI, 2005), coinciding with technology and R&D policies. Whenever a sector failed to make use of design resources, the government stepped in to intervene by implementing programs that either encouraged design among businesses or assisted them in locating and managing design resources (Raulik-Murphy et al., 2010). Murphy and Cawood point out to the fact that SMEs, being the primary job creators in an economy and facing intense competition, are the most eligible recipients of state aid, also in design (Foundation of SME Development, 2002). However, Murphy and Cawood also emphasize that the prosperity of a nation's economy is dependent on the success of its national industry, which includes both service and manufacturing sectors, as well as small businesses and large corporations. Indeed, design programs as a solution focused on correcting market failure have proved to be narrow. Alternatively, systemic failure is an approach borrowed from NIS studies, which challenges the market failure approach, directing the attention of governments to a holistic systemic perspective to support design. Murphy and Cawood (2010) assert that the design policies should consider the systemic failure approach, addressing the system as a whole. As they claim, in the systemic approach;

It is important to ensure that the elements in the system are also favorable for the investment. Important factors include companies being able to find good professionals to help with their projects; available credit for design investments; universities working to develop research and product development in partnership with companies; suppliers able to realize the proposed designs; companies being informed about trends and market opportunities in order to guide their investment

in design; and the market operating efficiently, creating a positive environment for product sales. (Raulik-Murphy et al., 2010, p. 56)

Murphy and Cawood (2010) propose a conceptual National Design System (NDS) built on the concept of NIS, which was developed by C. Freeman, R. Nelson, and B. Lundvall. NIS framework focuses on analyzing innovation and technological advances in a country, along with the support provided by infrastructures and institutions, the dynamics of the system, as well as how it impacts economic development. Likewise, the NDS framework analyzes the design infrastructure in a country, its development, integration with other institutions, and the social and economic impact it has. Building on this systems approach, Murphy and Cawood (2009) claim that;

investigating these systems, researchers may be able to identify, for example, insufficient interaction between actors in the system, an imbalance between privately and publicly funded programmes, mismatches between design support and promotion programmes, and other deficiencies that may be contributing to industry's poor use of design. (Raulik-Murphy & Cawood, 2009, p. 3)

Examining the previous studies and policy documents on national design systems (Love, 2007a, 2007b; Moultrie & Livesey, 2009), Murphy and Cawood took a different path. Rather than exploring the 'comparative metrics' and studying 'system dynamics', they focused on identifying the 'stakeholders' and the deficiencies in the relationships among them, as it was stated as the reason behind the compromise in the design policies in various countries. Building on this perspective, Murphy and Cawood propose that a national design system comprises;

organizations that accumulate knowledge and capabilities in design or that are somehow influential in the network due to financial support or political direction.

Therefore, besides agents designated for the implementation of education, promotion, and support programmes, the National Design System also includes professional associations and funding bodies. (Raulik-Murphy & Cawood, 2009, p. 8)

In the study, the elements of the national design system are called stakeholders. The research was conducted in two phases. The first stage aimed to identify the actors of the national design systems and reveal the ‘formal and informal’ relationships among them. At this research stage, the information was collected through published materials and face-to-face interviews with at least 3 people from each country who were informed about their NDS with diverse backgrounds: a designer, a government representative, or an academician. Visual elicitation was utilized in these interviews, which helped clarify complex networks of relationships. This method was selected due to its advantages in obtaining ‘data and understanding’ in interviews by reducing the risk of misunderstanding, increasing the focus on the topic of inquiry, serving as a reflection through analysis, and recording the discussion (Banks, 2001; Varga-Atkins & O’Brien, 2009). Researchers used visual and verbal information to identify ‘potential weaknesses in systems, power forces, and strategic alliances’, uncovering the effectiveness or inadequacy of design strategies in the countries under study.

Murphy and Cawood (2009) agree with the view that the networks of relationships in national design systems are complex. Indeed, the researchers point out the similarities between NDSs and CAS (Complex Adaptive Systems), as also suggested by the Santa Fe Institute in Mexico. “CAS are dynamic networks of many actors acting in parallel, constantly acting and reacting to what the others are doing, both competing and

cooperating, and usually in a highly dispersed and decentralized control.” (Raulik-Murphy & Cawood, 2009, p. 6)

The second stage aimed to present the national design systems based on the data collected in the first stage. To overcome the difficulty in presenting the complex data of the first stage, Murphy and Cawood (2009) developed a taxonomy as suggested by Koehler (n.d.), who stated that common taxonomy and different forms of visualization are required for the representation of complex systems. Accordingly, Maulik and Cawood proposed a taxonomy and a notation made up of four groups of actors/elements that are present in a ‘generic design system’ to further analyze the interrelationships of the empirical data from the interviews. Maulik and Cawood suggest that design support, promotion, and education as the main channels to increase the use of design to achieve competitiveness in a country. Additionally, they highlight the strategic role of design policy as the guide in the development and implementation of design programs.

Maulik and Cawood included professional associations and funding bodies in the design system while mapping the relationships between the groups of actors according to the pre-specified taxonomy and notation, utilizing graphic elicitation. The resulting maps were presented for practitioners and policy-makers in the four countries.

The study of Murphy and Cawood provided a tool to identify the actors and present the map of relationships in a national design system. The system maps offered researchers, practitioners, and policymakers a tool to visualize their national design system and to make comparisons with other countries. Using common taxonomy and notations decreased the complexity in the representation of design system maps and enabled ease in comparison between the design systems of different countries.

Murphy and Cawood included the professional associations and funding bodies in the design system. They highlight the key role of governments in design policy and design programs, providing direction and finance, as in successful examples of Korea and Finland. Consequently, they indicate the private design consultancies and NGOs as 'agents' in the design system, delivering design programs in countries lacking funds. Similarly, they highlight the importance of partnerships with large public and private institutions, in both financial and service terms, in implementing design programs in Brazil and India. Importantly, Murphy et al (2010) point out the designer's new role as promoter of their work while looking for incentives in countries where government support to design is limited.

Another important study that proposes a model to inform policy making on design systems is the study by Sun (2010). The study explores the relationship between design policy and industrial context through investigating the design industries and design policies of the UK and China, where the UK represents the knowledge-based economies and China represents the industrial economies. Analyzing this relationship, Sun proposes a design policy framework that includes the stakeholders and their roles in the policy-making process.

Sun (2010)'s main argument is that design policy and its implementation are generally bound by the dynamics that exist inside the design industry as well as the economy, which serves as the industry's broader context. Indeed, Sun notes that the UK and China, where design is recognized as a strategic tool, have significantly different industry dynamics and economic agendas, as well as different design policies. Correspondingly, Sun explores the design policies, the design industry dynamics, and economic agendas of the two countries to understand the relationship between the design

policy and industrial context. In the study, Sun does not provide a definition or the range of design activities in a national industry. However, analyzes the dynamics within the design industry, studying the rise and fall of different design fields to changing economic agendas. Pointing out the evolutions of the design industries in the two countries, Sun claims that design demand is determined by the economic structure in a way that directs the design services needed.

As Sun (2010) describes, the UK design industry has evolved significantly since the 1980s, shifting from focusing on ‘form and behavior’ to embracing inter-disciplinary and collaborative activities, as the industrial output declined and the designer's role as an ‘all-encompassing author’ was disregarded. With the decrease in manufacturing, the need for design moved away from its primary functions, making design services more fragile. To leverage creative thinking to offer value to enterprises, design has moved beyond traditional disciplines to include ‘service design, innovation, research, technology, marketing, branding, and strategy’. The shrinking manufacturing share in the UK has resulted in difficulties in product design and its associated services, including prototype and engineering design. Nevertheless, the expansion of the public sector has generated new avenues in the fields of service design and strategic design. Adding design thinking to the design world was a valuable addition (Sun, 2010).

As Sun (2010) mentions, after the 1990’s the design industry in China developed incredibly. The export-oriented economy of the time resulted in a significant increase in Chinese design capacity. This was mostly driven by OEMs (Original Equipment Manufacturers) who were looking for fast turnaround times to repackage their products. This restricted the design process to the creation of forms and styling, leading to a perceived absence of thorough research, planning, and innovation. Meanwhile, China's

advanced and economical product sketching and rendering abilities resulted in the adoption of open-source practices in the absence of legal restrictions. The growth of China's design industry has been driven by strong demand, but it has also resulted in deficiencies caused by insufficient infrastructure, like the practice of free pitching and the replication of others' work. The growing need for designers, resulted in a shortage. China's design education has experienced substantial growth and progress in the last two decades, with the establishment of more than 400 schools and the enrollment of thousands of students each year. Industrial design has emerged as one of the most prominent disciplines, positioning design students as a crucial workforce in the design sector. The Chinese design industry has been greatly influenced by an economy that is mostly driven by investments, resulting in a substantial demand for design services and influencing the industry's development trajectory. To advance in the global value chain, China has allocated substantial resources and effort to the development of an indigenous design capability that is based on a 'high investment, high-level skills and low-cost base'. This transition was announced with a new motto, replacing 'Made in China' with 'Designed in China'. Innovation is regarded as the crucial factor for the success of this shift, and it is widely believed that this presents a unique opportunity for design (Sun, 2010).

The methodology of data collection and analysis for the identification of the stakeholders and the potential policy areas was not shared by Sun.

Sun (2010) proposes the design policy framework consisting of the following key stakeholders;

- Design supply: freelance designers, design consultancies, in-house design teams
- Design demand: public sector, private sector

- Trade organizations
- Higher education institutions
- Government departments

The arrows represent the potential design policy areas and the relationships between key stakeholders.

Sun (2010) builds her design policy framework on the proposition of political economists (Galbraith, 1983; Muthoo, 1999) stating that; “nature of economic power lies in the balance within the supply-and-demand system. In this way, the government is able to deploy relevant policies to intervene in this balance.” (Sun, 2010, p. 75)

Based on this proposition, Sun (2010) asserts that analyzing the impact of each key stakeholder on this balance is useful for informing policy decisions. Correspondingly, Sun demonstrates six different potential policy areas among the key stakeholders presented with an arrow in the framework.

- Policy A: Subsidization, Tax Incentives / Design Supply
- Policy B: Subsidization, Tax Incentives / Design Demand
- Policy C: Accreditation, Leadership / Design Supply
- Policy D: Promotion of design capacities / Design Demand
- Policy E: Curriculum, Skills / Design Supply
- Policy F: Public awareness / Design Demand

Analyzing the design policies of the UK and China, utilizing the proposed design policy framework, Sun (2010) concludes that design demand, which is determined by the economic agenda, drives the design industry in these countries.

Sun (2010) proposes a design policy model that can be utilized as a tool to present the potential policy interventions and their influences on the supply and demand of design

at a national scale. Sun theorizes that the policy-making stakeholders – government, trade organizations, and academic institutions – influence design demand and design supply through direct and indirect policy interventions, and economic power requires a balance between the two. The design policy model emphasizes the balance between design supply and design demand at the national level.

The final important study of the design ecosystem is by Anna Whicher. The study aims to propose a Design Ecosystem model that facilitates effective policy making and enables international benchmarking. The scope of the study is European countries. The initial design ecosystem model was built on the information gathered through the interviews with representatives from Denmark, Estonia, Finland, and the UK. Additional data was collected from the Design Policy Monitor, available for a project for European countries.

Whicher (2017) supports the view that the formulation of design policy should be grounded in a thorough examination of the design ecosystem, like in innovation policy studies. Examining the theory of NIS coined by Freeman (Freeman, 1995, 2004) and Lundvall (Lundvall, 1985, 1992), she points out the statements about the role of design in innovation in these studies:

when we are considering national innovation systems (as opposed to global civilization and the world economy), then at least in the past (scientific discoveries) have not been so central to innovative success as those types of creativity which are characteristic of the engineer in the work of invention and design. (Sharif, 2006, p. 751)

In the above statement, Freeman acknowledges the increase in the centrality of design in innovation. However, Whicher also notes that later innovation theorists disregarded design due to the challenges of measuring its impact on innovation.

Whicher does not tackle the challenge of proposing a solution for positioning design in the NIS. Instead, she explores the concept of ecosystems in both innovation and previous design studies. In a table presenting the different sets of actors and stakeholders proposed by the previous studies, Whicher criticizes the studies for overlooking each other's work and proposing uncommon sets of actors. Furthermore, she highlights the lack of thorough testing for the 'design ecosystem' concept.

Borrowing from the previous work of Sun and Finland, Whicher supports the view that design policy should take into account all facets of the ecosystem to sustain a balance between the supply and demand for design expertise.

Whicher (2017) employed a strategy of consensus building, engaging policymakers, academics, and design center managers to examine and assess various components of a design ecosystem at a national scale. The method employed in the study was 'The Double Diamond' (Design Council, 2007), a well-known design research framework. As an interactive method that involves divergent and convergent thinking, the four phases – discover, define, develop, and deliver- of the model were adapted as the following to create a common design ecosystem model:

In the 'discover' phase, Whicher (2017) deconstructed the lists of actors and stakeholders of the previous design ecosystem models and renamed them as 'components', which she then used in constructing a design ecosystem model.

In the define phase, Whicher (2017) suggested that the policy-makers were the ones who would benefit most from the research and use the design ecosystem model.

Correspondingly, she conducted semi-structured face-to-face interviews with eight policy makers in the national ministry of economy (or equivalent) in four countries: Denmark, Estonia, Finland, and the UK to understand their needs. The questions addressed the design policy development constraints and opportunities, and what policymakers needed to know about the Design Ecosystem to make evidence-based decisions. Through the interviews, she acquired the requirements of the government, ‘user needs’, for the design ecosystem model and design policy.

In the ‘develop’ phase, Whicher (2017) tested the initial design ecosystem model in a workshop with ten policy-makers, six academics, and eight design center managers. This involved several steps. Firstly, each country mapped the actors and the initiatives of their design ecosystem, utilizing the nine components in the proposed design ecosystem model. The mapping tool utilized in the study was not shared. Secondly, the strengths and weaknesses of each component were identified. Thirdly, policy actions were developed to embrace the strengths and overcome the weaknesses mentioned. The final findings were shared among countries.

The data obtained from the mapping exercise was employed by the participants to substantiate government intervention to promote certain aspects of the design ecosystem. This process lasted for three years over an EU project, and more empirical data were gathered using the Design Policy monitor, which involved 18 policies and 48 programs at national and regional levels.

In the ‘deliver’ phase, a design ecosystem model was constructed in a consensus-building workshop with ten policy-makers, eight academics, and seven design center managers (n25). In the workshop, some of the components were consolidated to simplify

the model, like combining private and public sectors with the general public under the ‘design users’ component.

The final list of components and their contents is as follows:

- Design users: private sector, public sector, general public
- Design support: support (ex; mentoring, coaching, strategic interventions through idea to market) available to enterprises and the public sector to utilize design
- Design promotion: activities to raise awareness, like design weeks, biennales, festivals, design awards, exhibitions, conferences, design museums, etc.
- Design education: education for a design degree as well as multidisciplinary curricula in other disciplines.
- Design research: new research between academia and industry, the public sector, and society.
- Funding: Vouchers, subsidies, grants, and tax credits, etc.
- Design policy and government:

Whicher’s model consists of elements/components that should be taken into consideration in the development of design policy, but they are not the actors of a design-driven innovation ecosystem. The model does not provide any ‘formal or informal’ nor ‘causal and connection’ relationships between the actors, and does not reveal where innovation takes place.

As Whicher stated initially, the main research question she challenges to answer is ‘how government can effectively develop design policy?’. Therefore, she focused on reaching a design policy formation model that could be utilized and enable benchmarking between countries. The model provides a guideline for policymakers to list the actors and

initiatives in their countries and claims to help develop policies that maintain the strengths and improve the weaknesses. However, the proposed model is hesitant in the way the system functions, identification of relationships between actors, and in systemic failures in the system. Since it is a consolidated framework achieved through a consensus-building process with the users of the policy development process, the utilization of the model by the European countries could enable a quick comparison and ease in the common understanding of the design policies.

Finland is the first country to adopt the concept of Design Ecosystem in its design policy in 2013. The definition of the design ecosystem in the work of the Ministry of Employment and the Economy of Finland is an important and enlightening one:

A well-functioning design ecosystem plays a crucial role in the implementation of the program vision. The term refers to a complex system where factors affecting the utilization of design—education, research, design promotion organizations, companies offering design services, public sector incentives, and demand for design from businesses and the public sector operate in close interaction and strengthen one another. Also, business incubators, accelerators, and local innovation clusters are part of the nationwide design ecosystem. In a functional design ecosystem, the supply and demand for design competence are in balance. (Ministry of Employment and the Economy, 2013)

The components of those design ecosystem models are summarized in Table 1.1. The common components are: companies, education, research, promotion, and government.

Table 1.1 *Components of Design Ecosystem Models (Whicher, 2017, p. 120)*

	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government
Love (2007)	x			x	x	x		x	x	x	x	x
Moultrie and Livesey (2009)	x							x	x	x		x
Raulik-Murphy and Cawood (2009)				x	x		x		x	x	x	x
Sun (2010)	x	x			x		x	x	x			x
Ministry of Employment and the Economy (2013)	x	x	x		x	x			x	x	x	x
Anna Whicher (2017)	Design users			x	x	D.agents		x	x	x	x	x

As the ultimate solution to overcome the complexity and to propose a common approach in policy making, Whicher (2017) in her study deconstructed previous studies and reconstructed a design ecosystem model. This approach was far away from where it started by Love (2007), who named his subject as Design Infrastructure, where he put a design object at the center when identifying the actors of a design system and conceptualized the infrastructure as a ‘production system’.

1.2.3 Design as a Distinct Creative Industry

Understanding innovation in creative sectors is essential, as it influences the long-term competitive viability and sustainability of cultural production systems within a globalizing economy. In creative industries like design, innovation has serious consequences for development and economic growth (Andari et al., 2007; Cox, 2005).

Several cities have been identified by researchers as dominant design centers, such as London (Andari et al., 2007), Milan, Catalonia, Helsinki, the Rhone-Alps region

(Verganti, 2006), Detroit (Hall, 1998a), Los Angeles (Molotch, 1996, 2003), New York (Rantisi, 2004), Montreal (Rantisi & Leslie, 2006), and Palo Alto (A. Hargadon & Sutton, 1997).

Pratt (2005) asserts that there may be significant contrasts and variations among creative industries, especially in their 'relationship with markets, nature of their distribution channels and intellectual property rights'. Indeed, Pratt acknowledges design as a distinct creative industry.

1.3 Creative Economy in Istanbul

This section looks at the distinctive features and figures of the creative economy in Istanbul, a post-Fordist city where craft production is still alive. Then reviews the previous work on the design system and actors in the city, the crafts and design relationship through the emergent business models of designer-makers after digitalization. Synthesizing the previous information, the chapter presents a sketch of the Istanbul Design System.

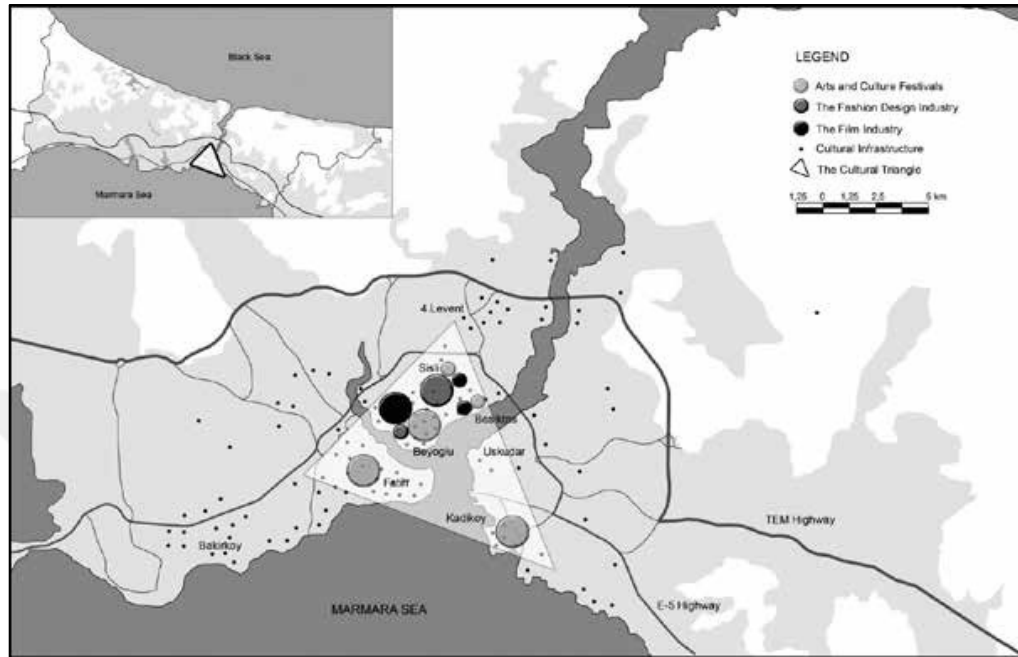
1.3.1 Istanbul – European Capital of Culture 2010

Istanbul, capital of two of the greatest empires of world history, has a distinct position within the world cities, still acting as a bridge between East and West and a hub for global interactions. As the Cultural Capital of Europe in 2010, Istanbul is the industrial, financial, cultural, and artistic center of Turkey. Having the biggest harbor and the airports of country, Istanbul is an important logistics center that operates as a crucial center not only for Turkey but also for the region. The city produces 30% of the country's GDP, drawing a high rate of foreign direct investment (Kuzgun et al., 2010). As an export and import center, there are more than 20.000 international firms and around 55,000

foreigners living in the city. The population of the creative class is also the highest in Istanbul since it possesses the highest cultural, financial, and intellectual capacity of the country (Çetindamar & Günsel, 2012).

Istanbul is the center of cultural production and consumption in Turkey. With its rich and evolving cultural agenda, the city is lively with cinemas, festivals, biennials, libraries, music, and gastronomy. According to the European Travel Commission Report 2005, the richness of heritage, art, and creative industries in Istanbul may compete with Berlin, Madrid, and Rome (Kuzgun et al., 2010). The media industry (music, publishing, television, and movie), both local and international, is located in Istanbul. Beyoğlu is considered a creative cluster in the city throughout history, which is also included in the 'cultural triangle' of the city, where most of the creative industries are congregated. The cultural triangle encompasses the areas: Fatih, Beşiktaş, Şişli, and Kadıköy. There are specific creative industries that cluster in those districts, such as the fashion industry in Şişli, the film industry in Beyoğlu, software in Şişli and Kadıköy, and cultural heritage mainly in Eminönü. Most of the historical and cultural sites are also present in the cultural triangle, as can be seen in Figure 1.3, just like the cultural life (Aksoy & Enlil, 2011).

Figure 1.3 *A Map of the Clustering of the Cultural Industries in Istanbul (Aksoy & Enlil, 2011)*



The Inventory of Cultural Heritage and Cultural Economy of Istanbul is an important document presenting the presence and status of the creative economy in the city done by Ministry of Culture and Tourism on eleven sectors including architecture, industrial design, fashion design, advertising, film, music, performance arts, jewelry design, visual arts, libraries, and museums. Those sectors are called 'the wheels for the cultural economy in Istanbul.' The study is important because it has both qualitative and quantitative data on the economic contribution of the creative industries in Istanbul, which serves as a base to construct future policies for the sector.

1.3.2 Istanbul – UNESCO City of Design

Istanbul is the leading city for the design industry in Turkey. Based on the figures of the World Design Survey directed by The International Council of Graphic Design Associations (ICOGRADA) and Seoul Metropolitan Government, Istanbul holds a

promising position compared to some famous cities in the area of design, like Beijing, Hong Kong, Montreal, Seoul, and Victoria, Australia. The design patents taken in Istanbul are 53% of the annual total of intellectual properties in Turkey, which places the city in a prominent position compared to some important cities.

Istanbul maintains its standing as one of the top five important cities, based on the presence of each of the survey's criteria: design industries, education, culture, and policies. There are nine organizations in Istanbul related to design policy, and related promotion and protection policies for design have also been present for the past 15–20 years. However, a national design policy is not yet available (International Council of Design, 2010).

Design is one of the important sectors of the creative industries in Turkey. The country is a net exporter of design, based on the statistics of UNCTAD. Ranked 6th among the developing countries, Turkey has 3,543 million USD of design exports compared to 2,226 million USD of imports. The share of design export was 1,46% of the world's design exports in 2008 and had an 11,72% growth rate between 2003-2008 (Creative Economy Report, 2010).

The second significant study on the creative economy in Istanbul is a workshop organized by YEKON and Istanbul Bilgi University in 2014. The study seeks solutions for the major problems of the key cultural industries in Istanbul based on the knowledge and experience of practitioners, representatives from related professional organizations, and local governmental offices. The key cultural industries are chosen according to their employment, export, turnover figures, and multiplier effects on the overall economy.

- music,
- film,

- publishing,
- advertising and PR (Aksoy & Ada, 2014).

The study presents the actors in the value chains of each of these key sectors, from ideation to consumption. The study focuses on the most critical linkages in the chain, which are production and consumption. There are six common problem areas for the five key sectors based on the previous research done in Istanbul. These problem areas are deficiencies in;

- Competency
- Product offer/Variety
- Physical structure
- Financial support
- Awareness and knowledge
- Data (Aksoy & Ada, 2014).

The solutions proposed by the study are important to overcome each of those deficiencies for each of the sectors to support the growth and productivity in the cultural industries in Istanbul. Each solution proposal is assigned to the relevant responsible party, which includes policymakers, the sector itself, NGOs, and the academy.

1.3.2.1 Istanbul Design System

A significant study on mapping the design system in Istanbul was conducted for YEKON by scholars from Istanbul Technical University in 2014. This seminal work by Er et al. (2014) presents the inventory of local actors and their interrelations as a ‘design system’ in Istanbul. This study stands as an important reference document displaying the current status of the design sector functioning as a system in the city of Istanbul. The design system of Istanbul, its actors, and their functioning schema are seen in Figure 1.4.

Figure 1.4 *A Schema of Istanbul Design System*



As Er et al. (2014) claim, Istanbul is a natural design lab, taking into consideration the variety of design capacities the city possesses. As stated earlier, the creative class in Istanbul has the highest LQ in the country; therefore, it has the potential to affect both production and consumption. As Er et al suggest, Istanbul is the only place in the country where design innovation is possible (Er et al., 2014).

2. METHOD

This research study was conducted in two stages over five years. In the first stage, a preliminary study was carried out as a research project for KTSM with designer entrepreneurs from the ceramic and glassware industry in Istanbul. Following this study, semi-structured in-depth interviews were conducted with design ecosystem and creative economy actors in Istanbul, as the second stage of the research program. The insights gained from these two stages provide a theoretical basis for a case study that will examine how design mediates among the actors of the creative economy. Additionally, the lack of a case study in the current research does not lessen the theoretical contribution of the study to the existing body of knowledge. This chapter starts with a discussion of the possible research methods in line with the aims of the study. Then it describes the actual methods used. The chapter ends with a discussion of the methods employed in the analysis of the research results.

2.1 Research Aims

The main objective of the study is to explain the role of design in the creative economy by demonstrating its mediating character, which drives innovation. This and other supporting aims are as follows;

- To gain a comprehensive understanding of the design ecosystem.
- To identify the actors of the design ecosystem.
- To map the relationships among those actors.
- To identify the interdependencies among those actors in the field of the ceramic and glassware industry in Istanbul.

The results of this research identify the role of design in the creative economy, revealing the functioning of the design ecosystem and shedding light on the cultural aspect of design, which is necessary to highlight the potential areas for policy intervention to support ‘design-driven’ innovation in the contemporary economy.

2.2 Discussion of Research Methods

In ideal conditions, it would be best to list all the outputs of the creative economy, and investigate all the actors who are involved in the creation of value around the product and services, all the design practices, designers and cultural workers working in Istanbul, all the firms - from majors with multinational connections and owning the distribution channels to open to global markets and the SMEs for all the sectors, and all the related governmental offices and the NGOs, supporting organizations and the members of the academy, the customers and, be present at each value adding activity through the actors and identify the mechanisms which give a product its unique character in Istanbul.

Previous methods in investigating the design ecosystems that were proven wrong by prior research were explained in the previous chapters. As mentioned by Love and Raulik-Murphy, the design ecosystem is not appropriate for investigation by analytical methods – the System Dynamics Method, since it resembles a CAS (Complex Adaptive System).

The Delphi method was considered as a method to investigate the relationships among the actors of the design ecosystem at the initial stages of the study. The Delphi method is considered to be a method to investigate phenomena where there is insufficient data for analytical techniques (Linstone & Turoff, 1975). It is also considered a well-suited method for exploration where there are differing points of view and disagreements between individuals on the subject, with participants from differing levels of

organizations, where power and domination might be an issue (ibid.), which is a coherent scenario with the subject of the current research. However, the current research design was decided after reviewing the literature on the ‘project’ concept by Grabher, the ‘projectification’ concept by Midler, and the recent works on the business models exploring ecosystems that gave the necessary theoretical foundations for utilizing the unit of analysis for the case study and the analytical lens to investigate the actors and their relationships.

Strauss and Corbin (2007) assert that qualitative methods are appropriate for revealing and comprehending the underlying explanations for phenomena that are poorly understood. Hakim (1987) also underlines the exploratory character of the qualitative research methods. Filstead (1970) points out that ‘the qualitative research methods such as direct observation, interviews, and case studies allow researchers to ‘get close to data’, thereby developing a conceptual, categorical, and analytical components of explanation from the data itself rather than the rigidly structured, and highly quantified techniques that pigeonhole an empirical social world into the structured operational definitions.

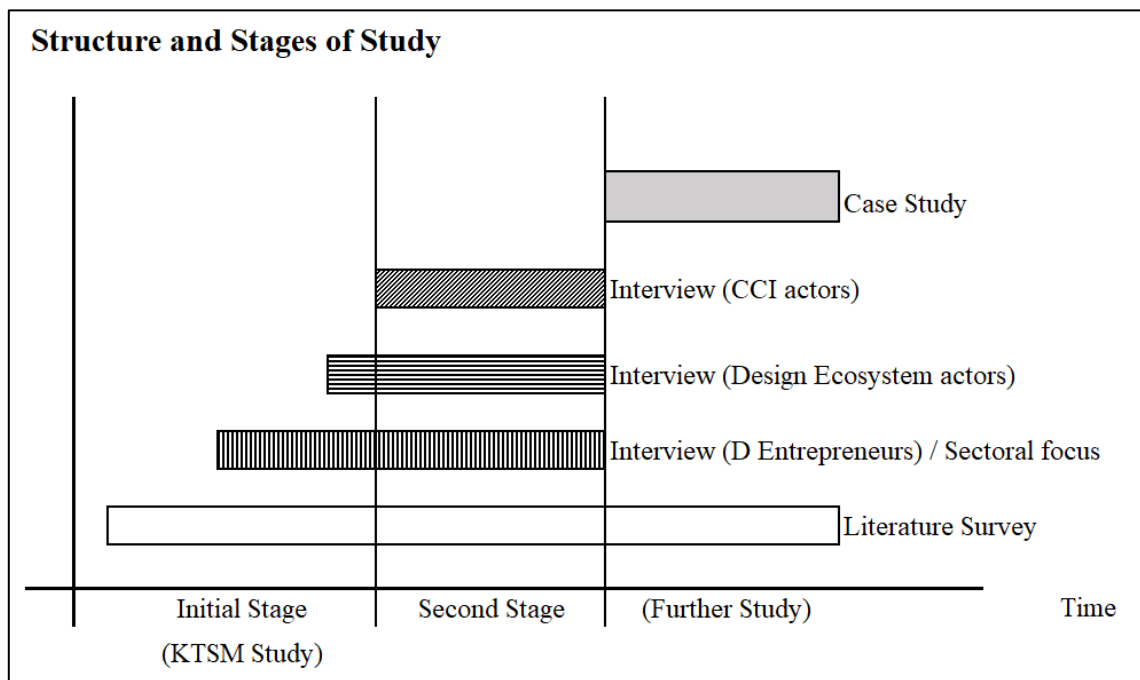
For the current study, the complex and social nature of the research topic and the absence of a framework to grasp the research question justified the application of qualitative data collection methods. A call for a social sciences approach to study the design and innovation relationship was previously placed (Hobday et al., 2011, 2012) and applied in recent studies (Kimbell et al., 2021). Therefore, interviews and case studies were the remaining options to gather data for the current study. Indeed, as Yin (2014) suggests, the distinctive need for case studies as a research methodology arises out of the desire to understand complex phenomena and assert that case studies are needed ‘to explain the presumed causal links in real-life interventions that are too complex for survey

or experimental strategies' (Yin, 2014, p. 15). Freeze (1992) also suggests that "Case study research is particularly important in under-researched fields, where no body of literature or theoretical framework yet exists".

There are three conditions to consider in the choice of a research strategy: a) the type of research question posed, b) the extent of control an investigator has over actual behavioural events, and c) the degree of focus on contemporary as opposed to historical events (Yin, 2014). Correspondingly, Yin mentions that the 'how' and 'why' questions are explanatory in their nature, and for this, they may lead the researcher to use case studies, histories, and experiments as research strategies. Accordingly, since the main research question of the study is a 'how' question (how does design mediate among the actors of the creative economy ?) and the researcher has no control over the contemporary phenomenon under study, the case study was chosen as the main research strategy.

A research design is a logical plan that guides the investigator in the process of collecting, analyzing, and interpreting observations. As Yin suggests for case studies, five components of research design are important: a) a study's questions, b) its propositions, if any, c) its unit of analysis, d) the logic linking the data to the propositions, and e) the criteria for interpreting the findings. Correspondingly, covering these five components of research designs effectively forces the researcher to begin constructing a preliminary theory related to the topic of the study. "For case studies, theory development as part of the design phase is essential, whether the ensuring the case study's purpose is to develop or test theory." (Yin, 2014, p. 28)

Figure 2.1 *The Structure and the Stages of the Study*



Accordingly, a research design with two main stages and a further study was constructed. All the stages of the research had an exploratory character and consisted of the literature survey, semi-structured in-depth interviews, and a future case study. Each stage contained specific data gathering techniques in such a way as to achieve both the interdisciplinary requirements of the investigation and to overcome the complexity of the analysis of the design and creative economy ecosystems to reach a synthesis. As the research topic suggests, the study required an interdisciplinary literature survey. The main topic of the study was particularly focused on the design and innovation relationship. All the former design ecosystem studies investigated the design ecosystems at a national scale within different contexts. However, exploring the design and innovation relationship in the context of the creative economy was a crucial perspective to disclose the cultural aspect of design, hence including those actors in the ecosystem scope. As the production in a geography is a major factor in symbolic production (Scott and economic

geographers), the city is chosen as the level of analysis for the current study. Thus, the literature on the creative field concept by Scott was utilized in the study. This background will be explained in more detail in the relevant sections of the methodology chapter.

The literature survey was carried out throughout the study. The results of the literature review are presented in the sections of Chapter I. These sections intend to provide background information before presenting the empirical data.

Concurrently with the literature review, an exploratory study was conducted, which was commissioned by KTSM, to collect 'first-hand' information about the design and craft relationship around the design 'project', in which the business models of designer entrepreneurs were investigated. This initial exploratory study was built on the existing literature on the emergent business models in creative industries; however, it was unique in its approach, investigating the design and craft relationship with digitalization through the emergent business models. Presenting the results of this study in the Glass Symposium organized by Şişecam enabled the researcher to get to know the sector, understand the nature of the project work in the sector, and recognize the relationships among the first group of actors of the design ecosystem in Istanbul.

In the same way, the second stage continued to identify actors and relationships in the design ecosystem and the creative economy, utilizing the business model lens. This stage aimed to reach a representative sample of key actors to draw results about the functioning of the design ecosystem and the role of design in the creative economy in Istanbul. All the empirical phases of this study were conducted with the approval of Özyeğin University Ethics Committee (Approval No: 2025/08/02).

2.2.1 Literature Survey

As Yin (2014) suggests, constructing a preliminary theory related to the topic under study, before the conduct of any data collection, is one point of difference between case studies and related methods such as ethnography and grounded theory: “For case studies, theory development as part of the design phase is essential, whether the ensuing case study’s purpose is to develop or test theory.” (Yin, 2014, p. 28)

Hence, theory development is an essential step in doing case studies, which requires theoretical propositions, aiming to have a sufficient blueprint for the study, “a (hypothetical) story about why the acts, events, structure, and thoughts occur” (Sutton & Staw, 1995, p. 378). As Eisenhardt (1989) points out, theory development takes time and can be difficult. Yin (2014) also mentions that for some topics, existing works may provide a rich theoretical framework for designing a specific case study. However, when the existing knowledge base is poor and the available literature does not provide a conceptual framework or hypothesis, an exploratory study is needed. These remarks are evident in the current study.

A good case study investigator should make the effort to develop this theoretical framework, no matter whether the study is to be exploratory, descriptive, or exploratory... The use of theory is not an immense aid in defining the appropriate research design and data collection, but also becomes the main vehicle for generalizing the results of the case study. (Yin, 2014, p. 33)

Indeed, the first and second stages of the study are exploratory to reach theoretical propositions for a future case study. The exploratory stages started with the theoretical propositions in the interdisciplinary literature. The literature survey for the current study had its limitations and challenges. Being a crucial component of an interdisciplinary

research approach, the literature survey of the study goes beyond just a critical evaluation of the body of current design ecosystems literature. The formulation of the research topic depends on the literature from several different disciplines and sub-disciplines, including design, management science, economics, innovation, creative economy, and economic geography and sociology; thus, a literature review that leads to the utilization of the design project as the unit of analysis for the case study and the business models as an analytical lens to explore ecosystems to disclose actors and relationships.

The design ecosystem studies literature is limited to approximately six studies (Love, 2007a, 2007b; Ministry of Employment and the Economy, 2013; Moultrie & Livesey, 2009; Raulik-Murphy & Cawood, 2009; Sun, 2010; Whicher, 2017), and several works on the relationship between design and innovation, where design is placed at the center (Julier, 2006; Leslie & Rantisi, 2006; Sunley et al., 2008; *The Place of Design*, 2009; Vinodrai & Gertler, 2007). Meanwhile, there were other sources on the creative economy, generally from economics and economic geography, where design has been referred to as a distinct creative industry and its important role in innovation has been acknowledged (Andari et al., 2007; Bakhshi et al., 2008; Cox, 2005; Design as a Driver of User-Centred Innovation, 2009; Potts, 2009; Pratt, 2004b; Throsby, 2008), bringing new theoretical openings into the subject. The Istanbul Design System study (2014), offered a schema of the design system in the city, naming some of the main actors without a sectoral focus; however, it lacked the presentation of interrelations among the creative economy actors, which is crucial to answer the questions of the study.

The literature review has been done from the viewpoint of a senior professional in the automotive industry with diverse experience in supply chain, marketing, and human resources management with an industrial engineering background, which coincides with

the interdisciplinary necessities of the study. The researcher's experience as the Product Manager in the processes of new project development of Fiat Doblo and Fiat Grande Punto and the responsible of the commercial strategy, i.e. business model, and the launching of Fiat Panda, Fiat Stilo, Fiat Idea, Fiat Grande Punto and Fiat 500 in the Turkish automotive market enabled her to understand the business model as a concept to conduct the empirical investigation of the study.

The most important wise decision was the choice of the context of the study as the creative economy. As stated earlier, this choice enabled the researcher to investigate the design ecosystem while acknowledging the cultural aspect of design, which was pointed out as a gap in the former design and innovation relationship studies, when defining and measuring the impact and the role of design in innovation. As the literature review was presented in the first three chapters of the study, only the necessary highlights that form the theoretical blueprint for the research design of the study will be overviewed in the following paragraphs.

The first theoretical proposition is suggested by the framework of the Work Foundation (2007), where the mediation of design between cultural industries, creative industries, and the rest of the economy is stated as the source of innovation. This proposition is the central idea that feeds the central question of the study -how does design mediate among those actors? - since the question serves to conceptualize the design ecosystem as a subset of the creative economy and points to the mediating character of design, creating both functional and expressive value. The WF framework is a seminal study for creative economy studies because it offers a map of the functioning of the commercialization of the 'expressive value', demystifying the relationships between creativity, culture, and economy (Flew & Cunningham, 2010). The expressive value as a

concept is also important for the study, as the Work Foundation recognizes that the business models of the cultural and creative industries are to create 'expressive value'. This important proposition is a key in the investigation of the business models of cultural and creative industries, which will be explained in more detail in the related paragraphs about the business models and ecosystems. The distinctive character of design is presented in this framework as a mediator between cultural production and the rest of the economy. This conceptualization reveals a significant perspective to study relations between the cultural industries, the design sector, and the wider economy and points to an intersection of the creative economy ecosystem with the design ecosystem.

The second critical decision is building on the theoretical outline of the creative field, where Scott (1996) asserts the necessities and interdependencies for symbolic production in a city, underlying the importance of collective actions among those actors for innovation, putting special attention to the relationship between independents (entrepreneurs) and major firms. This perspective is valuable because it proposes a relationship between the uniqueness of the cultural product and its organization, where this uniqueness is achieved through the 'collective innovations' created by the interactions between the various participants in that production web. According to Scott (1996) another component of the creative field is to work as an image-producing complex, where he describes the synergistic relations among the products of craft, design-intensive industries, film, and entertainment sectors in LA.

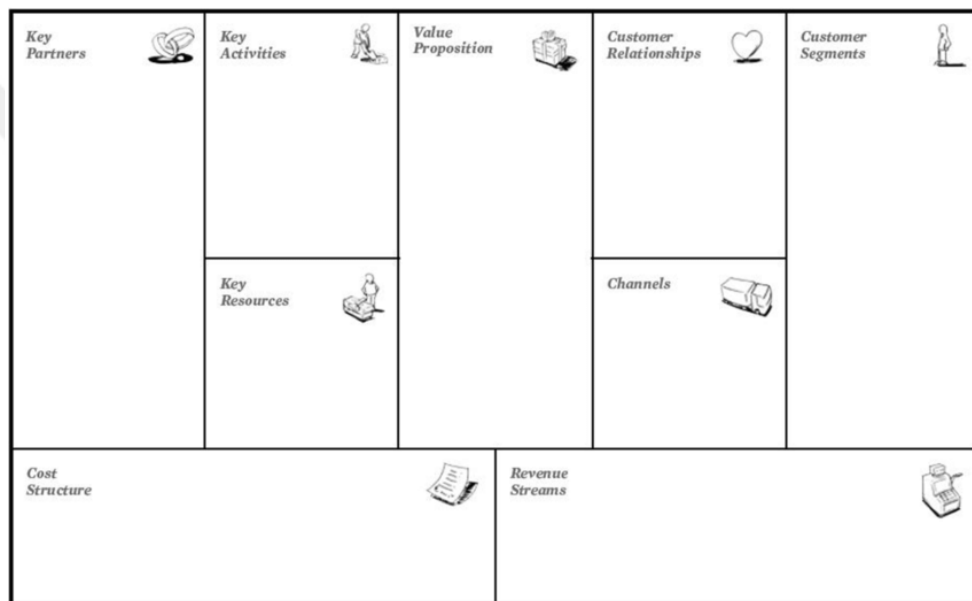
The 'value circuit' offered by Jeffcutt (2004), which supports the views of Scott on the creative field, is another important theoretical proposition for the current study. Jeffcutt states that the fundamental process for businesses in the cultural economy involves the development of intellectual property within a 'value circuit' for products and services,

covering from the very first idea to the final customer. As Jeffcutt states, he favors the term "value circuit" over the more frequently utilized term "value chain" because it emphasizes the complexity and dynamism of these relationships in the knowledge-based economy, which are not necessarily linear. The value circuits range from simple examples from craft to more complicated examples as films, where the common phases include 'content origination, production, reproduction, and exhibition' (Pratt, 1997). A recent study by Deloitte (2021) also builds on the ecosystem view of the creative economy and draws attention to the 'symbiotic relationships' between the sectors of the creative economy.

This brings the researcher to another important decision for the investigation of the 'value circuits' in the creative economy: the business model concept. Recently, business model scholars in the general and public management have recognized the potential of multi-actor networks and ecosystems for creating as well as delivering value (Adner, 2017), where the business models have increasingly been examined by complex multi-actor settings, such as ecosystems, which require joint efforts by various actors to create and deliver value (Linde et al., 2021). Business model shows the structure of the value chain (Zott & Amit, 2010), creating value as Chesbrough points out, 'by defining the set of activities from raw materials through to the final customer and with value being added throughout the various activities' (Chesbrough, 2007). Zott and Amit (2010) highlight the interdependencies created by entrepreneurs and managers that shape the links and activities and weave them into a system. As they point out, the business model of a firm presents 'how a focal firm is embedded in its ecology, i.e., its multiple networks of suppliers, partners, customers, as well as defining who the firm's potential suppliers, partners, and customers (and competitors) are in the first place'.

To enable the utilization of insights from extensive research on business models, Osterwalder and Pigneur (2010) created the Business Model Canvas. They identified the nine blocks business model building components and some key questions to analyze a business model, as presented in Figure 2.2. Their tool has been implemented by organizations that operate in a variety of sectors (Sort & Nielsen, 2018).

Figure 2.2 9 Blocks of Business Model Canvas (Osterwalder & Pigneur, 2010)



Note. Business Model Canvas by (Alexander Osterwalder, 2004) The Business Model Canvas was initially proposed by Alexander Osterwalder based on his earlier PhD work on the so-called Business Model Ontology. Since the release of Business Model Canvas, new canvases for specific niches have appeared (Alexander Osterwalder, 2004).

Magretta declares that all organizations explicitly or implicitly have a business model and claims that the business models are “variations on the generic value chain underlying all businesses”. The concept of the business model is founded on businesses seeking to make a profit (Teece, 2018) and performing within competitive landscapes (Ranerup et al., 2016). By definition, the goal of value propositions is to address the needs of a selected circle of actors and thereby create value for them (Heikka et al., 2018). Value propositions can be formulated for a diverse set of actors, like citizens and public

institutions (Geissdoerfer et al., 2018), building on multi-actor collaborations among private actors, public organizations, and citizens (Ranerup et al., 2016). Hence, Business Model Canvas can be applied to organizations, whether they are profit-oriented, public, private, or a combination of the two (Osterwalder & Pigneur, 2010). Indeed, Osterwalder & Pigneur introduce the application of the Canvas in the analysis of the Grameen Bank as a case, which was introduced as a social business model by Yunus et al (2010), in their book (Osterwalder & Pigneur, 2010, p. 265).

The Business Model Canvas is chosen as a lens to analyze the qualitative data from the interviews for the current study, since it is applicable for analysis of the interviews with entrepreneurs, firms, governmental and non-governmental organizations, i.e., the actors of the creative economy that create value. As Porter (1985) states, the activities undertaken by a firm are numerous; therefore, when designing and analyzing the business model, the 'level of aggregation' utilized in the definition of an activity can be taken as the appropriate level of design and analysis (M. Porter, 1985; Zott & Amit, 2010). Since the creative economy is organized around projects, and projects are carried out by entrepreneurs in project ecologies, the interviews were done with the 'key actors' of the project of each group of creative industries, whether she is the designer-maker, design head of a producer, category manager of a brand, the producer of a film, or the consultant of a restaurant. This decision enabled the researcher to identify the actors and interdependencies for value creation in the creative economy, whether it is commercial, social, or expressive value.

In line with the theoretical propositions, the stages of the study were planned, encompassing the following groups of interviews. According to the creative field and project ecology concepts, the actors of the creative economy in Istanbul may include;

- Stage 1: (sectoral focus)
 - ✓ Design Entrepreneurs (Independents, as called by Scott)
- Stage 2:
 - ✓ Other design businesses (design consultancy)
 - ✓ Firms (Major producers, as called by Scott), (for-profit)
 - ✓ Institutions: GOs, NGOs, Academia: (social value)
 - ✓ Cultural and Creative Film industries with synergistic relationships with the ceramic and glass sector that act as an image-producing complex (expressive value)

2.2.2 The Ceramic and Glassware Industry in Istanbul (Sectoral Focus)

Apart from the city-level analysis, another scope was necessary for the current study since design is embedded in all design-driven manufacturing sectors. Since the wider economy is an actor in the creative economy, and industrial design plays a central role in design-driven innovation, a sectoral focus was necessary. The chosen sector for the current study is ceramics and glassware. To be more specific, the study will investigate the actors and relationships around design projects of tableware made from ceramic and glass.

The reasons for selecting this sector for the study are as follows: a) Sectoral dynamism is achieved through rapid product innovations, b) availability of a range of enterprises in the sector: majors, SMEs, designer entrepreneurs, and craftsmen, c) historical and cultural roots of the sector for the city, and d) export numbers/figures.

The glassware sector is almost as essential for sustaining life as the food or textile industries. Despite eating only two meals a day and drinking only water in today's environment, we must utilize glassware for at least 1/10 of the time outside of sleep.

Especially when taking into consideration the preparation of meals, the hosting of visitors, and other activities, it is a well-known fact that housewives spend at least one-fifth of their day in the kitchen, making use of various types of glassware. Furthermore, glassware items have an even longer lifespan when used in the restaurant, entertainment, and tourism industries. It is certain that it is a sector that exists in many aspects of life. The product groups that the sector comprises are equally numerous due to its considerable integration into life and its broad range of applications (Palacıoğlu, 2024)

Despite fluctuations in energy, freight, and raw material prices, as well as inflation and currency problems, the glassware industry is a major sector worldwide, with exports and imports totaling approximately \$300 billion. In 2023, China alone accounted for half of the world's glassware exports, with a value of 150.2 billion and a share of 50.2%). Germany and the United States (US) are the countries that follow this nation, with shares of 5.4% and 5%, respectively. Türkiye occupies the tenth position among the top ten largest exporters, with five of them belonging to the European Union (EU), two to North America, and two to the Far East. Turkey's glassware sector has been a leader in the global glassware industry for years, and it has consistently generated a trade surplus that has benefited the national economy. Exports have consistently exceeded imports (Palacıoğlu, 2024).

The analysis of Turkey's porcelain ceramic tableware and kitchenware exports reveals that Germany is the leading destination, with exports totaling 7.9 million and representing an 11.6% share. Spain and Russia both possess shares over 7%. In our top 10 markets, Russia is placed 3rd, whereas all other countries, save for the United States (ranked 8th), are EU nations with elevated expectations for standards and products. In 2023, Turkey's foreign trade in glass products reached \$498.9 million, with exports of

\$360.4 million and imports of \$38.5 million, resulting in a surplus of \$21.9 million. This result is significantly lower than the 2013 results, which were \$408 million. Turkey is seeing a decline in export market share while simultaneously witnessing a significant rise in imports, particularly over the past four years following the pandemic. Spain ranks first in Turkey's exports of glass tableware and kitchenware, accounting for 8 million units and a 7.8% market share. The United Kingdom, previously the leading destination for our exports in 2022, now ranks second with 7.3 million and a 7.6% share. Germany and the United States occupy the 3rd and 4th positions, each holding a share of 6.8%, amounting to nearly 4.5 million (Palacioğlu, 2024).

Historically, the foundation of a "very expensive production technology system" has always been necessary for the manufacturing of glass. Thus, from the very beginning, glassmaking evolved as a form of "prestige technology" that was especially safeguarded and encouraged by governments and palaces. Correspondingly, the exceptional products that were produced as a consequence of such robust support also reflected the identity of those authorities. In the same way, beginning in the 1500s, the Ottoman Empire undertook substantial investments and implemented restrictions to cultivate its glass sector, where Istanbul consistently served as the epicenter of these changes. In Istanbul, a distinguished group of elite "craftsmen," referred to as the "Ehl-i hiref," operated in direct association with the Topkapi Palace of the empire. Glass artisans, referred to as "Camgeran," also operated inside this hamlet. At the forefront of these was the "Sercamger," or "Master Glassmaker." The name "Camgeran" in "Ehl-i hiref" might be defined as the contemporary counterpart of a "chief design consultant" representing the state (Küçükerman, 2021).

Throughout history, the glass goods of a location have served as "identity products symbolizing administrative authority" within that locale. From the tiniest glass bead to the most significant industrial glass product of the Roman Empire, there has consistently existed a contest for identity. The most evident proof of this is that each glass artifact exhibited in museum displays delineates the date and place of its production as distinctly as a written record. Glass manufacture invariably involves a specialized and substantial industrial process, both technologically and mechanically. Since the inception of glassmaking, the process of "glassblowing" has been employed. The Industrial Revolution introduced "blowing" processes, which transformed production methods, facilitating the creation of numerous products at reduced costs. The "blowing" technique remained fundamentally a manual procedure into the 1800s. However, as a result of industrialization, the cost of glass items was decreasing incrementally each day. When these new glasses were enhanced by exceptional methods, they may ultimately attain the worth of a work of art. Despite the restricted techniques, sizes, and products during these periods, there was significant competition among glass artisans. This reality, arising from the intrinsic framework of glass production, has perpetuated a fight for identity among the world's oldest and most significant glassmaking towns. Ottoman glassmakers undoubtedly held a distinctive competitive advantage in this domain due to their unique artistry (Küçükerman, 2021).

The establishment of the first glass factory in the Beykoz region dates back to the years when Venetian glassmaking began to open up to the outside world, to overcome its own crises. Şişecam was established in 1935 in Beykoz by Türkiye İş Bankası under the founding concept and signature of Mustafa Kemal Atatürk, to develop Turkey's glass sector and to meet the country's basic need for glass products. Initially a local project, it

has evolved into a global entity in the glass and chemicals industries over time. As the only global enterprise functioning across all principal domains of glass, it ranks among the top five manufacturers in its industry worldwide. Şişecam operates in 14 countries spanning four continents, namely Turkey, Germany, Italy, Bulgaria, Romania, Slovakia, Hungary, Bosnia and Herzegovina, Russia, Georgia, Ukraine, Egypt, India, and the USA. By prioritizing innovation and technology in its operations, it delivers products to clients in more than 150 countries through its competent supply chain (Küçükerman, 2021).

2.3 Stage 1: Study With Designer Entrepreneurs

The initial stage aimed to investigate the design and craft relationship in the digital era through the emergent business models and necessary skill sets for designer entrepreneurs. This part of the study can also be described as being exploratory in nature due to the lack of prior research in this particular area of design studies. Green and Tull (1970) describe exploratory studies as follows: “The major purposes of exploratory studies are the identification of problems, the more precise formulation of problems (including the identification of relevant variables), and the formulation of new alternative courses of action.”

Additionally, they mention the three stages of exploratory studies: “a search of secondary information sources, interviews with persons who are knowledgeable about the subject area being explored, and the examination of analogous situations”. Kinnear and Taylor (1983) assert that the design of an exploratory study is defined by its flexibility, enabling responsiveness to unforeseen circumstances and the acquisition of insights into previously unrecognized issues. In line with their approach, the initial part of the study had two parts: the literature survey as a secondary source of information and

the interview with designer entrepreneurs and ecosystem stakeholders as knowledgeable persons. Details on these issues are covered in the following sections.

2.3.1 Interviews With Designer Entrepreneurs

The method chosen for the initial stage was the interview, aiming to gain an understanding of the design project as a process and the important relationship between design and craft in the new product development in the ceramic and glassware sector. Additionally, the stage served to identify the actors and relationships around the design project, utilizing the business model as a lens, hence to connect to and verify the findings of the interdisciplinary literature survey. Eventually, bring experience and insights for the later stages of the study. Correspondingly, the KTSM project was an exploratory study to investigate both the design project notion in the context of the ceramic and glassware sector and the link between design and the craft and manufacturing sector, which is important in evidencing the new product development process of a product in this sector. Similarly, through exploring the business models of designer makers, the actors involved in and around the design project, and their interdependencies, were disclosed.

The literature asserts that the design business has changed in the post-Fordist era, where the designer started working on projects through four channels: freelancer, designer entrepreneur, design consultancy, and in-house design team. Designer entrepreneurs are also characterized as self-producers and self-promoters in the new economy, where their business models include actors from the initial design idea to the final customer. Designer entrepreneurs resemble the music industry's independents (Scott, 1999) in conceptualizing the creative field, where Scott emphasized their role in production for market niches and their interdependence with major firms for innovation to occur in a geography. Therefore, starting the exploratory study with the designer

entrepreneurs was both a strategic and methodologically wise decision to untangle the complexity of the design ecosystem and the creative economy.

The method for gathering data for this stage was chosen as the in-depth interview. To begin with, the data was inherently qualitative; in other words, the knowledge and experience of participants. Secondly, interviews are a well-known method to gather details since the interviewee has the permission to express all their ideas thoroughly on a topic, rather than present their choices on a questionnaire where their answers are predetermined.

2.3.2 Selecting Respondent Designer Entrepreneurs

From an empirical perspective, the investigation was conducted by analyzing the business models of 8 craft-based design enterprises that produce table-top objects from ceramic and glass in Istanbul and identifying the actors and relationships. The first interviewee was a key informant, a successful designer entrepreneur, the owner of the brand, and the founder of the export-oriented ceramic design studio in Istanbul. The consecutive interviewees were reached by the snowballing technique. The interviewees selected were purposeful and representative, focusing on the following criteria, as their qualifications are presented in Table 2.1:

- The designer entrepreneurs are self-employed or small business owners.
- The designer entrepreneurs utilize digital technologies in their enterprises.

Table 2.1 *Qualifications of Interviewees*

Designer Entrepreneurs	Position
Interviewee 1	Designer Entrepreneur
Interviewee 2	Designer Entrepreneur
Interviewee 3	Designer Entrepreneur
Interviewee 4	Designer Entrepreneur
Interviewee 5	Designer Entrepreneur
Interviewee 6	Designer Entrepreneur
Interviewee 7	Designer Entrepreneur
Interviewee 8	Designer Entrepreneur

2.3.3 Interviews

The first part of the data collection was conducted through face-to-face, semi-structured, in-depth interviews with designer entrepreneurs on their business models. The interviews were composed of 2 main parts to obtain data about:

- Background of the interviewee: Education, experience, current role in the job, and other active participation in design-related organizations. Those questions aimed to get to know the interviewee and understand the context of the social relationships of the businesses and identify knowledge and actors around those social relationships.
- The Business Models of Designer Entrepreneurs: The aim was to identify the actors and activities around the design project. In order to analyze the business models, the Business Model Canvas 9 building blocks were utilized as a guideline to lead the semi-structured in-depth interview. These questions aimed to understand the key activities and identify the key actors involved in

these activities, which are built as a system around the value proposition of the businesses of designer entrepreneurs.

The guiding questions were;

- Customer Segments: For whom are you creating value?
- Value Proposition: What value do you deliver to the customer?
- Channels: Through which channels do you reach your Customer Segments?
- Customer Relationships: What type of relationship does each of our Customer Segments expect you to establish and maintain with them? Through which activities do you build your relationships?
- Revenue Streams: For what value are your customers willing to pay?
- Key Resources: What key resources does your value proposition require?
- Key Activities: What key activities does your value proposition require?
- Key Partnerships: Who are your key partners?
- Cost Structure: What are the most important costs inherent in our business model?

2.4 Stage 2 Study With Creative Economy Actors in Istanbul

This second stage continued to identify the actors in the design and creative economy ecosystems, building on the creative field concept by Scott and the business model notion by O&P (2002), as explained in the previous section.

2.4.1 Interviews With Design Ecosystem Actors

Semi-structured in-depth interviews included all three parts of the interview: i) questions about the interviewee, ii) questions on business models, and iii) questions on the role of design and the designer in the business model. The interviewees were reached

through purposeful sampling, depending on their key role in the ecosystem, building on the theoretical propositions of the literature. Since the context, the creative economy is a dynamic sector and new actors and business model innovations are continuing to emerge with the rise of digital technologies and economic dynamism, there is a strong possibility of coinciding with new actors not mentioned in the literature. As an example, Mercado, a digital publisher, was a novice business start-up in the new media sector focused on creative industries in Istanbul, and was a new actor in the ecosystem and was included in the study. Horeca business consultancy was another new business that was included in the exploratory study. This new business offered services for investors and chefs to open a restaurant: from constructing their business model to making and realizing the necessary decisions on the key activities (hiring of the design professionals into the project team), until the PR activities and opening of the restaurants, also cafes, and bars.

2.4.1.1 Interviews

Semi-structured in-depth interviews were conducted with the following four groups as presented in Table 2.2.

Table 2.2 *Qualifications of Interviewees*

Design Consultancy Firms	Position
Interviewee 9	Design Consultant
Interviewee 10	Design Consultant
Major Producers	
Interviewee 11	Major Producer1 / Design Head
Interviewee 12	Major Producer1 / Production Mgr
Interviewee 13	Major Producer2 / Category Mgr
Interviewee 14	Major Producer2 / Graphic Designer

Design Consultancy Firms	Position
Interviewee 15	Major Producer ³ / Category Manager
Interviewee 16	Major Producer ³ / Industrial Designer
Interviewee 17	Major Producer ³ / Marketing Mgr
Distribution & Promotion Channels	
Interviewee 18	Curated Shop Owner
Interviewee 19	Wholesaler Owner
Interviewee 20	Horeca Consultant
Interviewee 21	Horeca Provider Company Owner
Interviewee 22	Digital Design Publisher
Interviewee 23	Gastronomy Publisher
GOs, NGOs and Academia	
Interviewee 24	Cam Ocağı Foundation / Design Head
Interviewee 25	ISTKA / Ex-CI Head
Interviewee 26	ISTKA / Current CI Head
Interviewee 27	ISTKA / CI Specialist
Interviewee 28	ETMK / Istanbul Head
Interviewee 29	British Council / CE Consultant
Interviewee 30	MSGÜ /Academician

2.4.2 Interviews With Actors From the Cultural Industries

This part of stage 2 aims to identify the interdependencies among design projects of the glassware sector actors and the most important image-making cultural industry: the film sector, through investigating the business models of a film project in the sector and understanding their project ecology. The producers are the people who construct the team and business model of the project, recognized as the ‘linked-pin’ who is ultimately

responsible for the task/the project to fulfill its mission. The business models of cultural industries are built to create expressive value as stated in the report by Work Foundation. Hence, the questions on the business model are adapted to this context. The results of this stage are important since they inform the role of design and the designer in the expressive value creation.

2.4.2.1 Selecting Respondent Actors

The following interviewees were selected as the foreseen actors based on the literature review and the preliminary study. The film sector is important for Istanbul for three reasons: i) image-making (general case), ii) the most successful sector among the Turkish creative economy iii) continued and recognized success of the sector, offering worldwide export projects that carry the culture to the world scene.

2.4.2.2 Interviews

Semi-structured in-depth interviews were conducted with the following interviewees, presenting their positions in Table 2.3.

Table 2.3 *Qualifications of Interviewees*

Film Project	Position
Interviewee 31	Film Producer
Interviewee 32	Production Designer
Interviewee 33	Production Designer

2.5 Analysis and Synthesis

The present exploratory study provides the theoretical foundations and the set of actors and relationships among them that are necessary to carry out a case study to present

the mediation of design in the creative economy. The interview data was analyzed, and the actors carrying out the key activities in the business models to generate value were identified, and the relationships among those actors were mapped utilizing Graph Commons. Graph Commons is a tool developed by a group of engineers that helps users visualize complex data on ecosystems and partnerships. Prominent institutions, policy organizations, and universities around the world are utilizing the tool. Graph Commons works on the representation of actors as ‘nodes’ and relationships as ‘edges’. Despite the tool allowing for manual network drawing, the researcher opted to import data for visualization due to the complexity and large number of actors involved. As a result, each set of interview data was organized into Excel sheets that included the identified actors and their relationships, and then uploaded to the Graph Commons site under the researcher's private account. The maps were modified for better visualization of the data, utilizing the color coding, scaling, insights, and cartography tools in the mapping canvas.

3. FINDINGS

3.1 Actors and Relationships Around Designer Entrepreneurs

Regarding the first area of inquiry, it was observed that designer entrepreneurs producing desktop objects from ceramics and glass primarily served customers who are mostly high-income women, tourists, and companies in need of unique products for awards and gifts. Customers valued uniqueness as a core principle, which arose from the limited availability, originality, and handmade characteristics of the design products. The Middle Eastern market was mentioned as one of the most important markets for designer entrepreneurs.

She (tourist from a Middle Eastern country) wants to be exactly like the West, but she can't jump to those northern countries because she can't use something, such a product in her lifestyle... They can't relate to themselves. However, my products fit into their lives. So, she captured that simplicity from my products. It wasn't something I did intentionally. It's just that <the state of being in the middle> we are neither Eastern nor Western. (Interviewee 1)

It was observed that some of the designer entrepreneurs are penetrating foreign markets with their own brands and making co-branding collaborations with retail companies under their own brands.

Actually, we work 90% in B2B. Our production is already going abroad. We also completed an efficient project with Crate and Barrel. I designed a special series for them. However, we are so well-known in the market that they added our brand next to theirs. So, while selling everywhere, they sold under my name in their stores and on their websites. (Interviewee 1)

International festivals were mentioned as platforms for designer entrepreneurs to connect with retail customers overseas and promote their brands.

Yes, over the years, the market there has grown, and I have gone back and forth a lot. Of course, I went to Index. There are also small sales-oriented fairs like this, but there are also larger ones, like beautiful exhibitions that are only attended by women, and we participated a lot in those over the years. At that time, we strengthened B2C there (Interviewee 1).

It was noted that the lack of knowledge in establishing a business model is a common case among designer entrepreneurs.

I started my own production, and of course, I began to produce what I wanted in the way I wanted as much as we desired. Again, we had started exporting after Qatar; we were receiving orders from countries like Saudi Arabia, but I still don't know how to price those first coffee cups I made.

It was noted that participating in international fairs is crucial for accessing foreign markets and boosting exports. However, the lack of adequate support for these efforts was criticized. In addition, connecting local producers with foreign designers through NGOs was also criticized by designer entrepreneurs, for potentially harming the business opportunities of Turkish designer entrepreneurs in the local and foreign markets.

I've been saying this for 10 years to the Chamber of Commerce, and no one pays attention. I mean, the Chamber of Commerce takes producers to a different place every year. If you're going to take me there, then take me to the designer hall in another venue; they take me for 2000 dollars. Actually, it costs 25000 dollars to go to the fair, so they are taking us at a very advantageous rate. They go with state support, but they don't give us that part. So I said, even if you take me for free, I

wouldn't go. I wouldn't go there. Even if you take me for free, I wouldn't go. Because my buyers don't come there.

I haven't attended any fairs since then. ITO has brought Dutch designers here for many years. As I see these... I mean, they brought Dutch designers here for years. The trade name, our trade chamber IMMIB, helped. They connected them with the things here. They brought them together with SMEs and artisans. At that time, I had declared a kind of war myself. To TIM and so on. I said, "You are buttering their bread. I am your member, I pay you membership fees every month, every year, and you don't introduce me to anyone. How can you do this? (Interviewer 1)

Artisans and accessory manufacturers were identified as actors collaborating with designer entrepreneurs through design prototyping and production processes. "Our own production, metals, our craftsmen, porcelain, and our craftsmen on both sides are very important, and of course, our raw materials as well." (Interviewee 1)

It was observed that due to face-to-face sales coming to a standstill during the pandemic, designer entrepreneurs who wanted to continue their sales either created their own online trading systems or continued their sales through e-commerce platforms. Correspondingly, it was observed that all the interviewed enterprises had websites and social media accounts. Instagram was identified as the most popular social media platform among the examined enterprise accounts. Algorithms implemented by the platforms were criticized since they limit the reach of entrepreneurs' posts to a small number of followers. As a result, even when the entrepreneurs run advertisements, it was mentioned as challenging to connect with the desired quality and quantity of customers.

It was observed that there were three options in the value chain for marketing, distribution, and sales activities for designer entrepreneurs who prefer to focus on the

creation and production of products: consignment stores, retail stores, and e-commerce platforms, depending on whether the priority in the design entrepreneur's business model is B2B (business-to-business) or B2C (business-to-consumer). In some cases, it was found that the product could be sold under the brand of the retail store. On the other hand, there were also cases where the design products were marketed simultaneously with the entrepreneur's brand. This second option was especially noted in partnerships where the entrepreneur had built a strong brand, and the retail store recognized the advantage of leveraging that brand value to enhance its product sales. This type of collaboration was also seen in museum shops for souvenir items or jewelry designs accompanying an exhibition.

Consignment stores that offer a particularly unique selection were recognized as an important channel for sales. It was found that the presence of products for sale alongside other selected items in these types of stores, along with the quality of the store's presentation, increased the perceived value of the products in the eyes of customers. A similar logic was observed in the museum shops as well. The value of the products in museum shops was perceived to be high by customers. It was seen that, especially in sales to tourists, the locations of consignment stores and the support they provide to customers in promoting the products had a positive impact on sales.

It was observed that e-commerce platforms offering unique selections over the internet emerged with digitalization. Similar to Etsy.com, e-commerce platforms were established in Turkey that open design products produced in the country to both domestic and international markets. Hopicon was recognized as a top platform that connects designers with architects, interior designers, and industry professionals who incorporate design objects into their projects using the application they have developed. Architects

and interior designers who are members of this application on the e-commerce platform have the opportunity to include digital visuals of the design objects they want to use in their projects, share dimensions, and create order lists based on the sales prices on the platform while preparing their projects in digital format as 2D, 3D visuals, or technical drawings. It was seen that this application provided a significant opportunity for architects/interior designers preparing their projects digitally by presenting the digital visuals, dimensions, and price information of the unique design objects they wish to include in the project. Thus, it was observed that through the application it became possible for architects/interior designers to detail and enrich their projects with up-to-date and accessible unique products, from dimensions to pricing. In this way, designer entrepreneurs who offer their products for sale through the e-commerce platform were observed to gain the opportunity to be part of the projects of other creative professionals in the ecosystem and to connect with end customers. It was recognized that digital technologies made it possible for the actors in different sectors within the creative industries ecosystem to co-create value together.

It was observed that most of their designs did not have design registration certificates, although all the interviewed designers' brands were trademarked. The material obligations and bureaucratic processes that need to be fulfilled in the processes of obtaining and protecting the design registration certificate were mentioned as overwhelming for designer entrepreneurs. Despite this, it was found that some of the interviewed entrepreneurs preferred this challenging and costly path by acknowledging the contribution of design registration to the uniqueness of the product and the value of their brand. Negative experiences related to the legal protection of the design registration

certificate are identified as the reasons why designer entrepreneurs chose not to pursue this path.

It was recognized that the common ethical values and social interactions among ecosystem stakeholders served as a barrier to the copying of original designs. It was seen that the difficulties encountered in the registration and legal protection of original designs also reflected on the situations where the designer entrepreneur collaborated with other artisans during the production process. This issue was mentioned as important in defining the collaboration between the designer and the artisan, progressing within the framework of trust.

When looking at the educational backgrounds of the designer entrepreneurs interviewed, it was observed that the fundamental business knowledge and experience they gained both during their university education and through working in various sectors was critical for the growth of their ventures and their expansion into international markets. It was observed that designer entrepreneurs who started their initial entrepreneurial attempts without possessing this knowledge and these skills suffered both material and moral losses. Likewise, cases where designer entrepreneurs with high internal motivation and strong belief in their work were also observed, where they learned from negative examples and continued on their paths. It was recognized that individuals graduating from both the Faculty of Fine Arts' Ceramics and Glass departments and the Industrial Design departments needed to acquire new knowledge and competencies before becoming entrepreneurs. Additionally, it was observed that individuals required guidance regarding what they could do in their professional lives after their university education.

Up until today, I have learned through trial and error. I had a lot of unsuccessful experiences... I had a couple of prototype products, and I went to an X luxury

retail store and asked if they would sell them. They said okay! ... But I couldn't follow up with them because I couldn't move on to the branding process... that opportunity was left there... my courage was broken there... They told me to send them my information... what am I supposed to send? There is no brand name, no pricing... I am so inexperienced... but I had goals. (Interviewee 6)

It was mentioned that the area of interest for graduates of the Industrial Design Department shifted from production to experience design in recent years.

Very rarely, for example, there was one female student at X University (in the Industrial Design Department). She is already making ceramic things, I see. They are nice things; I understand she has an interest. I took her on a trip to a glass workshop. She was the only one who tried to get a scholarship and participate in the course there. She loves it because she loves to create. I can usually see the difference right away.

Because I have been among designers for years... yes, they generally always go towards UX. I see the shift to digital jobs for Industrial Designers. (Interviewee 3)

Consignment stores, which are the most important sales channel before social media and e-commerce, were observed to take on processes such as promoting the product to the customer, actively marketing it, and packaging it, as the product was perceived as a whole in the eyes of the end customer. It was observed that different packaging and distribution channels needed to be selected for different markets and customer needs. Packaging, which is one of the significant cost items, was identified as one of the elements that reflected the brand values to the consumer. Sustainability was mentioned as a core value by designer entrepreneurs who chose to include this element

in their brand values, making appropriate choices when selecting their packaging designs and materials.

It was observed that the pandemic catalyzed enterprises to embrace digital technologies in reaching customers and maintaining sales. The most common digital tools utilized for these ends were found as websites, social media accounts, and e-commerce platforms. Instagram was identified as the most prominent social media platform. Shopier links, yet another digital tool, was recognized as the main facilitator for ordering and sales through Instagram accounts. The second most popular digital tool for communication was e-mail, followed by direct messaging on Instagram. It was mentioned that email was preferred for customer relations due to its legal significance.

Concerning the marketing and promotion processes, digital images and 'in the making' videos were identified as crucial tools for increasing the perceived value of products in digital channels. It was found that 'in the making' videos were particularly utilized for limited edition series targeting high-income consumers by showcasing the production process or specific product details. In addition, these videos were recognized as creating additional value for the enterprise by promoting the capabilities of designer-entrepreneurs. It was observed that these videos were shared with customers via the brand's digital communication platforms (website, YouTube, Instagram, Facebook) as well as with suppliers or stakeholders during the development phase of special projects.

Concerning intellectual property rights, it was found that all examined designer entrepreneurs possess registered trademarks, but most lack design registration certificates for their products due to burdensome material obligations and bureaucratic processes. On the other hand, it was seen that Interviewee 4 pursued design registration certificates for all the products despite the challenges since she recognized the potential benefits of

communicating product uniqueness and brand value. It was observed that the increase in the number of new designer entrepreneurs entering the market was creating pressure on the existing ones as the competition increased. It was seen that the ethical values and community ethos, which were recognized as social norms preventing the copying of designs, were losing their ground.

It was also observed that the difficulties in registering and protecting original designs were also affecting the collaborations between designer-entrepreneurs and artisans. Trust was mentioned as the crucial factor in these collaborations, and the artisan was often positioned as a team member responsible for production rather than an equal partner in creation (Interviewee 1, 3, 4).

In only one enterprise (Interviewee 8), digital technologies were utilized to transform the traditional business model, replacing the old processes. In this case, digitization departed the designer entrepreneur from the traditional business model, which involved marketing and selling a specific range of products based on the existing stock. In the new business model, each product batch, having fresh designs and seasonal colors, was presented weekly through social media, employing a pre-scheduled plan. The available products for sale on the website were updated weekly, creating pressure on the customers to purchase, since they may not find the unique product on the site if they wait too long after seeing it on social media. This strategy, reminiscent of the "fast fashion" concept in the clothing industry, has now been applied to the production of ceramic desktop items. This change was achieved primarily by altering the production, order receipt, distribution, and sales processes. The online order receipt, sales, and distribution of products have been coordinated according to a specific schedule that is communicated to customers through social media. The readiness of products for sale has been announced

through live ‘kiln-opening’ videos on the Instagram account. This approach has turned the ordering and distribution schedule into a celebratory event rather than a rigid guideline. Social media served as an active marketing tool, enhancing the connection with customers and increasing brand value. This strategy improved the interaction between the product and the customer, elevating the overall experience provided by the brand and transforming the entire value framework of the business model.

For a designer entrepreneur to produce their design, it was observed that it was essential to first find a manufacturer and work with a ceramicist who is familiar with the materials, thus making knowledge of manufacturability important. In this sense, R&D and product development expenses were considered as high costs and investment items for the designer entrepreneur.

The designer has no capital. We will turn it into a business model, we will enter these distribution channels, we will keep inventory... There will be a cost for the stock keeping unit... the designer doesn't know what SKU means... I will keep semi-finished products, I will have 1000 products made, I will have 1000 boxes made, and I will have 1000 sponges cut. Then someone will come out and say I want a special box... again, another cost. The designer cannot say I want to be both; a design consultancy owner and an entrepreneur. (Interviewee 10)

In the production of ceramic and glass products, it was seen that the technological requirements of the design play a significant role in the selection of the manufacturers. Designer entrepreneurs can produce their prototypes and small-scale orders in workshop-type kilns when the technology is suitable. The machinery and equipment of medium and small-scale producers in the ecosystem vary. In light of this information, it was recognized that designer entrepreneurs collaborate with medium and small-scale

producers that align with their designs (such as Galeri Set, İzcam, Efecam, Arda Cam) to produce their products, which are then sold through the distribution and sales channels of premium retail firms (like Beymen, Anatolia). Cam Ocağı Foundation was founded as one of the special areas where prototypes can be produced using unique techniques and artistic productions. It was particularly expressed as a key actor when production needs to be carried out in collaboration with glass masters. It was mentioned that designer entrepreneurs come together with local and foreign artists in Cam Ocağı Foundation to create unique productions. “We worked together with an academician and artist (who makes blown glass sculptures) by overseeing the glass furnace and creating together.” (Interviewer 9)

It was found that the issue of design registration is important in agreements made for production purposes between design entrepreneurs and small to medium-sized manufacturers. Although this topic was included in the agreement texts, in some cases, the intellectual property rights of the designer entrepreneur may not be protected.

I was having coffee at the Divan Taksim hotel and noticed that it came with my cup. It was one of my products sold at MoMA, and I was having it produced by a small manufacturer. I went and asked what they were doing. It was an order we couldn't break, and we gave them your name as well; they apologized (Interviewee 9)

It was observed that the customers include cafes, restaurants, event companies, and organization firms. Special products can be designed for special galas and celebrations. The customers may place orders by seeing the product displays in the physical showrooms, online, or by seeing different places where the design products are

sold. Sales to overseas museum shops are made through participation in international fairs.

It was seen that due to the high costs of trade fair participation, the primary preference was to attend the largest global fair for the sector, which is Ambiente in Frankfurt. It was seen as the most important exhibition and sales area because it was a fair attended by global buyers. The Ambiente fair hosts an average of 5,000 companies from all around the world. Zuchex fair in Istanbul is the third largest fair in the world, with 1,500 companies, and serves as a fair that brings together regional producers and buyers.

It was mentioned that the fair committees determine the place of the stands of the designer entrepreneurs after evaluating their portfolios.

I have a company, I have an export certificate, I am a member of TIM, as a member of IMMIB, and I am a member of the ITO chamber. I was receiving incentives because I was a member of these organizations. However, since I am a sole proprietor, the support provided is very minimal. More support is given to large corporations. There is national participation, Turkey has its own pavilion, and they give you space there. But I preferred not to showcase my own designs among the products there. When I applied myself, the fair committee had placed me on Alessi's floor. Additionally, I calculated that I spent more money when going with national participation. It provides operational convenience to participants, but it is not real support (Interviewee 9).

It was observed that finding local producers was becoming increasingly important when there is high demand for designer entrepreneurs at trade fairs. It was found that designer entrepreneurs are working with customs officials for exports. Packaging was

gaining importance, especially in terms of ensuring damage-free transportation and meeting customs regulations in exports.

It was mentioned that when foreign registrations were not obtained, the products displayed at fairs became susceptible to copying.

There is a fair policy in place. If you are caught making a copy product, the booth is closed, and they announce it at the fair. They expose the original and copy products by displaying them side by side with black dwarf statues. (Interviewee 9)

"I have never designed by looking at trends... I focused on making the design enjoyable and feeling different. I designed while paying great attention to ergonomics and design rules... There are so many criteria that it doesn't come from inspiration. The product exists, but you can't sit on it; you fall. Design is something that requires a lot of calculation. (Interviewee 9)

It was seen that retailers allowed designer entrepreneurs to sell the designs they produce under their own brands or under the names of designers who have their own brands.

I have never used an advertising or PR agency while marketing my products. A high monthly fee is required. Let's feature you in two magazines a month and market you to shopping malls. Of course, I discussed it, but no collaboration came about... Being in the fair catalog and list is the biggest PR. When someone clicks on you, all the information about you is there. Is there better PR than this? Especially in cases where an award is received... There is a special exhibition area for the German Design Award.

Marketers are the ones who sink and lift companies. There are very few marketers who provide a proper brief. (Interviewee 9)

Table 3.1 presents the list of identified actors around designer entrepreneurs.

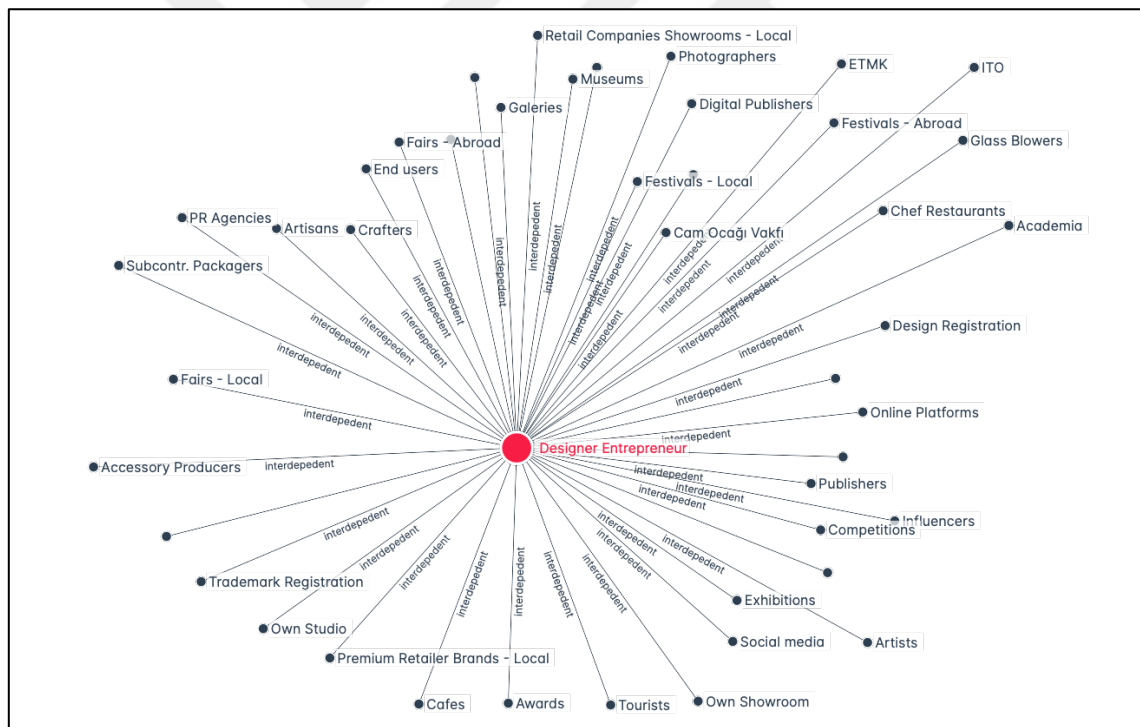
Table 3.1 *List of Actors Around Designer Entrepreneurs*

No	Actor	No	Actor
1	Moulders	25	Own Showroom
2	Design Entrepreneur	26	Curated Showrooms - Local
3	Accessory Producers	27	Museums
4	Glass Blowers	28	Festivals - Local
5	Crafters	29	Festivals - Abroad
6	Artisans	30	Fairs - Abroad
7	Artists	31	Fairs - Local
8	IPR	32	Retail Companies Showrooms - Local
9	Design Registration	33	Online Sales
10	Trademark Registration	34	Online Platforms
11	Own Studio	35	Premium Retailer Brands - Local
12	SM Producers	36	Premium Retailer Brands - Foreign
13	Subcontr. Packagers	37	Chef Restaurants
14	Social media	38	Cafes
15	Galleries	39	Customers
16	Exhibitions	40	End users
17	Competitions	41	Tourists
18	Awards	42	Academia
19	Influencers	43	Cam Ocağı Vakfı

No	Actor	No	Actor
20	Promotion material	44	TIM
21	Photographers	45	ITO
22	Publishers	46	ETMK
23	PR	47	YEKON
24	Digital Publishers	48	IMMIB

Figure 3.1 presents the map of actors and relationships around designer entrepreneurs.

Figure 3.1 *Map Actors and Relationships Around Designer Entrepreneurs*



3.2 Actors and Relationships Around Design Consultancy Firms

Interviews have been conducted with the owners of two design consultancy companies that provide design services to firms in the sector. Design consultancy firms offer services across multiple sectors beyond consumer goods and receive royalties based

on the volume of units sold of the products they design, as specified in their contractual agreements with manufacturers. Designers consider this circumstance to be a benefit, as well as the sense of fulfillment they have while working in their career. Similarly, designers working in the in-house teams of major producers have expressed positive sentiments about this diversity. “I have designed yachts before. I have been in this industry for 3 years. I believe that transitions between different sectors nourish the designer.” (Interviewee 16)

It was observed that in design consulting companies, the design service process begins with a brief from the marketing managers of retailers and/or manufacturing companies.

In my experience, design firms that are employers do not adopt the mission of embracing cultural heritage; they want to make money. Therefore, a company that is concerned about what would happen if it preserved cultural references or continued with today's materials and production processes in its own processes would look for a designer who shares this concern, and this could be a burden for someone... However, the marketing or product manager of a well-known brand or manufacturing company does not worry about these things. There is pressure from market competition. They also have a sense of urgency to have a comparable product. (Interviewee 10)

It was observed that the pressure to produce and sell products for the global market, driven by the size of production capacity and the status of being a global manufacturer, necessitates prioritizing production that meets global demand, focusing on fulfilling the needs of customers in diverse markets rather than merely exporting culture.

Of course, a product produced today contributes to the evolution of culture. If you were to create a dish for eating a hot dog today, it might create another hype, and perhaps something like the Istanbul-style hot dog eating culture would emerge. Why don't we have our own unique dish for eating mussels? This could perhaps be the beginning of a design process, but the white-collar marketers of the employer companies don't care about this; they don't approach the designer in this way... They come to the designer with the concern that someone from their product segment has taken a share, and they want to know what I (the designer) can do differently for them to regain that market share and make money. (Interviewee 10)

It was observed that fairs are important areas of contact for design consultancy firms, where they can showcase their new product designs and capabilities to manufacturers. In addition to the high costs of participation, design firms face other challenges when attending trade shows. There have been mentions of practices that hinder some Turkish design firms with award-winning designs in the process of participating in international trade shows:

The fair committee features an Adana-based company working with an Italian designer. They ask, which Italian fair stand company will you work with? They are actually asking, Will you bring money to my ecosystem? Otherwise, you are a competitor of my companies, why should I take you into my fair? They (Italians) know how to market the design concept as a multi-stakeholder element. We are not doing that. The design press is not doing it either, and our clients' worldviews are not sufficient for this. They want to do something similar to what is done in ISTOÇ to make quick money. (Interviewee 10)

It was stated that although imitation also incurs a cost, there was a lack of appetite for investing in something new among local producers and brands.

Decisions are being made with a short-term perspective. Manufacturers do not want to invest in a product that will increase brand value but may sell less. We are in an economic period where investment decisions are becoming increasingly difficult to make. The rates of new product launches are gradually decreasing. (Interviewee 10)

The lack of interaction among ecosystem actors was mentioned in the interviews and was pointed out as a barrier to the formation of design identity.

We are playing a game aimed at export where we need to see eight moves ahead like playing chess. But the issue is not with the players; it's with the mindset that guides the players. Employers, policies, our business culture, our codes for not seeking innovation... these are the things that hold us back. On the other hand, the customers we are trying to sell the product to have the same mindset. A pot with purple poppies is being sold in ISTOC. No one knows why there is a poppy pattern. The product manager of Madame Coco changed the red poppy to purple to differentiate from English Home, selecting purple products from all suppliers. There are rumors that purple is very trendy in ISTOC this year. We start producing pots with poppies because they are selling well. If we can't question why there are poppy flower patterns on the pot, how can we question why the poppy has turned purple?. (Interviewee 10)

The lack of social interaction among the creatives in Istanbul was also noted and was recognized among the reasons for the low level of cultural representation of design

products in the Turkish series that are exported abroad, along with legal operational difficulties related to sponsorship and product placement.

(In a Turkish series) It would be wonderful to see that Arzum's product were to appear in the kitchen without the need for sponsorship, and if it were to be featured in 4 or 5 important scenes, instead of an espresso machine... If the main character served coffee in a dervish cup... maybe one day it will happen. Foreign countries are using these tools to the fullest. Our integrated marketing skills are very weak.

(Interviewee 10)

If people are making these decisions (product selections based on their expressive values), if there is such an art director. I don't know them, just as they don't know me... NGOs actually exist for this, aren't they? (Interviewee 10)

It was stated that the design capabilities are strong in Turkey, and design students often realize upon returning from abroad that they were more advanced than they initially believed. However, the interviewees also highlighted the clash between Western design education, which emphasizes a specific perspective on what constitutes "good design," and the rich, diverse cultural traditions that inform different approaches to design, such as brewing coffee. The narrow definition of design success based on competition standards was stated as a reason for the overlook of the value creation through cultural context and tradition.

You studied at METU, where they taught you with the American education style and Bauhaus style, actually teaching you the Atlantic-North perspective of 'this is good design.' You came out of there and faced this pot. There, they actually broke your light thermostat because you came with a completely different tradition, a way of brewing coffee, let's see... a culture that could be talked about for hours,

and they tell you that if you do the profession this way, you will be 'good design.' Then you send it to competitions, and again according to that mindset, you become either good design or bad design. (Interviewee 10)

In Turkey, culture in this sector is only considered as a pattern. Not in terms of form, nor in terms of usage, primarily as a pattern... rather than usable products that reveal historical values or certain regional forms. (Interviewee 9)

It was highlighted that as designers present their new products developed through exhibitions without briefs and restrictions, they can offer original products for the appreciation of users and companies. Indeed, new design projects were encouraged through these exhibitions.

I have a coffee cup that values preservation while respecting cultural references, but this product was not requested from me with a brief. This product came out when I was asked for an original work for an exhibition purpose, said. (Interviewee 10)

It was noted that designers are not required to be linked to NGOs to practice their profession. As mentioned, the primary goal of ETMK is to advance the design field, notably through events that highlight the significance of design to businesses. It was observed that one such event, Design Week, serves as a platform for designers to present their work and network, but it has been canceled by the Ministry due to budget limitations. Additionally, the Design Turkey awards, which are related but distinct from Design Week, have also been paused and have not been awarded for the past four years.

The most important role of ETMK was to demonstrate how good design can generate revenue and how it can elevate a company from one point to another by

organizing design exhibitions. Unfortunately, it no longer does this... It could have been done during Innovation Week. (Interviewee 10)

It was observed that NGOs lack a clear purpose or role in the creative ecosystem from the viewpoint of designers, leading to a lack of expectations from the business scene. “If we return to the chess analogy, NGOs are not on the board. They have no defined roles; they have no function. I have no expectations from the public regarding creative work.” (Interviewee 10)

It was noted that the ability of China to produce high-quality goods at significantly lower costs disrupted the business in the ceramic and glassware industry. Hence, some manufacturers approach this challenge by setting up offices in China to oversee production and distribution processes, while others enter local low-end supermarket chains where there is volume to overcome new product investment costs.

You can produce everything in the quality you want in China. There are copying departments. China offers a delivery price that is half of the price I produce... Kiwi electric home appliances. Set up an office in China, supervise the companies, and bring them to sell at BIM. One box of 10 for each of the 11,000 stores... They are selling 110,000 nutcrackers. Everyone is trying to supply them. Calculate the mold cost. For many, this is now their business model. Very few discount markets will establish their own design departments if they are logical... Distribution channels and these markets have changed a lot in the business. (Interviewee 10).

It was mentioned that the consumer's living spaces and lifestyle preferences are causing changes in the ceramics and glassware sector. The rise of the gastronomy sector was also influenced by the cultural industries. It was seen that cooking shows featuring both chefs and ordinary people from everyday life, competition programs like

MasterChef, and travel programs that combine travel and food culture are affecting the consumer's perspective on food, their attitudes towards food presentation, and consequently their views on glassware and purchasing preferences. It was noted that changes in food and beverage culture are occurring at every socio-economic level.

The expectations of retail and Horeca regarding quality, longevity, etc., are completely different in their operations. But they are starting to converge now. We now have Aunt Ayşe, who watches MasterChef, marinates meat for 12 hours, and cuts it into julienne. She knows how to make Café de Paris sauce... she wants to present it that way to her neighbor... She sees it on cooking shows... but culture, this is also culture. She goes to English Home to get her plate and tray. Therefore, Horeca has started to enter homes, but homes have gotten smaller. In a 1+1 apartment, there's an open kitchen with one cabinet. Consumers' living spaces are changing. These affect design. There is a movement happening right now. (Interviewer 10)

The country's image was expressed as a significant barrier for Turkish design consultancy firms to work for foreign companies.

We are talking to a Swedish manufacturer. Everything is going well. He can't tell if I'm Albanian or Portuguese. When he asks where I'm from, I say I'm from Istanbul. The guy runs away. It's very difficult to change this image. Europeans are a bit two-faced. (Interviewee 10)

The list of identified actors around design consultancy firms is presented in Table 3.2, and the map of their relationships is presented in Figure 3.2.

Table 3.2 *List of Actors Around Design Consultancy Firms*

No	Actor	No	Actor
1	Marketing Mgr	14	Awards
2	Market research	15	Social media
3	Brief	16	Exhibitions
4	Moulders	17	Photographers
5	R&D Dpt	18	Fairs - Abroad
6	Industrial Designer	19	Fairs - Local
7	Design Registration	20	Festivals - Local
8	Trademark Registration	21	Academia
9	Major Producers	22	Cam Ocağı Vakfı
10	SM Producers	23	ITO
11	Firms need design services	24	ETMK
12	Beverage Companies (B2B)	25	Design Consultancy
13	Competitions		

Figure 3.2 *Map of Actors and Relationships Around Design Consultancy Firms*



3.3 Actors and Relationships Around Major Producers

According to the literature review, major producers were defined as producers who possess production and distribution channels and can provide their products to the final consumer through these channels. In accordance with this definition, the business models of three major producers were examined, and the actors and relationships they are involved with while creating value were identified.

These three manufacturers with distinct business models were chosen purposefully to complement each other in order to represent the industry's dynamics. Consequently, the findings were consolidated to create a generic actor list and relationship network for a main producer in the sector.

The major producer 1 is the largest global manufacturer in the glass sector and owns some of Turkey's most important brands. The company not only produces for its own brands but also manufactures products for other companies globally on a 'make to

order' basis, which can be either branded or unbranded. It has production facilities both in Turkey and abroad, with its design and R&D center located in Istanbul and a glass packaging design center in Russia. Domestic retail sales of glassware represent a small portion (1-2%) of the company's overall production. Most international retail sales occur in Italy, America, and the Middle East. In Turkey, company's retail brand operates with its own identity and categorization strategy, functioning as a separate entity from the manufacturer.

The major producer 2 is the export champion of the ceramic tableware sector in Turkey. The company's headquarters and design office are in Istanbul, while its production facilities are located in Bilecik. It exclusively sells to the Horeca sector, both domestically and internationally, without a retail sales network. Instead, it reaches customers through local and foreign wholesalers and authorized sellers focused on the Horeca sector. The company is recognized for its ceramics, particularly its edge crack resistance. The brand is known for its innovative approach and actively engages stakeholders from the gastronomy sector in its product development processes. The material technology used was developed through a TÜBİTAK project. Additionally, the company is enhancing its branding efforts through the Turquality program.

Major Producer 3 is a prominent houseware brand in Turkey, with sales in both domestic and international markets across retail and Horeca channels. The company is headquartered in Istanbul, where its marketing office is also located. It reaches end customers through its own sales and distribution company.

It was observed that, there are basically four groups of customers for the major producers in the ceramics and glassware industry:

- End users,

- Customers (brands requesting unique designs as contract manufacturing, event companies, companies ordering unique awards and gifts),
- Horeca channel customers consisting of hotels, restaurants, cafes, and bars,
- Companies in need of glass packaging, and
- Beverage companies that require unique productions for promotional bottles and glasses.

It was noted that producers often establish distinct sales and distribution companies from their own production firms to reach retail customers. On the other hand, they also utilized supermarket chains as a secondary channel to sell special series that target a different mass customer segment. Targeting customers in the wholesale sales segment, the company employed sales offices, authorized sales points, authorized wholesalers, and multi-brand wholesalers, both domestically and internationally. There were salespeople, distributors, and brand-specific showrooms abroad, especially in the Horeca sector, that provided critical contacts. It was identified that chefs and bartenders were key actors in the wholesale sales process, also contributed valuable insights for product design. Additionally, it was seen that the company utilized online sales channels such as Trendyol, Amazon, and Hepsiburada.

It was found that the retail product range could differ from the wholesale product range due to customer expectations. In this context, a major producer may embody multiple brands aimed at different customer segments, as these brands respond to various functional and aesthetic needs. Consequently, collaborations with local and foreign star designers were established based on the desired values and market goals for brand development.

Major producers included both domestic and foreign manufacturers when developing product categories for sales. It was seen that these categories typically consist of niche products that manufacturers preferred not to produce themselves, as well as complementary items in the desktop sector, such as cutlery, serving equipment, accessories, and cooking tools. These products could be marketed under the retail brand name or the name of the designer or craftsman. It was observed that collaborations could result in final products sourced from various manufacturers or involve manufacturers, designers, and craftsmen who create products on demand to enhance the retail product range. Additionally, it was noted that design support may be provided by the design team of the major producer during the creation of these product ranges.

It was examined that bringing an innovative product to market for major manufacturers can take up to two years. Manufacturers operating in global markets could monitor consumer needs worldwide and leverage solutions from different markets to develop new products. Establishing a product's presence on store shelves and gaining customer recognition was mentioned as a lengthy process due to the wide variety of products and the complex sales chain, along with the internal dynamics of retailers. It was found that it could take about two years to assess the sales performance of a newly launched product to determine its success. Additionally, the cost of molds for ceramic tableware production was mentioned to reach up to \$1 million.

It was observed that the creation process began with a brief directed to the in-house design team or the designer. This request may originate from the marketing teams across various channels that were clients of the manufacturing company. The profit/loss (P&L) of the new product was recognized as the responsibility of the marketing team.

The design team is actually designing the product in a way that will respond to the P&L account of marketing. The process starts with the idea that they will invest in its mold, accessories, and communication, and will profit and turn profit from this product to the company. If they can't make a profit, they are the ones who will be held accountable, not me (designer head). That's why we offer design services here. But this service is authentic, verifiable, and also has the quality of a work of art; it has aesthetic value, but it is also a commodity... the marketing will determine the value of this product, and the end user will make the decision regarding its value... it is important to effectively manage all this interaction (for a successful design). (Interviewee 11)

It was observed that for the design team, it was important to reach a brief that contained information about the scope of the work, enough to understand how many different design proposals were needed from the design team and the designer. In the next stage, market research was conducted to gather the necessary information for concept development to shape the design after the brief, along with selections regarding the techniques to be used in production (if external resources are to be consulted, relevant manufacturer network resources (patterns, etc.) are evaluated). As stated, the actors involved in this process included the marketing team, design team, mold makers, production teams, etc. It was observed that these interactions occurred through interdependence. It was observed that, during the implementation phase of a new design project, teams also worked together on accessory and decoration design, packaging design, handmade design, and mold design, depending on the nature of the design project.

Design decisions for final touches after the prototype are made as a team, and the design takes its final form. The retail category manager and the teams responsible

for categories in the store are also included in this process... For example, the retail category manager might say that my shelf height is 32 cm, and if you give me a product that is 35 cm, I won't be able to place it on the shelf... or they might develop the idea of whether we should sell this collection as a family or place it next to another series in the store for better sales, which could change the initial brief... the product is not solely the designer's in that sense. We are working to find out how we can achieve success together. (Interviewee 11)

It is stated that unique packaging designs for the product and brand are important. It was mentioned that, when produced in large quantities, packaging that included product photos and usage features was created in the same quantity as the products and shipped together with the unique packaging. In other situations, products would be sold in generic packaging without special features.

It was observed that major producers in the ceramics and glassware sector interacted with various key partners for production, including mold suppliers, packagers, accessory manufacturers, subcontractor manufacturers, decorators, and assemblers. It was seen that the production process is labor-intensive, particularly during decoration, assembly, and packaging after mass production. Additionally, it was recognized that there were specialized artisans in Beykoz and Denizli who created unique handcrafted products and collaborated with the retail divisions of major producers. It was also noted that the glazers were important actors for unique design production.

It was seen that the forecasted production volume for a new design significantly influenced the decisions of the major producers in the new product development process. It was stated that to initiate a production order for a new glass product, it was essential to fill at least 3 days of production capacity of the major producer's factory. It was stated

that when a new product design was developed, major producers gather demand information from their distribution and sales teams, including data from export regions like the Far East and North America. These demand forecasts guided which designs will be produced.

It was observed that pricing played a crucial role in the new product development process, involving detailed procedures. The pricing of products was influenced by various factors, including packaging and labeling. In the context of exports, customs duties, quotas, and shipping costs provided competitive advantages. It was observed that companies would select production locations abroad based on these factors. It was also found that retailers considered costs when choosing products for their range, ensuring that the selected items can be produced in locations equipped with the necessary production technology.

It was observed that the Horeca channel is crucial for manufacturing companies in the industry due to the large number of orders it generates.

During my visit to one of the hotel chains with 5 stars and above, they shared some striking figures. They said, 'I break 10,000 tea glasses every year.' This number of broken... There are probably 8 times that many tea glasses in storage. This is just for tea glasses... think about the other drink glasses, plates, and presentation equipment used. In the evening, they serve dinner for 3,000 people; it's such a large hotel... In all-inclusive large hotels, different cuisines, different drinks, soft drinks are served separately, beer is served in a separate glass, wine is served in different glasses, and the presentations are different. When you consider the in-house presentations, there is an incredible volume. Think about the products a hotel acquires at its opening. The Turkish tourism sector has a very strong hand

in design decisions... A hotel typically purchases around 3,000-4,000 different items. (Interviewee 11)

It was seen that the sales to the Horeca sector are made through the wholesale sales channel. Many wholesalers offer a variety of brands for ceramic and glass tabletop products, as well as complementary items like cutlery, cookware, and acrylic products for poolside use. It was stated that the major producer 1 has a catalog featuring 7,000 active stock-keeping units (SKUs) and 20,000 passive SKUs. Wholesalers could place special product orders with major producers as well as order from the catalog.

It was observed that new product designs in the ceramics and glassware sector were carried out not only through new forms but also through decoration. Manufacturers specializing in decoration would create new products and series by applying patterns and colors onto the finished products of major producers, selling them under their own brands (e.g., Rakle Cam, small companies developing special products for market chains). It was seen that the techniques preferred in graphic pattern application affected the quality and sales price of the final product, and decisions were made considering production costs as well. The patterns applied in collaboration with graphic designers were also evaluated during the R&D processes alongside production on prototypes.

It was stated that the major producers had trademark registration certificates and obtained design registration certificates for all their designs.

It was observed that major producers targeting retail customers utilized a variety of marketing strategies, including TV advertisements and collaborations with social media influencers, to expand their customer base. They leveraged traditional media, social media, and trade fairs as key communication channels, often working with media buying agencies to place ads in industry magazines. Additionally, it was found that they

engage in sponsorships with online sales platforms, renowned chefs, and cooking competitions like Gastromasa and MSA. By combining traditional marketing methods with new media, producers aligned their strategies with their business models. It was seen that they maintained websites and social media accounts for communication and facilitated online sales through their own sites or platforms like Amazon, Trendyol, and Hepsiburada.

Google Shorts and TikTok are new media areas to capture young people. In my previous company, the Marketing team had started to develop marketing strategies based on TikTok reports. These preferences are very important for brand awareness and sales. (Interviewee 13)

It was stated that firms preferred to purchase unique design products from major manufacturers rather than from artisans or designer entrepreneurs when the order volume was high (For example, BJK ashtrays, special gifts, and awards).

It is very difficult to produce with molds and ensure consistency between products. Due to mass production, production consistency, and quality, large manufacturers are preferred. It is natural and inevitable for there to be differences among the products made by design entrepreneurs. This may be a value, but when customers do not want this, especially with guaranteed delivery times, they prefer large manufacturers. (Interviewee 11)

It was observed that there were many triggers for a new product design in the ceramics and glassware industry. Some of these included changes in lifestyle, research on changes in consumer preferences, opportunities for functional and aesthetic advancements from new materials, and new cooking tools and technologies. It was noted that a deficiency in competitor products and thus in the marketing and sales product range

would trigger the design of a new product. It was stated that industrial designers concentrated on form design, facing heightened competition due to fast-changing trends in the sector. Major producers were also hiring graduates from graphic and pattern design programs to innovate product designs. It was seen that mold design teams collaborated closely with research and development (R&D) and design teams. R&D departments focused on material and production technology development, with raw material properties being crucial for designing new ceramic product lines. Indeed, it was stated that 'masse'—a mixture of minerals—played a significant role in the new product development process.

A glass called borosilicate came out. It had to have a handle because it is very thin. Since borosilicate cannot retain heat, double-walled designs emerged. Despite being thin, Horeca started to choose these designs because they are aesthetic. The quantities increased. Then ISTOÇ got filled up. Once ISTOÇ was full, we started to move away from these designs. They were being sold, but we thought about how to differentiate them. We put some things inside. We changed their packaging. (Interviewee 13)

It was seen that trend-tracking tools like WGSN and Trendbible played a crucial role in developing new design ideas by providing insights into global trends, including iconic themes such as "The Little Prince" and wolf motifs. These platforms offered trend forecasts for up to three years, detailing anticipated changes in materials, forms, colors, and shapes. While they were widely utilized by producers and retailers in the industry, membership fees were high for individual users. Notably, all three major producers interviewed reported using WGSN.

I think trend reporting tools are something that enhances creativity. But... there are those who are born as artists and those who become artists. It might kill the creativity of those who become artists. The tools provide you with some guidance. We develop our designs inspired by the trends we see at the Trend bible. For example, even if we design a unique flower, we use the trendy color. We see pink there. When creations are made inspired by that, you start seeing pink everywhere, and it becomes a trend. This is actually how fashion is created. The butterfly effect. No one says, 'Go make it pink,' we look and get inspired. (Interviewee 13)

It was observed that product segments were created by identifying the target customers, which was essential for shaping the product's concept and pricing. Effective design decisions involved collaboration among marketing teams, sales teams, market research, and competitor analysis. It was stated that the dimensions of ceramic platters significantly impact design choices, with culinary professionals determining sizes during the development of new series. Indeed, it was noted that these dimensions were crucial for production and future product lines, as the design was adapted to the type of cuisine served, taking into account cultural differences and culinary needs.

It was observed that major producers were focusing on increasing sales volume to better utilize their production capacities, with export figures playing a key role in this effort. International trade fairs were observed as becoming increasingly important for promoting exports, as they provided opportunities to observe industry trends, analyze competitors, showcase products, and conduct sales. It was found that the notable trade exhibitions include Maison Object Paris, Ambiente Frankfurt, Host Milano, and China Canton, with Ambiente Frankfurt being the leading fair globally and Host Milano being the top event for the Horeca sector. It was stated that the latest developments and

innovations were observed and analyzed at the fairs, which led to a detailed report that compared current trends with the previous year. Competitor analysis was conducted to predict future actions and assess differentiation, ranking competitors accordingly. It was seen that this comprehensive report was shared with production and marketing teams to prepare for future challenges, with design teams focusing on manufacturability and technology, while marketing teams concentrated on market needs. It was observed that in the retail sector, category managers were leveraging these insights to refine their product procurement strategies in anticipation of international trade exhibitions.

It was observed that new design projects were emerging that elevated designers to "celebrity" status among major producers and star designers. Indeed, these collaborations aimed to enhance the brand values of both the producers and the designers. It was stated that major producers that partner with foreign star designers benefited from improved brand perception and increased visibility in global business networks, paving the way for new collaborations. As a result, it was observed that major producers often chose to work with these star designers to boost their brand image, with examples including Mario Trimarchi.

When collaborating with a star designer, it can become easier to sell through certain channels thanks to the designer's reputation. For example, when working with a designer who has hotel connections, it becomes easier to sell to that channel. It can also facilitate meeting other manufacturers. From the perspective of the main manufacturer, it allows me to produce a qualified design product that belongs to a different product language, as well as to reach teams that might be interested in this product. It is also a tool for making Turkish design visible. For this reason, we also come together with Turkish designers, said (Interviewee 11)

We select designers who have a design language aligned with our goal and give them a brief, but we do not dictate style. They have freedom there, but we are making the selection from the beginning. (Interviewee 11)

It was stated that another reason to work with star designers was to benefit from their expertise in the ceramic and glassware industry. Particularly, the mastery of foreign star designers over materials and production techniques was mentioned as one of the common themes emphasized in interviews.

Everyone can design very beautiful things, but it is also important for that design to be manufacturable. For example, we worked with a designer who had collaborated with Villeroy & Boch in porcelain... When working with star designers, they consider questions like which machine will produce the plate, will it come out of an isostatic press? Will it be produced in pressure casting? Is it difficult to manufacture? Can it be produced efficiently? They design with those considerations in mind. There is such comfort in working with people who are truly specialized in this field. (Interviewee 15)

When famous designers abroad design something, they see that the master cannot produce it, so they move on and do it themselves. They know the glasswork so well... And the main manufacturers with production facilities abroad can also produce products for the Turkish market from the designs of these designers aimed at the high-volume global market. So what happens is that the products of the main manufacturer in Turkey are already being presented by the Turkish producer as products of perhaps a German designer. (Interviewee 9)

Good designers know glass and production technology very well, and they also know the world very well. It's not just about visiting trade shows; they travel the

world to understand the culture. I can only look at it online from here, but I can't travel like they do. (Interviewee 9)

We don't have a Rock Star designer. There is a Zaha Hadid line. If you go to her, she will design a product in that line for you. We go through a long design process with the client to be able to speak the same language according to the brief we receive, so that in the end, they don't say this is not what I wanted. (Interviewee 10)

It was observed that co-branding was also done with artists similar to star designers (for example, a project developed with Ahmet Güneştekin). Consequently, major producers collaborated with artists through supporting their productions and opening exhibitions in museums in Istanbul (Pera Museum, KTSM). It was also seen that major producers collaborated with artisans to enhance their production and develop the skills of their crafters through collaboration with Cam Ocağı Foundation. It was stated that they were providing glass materials to the Foundation to get an education from the masters. As a result, the collaboration enabled the major producers to create distinct product designs that reflected cultural values, drawing inspiration from historians and museum collections, with artisans actively participating in the production process.

It was mentioned that the gastronomy sector was experiencing significant growth, which was a key factor in the speeding up of innovation in the ceramics and glassware sector. Consequently, collaborating with experts in this field boosted brand value and sales for major producers. For instance, partnering with Giani, a bartender renowned for his cocktail recipes at a popular London bar, was favored because it enhanced brand perception by associating with respected names in the community. Other notable collaborations included working with Refika Karaca, among others.

Chefs have become leaders. Their words carry a lot of weight now. They are intervening in the design. When designing the menu, the chef imagines the plate as well, thinking about how to present it and how to plate it. If they are going to add a sauce or anything else, they want to be able to showcase it comfortably. That's why, especially in high-end restaurants, they tend to move towards more handmade, boutique production. They don't want the same plates to be seen everywhere... Just like with decoration... they want to choose the plates themselves, just as they do when selecting the furniture and the wallpaper... they want to integrate everything. (Interviewee 15)

It was observed that major producers design and produce unique products using special patterns and series specific to restaurant chains by utilizing their existing design forms.

We also value personalization. For example, there was a request during a restaurant opening. Our marketing team, design team, chef, restaurant owner, architects... quite a crowd... should it be this or that? We look at the plates... I said, open the architectural project so we can look accordingly. What is your vision? What is your line? Let's see the colors and concept, and then our designers can create a design that fits. (Interviewee 15)

It was stated that when chefs had a limited budget but wanted unique products, they often contacted designer entrepreneurs for distinctive designs. In these situations, the uniqueness of the product was prioritized over its cost. It was found that in fine-dining restaurants, aspects like the durability of edges were less important. Even if a plate was broken, the extra expense was seen as less significant because these restaurants focused more on visual appeal.

It was observed that design awards played a crucial role for major manufacturers in the industry by boosting their brand value. These manufacturers were actively seeking awards for their innovative and ambitious designs. To fully leverage the benefits of these awards, it was essential to apply before the design process was finished and the product was launched. Additionally, leading producers were sponsoring industry competitions in the Horeca sector, such as the SCA Barista Coffee Championship, to enhance their effectiveness and strengthen their connection with customers.

It was seen that apart from product design, other design practices were present in the business models of major producers to build brand value. It was noted that showroom display and stand designs were created with the design services of architects from internal departments of major producers or architecture firms. Hence, the process was similar for fair stands. It was stated that the initial concept designs were tested in a sample showroom before being arranged by visual merchandising teams in all dealer showrooms and corners. Hence, the process was similar for fair stands.

Desktop product manufacturing sectors influence each other in their designs. Tablecloths, cutlery sets, vases, and other objects come together with plates as a whole... The display concept for new collections is created by teams (marketing team and product designers, category purchasing teams: non-production concept completers). Checks are made to see if the auxiliary products in the concept are available in stores. If there are any deficiencies, they are completed by the sales teams. Visual Merchandiser teams reach each display point and ensure that the store or windows are presented according to the demo of the initial concept... This process takes place for both domestic and international sales points. (Interviewees 13 and 14)

The list of identified actors around design consultancy firms is presented in Table 3.3, and the map of their relationships is presented in Figure 3.3.

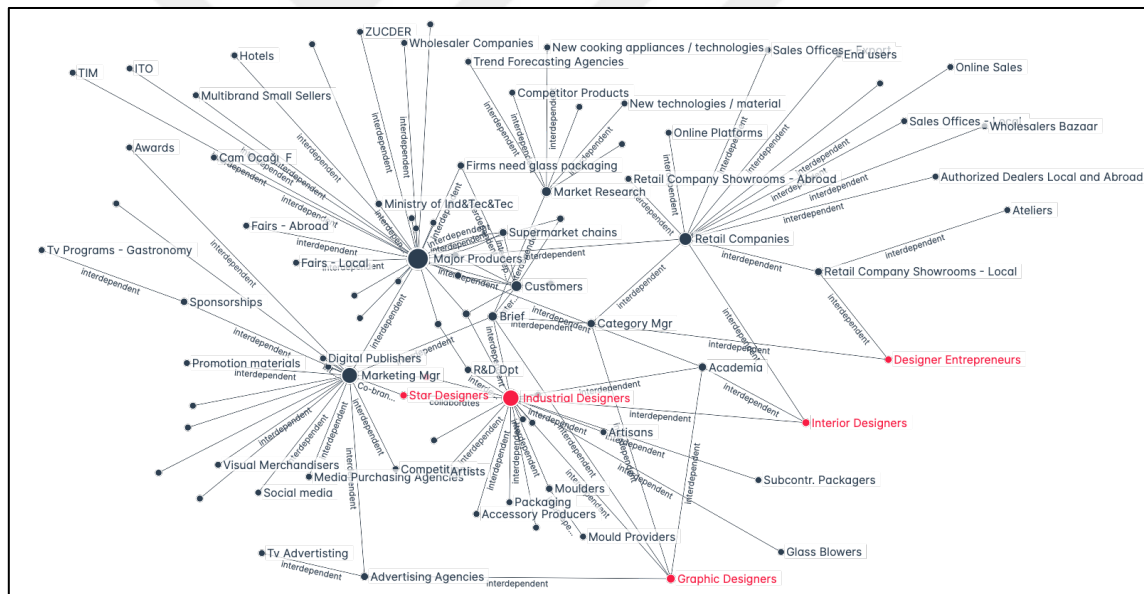
Table 3.3 *List of Actors Around Major Producers*

No	Actor	No	Actor
1	Trend Forecasting Agencies	54	Advertising Agencies
2	New technologies / cooking appliances	55	Media Purchasing Agencies
3	New technologies / material	56	Own Showroom
4	Complementary Products	57	Curated Showrooms - Local
5	Competitor Products	58	Museums
6	Market research	59	Festivals - Local
7	Chefs	60	Festivals - Abroad
8	Cultural Heritage	61	Fairs - Abroad
9	Brief	62	Fairs - Local
10	Marketing Mgr	63	Galleries
11	R&D Dpt	64	Retail Companies
12	Category Mgr	65	Retail Company Showrooms - Local
13	Moulders	66	Retail Company Showrooms - Abroad
14	Mould Providers	67	Authorized Dealers
15	Decorators	68	Multibrand Small Sellers
16	Accessory Producers	69	Wholesalers Bazaar
17	Industrial Designers	70	Wholesaler Companies
18	Graphic Designers	71	Sales Offices - Local
19	Interior Designers	72	Sales Offices - Export
20	Historians	73	Online Sales
21	Glass Blowers	74	Online Platforms

No	Actor	No	Actor
22	Artisans	75	Premium Retailer Brands - Local
23	Designer Entrepreneurs	76	Premium Retailer Brands - Foreign
24	Artists	77	Brands - Home & Appliances
25	Foreign Star Designers	78	Supermarket chains
26	Local Star Designers	79	Hotels
27	IPR	80	Food&Beverage Vendors
28	Design Registration	81	Restaurants
29	Trademark Registration	82	Chef Restaurants
30	Major Producers	83	Chefs
31	SM Producers	84	Cafes
32	Ateliers	85	Bars
33	Designer Entrepreneurs	86	Barmens
34	Subcontr. Producers	87	Firms need design services
35	Subcontr. Decorators	88	Firms need glass packaging
36	Subcontr. Packagers	89	Beverage Companies (B2B)
37	Combiners	90	Customers
38	Packaging	91	End users
39	Social media	92	Tourists
40	Influencers	93	Academia
41	Sponsorships	94	Cam Ocağı F
42	Galleries	95	TIM
43	Exhibitions	96	ITO
44	Competitions	97	ISO
45	Awards	98	ETMK
46	Visual Merchandisers	99	ZUCDER

No	Actor	No	Actor
47	Promotion materials	100	YEKON
48	Photographers	101	ISTKA
49	Publishers	102	IBB
50	Digital Publishers	103	British Council
51	Tv Advertisting	104	Ministry of Ind&Tec&Tec
52	Tv Programs - Gastronomy	105	TUBITAK
53	Films	106	IMMIB

Figure 3.3 *Map of Actors and Relationships Around Major Producers*



3.4 Actors and Relationships Around Distribution and Promotion Channels

It was stated that the Horeca sales channel gained significance for producers and designers due to the rise in outdoor dining. Basic products are typically found in food courts. It was stated that restaurants were classified into categories like A, A+, B, B+, and C, which was a standard classification used internationally. Within these categories, selections were made based on the price-quality ratio of tabletop products and the target

customer group of each restaurant. As observed, the culture and the cuisines played an important role in design decisions.

The French are a leading country in food and beverage culture. Because French chefs have spread their traditional dishes and production preferences all over the world. Italian cuisine also has its own culture. You can find it everywhere in the world. There is a very rich Far Eastern cuisine. Although they are distinct within themselves, they have basic products in terms of plates and serving items, especially in seafood and chicken categories... there are elements in the designs that immediately reveal their identity. Indian cuisine has sauces. And there are tableware products according to these cuisines. (Interviewee 20)

When we say a plus restaurant, the business owner does not want to see those plates in another restaurant. They say they charge the customer 500 euros, so they want to have special ceramic plates made for themselves. At the same time, they source and present the best materials for the products they produce. The best Parmesan is in that restaurant... a world standard has been established there. In fact, the starting point is based on the amount the business receives from the end customer, and all choices branch down from this framework. (Interviewee 20)

It was mentioned that the classification systems, like the Michelin Guide, continuously raise the bar in restaurants and keep the dynamism in the industry ongoing.

The development of the Horeca sector is entirely driven by consumer demands. No institution or organization, including NGOs, has contributed to this development. The blind lead the deaf. (Interviewee 20 & 21)

As stated in the interviews, chefs' preferences for plates significantly impacted both design choices and purchasing decisions, as these preferences were shaped by their

social connections with brands and wholesalers. Indeed, it was mentioned that the restaurants aiming for competitions like Michelin placed more importance on presentation and claiming to be original, so they preferred boutique tableware products in line with their positioning.

On the other hand, it was stated that Turkish restaurants that focus on specific types of menus (köfte, döner, traditional cuisine) that continuously offer the same recipes generally made their kitchenware selections based on technical features such as functionality and edge durability. Restaurants in this group preferred designs that do not require the entire series to be renewed in their selections. Indeed, it was noted that each brand had classic designs that responded to the demands of these types of customers.

It was observed that Horeca consultancy emerged as a new business model in the sector. It was noted that Horeca consultants brought restaurant projects to life from scratch by working with advertising agencies, chefs, beverage producers, bartenders, real estate agents, designers, and architects. As stated, depending on the nature of the project, they collaborated with designers who specialized in cafes, bars, and restaurant projects from their established network. It was seen that Horeca consultants were individuals whose opinions were sought by major producers during new product design processes.

The restaurant concept starts with mathematics. The return on investment is calculated based on the budget. How much the investment costs, how many people will work, how many customers will be served during which hours, and based on that, how much money will be earned, thus determining how long it will take to recoup the investment. After this is established, the name of the restaurant and the corporate identity work begin. Recipes are created, and architectural drawings are made. Because these provide us with information down to the fork and the spoon,

we will use for the plate we will serve. According to the concept guided by the architecture, we determine the plate sizes and styles based on the menu variety. Should it have a logo or not... should it be deep, etc. The kitchen and industrial equipment need to be designed... After purchases, demos are conducted with the plates and recipes obtained... If we are having special products made, we keep a higher volume of stock. The selection of restaurant staff is determined, and after communication and PR campaigns, the restaurant opens. (Interviewee 21)

I prefer to work with designers who specialize in their field for the restaurant project. There are significant differences between someone who builds homes and someone who builds restaurants. For example, we sweep the floor every day. If the architect doesn't know how to make the flooring choice accordingly, they will start throwing it out from that corner in two days. The textile selection in the restaurant, even the polyester and cotton content, is very important. (Interviewee 21)

The importance of tourism for the Turkish economy, as well as the ceramics and glassware sector, was mentioned in the interviews. It was stated that the product selections in hotels were made by general managers and purchasing managers. Indeed, it was stated that the purchasing decisions of hotel chains were determined by the central purchasing units at the headquarters. It was noted that hotels within the chain could not make purchases above the established price level. It was mentioned that some hotels have good relationships with and sell to all brands, which would be referred to as their strongholds.

In hospitality, ceramics and glassware are present in every area of the business. After entering from the lobby, these products are used in the decoration block. Different equipment is used in the rooms... There are various restaurant options.

You cannot use the tableware you use in the Italian restaurant in the à la carte restaurant... Different products are used in all of the hotel's dining options.
(Interviewee 22)

The list of identified actors around design consultancy firms is presented in Table 3.4, and the map of their relationships is presented in Figure 3.4.

Table 3.4 *List of Actors Around Distribution and Promotion Channels*

No	Actor	No	Actor
1	Restaurant Brief	21	Promotion materials
2	Trademark Registration	22	Photographers
3	Accessory Producers	23	Publishers
4	Industrial Designers	24	Wholesaler Companies
5	Graphic Designers	25	Online Platform Sales
6	Interior Designers	26	Restaurants
7	Fashion Designers	27	Chef Restaurants
8	Artisans	28	Chefs
9	Designer Entrepreneurs	29	Cafes
10	Artists	30	Bars
11	Major Producers	31	Barmens
12	SM Producers	32	Beverage Companies (B2B)
13	Investors	33	End users
14	Social media	34	Tourists
15	Influencers	35	Restaurant workers
16	International Competitions	36	Real Estate Agencies
17	Awards- Gastronomy	37	Hotel General Managers
18	Advertising Agencies	38	Hotel Purchasing Managers

It was noted that ISTKA (Istanbul Development Agency) was established within the framework of the European Union harmonization process laws. It was stated that after a period of collaboration with the State Planning Organization, the agency began operating under the General Directorate of Development Agencies within the Ministry of Industry and Development, and continues to do so. As stated, to enhance the visibility of the outcomes of its support, regional agencies were directed to focus on specific areas. Subsequently, it was observed that a structure was established whereby each region, depending on its developmental potential or strengths, received targeted support programs that lasted from 3 to 5 years.

It was mentioned that, as a funding institution, the agency's budget sources included allocations transferred from the treasury and contributions from local organizations. The Istanbul Regional Plan and the Medium-Term Regional Plan prepared by the IPA provide inputs for the focus areas. Additionally, support was provided through the Directorate General for European Union Affairs and European Union Grant Programs. It was noted that ISTKA's board of directors included representatives from the Istanbul Governorship, Istanbul Metropolitan Municipality (IBB), Istanbul Chamber of Industry (ISO), Istanbul Chamber of Commerce (ITO), İlim Yayma Cemiyeti, and the Turkish Volunteers Foundation. It was seen that the agency's Development Board comprised municipalities, foundations, universities, organized industrial zones, provincial directorates, exporters' associations, Istanbul Foundation for Culture and Arts (IKSV), district governorships, technoparks, the Turkey Design Foundation, and the Turkish Exporters Assembly (TIM).

It was mentioned that the agency centered its efforts around three key themes that also formed the basis of its organizational structure.

- Entrepreneurship / Start-up: Developing Istanbul's entrepreneurial ecosystem
- Innovation and Technology: Digital and green transformation
- Creative Industries

It was stated that after Istanbul was named a cultural capital and later a Design City, there has been a strong emphasis on supporting design. As a result, several projects have been launched to promote design:

- ISO ETP Prototyping Center Project: In collaboration with the Istanbul Chamber of Industry
- Istanbul Design Summit: Design-focused event in cooperation with Istanbul Technical University (ITU)
- INSPIRE: A research project aimed at capacity building for creative economy stakeholders, conducted in partnership with Culture Unleashed, including meetings and reporting
- FabriKHAS: A laboratory and studies focused on screen industries at Kadir Has University
- Istanbul Creativity Network Project
- Circular Design Report
- Şile Cloth Project: Collaboration among Şile Municipality, cooperatives, women, and fashion design
- Workshop with Masters: Joint workshop of Dutch and Turkish glass masters in cooperation with Cam Ocağı Foundation
- Recycling Project: New designs created from waste in collaboration with Edirne Kırkyama Association
- KarmaLab: In partnership with Koç University

- KTSM Digital Library Project: In cooperation with Kale Design and Art Center
- Turkish Music Digital Library: In collaboration with ITU

It was stated that the Creative Industries Council (YEKON) is a non-governmental organization (NGO) that was established with the support of ISTKA. As mentioned, the president of YEKON actively participated in ISTKA's project meetings. Hence, it was mentioned that YEKON played a crucial role in enabling the creative industries and design sectors to access ISTKA funds.

As a fund provider to the agency, there is a resource above, and we need a filter to transfer that resource. The existence of that filter actually stems from our direct access to those individual points and capillaries. Or we can reach them, but that requires a different workload and legislation... which we currently do not support. That interface structure advances the necessary legislation for us to reach those people. Similarly, there are so many different sectors in creative industries that we need the expert knowledge of that structure and real-time access... (Regarding design) This expert knowledge is actually YEKON and the Turkey Design Foundation, and possibly universities. (Interviewee 27)

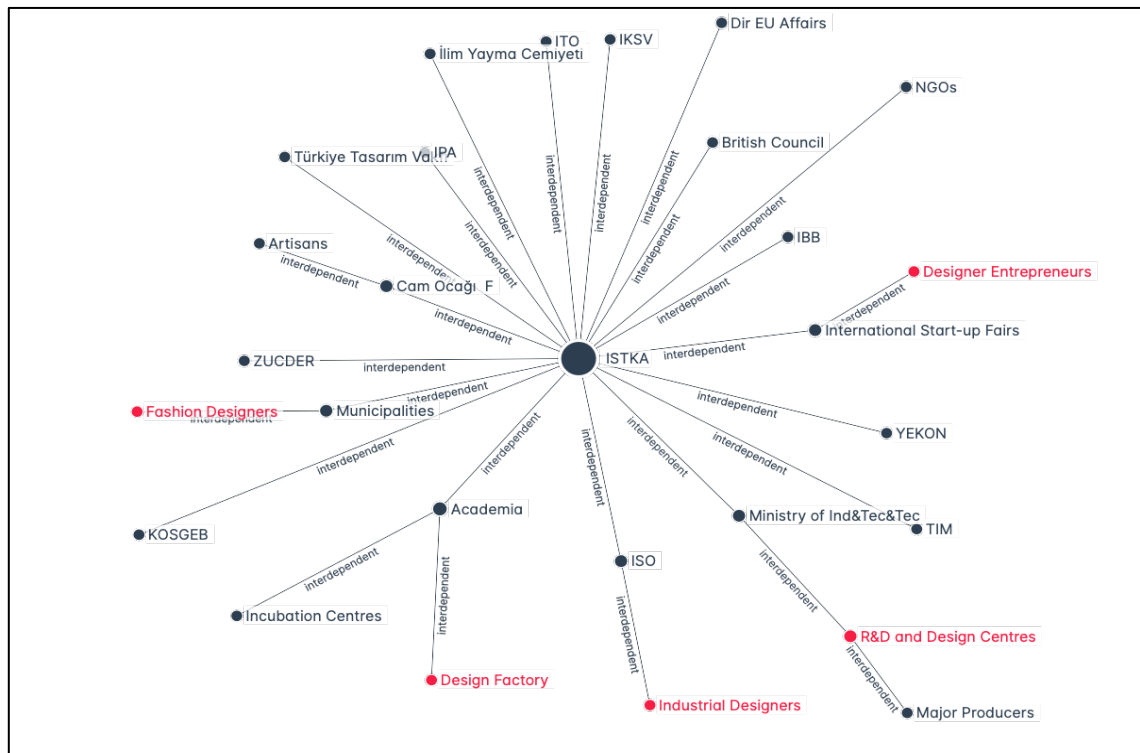
The list of identified actors around design consultancy firms is presented in Table 3.5, and the map of their relationships is presented in Figure 3.5.

Table 3.5 *List of Actors Around - ISTKA*

No	Actor	No	Actor
1	ISTKA	15	ZUCDER
2	Academia	16	ITO
3	IBB	17	NGOs

No	Actor	No	Actor
4	Ministry of Ind&Tec&Tec	18	British Council
5	TİM	19	İlim Yayma Cemiyeti
6	IKSV	20	Municipalities
7	YEKON	21	Fashion Designers
8	Türkiye Tasarım Vakfı	22	International Start-up Fairs
9	KOSGEB	23	Incubation Centres
10	Dir EU Affairs	24	Design Factory
11	IPA	25	R&D and Design Centres
12	Cam Ocağı F	26	Major Producers
13	Artisans	27	Industrial Designers
14	ISO	28	Designer Entrepreneurs

Figure 3.5 Map of Actors and Relationships Around Institutions – ISTKA



3.5.2 Cam Ocağı Foundation

It was stated that the mission of Cam Ocağı Foundation was to popularize glass art among broad audiences and become a center for contemporary glass art. It was noted that the continuation of glass production and art education in Beykoz was among the foundation's goals. It was observed that the foundation's establishment was around the former crystal cutting factory of Paşabahçe. Hence, the foundation included accommodation facilities and exhibition spaces. It was mentioned that the key activities of the foundation were training and workshops for glass masters, fairs and exhibitions for glass artists and designers, renting of furnaces and workshops for artists and designers who wish to produce unique designs, and arranging school visits and activities for children and youth. Additionally, it was noted that the foundation undertook project design services to realize original design project requests, alongside production and sales. It was stated that the operating expenses and energy costs for furnaces were covered by income generated from these activities and through grants and support.

It was stated that the key customers /beneficiaries of the Cam Ocağı Foundation included children and youth, entrepreneurs wishing to produce in the glass field, domestic and foreign individuals seeking to learn glass production, individuals and institutions requiring original products, designers needing production space for prototyping, and companies requiring production facilities for a limited number of unique products. It was observed that the foundation's key stakeholders included district governorship, governorships, grants obtained from TÜBİTAK, ISTKA-supported projects, long-term corporate project collaborations (e.g., Anadolu Sigorta – One Master, One Thousand Masters Project), and long-term corporate award production partnerships (e.g., Coca Cola, BP).

3.5.3 YEKON

It was stated in YEKON website that this council was an umbrella organization encompassing numerous NGOs, with the mission of strengthening collaborations within the creative industries. It was noted that there were numerous professional organizations under YEKON.

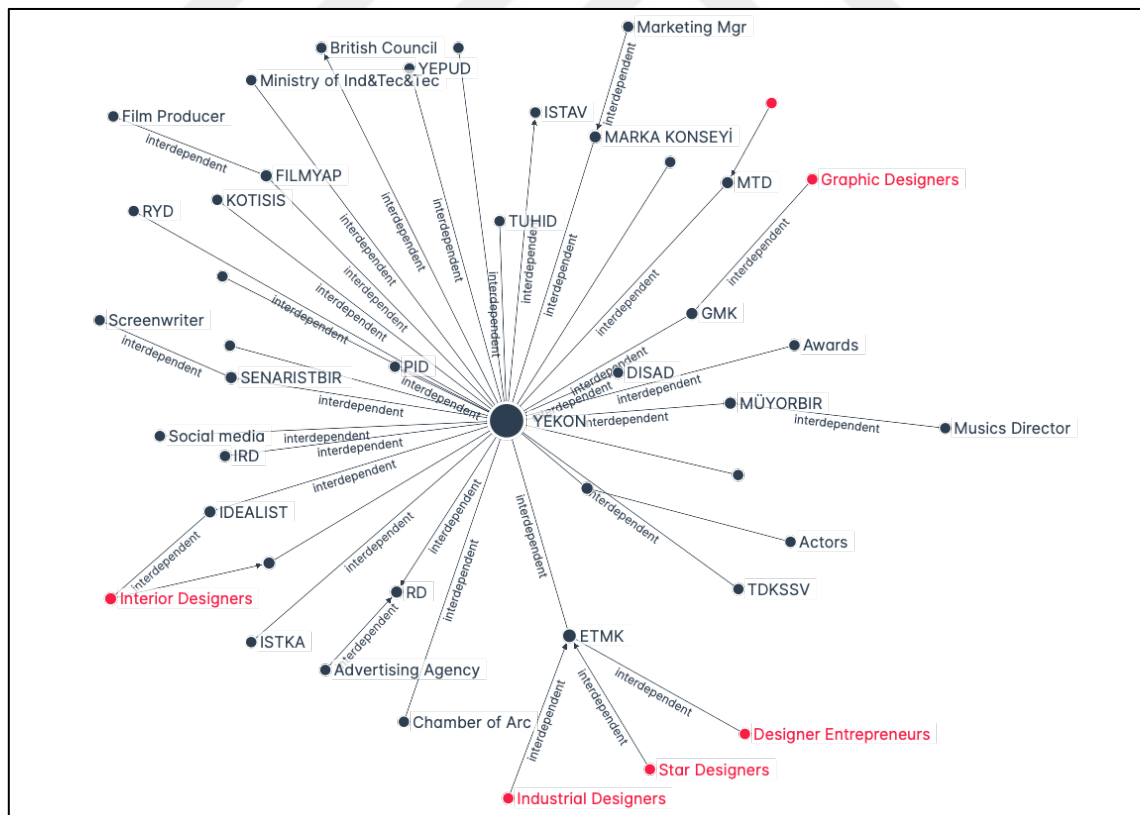
The president of YEKON accepted the offer to be an interviewee for research, but was unable to allocate time. Due to the YEKON president also being the president of ETMK, an interview with the ETMK president could not be conducted. The list of identified actors around design consultancy firms is presented in Table 3.6, and the map of their relationships is presented in Figure 3.6.

Table 3.6 *List of Actors Around - YEKON*

No	Actor	No	Actor
1	Industrial Designers	23	BMYP
2	Graphic Designers	24	DISAD
3	Interior Designers	25	ETMK
4	Fashion Designers	26	FILMYAP
5	Designer Entrepreneurs	27	GMK
6	Local Star Designers	28	IDA
7	Marketing Mgr	29	IDEALIST
8	Advertising Agency	30	IRD
9	Musics Director	31	ISTAV
10	Actors	32	KOTISIS
11	Film Producer	33	MARKA KONSEYİ
12	Screenwriter	34	MÜYORBİR
13	Social media	35	MTD

No	Actor	No	Actor
14	Awards	36	PID
15	TOBB	37	RD
16	Chamber of Arc	38	RYD
17	Ministry of Ind&Tec&Tec	39	SENARISTBIR
18	ISTKA	40	SSTD
19	British Council	41	TUHID
20	YEKON	42	TURKIYE TASARIM VAKFI
21	ARED	43	TDKSSV
22	BIROY MO	44	YEPUD

Figure 3.6 Map of Actors and Relationships Around Institutions – YEKON



3.5.4 ETMK – Istanbul Branch

It was stated that the mission of ETMK (Industrial Designers' Association) was to introduce design to the Turkish ecosystem, improve the rights, working conditions, and remuneration of designers, and ensure their inclusion in the ecosystem. It was observed that the association was regarded as a successful organization that had previously implemented successful projects, organized design awards, exhibitions, found incentives, and strived to be a pioneer within the community. As mentioned, ETMK currently has approximately 350 active members and has had over 1,000 members since its establishment. It was mentioned that due to its voluntary nature, members leave and new ones join, and those who joined informally cannot return once they leave. It was stated that approximately 1,000 industrial designers graduated annually from universities in Turkey, but membership rates in ETMK among graduates were low.

There are problems on both sides. Some manufacturers want to work with designers; others say, 'I can handle it myself.' After a generational change in the industry, some want to work with designers, but some manufacturers do not know how to collaborate with designers. ETMK tries to create benefits for both sides. (Interviewee 28)

It was mentioned that, to fulfill its mission, ETMK organized exhibitions, competitions, fairs (e.g., FDI, Zuchex), training sessions, provides networking opportunities, and accredits universities (ENTAK). It was stated that design competitions were important for both designers and companies. Consequently, it was noted that ETMK supported institutions (e.g., IMMIB) in preparing competition specifications, concept development, and jury selection. It was recognized that when companies had design or designer demands, ETMK communicated these requests to its members to support

companies in meeting their personnel or design needs. It was noted that due to time and personnel shortages, organizing events was challenging. Also, it was found that limited income sources (membership fees, competition application revenues) and weak social ties between current and former members restricted the association's activity scope:

Some members participate in other competitions but do not share that they are ETMK members. I think they should write about it; it's not a big deal. If you are a department head and do not promote ETMK or any NGO in your department, that is a problem. This is not an institutional problem but a personal one. Because you have a public responsibility... It could be our association or another institution, it doesn't matter... but if you do not open a path for the association you belong to... there may be personal ambitions, grudges, anything. Fundamentally, it comes down to that, budget is a constraint but that is also a constraint... this is the main problem in creative industries. (Interviewee 28)

Similarly, it was mentioned that ETMK's activities were less effective due to insufficient support from some academics. For example, it was stated that the Design Hackathon event at Zuchex 2025 was not shared in some universities. Applications came from universities where they were shared, but no applications were received from students unaware of the event. Problems in interactions among actors in the creative industries ecosystem were noted.

It was mentioned that the most recent Industrial Designers' Day event on June 29, 2025, was held thanks to venue sponsorship (Kolektif House Moda) and beverage sponsorship (IMOS İnegöl Furniture Manufacturers Association).

There is Maruf. Marmara was invited to a networking event there. They invited me because they know me. So unfortunately, it goes through individuals. The

branch became active, they know you. At another place, there were people we met at a British Council cultural policy development training. ‘Can you come and speak from industrial design?’ There were over thirty people, probably from different institutions, and we had a brief networking meeting about creative industries, talked, etc. Now, if a person who goes does not say ‘I am an ETMK member’ and promote you, you automatically fall behind. Because it puts you ahead from the association. This basically goes to the brand part... the brand part, the image part, if you think an association or institution adds value to you, you share that difference. (Interview 28)

It was stated that within the scope of Design Turkey, large exhibitions have been held in the past. As mentioned, the Istanbul Metropolitan Municipality allocated an exhibition space at the Istanbul Design Museum, and some exhibitions were organized recently. However, after the initial installation, exhibitions did not continue, and members did not utilize the potential of the exhibition space. It was claimed that the structural problems with the entire museum space provided by IBB led to a lack of interest in the project.

Even making a 110-person installation was a huge task. An exhibition is a big project. First, a serious budget must be created so that professionals can follow and establish relationships. We can only be in managerial positions there. Otherwise, we cannot afford to call people and check if they sent or not. (Interviewee 28)

It was observed that ETMK Istanbul Branch and ETMK Centre in Ankara operated autonomously in planning and implementing their activities. It was mentioned that the Istanbul Branch management meets periodically, but there is no routine for

meetings with members. However, the success of GMK (Graphic Designers Association) was stated as a successful association. It was mentioned that the reasons for their success included having no branches (Istanbul is the sole center), higher income through advertising agencies, and sponsorships.

It was noted that ETMK Istanbul faces sustainability problems due to resource shortages. As mentioned, Design Turkey and IMMIB Design Competition have been ongoing activities for ETMK, but Design Turkey has not been held for the last four years. It was observed that the cancellation of Design Turkey also meant the loss of an important revenue-generating activity. Hence, it was stated that, due to limited resources, the current ETMK Istanbul Branch struggled to advance the professional organization beyond its current state.

It is harder to lift something when it is down... Steps were taken incorrectly... I have no idea who took or did not take them... I do not comment. If a project was done with the Istanbul Development Agency... there is such an example, others should think about how to do it next, maybe a step should have been taken... or a sponsorship was made early on. It should have been done to see if it can continue like this. I have no idea what happened inside. (Interviewee 28)

It was mentioned that the member participation in events remained low for various reasons. It was observed that the association management hesitated to commit to collaborations for activities where participation was crucial.

How popular is industrial design in the country? I understand why they cannot come when everyone works with minimum wages and maximum effort. For example, in a city like Istanbul, they do not come to an event on the Anatolian

side... it is normal because they work like crazy six or five days a week. Their mind is very tired, and they do not want to spend it there. (Interviewee 28)

It was stated that a common criticism in many creative industry activities was that meeting invitations were shared at the last minute and that the balance among invitees was not considered. It was thought that the representation and desired inputs were not sufficiently reflected in the outputs of the work.

There is the INSPIRE project. You can barely find it. (Where and when is it held?). Invitations go to people... People need to check if ETMK or X association is participating. These should also be part of the invitation... For example, there was a design workshop at Bilişim Vadisi. It was a joint event by ETMK Central and Bilişim Vadisi, but branches were not invited... There are industrial designers, academics... If academics come from İzmir or Ankara, the ETMK branches there should also be invited. (Interviewee 28)

It was stated that young freelance designers did not sign contracts after submitting proposals to companies requesting design services, even if their proposals were accepted. It was observed that this created problems in managing intellectual property rights. As mentioned, there was no professional standard when submitting proposals. Hence, there could be significant differences between proposals from experienced, accomplished designers and new designers. It was found that, based on this need, a service contract project run by ETMK Central was described, which was regarded as successful. With legal services from a lawyer, members' problems were first collected, issues were discussed in online meetings, and draft contracts were prepared to address these problems. It was noted that these draft contracts (four different alternatives for licensed design production) were shared with all members to provide guidance and clarity in business

practices. It was stated that this service, which could be very expensive if procured externally, was provided to members.

A new graduate starts working with a designer, is not satisfied... says 'I cannot work with designers,' which I think is unrealistic... They chose the wrong designer, did not manage the process, took the risk, or did not want to pay... That is the reality. I say, why? They made the same thing as their neighbor... they do not want to take risks... because design is not just designing and producing... it has PR and marketing... They say the product did not sell... Friend, if you do nothing to market, the product will not sell. It is a very simple equation. Even if I design the best, if you do nothing to sell, the product will not sell. They bear all the mold costs, expenses, but do not even pay the designer. (Interviewee 28)

It was stated that the projects carried out with public support did not yield sufficient outputs.

There was the ISO ETP project with ISTKA... The presentation was held at Odakule. The prototyping center moved to Technopark, then I heard it would return to Yıldız Technopark. ETMK Central is a stakeholder in that project. Mr. Sertaç also made a presentation there... Then there was a talk at ITU. For example, I have no news as a branch... The association was included as a stakeholder just for procedural reasons... a strange setup... we have such deficiencies. (Interviewee 28)

Set design is mentioned as a potential business area for industrial designers.

It is a very suitable department for us, set design... but no one knows about it, strangely... there is no elective course... At Mimar Sinan University, there are stage set design courses... An industrial designer can transition to art direction if

they have a network, then you get into that business... I had a friend who was a producer... I designed sets... we shot commercials with a director I worked with.

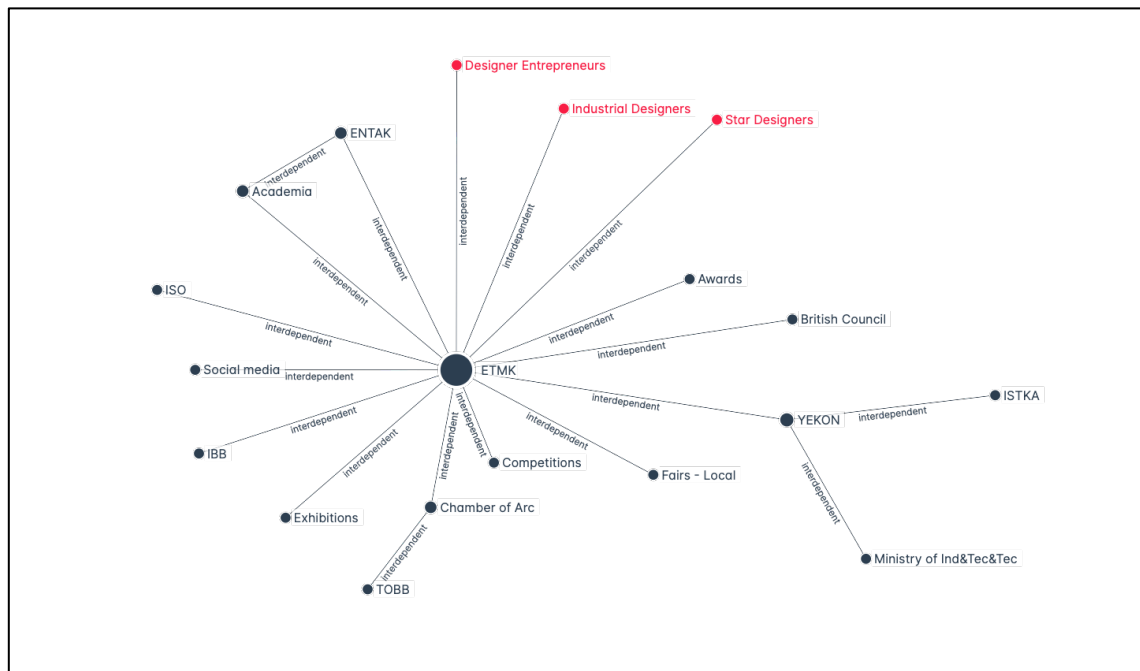
(Interviewee 28)

The list of identified actors around design consultancy firms is presented in Table 3.7, and the map of their relationships is presented in Figure 3.7

Table 3.7 *List of Actors Around - ETMK*

No	Actor	No	Actor
1	ETMK	10	Academia
2	Industrial Designers	11	ISO
3	Designer Entrepreneurs	12	YEKON
4	Local Star Designers	13	TOBB
5	Social media	14	Ministry of Ind&Tec&Tec
6	Exhibitions	15	ISTKA
7	Competitions	16	IBB
8	Awards	17	British Council
9	Fairs - Local	18	Chamber of Arc

Figure 3.7 *Map of Actors and Relationships Around Institutions – ETMK*



3.5.5 Academia

It was recognized that the mission of academia was to equip its students with the competencies needed by the business world, thereby enabling them to earn a living after graduation. It was stated that in the first two years of university, students in the ceramics and glass departments took basic courses that cover essential shaping materials and chemistry, focusing on both art and design. Starting in their third year, they began workshop courses and chose between two paths: workshop-industry or industry-art. It was stated that those who select the workshop-industry track usually design ceramic and glass products for desktops based on trends or project briefs. It was mentioned that this training prepared them to start their own workshops and work independently after graduation. However, it was observed that few graduates managed to secure positions in large companies within the industry.

You can see more industrial product designers in the design teams of companies in the sector. Our students tend to look at things from a material-specific perspective. They have their advantages. Knowing the material is very important in ceramics. When I spoke with representatives from the industry, we discovered that knowledge of 3D modeling programs is a very important criterion in hiring. I think I would look at the vision, portfolio, and taste of the student I would hire. But I was very surprised that not being hired had such a practical reason. I thought that my students' knowledge of materials would give them an edge. (Interviewee 31)

It was mentioned that the graduates of the department were more likely to produce works as artists and make sales through exhibitions. Additionally, it was stated that they could produce and sell boutique products, teach classes, pursue careers in chemical technology, and work as mold makers or in R&D departments as intermediate staff in the industry. It was also highlighted that there were successful graduates who served as product managers in the ceramics and glass sector.

It was stated that because the education of the ceramics and glass departments was a costly one, there were collaborations with major manufacturers and academia, like Vitra with the Mimar Sinan University Ceramics and Glass department. These collaborations included support on production facilities, joint production projects with international artists, and support for exhibitions and education regarding machinery, equipment, and materials. It was also mentioned that some professionals working in important companies in the sector gave seminars at the university. However, it was stated that some courses, such as marketing and restoration of ceramic works, were terminated as part of public austerity measures.

In the past, there were interior architecture and industrial design departments that admitted students based on special talent. At one point, all universities suddenly switched to a centralized system. It was offering product diversity to the market. It brought differences in schools of thought. It was something very valuable for employment. (Interviewee 31)

It was mentioned that the university curriculum was a seminal source for education. According to the interviewee, the university curriculum was developed by the founding academics of the department, discussed by the department board, reviewed by the faculty board, and then submitted to the university senate for approval. It was noted that the curriculum would be updated to address current needs. For instance, 3D modeling training, recognized as necessary by the industry, was incorporated into the ceramics and glass department's curriculum. Additionally, it was mentioned that the curriculum in industrial design departments was shifting towards service design, based on the demands of students and the business world. The importance of the city where university education was located was also mentioned in the interview.

I believe that it is necessary and essential for a student studying design and art to be in the city center of Istanbul, and I try to explain this to my students. Studying art in a remote corner of Anatolia doesn't work; some things will be very lacking. (Interviewee 31)

The list of identified actors around design consultancy firms is presented in Table 3.8, and the map of their relationships is presented in Figure 3.8.

Table 3.8 *List of Actors Around - Academia*

Node Type	Node Name
ETMK	ETMK
Industrial Designers	Industrial Designers
Designer Entrepreneurs	Designer Entrepreneurs
Local Star Designers	Local Star Designers
Exhibitions	Exhibitions
Academia	Academia
Art Director	Art Director
Production Designers	Production Designers
R&D and Design Centres	R&D and Design Centres
Ateliers	Ateliers
Own Studio	Own Studio
Artists	Artists
R&D Dpt	R&D Dpt
Marketing Mgr	Marketing Mgr
Major Producers	Major Producers

The diagram illustrates a network of stakeholders in the design process, centered around 'Academia'. The central node is 'Academia'. Other nodes include 'Industrial Designers', 'R&D Dpt', 'R&D and Design Centres', 'Major Producers', 'Marketing Mgr', 'Exhibitions', 'Production Designers', 'Artists', 'Designer Entrepreneurs', 'Art Director', 'Local Star Designers', and 'ETMK'. Lines connect the central node to most others, labeled 'interdependent'. There are also lines between 'Industrial Designers' and 'R&D Dpt', 'R&D Dpt' and 'Major Producers', and 'Major Producers' and 'Marketing Mgr', all labeled 'interdependent'.

To identify the actors and relationships involved in the realization of a film project, interviews were conducted with a creative producer and two production designers working within design teams affiliated with the art director.

Because humans are imitators, they need to imitate by seeing something. If you want a person to do something, you must also appeal to their visual memory. Therefore, since it is something that can develop through imitation, I believe cinema will not disappear. Theater is actually the beginning of cinema... theater is where people created their own frames and acted within them. (Interviewee 34)

It was noted that the term “film” referred to all moving images, including feature films, commercials, social media videos, and animated films. Hence, the processes and actors involved in film production were similar across these types.

No production in the world is known by its creators; it is known by its owner. For example, a mobile phone. Who made this? iPhone... but they didn't make it themselves. It is a company. We do not know the names of those who worked on it or designed it. In cinema, there are opening and closing credits. The opening credits list the heads of creative teams: director, art director, cinematographer... The closing credits list all team members. Even the person who rented the taxi is named there... Cinema is a collective production. Everyone involved knows their place in the creation and that their name will appear in the credits... and with that spirit, they take their place in film production. (Interviewee 34)

It was observed that a film project typically begins with the initial idea conceived by the screenwriter. However, it was also noted that the idea to make a film could also originate from a producer. It was stated that in the industry, creative producers—individuals who combine creative and production roles—develop creative works. It was highlighted that after creating the idea, creative producers turn to the screenwriter, who writes a script aligned with the producer's vision.

The existence of a script about Istanbul or the filming of a series is not Turkey's own decision; it depends on how Netflix positions Turkey... just as Spain is portrayed with more sexual content and tension, they want us to be more mystical... or 'Bir Başkadır'... projects with human stories. The same applies to festivals. They do not want stories similar to their own... They want to see Turkey as more steppe-like, more ghetto... A story set in Bomonti targeting the upper-

middle segment is already being filmed in France. They do not want to see that here. (Interviewee 36)

It was pointed out that the director was the person who brings the screenwriter's story to life, making it visible and transforming the script into a product. As noted, the director led the creative team responsible for the realization process. It was found that the first group among this team was the actors. It was recognized that, to bring the script to life, the director needed actors who would embody the characters. Additionally, the director required an art director to realize the world depicted in the script. It was observed that the art director was the seminal actor who made and implemented choices that expressed, within a frame, the costumes, lighting, the condition of people, and the location of the story. While doing so, it was seen that the art director began to design and got the director's approval for the designs.

The art director says, 'Director, I want to use green objects here because they will give us a spring atmosphere. At the same time, I want a yellow light from the lighting technician, and I want the light source to create very clear beams. Thus, even though we are shooting indoors, we will show that the film is set on a sunny spring day when flowers bloom.' Like in every profession, art directors are expected to be knowledgeable about their work... The more knowledge they have about their field, the more beautiful the creation, design, and implementation become... This is not only valid for film; when a good job is done, for example, a vase does not even need flowers. (Interviewee 34)

It was stated that the art director oversaw several subgroups, each comprising numerous personnel. Indeed, it was mentioned that, if a period film was being shot, the selected objects, costumes, hair, and makeup must reflect the era. It was noted that the art

director worked with the team to reflect these details through detailed analysis. It was found that the actors in the team included historians, artists, craftsmen, location scouts, set designers, fashion designers, industrial designers, interior architects, and graphic designers. As mentioned, all these professionals needed to apply their expertise with an understanding of the film world.

It was highlighted that the designers working within the art direction team began by accumulating their own “references” to create the visual worlds of the scripts they would work on. As stated, these references may come from architecture, painting, art history, sculpture, etc.

When starting a project, I have a library at home; I download magazines. I do not want to be limited to the internet. I go to libraries... You also need to look at the reality of the world the story tells. For example, in the Istanbul Encyclopedia, there is a surgeon... open-heart surgery... how is open-heart surgery performed?... You need to sit and research... even the color of the thread used must be examined in detail... You do not want a doctor watching to say how wrong it is. (Interviewee 35)

It was pointed out that the expressive value of products used in set decoration was particularly important. Indeed, as acknowledged by the Interviewee, the set and product selections were made to support the story and character and to accurately convey a moment in the film. It was stated that the items placed purposefully in the scene to communicate about the story, the character, or the moment.

For example, recently I was looking at a project set in the 1970s. Some lighting or seating elements... They are correct for that period, but they have become so

fashionable now that I cannot use them... If I use them, it will mean something else, and I do not want to do that. (Interviewee 35)

It was recognized that the expressiveness of product selections in the film *Istanbul Ansiklopedisi* was made purposefully by the art director and the production designer.

I make product selections both from a socio-economic perspective and an emotional perspective based on the character... When I put that lighting there, what does it mean? For example, in the *Istanbul Ansiklopedisi*, Nesrin is a doctor. Considering her socio-economic status, background, not only the house but also the table and lighting in the house, we think about what kind of home she would have...

The house in *Çarşamba* is completely different. Everything you see there is a conscious choice, not something randomly placed... Fatma's character... The food is different too... If you serve lentil balls and tea... they are considered together, and choices are made accordingly... The director wanted the mother in the *Amasya* house to have a deep cultural identity... We even carefully selected the books in the library; she reads English literature and Sufism... We arranged the labels one by one to avoid copyright issues... For example, she has a hobby like marbling. She is conservative but has a university education... We worked hard to give her a unique depth. (Interviewee 35)

It was mentioned that the objects seen on the screen would create fashion. It was observed that production designers acknowledged that cinema has such power.

Fashion influences everything. Cinema also supports design. For example, an accessory on an actor's ear can influence fashion... There was something called 'Bihter's scent.' The only sense not directly associated with cinema is smell; you

wonder how that works... Hürrem's ring... Whether it is planned or not is fifty-fifty... sometimes planned, sometimes not. For example, in 'Kurt Seyit Şura,' the actors were incredible... all the necessary inputs for the film to be a success were present...however! after two or three episodes... the series ended. (Interviewee 36)

It was pointed out that the director, the film's budget, locations, and the time allocated for research and selection all influenced these choices. Hence, the budget allocated to the art team was particularly important. As noted, when the budget was limited, rentals were made from industry-specific product warehouses. As highlighted, the sponsorships were generally used for such needs in series productions.

"Sponsorships suitable for the work you are shooting must be found. That requires separate effort. What kind of world is this, which brand fits this world... My last experience in this regard was negative... They (the producers) have certain firms ready... I choose, but it's not that one, it should be this one... This can prevent making selections suitable for the visual world you want to create. (Interviewee 35)

It was observed and noted by the interviewee that the art director's choice of location and tableware for a scene in the film *Istanbul Ansiklopedisi* was purposeful, considering the expressiveness of the design of the plate in a chef's restaurant.

For the luxury restaurant we selected as a location in *Istanbul Encyclopedia*, we looked at what we could do to make it look luxurious... I did not like the plates, for example. I went to H&M Home, bought those plates, carried them... the labels were still on during shooting... then we returned them. This is an example of having no budget... For example, in the first scene at the Italian restaurant, there

was a Turkish coffee cup with the Istanbul silhouette, which did not change the budget at all... We wanted it to be a small touch. (Interviewee 35)

It was noted that a carpenter working in set design must know that the simplest production they make was not for permanent use:

Carpenters working in a film must be part of that system. They must understand the quick assembly and disassembly of the set, the feeling the light will give when it hits the set, and the work that will create the intended effect... There are places where speed is required in what we call the set... In daily life, carpenters produce furniture expected to be very sturdy. But this is not important in cinema... The carpenter working the set production must think like this... without being told, it should look heavy visually but be light, the light there will not be like normal life... The carpenter must understand how the furniture will look when the light comes... They must also know the other work of the art group... which costumes will be worn... which plates will be on the table... There are countless details... The carpenter must keep up with the set. (Interviewee 34)

It was observed that the cinematographer was an important actor responsible for producing the visible result of the environment created by the art director within the frame. It was mentioned that the appropriate camera must be selected and used correctly for the film. Therefore, it was noted that the mastery of new technologies and applications was important for this role. It was noted that cinematographers received theoretical training, but their experience—with whom they worked, their school of thought, and previous works—was also significant. As mentioned, when a period film was to be shot, working with a cinematographer who has previously shot period films was prioritized. It was noted that the cinematographer worked with the lighting chief, who was also an

important actor in the creation. “... *To convey the emotion here, I must slowly lower the tear. I must place my lights at these points... The person turns, falls into shadow... I must adjust the light accordingly.*” (Interviewee 34)

It was observed that the actors working under the cinematographer included colorists, visual effects supervisors, editors, dubbing directors, and foley artists.

It was noted that three actors stand out as owners of a film project: the screenwriter, director, and music director, all of whom hold copyright as creative individuals.

It was stated that location scouts were the actors who identified shooting locations in line with the film’s needs. It was noted that the locations in a film were determined according to the director’s brief and submitted for approval by the director and art director. It was observed that permissions must be obtained from municipalities, governorships, and provincial directorates of the Ministry of Culture to shoot at selected locations; hence, these bodies were also actors in the film production. As stated, Film Offices have been established to expedite these permission processes with the rise of the Turkish TV series sector, introduced as another important actor for film production in Istanbul.

It was highlighted that the most important actor enabling all the above processes in the realization of a film project was the producer. As it is stated, the producer was the commercial owner of the film and holds many responsibilities, including budgeting all aspects of the film, forming production teams and ensuring their coordination, managing necessary procurement, and more. It was observed that the producer connected all these processes and actors through contracts and produced the film. Therefore, it was seen that the producer was the sole authority over production and subsequent commercial

circulation. It was stated that the producer undertook these tasks with an expectation of profit:

Because cinema is a commercial product. Cinema is not something where people go to watch for free. There are theses that perceive cinema as art. There are theses that perceive cinema not as art but only as a commercial structure. Both are true. I am neither against nor alongside either... Essentially, cinema is a commercial structure as an output. Because cinema works are sold. People pay to watch. That is the purpose: to make money. (Interviewee 34)

To express it simply, I think cinema is a philosophy that tries to advance humanity. You can write philosophy as you wish... What we saw in science fiction films, we have now lived beyond them. I remember films from our childhood... In the film, the door opened inward to the captain's cabin, and we thought that was impossible... Now cinema thought of that. Science has not yet thought of it. Cinema thought of it, but where did it get it from? While science talks about some possibilities, in cinema it is possible. Because it does not need a material basis. Cinema can increase our imagination. But science cannot create fiction based on imagination. That is why it benefits from cinema, exploits it, and advances itself. (Interviewee 34)

It was noted that the producer earned repeated income by licensing the film for broadcast on television channels and various internet platforms. It was mentioned that a film producer was regarded as a profession requiring formal education abroad, but in Turkey, it was often performed by self-taught individuals. As noted, some universities offered production education; however, considering the available instructors and curriculum, the education chain was not fully established yet. Correspondingly, it was

observed that the relationship between two actors, the academia and the film producers, was lacking. It was pointed out that film production was a major academic discipline in the United States.

Now, at the core of production is mathematics. You must know accounting. A producer must be a very good businessperson because this is a commercial structure. Above all, you are creating a commercial structure on a product. While neglecting this, on the industrial side, you must first calculate how to create a cost with a good budget. How much can I sell this for, how, where, how widely can I distribute it, where does it start? You must have business knowledge to calculate all these. To be a producer, you must be a businessperson... but being a producer is not just being a businessperson; you must also be an expert in marketing. (Interviewee 34)

It was noted that the largest revenue in the film sector came from box office sales. It was also pointed out that new business models emerged after digitalization as a result of new distribution and viewing channels. As mentioned, the budget for a film was calculated backward from the targeted box office revenue in the traditional model. Indeed, the goal was to cover the budget with box office revenue first, then achieve profitability with additional screening/sales income through licensing. It was highlighted that different business models were applied to films made directly for TV and digital platforms.

People watch films on Netflix but do not go to the cinema... fewer people go to the cinema now. Because going to the cinema means wasting time... you cannot pause while watching... You cannot rewind... The system has changed in life. (Interviewee 34)

It was observed that the production team was the group of actors that ensured the services for the realization of the entire organization around film production. It was noted that the producer must be a good manager and organizer, as they were the actors who brought together all people and resources for the film project and coordinated effectively until the film was completed. It was stated that while the focus of actors involved in the creation and realization of the film was on the quality of the film and the ‘emotion it will evoke,’ the producer was responsible for developing the right relationships and business connections to ensure the film reaches the audience at the right time and place and generates profit. It was observed that these actors included distribution companies, cinemas, digital platforms, private screenings, festival screenings, awards, and companies through sponsorships. As noted, all these channels, which also had their own business models that were formed with other actors, were sources of income for the producer.

It was observed that sponsorships are divided into two types: in-kind and cash sponsorships. As mentioned, decoration needs such as furniture, objects, costumes, etc., may be met through sponsorship, as the sponsor’s name was displayed at the end of the film in exchange for these products. It was stated that through cash sponsorships, firms may place their products in the film or logos at film premieres and posters. It was highlighted that cash sponsorships were limited in films in Istanbul due to legal and commercial restrictions.

Suppose you are Arçelik today; we have logos showing Arçelik in the film, but Kanal D does not want to broadcast this film as a broadcaster. Because they must be paid to show it there. (There must be an agreement between Kanal D and Arçelik)... There is no such legal regulation in cinemas; they do not interfere... But when you want to show it on TV, it is not accepted. If you pay, it is possible.

You must accept the channel's conditions and comply with their rules.

(Interviewee 34)

It was noted that tax regulations did not encourage sponsor companies. It was pointed out that practices in foreign countries created advantages, thus enabling the co-creation of value for firms and film production companies.

When a Bond film is watched today, Audi provides the product it will release in the film... First, you watch the film, then you want to buy it. Here, we cover the logos of brands at launches. In such an environment, who would invest money? It is impossible. (Interviewee 34)

It was stated that box office figures in Turkey were declining due to economic conditions, new habits after the pandemic, and the convenience of watching films on digital platforms. It was noted that foreign film companies could produce better works with higher budgets and distribute them worldwide simultaneously, since they had high box office revenues in their own countries, pointing to a disadvantage for the film sector in Istanbul. As mentioned, the export revenues from the overseas screening of Turkish TV series were valuable for the national economy; the per-episode sales prices, airing times (morning, daytime), and target audiences (mostly housewives) of these series abroad were considered lower compared to foreign series.

It was observed that NGOs, which were important actors representing the sector, were working on the intellectual property rights of the actors in film production. It was pointed out that regulating actor fees, which constituted a significant item in film budgets, to allow royalties from subsequent screenings would reduce production costs and support higher-quality productions. It was mentioned that this practice was successful in the music industry in Istanbul and was expected to be implemented in the film sector as well.

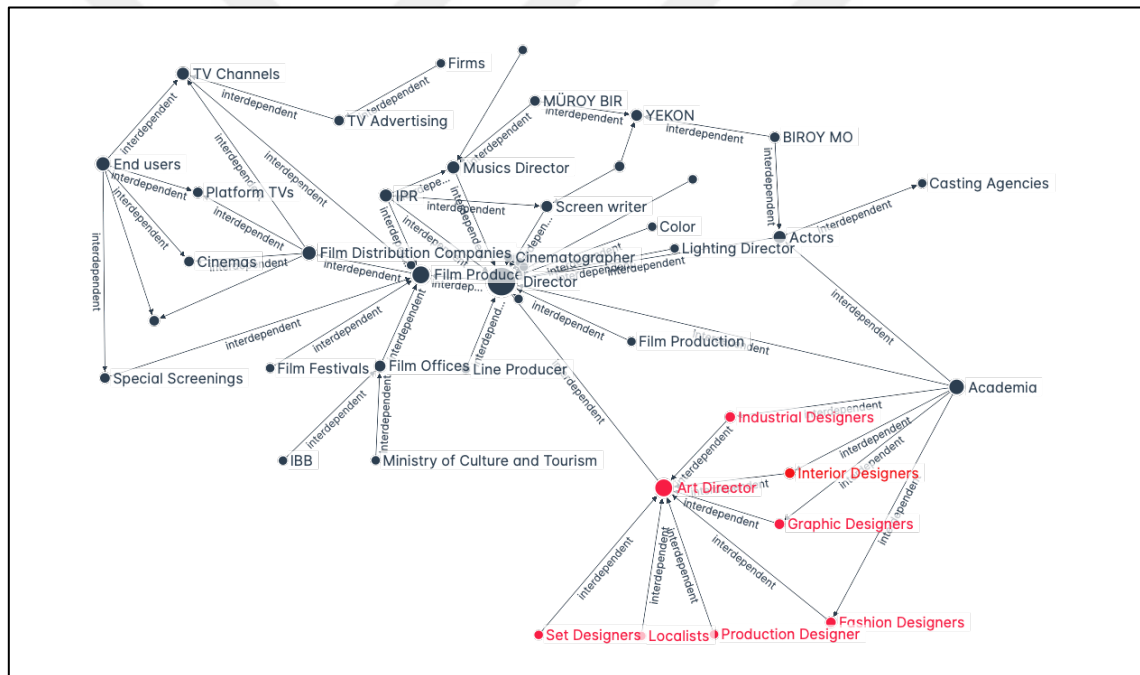
It was noted that due to economic difficulties, producing films in Turkey became more expensive than in Spain, a country that is rising in creative production. It was stated that some previously established production studios in Turkey were closed recently due to financial constraints (e.g., Antalya Studio). The list of identified actors around design consultancy firms is presented in Table 3.9, and the map of their relationships is presented in Figure 3.9.

Table 3.9 List of Actors Around a Film Project

No	Actor	No	Actor
1	Screen writer	24	Musics Director
2	Production Designer	25	Foley Artist
3	Director	26	Color
4	Actors	27	Film Festivals
5	Casting Agencies	28	Film Awards
6	Art Director	29	Special Screenings
7	Localists	30	Cinemas
8	Set Designers	31	TV Channels
9	Fashion Designers	32	TV Advertising
10	Industrial Designers	33	Internet
11	Interior Designers	34	Platform TVs
12	Graphic Designers	35	Audience
13	Cinematographer	36	Firms
14	Lighting Director	37	Academia
15	Film Producer	38	NGOs
16	Film Distribution Companies	39	YEKON
17	Film Production	40	BIROY MO

No	Actor	No	Actor
18	Stage Director	41	SENARIST BIR
19	Post Production Supervisor	42	MÜROY BIR
20	Line Producer	43	Film Offices
21	First Assistant Director	44	Ministry of Culture and Tourism
22	Visual Effects Director	45	IBB
23	Editor	46	IPR

Figure 3.9 Map of Actors and Relationships Around a Film Project



4. RESULTS AND DISCUSSION

Analyzing the actors and their relationships in the creative economy in the ceramics and glassware industry in Istanbul, the following types of relationships in value creation were identified.

4.1 Co-Creations With Actors in New Product Development Processes

In the ceramics and glassware sector in Istanbul, design projects are formed around two important actors: designer entrepreneurs and marketing managers of major producers. Meanwhile, designers working in design consultancy firms and in-house teams of major producers work as design service providers. Indeed, they mediate design knowledge between production and consumption, not independently but through collaborating with marketing managers. Correspondingly, the brief is a non-human actor in the design process, through which the other actors interrelate to reach a consensus and, as a result, co-create the prototype. Similar to the contractor definition in the project notion by Grabher, designer entrepreneurs and marketing managers are leaders around whom the design project is assembled. Indeed, they act as the ‘link pin’ where the trust is given, since they are responsible for profit and loss on the commercial lifecycle of the product, from the decisions on the mold investment to advertisement, etc. The findings of this research indicate that the relationship between marketing managers and design consultancy firms in the sector is ineffective due to low-quality briefs and a lack of common language. As Grabher highlights, ‘projects are not only for a specific client but also, to some extent, with a client’ (Girard & Stark, 2002), highlighting the importance of the quality of interrelations between these two actors for project formation. This

finding, pointing to a deficiency at the very start of the design project in the sector, is a critical drawback for the innovativeness of the major producers in the sector in Istanbul.

On the other hand, designer entrepreneurs in the ceramic and glassware sector in Istanbul interrelate with craftsmen in production to produce their unique designs. Similarly, the most vital relationship required for the realization of a design concept is the shared language established between the design entrepreneur and the craftsman, who possesses an understanding of the material. The artisan network in Istanbul offers significant opportunities for designers; however, it was observed that young designers increasingly prefer to work in the UX design field, and this trend was recognized as a barrier to this valuable collaboration. It is important to notice that the role of the marketing manager, in the former scenario, must be executed by the design entrepreneur, as the responsibility for profit and loss concerning the design project lies with the design entrepreneur. Since the organization lacks a dedicated research and development department, the most vital team members for the design entrepreneur are craftsmen, glassblowers, and mold makers.

The ceramics and glassware sector in Istanbul relies on new cooking appliance technologies, new materials, complementing products from other manufacturers, competitor launches, and market research data as essential elements to initiate a design project. Trend forecasting firms, such as Trend Bible and WGSN, play a significant role in design projects, also in Istanbul, by disseminating global trends to manufacturers globally. Major producers in the sector utilize those tools in both securing their investments in design projects as they keep them in line with major trends, as well as guiding their production and purchasing decisions for market niches that are both trendy

and distinctive. Findings show that the design entrepreneurs in Istanbul lack access to such tools since the subscription fees are extremely high.

The growth of the gastronomy sector is driving global demand for innovative glassware, also in Istanbul. Industry representatives highlight that the Horeca channel plays a significant role in both local and export markets, making chefs influential figures for design projects. As Hennion notes, organizations create various strategies to navigate challenges and risks, one of which is employing skilled "contact men" at their operational boundaries. According to Hennion success of an organization relies on effectively selecting and marketing cultural products, making these boundary actors essential to the process. For the ceramic and glassware sector in Istanbul, chefs act as "contact men," participating actively in design projects of both major producers and designer entrepreneurs, impacting both new product development and purchasing decisions within the Horeca sector.

For the ceramic and glassware sector in Istanbul, other actors who are interdependent to bring a design project to life also include decorators and graphic designers. Historians are also included in the team when their knowledge is necessary. There is also a network of producers either inside or outside the designer entrepreneurs and major producers' boundaries who produce the packages, accessories, and combine them into final products. Glassblowers are important actors for both parties in new product development processes since they co-create with designers, especially in prototyping. R&D departments are pivotal actors for the sector, where the quality of glass and ceramics also defines the quality and category of the product in the market, which are critical for production and sales purposes in the sector. TUBITAK is a governmental actor

that collaborates with producers in Istanbul through R&D departments to innovate materials for the sector.

Analyzing the interview data, all of the mentioned actors in the new product development process in the glassware sector in Istanbul are interdependent around the design project. Resembling the music production in the recording studio, in the work of Hennion, the producer in the recording studio resembles the innovator in the lab who mediates between production and consumption (Scott, 1999a). In the glassware sector in Istanbul, this role is fulfilled by the designers in two paths: first, as designer entrepreneurs, and second, as design consultants collaborating with marketing managers of major producers in design projects. This mediating role of the designer is also acknowledged in the works of Julier (2006) and Sunley et al (2008), where they argue that designers act as 'creative brokers' between those key domains in the network, exchanging and synthesizing different knowledge to have design-driven innovation.

4.2 Collaborations With Actors in Production Processes

In the glassware industry in Istanbul, the collaborations in production processes are important for the design projects to come to life. As interview data suggests, the anticipated sales performance of new products significantly influences the design choices made by major producers. Marketing managers and commercial teams play crucial roles in this process, as sales teams contribute by providing sales forecasts for prototypes. Design project is interdependent on these forecasts, which cover both domestic and international markets, and are essential for calculating the return on investments related to production, molds, and advertising, ultimately determining profitability. As a result, for major manufacturers in Istanbul, the profitability of a design is just as critical as its originality.

Collaborations among major producers and designer entrepreneurs in the production processes in the ceramic and glassware sector in Istanbul are limited, primarily because small-batch production is not economically viable, especially for glass. In his influential study on the music industry, Scott (1999) discusses the interdependent relationships between major producers and independent companies, which create a social framework for productive activity within a region, and states that these collaborations increase the innovation capacity in a geography. Unfortunately, this is not the case in the production processes for the actors in the ceramic and glassware sector in Istanbul.

Designer entrepreneurs in the sector in Istanbul produce their designs within their own ateliers, collaborate with craftsmen, or work with small and medium-sized manufacturers, where all those alternatives are present in the city. Indeed, the collaborations among the designers, artisans, and the small and medium-sized producers of glass and ceramics are crucial for new design projects to be produced and enter the market for niche demands. Cam Ocağı Foundation, which offers its facilities for production and prototyping to designers, is an important actor for the design project ecology of the city.

4.3 Collaborations With Actors in Distribution and Promotion Processes

The organization of the majors of the glassware industry in Istanbul has horizontal and vertical linkages, especially in the distribution and promotion processes. Major producers in the sector coordinate their distribution and promotional efforts through other companies they own, which typically bear the brand name as the company's title. Likewise, the distribution company may also act as a retailer brand distributing and selling other producers' products, either locally produced or imported. Visual Merchandising teams are important actors in the sector for designing and implementing

the exhibitions in retail outlets. In visual Merchandising teams, interior architects and industrial designers collaborate with marketing managers and sales teams in local and export markets to present design projects in distinctive ways to increase both product and brand value.

Findings of the study show that other distribution channels for the glassware sector in Istanbul include: wholesalers, multi-brand retail sellers, authorized sellers, corner shops, and retailers. Wholesalers are important actors since the sales to the Horeca channel are done through them. The strength of their social and professional relationships with hotel general managers, purchasing managers, and chefs significantly influences the choice of glassware from various brands. Indeed, the sales teams of major producers value their relationships with wholesalers both in Turkey and abroad.

According to the findings of this study, supermarket chains are important channels to reach mass customers for the glassware sector. The products sold in those channels are often differentiated by decorations and packaging from the product portfolio of the producer's brand. Authorized decorator companies (like Rakle Cam) are important actors in this product differentiating process in Istanbul. Decorator companies hold their own in-house design teams, mostly formed by graphic designers, to design the décors to apply to ceramic and glass products produced by the major producers in the glassware sector.

The designer entrepreneurs collaborate with major producers through their distribution and promotion channels in the glassware sector in Istanbul, which is important for new design products to reach customers both locally and globally. In addition to these channels of major producers, luxury retailers like Beymen and Anatolia in Turkey, and Crate and Barrel abroad, collaborate with designer entrepreneurs in distributing and promoting their design projects. This kind of collaboration is a win-win

where the designer entrepreneur reaches a wider customer base, and the retailer extends the product range with unique products for market niches in the glassware sector. Retailers with high brand value have a prestige-enhancing effect, especially for new designer entrepreneurs. According to the interviewee data, the category managers are the key actors selecting a new design product to enter the product portfolio of a retail firm in the glassware sector. Galleries and curated shops are other distribution and promotion channels for designer entrepreneurs in Istanbul.

4.4 Co-Opetitions Among the Actors in the Cooperating Sectors

Design projects in the ceramic and glassware sector are ‘creative inputs’ for the gastronomy and hospitality sectors. Indeed, glassware, gastronomy, and tourism are ‘cooperating’ sectors, and the relationships among the actors of those sectors are important, especially for Istanbul. Interviewees from the glassware industry emphasize that innovation is essential due to evolving dining and socializing cultures, along with new trends in gastronomy and hospitality. They note that the consumption culture, fueled by experience marketing and social media (often referred to as "food-porn"), has positively impacted these sectors. The study's findings reveal that the desire for uniqueness is driven by competitions and awards across all these sectors, where participants engage in both cooperation and competition, a concept known as "co-opetition."

Design awards play a crucial role for major producers and designers, enhancing brand value in Istanbul's glassware sector. Among the various awards, the Design Awards, German Design Awards, and Red Dot are the most prestigious. The Design Turkey Awards, organized by ETMK, aim to promote the significance of design, foster collaboration and competition among designers and companies, and are important for the

glassware industry. However, the award organization has not taken place for the last four years due to budget issues, leading to significant disappointment within the Turkish design community. In contrast, the IMMIB industrial design awards have continued without interruption.

The interviewees from the Horeca channel in the sector note that Michelin awards recognize chef restaurants, rewarding chefs and encouraging them to constantly experiment with new recipes and present their dishes to customers in the most innovative ways. They claim that this competition, which is effective in transforming food into an experience and in the constant pursuit of innovation, increases the demand for new glassware products for chefs to create special presentations. As the findings present, the demand for a combined experience of taste and presentation, starting with the most prestigious restaurants in the sector and cascading downwards, is evident in restaurants, cafes, and dining establishments at every level in Istanbul.

For the glassware sector in Istanbul, fairs are important venues that serve as essential venues for exhibitions and sales, where ‘co-opetition’ also takes place, as stakeholders within the design and business ecosystems come together, allowing the sector's strength and competitiveness to be observed. Ambiente Frankfurt, Host Milano, and Canton China are important fairs for the sector, especially for export sales. For majors and designer entrepreneurs in glassware, participating in the Ambiente trade fair, the largest in the industry, is extremely important. However, the support provided by TIM is particularly inadequate for designer entrepreneurs and therefore acts as a negative factor in their entry into the export market. Relationships with foreign fair organizing committees/companies are important for both approval of fair participation and the

allocation of stand space at the exhibition grounds, as noted by a designer consultancy firm owner interviewed.

4.5 Co-Creations and Collaborations With the Actors in the Creative Industries

Marketing managers are the actors who build the brands, as in the case of major producers in the ceramic and glassware industry in Istanbul. The findings of the research also suggest that the marketing managers achieve this through investing in marketing activities for the design project with extensive media coverage, which can be in different forms, from editorial reviews, TV broadcasting, social media, to sponsorships. Consequently, advertising, media purchasing and PR agencies are pivotal actors collaborating with marketing managers for the sector. It is important to notice that advertising and PR are also project businesses (Grabher, 2002) where brands are ‘incubators’ and sponsors of projects (Grabher, 2002). More importantly, as acknowledged, advertising, PR, and media are also among the creative industries (DCMS,1999).

As the study indicates, a design project in the glassware sector initiates other projects in other creative industries, leading to co-creations around brands. The collaborations and co-creations by creatives in design, marketing, advertising, and PR domains around the design projects articulate important knowledge relationships to achieve successful ‘products and performances’ in the cultural economy. Indeed, this finding coincides with Hesmondhalgh’s (2002) claims, suggesting that knowledge relationships are formed around ‘complex value circuits of symbolic goods’ where the owners of new ideas are connected with the consumers (Caves, 2000; Scott, 1999a, 2001b). The importance of co-creations and the crucial role of design in the

‘production, mediation and control’ of the flow of ‘images, objects and information’ when a product or service is born was also emphasized by Julier (Julier, 2000, p. 2). Julier also points to the heterogeneity of the design disciplines as - industrial design, interior design, architecture, event, exhibition design and graphics, and branding. Pratt also underlines the uniqueness achieved through the 'collective innovations' (Pratt, 2004b, p. 118) created by the interactions between the various participants in the production web. Indeed, the project formations in all these domains are crucial for the co-creation of value in the creative economy in a geography. The analysis regarding the interdependencies and the quality of relationships around the design projects in those sectors is not covered in this study.

The study reveals that marketing managers in the glassware sector are increasingly collaborating with Star Designers to enhance their brand perception and facilitate the international expansion of local designers. These partnerships also extend to foreign designers, allowing major manufacturers to access international project networks. Collaborations with celebrity chefs and bartenders aim to achieve similar goals, with recent examples including the Bar Giani Mixology collection co-designed with chef Antonio Bachour.

Additionally, marketing managers are partnering with influential organizations like UNESCO and TEV to bolster their brand image. They create limited collections and unique designs, donating proceeds to these foundations in Turkey. The data also indicates that marketing managers engage with gastronomy departments at universities and cooking schools through plate sponsorships. Major players in Istanbul sponsor competitions such as Arena Bucatarilor in Romania, luxury table design exhibitions, and

global coffee tasting championships, further promoting their brand within the culinary community.

The findings of the study reveal that the designer entrepreneurs build their brands through social media and collaborations with artists. Exhibitions and museum shops in Istanbul as sales points are important for designer makers to increase their perception. When the designer entrepreneur transforms into a brand in the glassware sector, they are able to market their own brand through the major producers' distribution network, turning this collaboration advantageous for both parties in the sector. Despite of some positive examples, this type of collaboration is not a common practice in the sector in Istanbul.

4.6 Collaborations With Institutions

Design projects in the ceramics and glassware sector in Istanbul rely on key institutions such as ISTKA, YEKON, ETMK, the Cam Ocağı Foundation, the British Council, and academic entities, since these organizations represent vital resources, as also noted by Grabher (2002).

ISTKA's mission is to support the socio-economic development of the Istanbul region through funding projects in line with the projections of the Ministry. Indeed, development Agencies are important in 'mobilizing latent networks and potential pool of resources', devoted to facilitating project collaboration in a geography (Grabher, 2002a, 2002b). As stated by the representatives, the creative industries constitute one of the key project sectors prioritized by ISTKA. Founded after ISTKA, YEKON functions as a liaison to ensure that resources are allocated appropriately to the relevant sectors within upcoming initiatives in the creative industries. To enable design entrepreneurs in the glassware sector to access these funds, they must develop initiatives in partnership with YEKON.

ETMK is a key actor for industrial designers to connect with other actors in the business scene in the country. Indeed, design work requires belonging to specific social and professional networks (Grabher, 2002a, 2002b), which can be challenging for designers to break into (*The Place of Design*, 2009). The ETMK Istanbul Branch organizes exhibitions and competitions, while its headquarters in Ankara provides accreditation to university training programs through a certificate called ENTAK. However, membership rates in Istanbul are low, leading to a decline in the association's activities due to limited financial resources and membership fees. The absence of the Design Turkey awards, which previously generated revenue and prestige, has further impacted the association. Although the academy is expected to collaborate with ETMK, its current engagement with other organizations, such as the Istanbul municipality and ISTKA, is inadequate. As a result, ETMK lacks the resources to effectively build a network and offer labor market support to its members in Istanbul.

Istanbul possesses the skilled design professionals required by the glassware industry. However, the employment rate of designers in the industry and the collaboration with design firms within the sector remains minimal. Particularly, medium-sized companies in the glassware sector perceive this as an extra expense and tend to develop new products through imitation. The increasing tendency of young designers to pursue UX design restricts collaboration with artisans in Istanbul, resulting in the loss of vital production skills and capabilities. For designers unable to secure employment within the industry, producing and commercializing their own designs as designer entrepreneurs has emerged as a notable alternative in Istanbul, particularly in the context of digitalization. Bıyık and Er (2025) emphasize the importance of entrepreneurial skills for designers, noting that these skills are often not developed during their undergraduate studies. They highlight

that the decline in master-apprentice relationships in the craft industry, along with reduced designer involvement in production, poses significant challenges to the creative potential of Istanbul in the ceramic and glassware industry. Furthermore, the declining number of glassblowers in Istanbul underscores the importance of addressing these concerns to safeguard traditional craftsmanship. Cam Ocağı Foundation offers a valuable ground to overcome these challenges; however, the support from major firms for this foundation is also minimal.

4.7 Co-Creations With the Actors in the Cultural Industries: A Film Project as an Example

In recent years, the film industry has emerged as one of the most rapidly expanding sectors within Turkey's creative industries and has established itself as a successful export industry. According to the interviewed sector representatives, Turkish television series have emerged as one of the most favored productions in the international market, particularly in morning programs. Consequently, numerous images of Turkey and Istanbul are reaching a global audience through the productions of the film industry.

ZUCDER, the leading association in the glassware industry, reports that the sector's export figures show positive outcomes similar to those of the film industry, targeting overlapping markets. Films often feature glassware products in various settings such as homes, kitchens, restaurants, and hotels. Scott (1996) emphasizes the interconnectedness of cultural sectors in Los Angeles, noting that their success relies on creatively highlighting the city's unique cultural traits. It is reasonable to suggest that collaboration between glassware design projects and film initiatives in Istanbul could be mutually beneficial. However, the study reveals significant barriers that hinder this potential co-creation.

The findings of this study highlight the critical roles of key actors in a film project. The producer is identified as the most significant figure, responsible for securing financial resources and making agreements that will generate revenue, at least matching the production budget. Following the producer, the art director plays a vital role in determining the visual elements of the film, including costumes, lighting, and settings. The study reveals that the art director team comprises various professionals, including craftspeople, location scouts, set designers, fashion designers, industrial designers, interior designers, and graphic designers. As interviewees state, art directors conduct thorough research to ensure accurate representation of the script through careful selection of objects, costumes, and makeup. Production designers emphasize the importance of the expressive value of props and sets, which are chosen to enhance the narrative and character development while effectively conveying the story's moments.

Correspondingly, in the interview with the production designer of a Netflix production film project produced in Istanbul, the "Istanbul Encyclopedia," it was affirmed that the characters in the film and the glassware used by the restaurants were chosen accordingly. The houses, the kitchens, and the furniture owned and the glassware used by the main characters in the movie had been chosen considering their socio-economic status of the characters in the film. The glassware in the luxury restaurant in Galata in Istanbul, which appeared in the movie dining scene, was replaced by the art director to enhance the luxury image of the dining experience in Istanbul.

As stated by the producer interviewed, in-film product placement, product and location sponsorships, and holistic marketing activities are areas that are particularly successfully implemented in Hollywood cinemas and provide positive support to production budgets. These remarks are parallel with the claims of Scott (1996) where he

describes the combination of 'craft-based, design-intensive industries' and 'entertainment industries' in Los Angeles as a diverse 'image-producing' complex. The research findings indicate that film sponsorships in Turkey are not favored as a marketing strategy due to the lack of tax benefits for companies and challenges they pose for producers and TV channels during broadcasts. Consequently, art directors in Istanbul must make design choices that align with limited production budgets. Additionally, interviews with designers revealed that integrated marketing is not utilized in the Turkish film industry to enhance brand value through cultural products. Film offices play a crucial role in facilitating the selection of filming locations that effectively represent Istanbul's cityscape in film projects.

5. CONCLUSION

This study extends the ‘design ecosystem’ literature by offering a new approach to exploring the design ecosystems, building on Scott's creative field concept, which aligns with the work of Freeman (1987) and Nelson (1993) on national innovation systems (Scott, 2006). Correspondingly, the actors and relationships of the design ecosystem are identified at the city level. As Istanbul is a city of design, it provides a valuable field to explore the research questions. A definition of design, which is missing in some earlier design ecosystem studies (Moultrie & Livesey, 2009; Raulik-Murphy & Cawood, 2009; Sun, 2010; Whicher, 2017), is also presented in the study. Design is recognized as “a systematic and deliberate business activity representing a formal relationship between the designer (in a broad or strict sense) and the customer, possibly in the framework of projects and/or defined team roles” as proposed by Galindo-Rueda & Millot (2015) and proposed by Design Council (2021). In line with this definition, the project notion by Grabher (2002) is utilized as the main unit of analysis to serve two important ends. Firstly, to disclose the actors in and around the design project, highlighting its collective and social character. Secondly, to present the mediation of design between cultural production and wider economy, which generates innovation as proposed in former studies of the Work Foundation (2007), Julier (2006), and Verganti (2006). The study utilized the business model concept as a lens to identify the actors and their relationships, in line with recent works of scholars in management science (Adner, 2017; Linde et al., 2021).

The study presents maps of relationships among the key actors of the creative economy in Istanbul with a focus on the ceramic and glassware sector. It shows that the actors are mutually dependent for value creation, with design playing a key role while

mediating among the actors to drive innovation in the city. This exploratory study provides empirical evidence on the actors and their relationships in the creative economy, and the availability of design in

- Co-creations with actors in the new product development
- Collaborations with actors in production
- Collaborations with actors in distribution and promotion
- Co-opetitions with actors in the cooperating sectors
- Co-creations and collaborations with actors in the creative industries
- Collaborations with institutions
- Co-creations with actors in the cultural industries,

revealing that design binds the actors of the creative economy to work as an ecosystem driving innovation.

The study indicates that the design ecosystem and the creative economy are intertwined, hence the cultural industries and NGOs are actors of the design ecosystem, emphasizing the project nature of design and its cultural aspect in value creation.

The study presents the actors and their interdependencies around a film project in Istanbul, focusing on the synergetic relationships with design projects of the ceramic and glassware sector and the other actors in the creative economy. The identified interdependencies indicate that the mediation of design among cultural industries and the rest of the economy is necessary for innovation. These findings align with Scott's studies, which argue that the culture shaped by commodified cultural products emerges from the collaboration of the entire production system. Additionally, cultural and economic history, as well as geography, play significant roles in this social construction.

The research also indicates that, in addition to government and public institutions, NGOs are also critical actors in the creative economy since they supply the essential elements to activate latent networks and the potential resource pools necessary for ‘projectification’ of production in a city (Grabher, 2002). As mentioned, since the design ecosystem and creative economy are interconnected, NGOs of related creative-cultural domains and business sectors are acknowledged as actors in the design ecosystem by the study. Table 5.1 presents the identified group of actors of the current and former studies.

Table 5.1 *Design Ecosystem Actors of Current and Former Studies*

	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
Love (2007)	x			x	x	x		x	x	x	x	x		
Moultrie and Livesey (2009)	x							x	x	x			x	
Raulik-Murphy and Cawood (2009)				x	x		x		x	x	x		x	
Sun (2010)	x	x			x		x	x	x				x	
Ministry of Employment and the Economy (2013)	x	x	x		x	x			x	x	x		x	
	Design			D.agent										
Anna Whicher (2017)		users		x	x		s	x	x	x	x		x	
Bıyık (2025)	x	x	x	x	x	x	x	x	x	x	x	x	x	x

The study indicates that designer entrepreneurs in the glassware sector have effectively penetrated external markets, collaborating with artisans available in the design network of the city. Major producers in the sector have huge production capacities, and

the country owns promising brands distributed globally. The collaborations among major producers and designer entrepreneurs are limited to distribution and sales channels, presenting opportunities for financial and production support that could enhance mutual benefits for both parties. A primary problem recognized is the need to establish a common language among designers, artisans, and marketing managers to facilitate collaboration and informed decision-making in risk-taking for design initiatives.

Collaborations with major producers and institutions in participation in international fairs would unlock the potential of designer entrepreneurs. Legal regulations removing obstacles in the areas of sponsorships and product placement among companies, filmmakers, and TV channels will enable producers' products to be more visible through their expressive value dimensions, thus making the design products and brands of Istanbul visible on the international stage.

Efficient collaborations among institutions would vitalize all the projects in the creative and cultural industries in Istanbul. Since Istanbul is the city where the country's creative class resides, it possesses the necessary creative human resources. Institutional support is essential for advancing design entrepreneurship, as financial resources, skill development programs in business and social networks are vital for designer entrepreneurs to produce and promote their work both locally and internationally.

The scope of the study is limited to the ceramic and glassware sector in Istanbul. As the findings of the study suggest, there are co-creations of value among the sectors of the wider economy as well as among the creative and cultural industries. Due to the limitation of time and the scope of the study, the empirical data is limited to key actors; however, more actors may be identified by analysing the business models of the identified

actors in the study. More in-depth studies, such as case studies, etc., are needed to further the theoretical framework presented in the current study.



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APPENDICES

APPENDIX A. TABLE

Table A1 *Actors and Their Taxonomies in the Design Ecosystem*

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
1	Trend Forecasting Agencies	x													
2	New technologies / cooking appliances										x				
3	New technologies / material										x				
4	Complementary Products										x				
5	Competitor Products	x									x				
6	Market research										x				
7	Chefs	x													
8	Cultural Heritage														x
9	Brief	x													
10	Marketing Mgr	x													
11	R&D Dpt										x				
12	Category Mgr	x													
13	Moulders	x													
14	Mould Providers	x													

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
15	Decorators	x													
16	Accessory Producers	x													
17	Industrial Designers								x						
18	Graphic Designers								x						
19	Interior Designers								x						
20	Fashion Designers								x						
21	Historians														x
22	Glass Blowers														x
23	Artisans														x
24	Crafters														x
25	Designer Entrepreneurs								x						
26	Artists														x
27	Foreign Star Designers								x						
28	Local Star Designers								x						
29	IPR												x		
30	Design Registration												x		

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
31	Trademark Registration												x		
32	Major Producers	x													
33	SM Producers	x													
34	Ateliers	x													
35	Own Studio								x						
36	Designer Entrepreneurs								x						
37	Subcontr. Producers	x													
38	Subcontr. Decorators	x													
39	Subcontr. Packagers	x													
40	Combiners	x													
41	Packaging	x													
42	Social media														x
43	Influencers														x
44	Sponsorships	x													
45	Galleries														x
46	Exhibitions														x
47	Competitions	x													

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
48	Awards	x													
49	Visual Merchandisers	x													
50	Promotion materials	x													
51	Photographers														x
52	Publishers														x
53	Digital Publishers														x
54	Platform Channels														x
55	Tv Channels														x
56	Tv Advertisting														x
57	Tv Programs - Gastronomy														x
58	Films														x
59	Advertising Agencies														x
60	Media Purchasing Agencies														x
61	PR Agencies														x
62	Own Showroom								x						

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
63	Curated														
	Showrooms -	x													
	Local														
64	Museums														x
65	Festivals - Local					x									
66	Festivals - Abroad					x									
67	Fairs - Abroad					x									
68	Fairs - Local					x									
69	Galleries														x
70	Retail Companies	x													
71	Retail Company														
	Showrooms -	x													
	Local														
72	Retail Company														
	Showrooms -	x													
	Abroad														
73	Authorized Dealers	x													
74	Multibrand Small														
	Sellers	x													
75	Wholesalers														
	Bazaar	x													

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
76	Wholesaler Companies	x													
77	Sales Offices - Local	x													
78	Sales Offices - Export	x													
79	Online Sales	x													
80	Online Platforms	x													
81	Premium Retailer Brands - Local	x													
82	Premium Retailer Brands - Foreign	x													
83	Brands - Home & Appliances	x													
84	Supermarket chains	x													
85	Hotels														x
86	Food&Beverage Vendors	x													
87	Restaurants	x													
88	Chef Restaurants	x													
89	Chefs	x													

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
90	Cafes	x													
91	Bars	x													
92	Barmens	x													
93	Firms need design services	x													
94	Firms need glass packaging	x													
95	Beverage Companies (B2B)	x													
96	Customers		x												
97	End users		x												
98	Tourists														x
99	Restaurant workers	x													
100	Real Estate Agencies	x													
101	Hotel Managers														x
102	Hotel Purchasing Managers														x
103	Academia									x	x				
104	Cooking Schools									x					
105	Cam Ocağı F				x										
106	TIM													x	

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
107	ITO													x	
108	ISO													x	
109	ETMK													x	
110	ZUCDER													x	
111	YEKON							x							
112	ISTKA											x			
113	IBB		x												
114	British Council				x										
115	Ministry of Ind&Tec&Tec												x		
116	TUBITAK												x		
117	IMMIB													x	
118	TOBB													x	
119	Chamber of Arc							x							
120	Film Offices														x
121	Ministry of Culture and Tourism												x		
122	IKSV													x	
123	Türkiye Tasarım Vakfı				x										
124	İlim Yayma Cemiyeti													x	

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
125	KOSGEB		x												
126	Dir EU Affairs											x			
127	IPA		x												
128	Municipalities		x												
129	International Start-up Fairs				x										
130	Incubation Centres						x								
131	Design Factory						x								
132	R&D and Design Centres						x								
133	Foundations													x	
134	ARED													x	
135	BIROY MO													x	
136	BMYD													x	
137	DISAD													x	
138	FILMYAP													x	
139	GMK							x							
140	IDA													x	
141	IDEALIST							x						x	
142	IRD													x	
143	ISTAV													x	
144	KOTISIS													x	

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
145	MARKA													x	
	KONSEYİ														
146	MÜYORBİR													x	
147	MTD													x	
148	PID													x	
149	RD													x	
150	RYD													x	
151	SENARİSTBİR													x	
152	SSTD							x							
153	TUHİD													x	
154	TDKSSV													x	
155	YEPUD													x	
156	Screenwriters														x
157	Production														
	Designers								x						
158	Directors														x
159	Actors														x
160	Casting Agencies														x
161	Art Director								x						x
162	Localists														x
163	Set Designers								x						
164	Cinematographer														x

No	Actors	Private Sector	Public sector	General Public	Design support	Design Promotion	Design centres	Design associations	Design sector	Education	Research	Funding	Government	Non Design NGOs	Cultural industries
165	Lighting Director														x
166	Film Producer														x
167	Film Distribution Companies														x
168	Film Production														x
169	Stage Director														x
170	Post Production Supervisor														x
171	Line Producer														x
172	First Assistant Director														x
173	Visual Effects Director														x
174	Editor														x
175	Musics Director														x
176	Foley Artist														x
177	Color														x
178	Film Festivals														x
179	Film Awards														x
180	Special Screenings														x
181	Cinemas														x
182	Internet														x

APPENDIX B. CURRICULUM VITAE

Name-Surname: Müge Bıyık

Education:

Master's degree, Istanbul Technical University, Engineering Management, 1996 – 1999

Bachelor's degree, Istanbul Technical University, Industrial Engineering 1992 – 1996

Work Experience:

TOFAS A.Ş., 1996 – 2017

Head of Human Resources – Headquarters (Istanbul), 2009 – 2017

Human Resources Business Partner, 2007 – 2007

Marketing Product Manager – FIAT Import Cars, 2000 – 2007

Logistics and Import Specialist, 1996 – 2000

Scientific Publications:

Bıyık, M., & Er, H. A. (2025). Digitalization in the Craft-based Design Enterprises in Istanbul: The Emerging Business Models and their Competency Needs in the Creative Industries. *Online Journal of Art and Design*, 13(3).
<https://doi.org/10.30935/ojad/2513043>

Scientific Presentations:

Bıyık, M., & Er, H. A. (2022). The Emerging Business Models and Competency Needs: Digitalization in Design-oriented Craft Sector in Istanbul. *Inspiration for Tomorrow: Celebrating the International Year of Glass 2022*. 37th International Glass Conference, Istanbul.

Bıyık, M., & Er, H. A. (2025). The emerging business models and competency needs: Digitalization in the design-oriented craft sector in Istanbul. Converging Paths: *Design in the Creative Economy*. Design History Society Conference.