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THE ROLE OF PLACE BRANDING AND IMAGE IN THE DEVELOPMENT OF SECTORAL CLUSTERS: THE CASE OF DUBAI

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THE ROLE OF PLACE BRANDING AND IMAGE IN THE DEVELOPMENT OF SECTORAL CLUSTERS: THE CASE OF DUBAI

ABSTRACT

This paper contextualizes how place branding and image influence the development of Dubai's key sectoral clusters, including the key determinants of growth and success under the impression of Porter's cluster theory. The approach is exploratory and of a qualitative inductive nature. Data was collected through conducting 21 semi-structured interviews with Dubai's marketing/communication managers and stakeholders. Findings suggest that Dubai's *traditional clusters*, namely, trading, tourism and logistics that have strong place branding and image show strong signs of success owing to Dubai's geographical location (i.e., physical conditions). Among the *new clusters*, the financial sector is also benefitting from place branding. The results suggest that the success of traditional clusters have a positive spill over effect on the new clusters, in particular on construction and real estate. For policy makers it is worth to note that the recent success of the financial services cluster in Dubai will have positive impact on both, the traditional as well new clusters. The marketing and brand communication managers must consider the correlation and interplay of strength of activities amongst trading, tourism and logistics clusters and its implication while undertaking place branding for clients in their sector.

THE ROLE OF PLACE BRANDING AND IMAGE ON THE DEVELOPMENT OF SECTORAL CLUSTERS: THE CASE OF DUBAI

Over the last two decades, both communication/marketing practitioners and academia have shown an increasing interest in place branding and image (e.g., Foroudi et al., 2016). Place branding and image are broadly recognized as a potent instrument to employ in order to attain competitive strength in the marketplace (Boisen et al., 2011), as it creates value for the consumers and producers in that place (Keller, 2003). A positive place branding and image can be used to attract foreign investment and improve urbanization for a specific place by promoting jobs, investment opportunities, fun, and so on (Kaplan et al., 2010; Papadopoulos and Heslop, 2002; Warnaby and Davies, 1997).

However, there is a dearth of theoretical knowledge concerning the relationship between place branding and image from the perspective of sectoral clusters. Sectoral clusters are the co-location of industries along a supply-chain eventually terminating in the territorial concentration of certain economic activities. Examples of successful clusters in Asia include the development of silicon valley in Japan (Kenny, 2008), the automobile production in Kyushu cluster in Japan (Nabeshima and Yammashita, 2008), the Hsinchu Science Park as an IT cluster in Taiwan (Chen, 2008), the IT cluster in Banglore (Basant, 2008), and the ICT in Singapore (Wong, 2008). Little is known about the underlying composition and governing factors of how the key clusters have developed. The formation and inside working of a cluster and factors that lead to its success or failure is thus still a topic of hot debate among academics as well as policy-makers in the developing and developed worlds alike. In particular, questions are still asked 'can clusters be made to order?' (Yusuf et al., 2008).

With the benefits associated with a sectoral cluster within a country, it seems appropriate to link the study of place branding and image to cluster growth in order to investigate how place branding can assist in the development of such clusters. Branding a cluster faces many challenges such as multiple stakeholders and low control of the actual 'product', making it difficult to forge a coherent brand identity, achieve differentiation, and make place cluster stakeholders' carriers of the brand. Therefore, to fill the above gaps in the literature and to understand the relationship between place branding and clusters further, the current study contextualizes the role of place branding and image in developing key sectoral clusters. In particular, the study seeks to gain further understanding of the strategic power of place by examining how place branding and image can explain the underlying composition and governing factors that have influenced the development of key clusters in the case of Dubai. To examine these issues further, this study formulates the following research questions: (i) to what extent can Dubai's place branding influence on Dubai's image?, (ii) to what extent can the success of Dubai's service-based clusters be attributed to its geographical location and trading history compared to the 'made to order' approach used in the formation of new clusters?, and (iii) what lessons may be drawn from the experience of Dubai's place branding and image strategy for the benefit of regional and emerging economies?

Dubai is an interesting case as there are a number of clusters that exist in a relatively small geographical region. For example, Dubai has taken a leading role in setting up a range of industrial and service clusters to allow for huge economic growth. In addition, it sits on an important sea route and has a long history of trading. This geographical and historical positioning has enabled Dubai to establish itself as a major regional and global trading centre. The success of Dubai's progress may be measured by the level of foreign direct investment into the emirate as well as its rankings in global measures. Dubai thus represents what is

referred to by Yin (2003) as a unique case that can make an important implication to theory building.

This paper begins by briefly summarising the literature on place branding and image. Next, it examines the historical and geographical context and seeks to identify the 'physical conditions' (with reference to Alfred Marshall) in terms of place branding and image to examine the success or failures of different clusters that are growing and maturing in the Emirate of Dubai. Then, it describes the research context and methods used and the results and discussion. Finally, the article discusses the implications, limitation, and future research followed by conclusion of the current research.

Literature Review

Place branding and image

Countries, regions, and cities are increasingly turning to the use of brand management techniques in their effort to compete in attracting visitors, residents and businesses (Morgan et al. 2011; Cardinale et al., 2016). Concepts such as brand equity (Keller, 2003), brand positioning (Ries and Trout, 2001; Quelch and Jocz, 2005), brand identity (Nandan, 2005), and brand image (Sjodin and Torn, 2006) are gaining traction in the branding of places rather than being limited in application to traditional products and services. Kotler and Gertner (2002) compared a country to a company and indicated that countries should develop a unique brand image to empower investment and tourism attraction capabilities. They also emphasized that place branding utilizes strategic marketing to communicate identity as a strategic tool to improve the competitiveness of a place (Akotia, 2005). Place branding can thus be viewed as a complex management and marketing task (Zenker and Braun, 2010)

which concerns selecting a consistent element mix to identify and differentiate it through image building of a place (Cai, 2002; Wagner and Peters, 2009; Fan, 2010).

At the country branding level, a key objective of place branding is to establish a positive image in the minds of relevant target audiences (Foroudi et al., 2014). Tasci and Kozak (2006) state that the values of diverse stakeholders should be represented in the place branding process. Such stakeholders include, but are not limited to, foreign investors, local businesses, citizens and tourists. Each stakeholder group will hold certain image perceptions of the place concerned. The wide range of stakeholders involved in the place branding process represents a key challenge for places that seek to use branding to improve their image (Bornhorst et al., 2010; Garcia et al., 2012; Weible, 2006). For example, the image formation process is multi-dimensional and may be derived from sources as varied as exposure to TV shows and films, sporting events and teams, cultural figures, media reportage, as well as first-hand experience through visitation or product purchase. As a place's brand image reflects the affinity and relationship visitors or potential visitors have with the place, its attributes, values and personality (Vasudevan, 2008) creating a country identity that attracts a multitude of stakeholders creates a competitive advantage for that place (Che-Ha et al., 2016).

At the regional level, stakeholders, who would like their region, or in Dubai's case, their city to remain perceptible and visible in the global village must offer a unique proposition such as a range of experiences that distinguishes it from other places (Cleveland et al., 2015). A place for experiences that are unique, cannot be copied, and will attract a certain type of people in a certain stage of life to contribute to shaping the place or region's identity (Askegaard and Kjeldgaard, 2007). A region needs a strong identity and an understanding of their main strengths, assets, and a vision for the future before it can attract private investment, business

and tourists. Given the huge investment, some cities have established semi-autonomous organizations dedicated to marketing and branding in order to improve their regional identity and overall place image (Hankinson, 2001; Moilanen and Rainisto, 2008).

The terminologies found within the place branding literature are extensive and the literature has interchangeably used 'place' as a location, country, region and a city, while 'destination', however, has indicated tourism only. Table 1 shows the various definitions of related concepts and definitions of place branding. For a deeper analysis of the various terminologies, we refer to Hanna and Rowley (2008), Gertner (2011), Lucarelli and Berg (2011), and Bose et al. (2016).

<<<Table I>>>

What are sectoral clusters?

The idea of clusters was noticed as early as 1890 by Alfred Marshall. According to Marshall (1890) various causes can lead to the localization of industries, but the main causes can be physical conditions. Positive externalities in industry have been well known for over a hundred years with the writings of Marshall (1890) who referred to it as 'agglomeration effects'. Marshall (1890) argued that locating suppliers, producers and customers in close geographical proximity leads to various benefits such as transportation, the need to hold inventory, availability of skilled labor, etc. More recently, Michael Porter (1990s) re-ignited the interests of many countries and regions to adopt 'economic clusters' as means for economic growth and internalization. Porter (1990) formalized the early work on agglomeration by developing the modern concept of industry clustering, and proposing the theory and related environmental framework for clusters.

7

The definition of cluster by Rosenfeld (1997) elaborates on that of Porter (1990) suggesting "a geographically bounded concentration of similar, related or complementary businesses, with active channels for business transactions", and "a dialogue that share specialized infrastructure, labor markets and services, and that are faced with common opportunities and threats" (p.10). Clusters thus include a group of related companies and other institutions which provided inputs to a firm operating in the cluster, and supported it in competing effectively (Porter, 2008).

A growing body of literature (Campaniaris et al., 2011; Delgado, et al., 2014; Porter, 2008) support the view that clusters influence and benefit the businesses located within them in numerous interrelated ways by (i) providing a market for products/services of businesses in cluster (Campaniaris et al., 2011) through the availability of a rich and diversified supplier base (Porter, 1998); (ii) providing a rich labor pool to businesses in cluster (Campaniaris et al., 2011), as government often sets up specialized training programs in cluster regions, and a number of qualified and trained people are attracted to the region which provides them with job opportunities and no relocation inconveniences should they change employer (Porter, 1998); (iii) facilitating higher growth in new business formation and start-up employment (Delgado, et al., 2014); (iv) supporting the development of new establishments of existing firms, and new businesses within the cluster (Delgado, et al,. 2014; Porter, 2008); (v) driving the direction and pace of innovation through close interactions to recognize buyers' needs, the ability to source quickly through close suppliers' networks, and the ability for staff to perceive gaps in product/service offers more quickly (Hafeez et al., 2010); and (vi) providing social networks (Hafeez and Alghatas, 2007) which facilitate the communication and the articulation of tacit knowledge (Malmerg and Power, 2005), as technical and competitive

8

information accumulates within a cluster to which the businesses present may have access through supply chains (Hafeez et al., 2006; Keoy et al. 2007) and networking (Porter, 2008).

In understanding how these benefits are leveraged, Porter (1990) explained the effects of the local business environment on competition through four interconnected factors in his 'Diamond Model'. The four influences in the Diamond Model are: (i) factor conditions representing the cost and quality of inputs for example natural resources, skilled labor, infrastructure and technology-related developments on which local businesses seek to participate, (ii) request conditions or the sophistication of local consumers in terms of request for the industry's products or services, (iii) businesses strategy and rivalry which include the nature and intensity of local competition, which affects the way companies do corporate with each other, their employees and the government, and (iv) related and supported industries which represent the local extent and sophistication of suppliers and globally successful challengers that stimulate cooperation and competitive rivalry?

Despite its establishment as a useful framework, Porter's cluster theory and diamond model need some critical reflection. For instance, the Porter approach talks about nations - which is ambiguous in modern times. In the definition of clusters, geographical closeness plays an important role, thus the cluster approach focus on regions, not on nations. Where does Japan (or even Germany nowadays) have a competitive advantage with cars? Production is global and the Chinese, French, and many others also have cars that are selling worldwide. Also, the US itself cannot be said to be a wine cluster, as the wine valley in California only. This is the same in the Dubai case. Nevertheless, a more critical approach with Porter is necessary to improve the theory further and we welcome such discussion.

9

The example of Dubai

Various countries and regions have adopted 'clusters' as a strategy of economic growth, following to the success of Silicon Valley in California. In the Middle-East, Dubai has been seen as an example of great success. The Emirate of Dubai in the UAE has emerged as an international city and commercial hub of the Middle-East and South Asia and is one of the fast emerging-markets in the gulf region (Alvi, 2012; Billmeier and Massa, 2009; Contractor, 2013; Rao, 2005; Rettab et al., 2009; Thorpe and Mitra, 2011). Dubai International Financial Centre (DIFC) is a federal financial free zone which has long played a significant role as a regional financial centre for the Middle-East which located in Dubai, "the legacy of an open and liberal trade regime, and proactive stance of the governments of the emirates to promote modern and technologically advanced infrastructure" (Rao, 2005, p.283). In addition, the "Emirate of Dubai has emerged as a leading transport and logistics centre serving not only the Middle-East and North Africa (MENA) region, but also Russia, Europe, Asia, and the Far East" (Thorpe and Mitra, 2011, p.342). Overall, Dubai's strategic approach has been to support its economic development is the development of a range of clusters to allow for organic growth and networking opportunities.

Although Dubai has been experiencing considerable amount of success in developing clusters and attracting businesses within it, little is known about the underlying composition and governing success factors of the key clusters. This study therefore seeks to examine the success (or failure) of old and new clusters that are found in Dubai. Further investigation is needed to better fill the void in the literature about the underlying how place branding and image influence in developing composition and governing factors of the key clusters from the perspective of physical conditions as identified by Alfred Marshall (1890), and from the perspective of factor conditions as prescribed by Michael Porter in 1990.

Method

The research purpose justifies an explorative, qualitative research design as a valuable strategy (Gummesson, 2000; Ryan, 2000; Prebensen, 2007; Wagner and Peters, 2009). The exploration was based Porter's cluster theory on an in-depth case study of how place branding and image influence in developing cluster at the macro-level. According to Yin's (2003) terminology, the approach undertaken can be characterized as an embedded single case study (Normann, 1970), described with a narrative approach (Langley, 1999). The case study research allowed "the investigation of complex, fuzzy, and dynamic phenomena where context is essential, and there is no limit to the number of variables and links" (Urde et al., 2007, p.7). Dubai as a case study increased the theoretical sensitivity and inspired and guided us to the research concept and phenomenon.

At the corporate level, 21 in-depth interviews were carried out with individuals ranging in age from 27 to 56 years old. The sample size is appropriate and in accordance with other similar studies. For example, Creswell (1998) suggests 5 to 25 interviews whereas Morse (1994) suggests a minimum of 6 and Bertaux (1981) a minimum of 15 participants. Guest et al. (2006) posit that 12 interviews are adequate when the purpose is to discern themes regarding common experiences and views between relatively homogeneous people. The participants were mainly marketing/communication managers and stakeholders from the companies in Dubai and thus consisted of "a judgement sample of persons who can offer ideas and insights into the phenomenon" (Churchill, 1979, p.66). All respondents signed the consent form, which included an approval to be recorded and an assurance of anonymity and confidentiality of data. In addition, an ethics approval was obtained from the University Ethics Committee prior to the beginning of this study. The breakdown for gender was 25 percent females and 75 percent males. Respondents were general marketing/branding

consultants, top-managers and were held high-level positions, with several organizational titles and responsibilities in the country. The interview topics addressed such issues as 'the state of associations between place branding, identity, image and image of Dubai'. The interviews were lasted on average for approximately 69 minutes.

The data were examined employing qualitative techniques explained by Miles and Huberman (1994) and taking into account the need for transferability, dependability, confirmability and credibility (Hirschman, 1986; Riege, 2003). The process of the study's analysis and synthesis were corroborative and iterative in nature by following the common protocol of qualitative study which was designed under the lens of Porter's model (factor conditions, demand conditions, firm strategy and rivalry, related and supported industries). Data collection was recorded and transcribed, followed by the analysis and the interpretation of data, which took place at the same time (Gummesson, 2000). The data obtained from these interviews presents novel insights into the meaning and causes of place branding and image, as presented next.

Results and Discussion

Drawing on Porter's cluster theory, the thematic analysis largely confirmed the strong relationship between place branding and image and allowed a better understanding how place branding and image influence the development of Dubai's key clusters. The main themes arising from the qualitative data are clustered through the lens of Porter's cluster theory and are illustrated in Table II and Table III. Table II summarizes the lesson from the early clusters is that Dubai greatly benefitted from a focused approach with complementary supporting services/facilities developed around the core service. The results illustrated that the new portfolio of cluster development has lacked the same level of synergistic development, with each cluster tending to operate in isolation (Table III).

Dubai Clusters: A Comparative Analysis

In line with the study objectives and preceding discussion, this study analyzes the contributions made by the traditional 'trading' cluster based on historical trends; as well as the cluster strategy that supported the growth of new economic clusters. Based on the results, two clusters under two categories were identified as (i) traditional clusters emanating from Dubai's trading history, and (ii) new clusters that are evolved based on the focused strategy of Dubai for economic growth.

The Traditional Clusters: The Key Role of Trading

As mentioned earlier, since late 1890 Dubai has been proactively involved in attracting ship liners to use it as trading hub. This strategy had continued and Dubai has been developing facilities to attract traders in this part of the world. During the late 1980s, Dubai's strategy was to provide sufficient facilities, both physical and soft, to ensure that it was able to attract and retain traders. The former was largely in the form of infrastructure, while the latter consisted of business facilitation and support. The rationale was that traders would bring with them buyers and this in turn would lead to economic prosperity for the Emirate. In order to support trade the Emirate developed two key aspects namely logistics and tourism.

Development of Logistics Cluster

With the increase in shipping lines it was evident that some of them would expand the range of services that they offer. The evidence has been that a large number of shipping lines have sought to derive additional revenue streams through vertical integration. At the same time companies have sought to focus on their competencies and outsource non-essential services (Hafeez et al. 2007). Therefore, it was natural for shipping companies to transform themselves from pure transport companies to third or fourth party logistics (3PL or 4PL)

providers. As Dubai became more successful in attracting more shipping lines simultaneously it was able to benefit from these firms' ability to expand their portfolio of services. An interviewee then made the following recommendations,

> *"It is apparent that Dubai was the beneficiary of the changing nature of global business. However, certain strategies adopted by the emirate have specifically supported its sea-based logistics development. For instance, Dubai had correctly anticipated the importance of modern infrastructure to support to container traffic in order to become a regional seaport of choice. In particular, Dubai was able to focus on transhipment business to serve the needs of regional ports. In fact, two-thirds of the container traffic at Jebel Ali was re-exported. The close proximity of the free zone to the port has allowed exporters and manufacturers to benefit from the tax-incentives and purpose-built facilities."*

Tourism Cluster

The following statements from a stakeholder in the tourism industry identified the main competitive strengths of the country image,

> *"Dubai government has been instrumental in driving the tourism sector in not only making it easier for visitors to enter but also by investing heavily in the sector. The key decisions regarding the tourism sector were made a little after the height of oil production and falling oil prices, when it became important to diversify the economy. Also, there was a clear realization that tourism was an important component to support the emirate's trading activities. Therefore, the government has been keen to promote the tourism sector not only to the casual visitor looking to sample the sights and attractions but also to the commercial buyer".*

Tourism is highly dependent on the level and ease of connectivity which today is largely by air. In this respect Dubai has greatly benefited from Emirates Airlines (thenational.ae, 2015), with the later market entry of low-cost airlines such as Fly Dubai contributing to further grow the tourist segment. As Emirates Airlines has expanded the destinations to which it flies it has made the emirate more accessible to larger number of people. Also, in acting as an air transportation hub (an outcome of place branding) Dubai has become a convenient stopping point for transiting passengers (thenational.ae, 2015).

The New Portfolio of Clusters: The drive towards services and knowledge economy

Over the last decade, Dubai has extended its cluster approach to include construction, financial services, media and ICT services, manufacturing, healthcare and education. These new clusters have been supported by an array of 22 or so free zones in order to support their development.

Financial Services

The expansion of investment in Dubai has experienced three distinctive phases (i) early banking, (ii) post-regulation banking and (iii) post Dubai international Financial Centre (DIFC). In the pre-banking period, moneychangers carried out many banking activities and functions. The requirement for money-changers ascended due to increased global trade. Dubai represented as the hub of global trade with wholesalers largely from Persia, India, and East-Africa using the Indian rupee as currency (Kerr, 2013). The second stage of banking development took place as a result of the 1980 Union Law No. 10. The Union Law No.10 recognized the UAE Central Bank and brought in new rules and guidelines leading the activities of banks, particularly in relation to prudential control and management (centralbank.ae, 2015). The third and perhaps the most significant for Dubai was the establishment of the Dubai international Financial Centre (DIFC) in 2004 which allowed foreign financial services firms to set up operations within the free zone. This free zone allowed new entrants to avoid all the restrictions imposed by the central bank and is overseen by an independent regulator namely the Dubai Financial Services Authority.

Over its rather short existence the DIFC has been very successful in recruiting close to 400 companies in the wider area of financial services (which includes consultants, lawyers and accountants). Estimates by the DIFC show that it has contributed to about 2.5% of Dubai's

GDP (DIFC, 2013) like all financial centres the international financial crisis has certainly impacted on the rate of growth within the DIFC. Although, the number of registrations have increased in the period following the international financial crisis the level of activity of financial firms has slowed greatly.

Media and ICT Services

Media and ICT free zones were the first of a new wave of new cluster development in Dubai. Dubai Internet City (DIC) was set up as a cluster that offered a wide range of Information Communications Technology clarifications. In addition, it offers the wide-ranging coverage in the North Africa and Middle-East (Internet city, 2013). The cluster provides the good chances for companies planning to start ICT business ventures in the UAE. The firms undertake a one stop shop structure. It can permit its associates to put more stress on their main procedures for instance telecom, trade licenses, and Internet services among others. The initial value proposition for Dubai's media and ICT cluster were recognised by interviewees as

> *"The initial value proposition for Dubai's media and ICT cluster the ability to have full ownership rights in a country which restricts foreign ownership to 49%. This was a key motivator for the vast pool of foreign talent in the country to establish their own business in the media and ICT sector. The foreign ownership rules also encouraged investment from overseas which was fearful of not having control of their operations in the emirate. Second, the media and ICT clusters dramatically reduced costs in establishing and operating a business. In the media and ICT clusters the rules to opening a business are simpler than on the mainland Dubai and require far fewer days for approval. In addition, companies operate in the cluster knowing that they will not be liable for any taxation or import duties. Dubai's media and ICT clusters also provide a whole host of business support and matchmaking activities. The latter are focused towards enhancing the companies' ability to acquire additional business".*

Healthcare

The first medical clinic in Dubai was established in 1943 followed by a hospital eight years later. A department for healthcare was formed in 1972 and thereafter the provision of medical

services has increased considerably within the emirate. However, until 2002 the provision of healthcare took a new direction in 2002 with the launch of the world's first healthcare free zone namely the Dubai Healthcare City (DHCC). The aim of the free zone was to bring to establish a healthcare cluster that targeted its services to the domestic population but more importantly to the wider region. It was felt that Dubai with its excellent connectivity and geographical location was ideally placed to create a regional medical tourism sector. The key value proposition for the medical cluster was the same as the early model that had been applied to the media and ICT cluster namely reduction in operating cost, provision of world class infrastructure, business support services and bringing together of different players in the same sector. To date DHCC has two hospitals, close to a hundred clinics with over 1,500 licensed medical practitioners.

Education

In addition to the government provision of schools there was a strong private sector provision to cater for the growing expatriate population which was largely from the sub Asian continent and Iran. From the establishment of Jebel Ali and the large influx of mainly British expatriates a number of English Curriculum Schools were established. From the 1990s there has been a considerable growth in the number and diversity of school level education in Dubai. However, as far as the university level education is concerned this is largely a new area with the first university being established in the mid-1990s.

DKV (Dubai Knowledge Village) was launched in 2003 to cover the HR demand from Dubai and to deliver a diversity of worldwide degree programs and training classes to assist further clusters (UAEintreact, 2012). Furthermore, Gulfstay (2012) states to provide online programs and training clasesses, DKV occupy 1 million square feet including 450 businesses which has

involved branches of professional training centres, global universities, e-learning providers, and research and development centres from across the world (DIAC, 2013). To cater and improve the education, DKV was expanded to launch DIAC (Dubai International Academic City) in 2007. Dubai International Academic City inhabits 18 million square feet (DIAC, 2013) which help to attract over 40 worldwide universities (GoD, 2012); and offering over 400 higher education programmes in a range of disciplines from engineering, media, IT, healthcare business, fashion design, and mass communications (Khda, 2013), with a student community comprising of 137 nationalities (DIAC, 2013).

Construction

The economic change from the late 1960s and early 1970s fuelled by oil revenues dramatically boosted the sector. The expansion of the creek, construction of Port Rashid and Jebel Ali meant that global construction companies were attracted to the emirate in order to provide their services for these projects. A further boost to the sector was provided with large scale government investment to develop a tourism sector. Then in the 1990s the government established Emaar as a primary developer of free and leasehold properties in Dubai. With the property boom from 2003 onwards a number of other governments owned or related property firms were established. The financial crisis in 2008 impacted on the sector, although recent press reports show a definite recovery illustrated by a major hike in property and rental prices in 2013. Dubai has recently won the bid to host Expo 2020 and it is expected that Dubai will spend $8.1 billion towards this activity (Arabian Business, 2013, p.12), most of this spend will be in developing infrastructure projects, and construction will be the main beneficiary of this investment.

Lessons Learnt from Dubai's Experience

It has been discussed above that in order to increase trade, the Dubai creek was widened and then Port Rashid was built followed by Jebel Ali. The authors are of the opinion that Emirates Airlines played an important role in supporting the trade activities of emirate especially as air freight was concerned. By leveraging the strength of place branding tourism sector was created to increase the flow traffic both for the airline and to make it financially viable to extend its reach to different destinations. The tourism sector also assisted in developing an image of the market conducive for commercial buyers who visited Dubai. It feels that this created a ripple and synergistic impact with the core service, and supported and enhanced supported industries. In a nutshell, greater trade helped the logistics sector which increased the number of visitors which assisted the tourism industry and all supported the trading activities of the emirate.

With regards to the newly developed clusters, the authors are of the opinion that these were developed based largely on the demand and factor conditions and lacked the strengths of place branding and image. This may explain the lower level of connectivity between the different firms within these clusters. It inclined to believe that a more successful approach would have been to establish a few selected clusters and to develop them and their supporting services in a holistic manner. It may in this regard compare Dubai to say California in the US; which is many times larger with a greater population and economy. In the case of California the approach has been to focus on the competence of place branding (for wine cluster) and image (entertainment) to develop IT cluster. In doing so the cluster approach in California has been able to make a significant difference to the companies as well as to the economy.

As discussed above, the benefits associated with the development of clusters are closely associated with synergies achieved among supporting industries, suppliers and customers in the value chain. Networking among these stakeholders present in the cluster creates a dynamic and positive culture of continuous innovation thereby leveraging the benefits of geographical proximity, and the achievement of economies of scale. For example, the supporting industries may interact with and supply tailor made products and services to a variety of firms in the cluster. For this to effectively occur, a range of supporting industries must evolve around the core product/service of a cluster. In the construction cluster, there is need for engineering and architectural consultancy services, supply of materials and specialized equipment, maintenance services for such equipment, transportation services, as well as research and development in the related disciplines through universities and Research and Development institutions.

In Dubai, it feels that a large focus within the new portfolio of clusters has been on the development of Real-estate projects rather than on the core cluster functionality. In one of the participant's words:

> "*In certain instances, firms joining the new clusters tended to invest in the area with higher short term profitability returns. This resulted in a disproportionate amount of Real-estate developments and more limited investments in supporting industries, which later impacted negatively the growth and development of the clusters. This experience would suggest that the blueprint for the development of clusters should chart out the relative emphasis on each area of activity within the cluster. We believe that the Real-estate focus of the clusters and the large profits that were earned at the time may have detracted the cluster from building its core activities. We are led to believe that to a certain extent that focuses towards Real-estate and leasing space may have led clusters to target representative or sales offices of foreign companies rather than new entrepreneurs*".

<<<Table II>>>

<<<Table III>>>

20

Conclusions

The primary aim of this study was to examine the how place branding and image influence the development of Dubai's key clusters. Three contributions to existing literature are offered: (1) First, the paper is unique in creating a link between place branding and image with Porter's cluster theory, and in examining this link empirically in an emerging country. (2) Second, the study provides a nuanced perspective on the makeup of factor conditions of various 'old' and 'new' clusters found in Dubai, offering qualitative insights that guides valuable strategic directions for the Emirate of Dubai to improve its place competitiveness through cluster development. (3) Third, the study develops a detailed taxonomy of seven different sectors, namely, trading, tourism, logistics, financial services, media and ICT services, health care, and higher education with factor/demand conditions, firm strategy and rivalry, highlighting via analysis the strength of each cluster. The taxonomy will be useful for marketers interested in a framework to analyze a place brand for their place branding strategies.

It has become clear based on the findings that Dubai's place branding efforts have influenced Dubai's image positively. Dubai's geographical location and trading history, in particular, have been utilized intelligently as part of the place branding efforts. However, not only have these favourable attributes resulted in the positive image of Dubai; as a city itself, it has been able to develop a 'made to order' approach to the formation of new successful clusters. The research analysis suggests that the clusters are strongly linked with Dubai place branding and image (i.e. trading history and geographical location) namely, Trade, Logistics and Tourism; they have been a success story compared to new 'make-to-order' clusters such as ICT, Healthcare or Media. However, there is strong spill over from the 'trading' cluster posited to the success of related clusters. In that vein, Tourism (hoteliers) and logistics (logistics

including warehousing, sea, land and air freight) are the direct beneficiaries of this spill-over, whereas, Financial Services, Construction and Healthcare clusters have experienced many indirect benefits. Clearly, with the exception of manufacturing (i.e. mainly assembly) the growth relatively less strong in the new (make–to-order) clusters. The Financial cluster seems an exception where state policies and investment with the view to make Dubai a Centre for Islamic finance has directly benefitted the cluster. However, in return this should directly benefit to the growth of other sectors. In the authors view the noticeable difference in the growth of the new clusters relates directly to the recent population growth of Dubai. The research findings are also vindicated by the fact that Dubai has recently won the Expo 2020 hosting, beating competition from Sao Paulo (Brazil), Ekaterinburg (Russia), and Izmir (Turkey) with 116 of the 168 votes. Many media pundits and commentators have frequently attributed the reason for Dubai's bid success owing to its place branding and image (central location in the region) compared to the other three participant cities.

Critical lessons can be learnt from the Dubai case, as illustrated by the taxanomy developed for this study. Specifically, our study generates implications for theory as follows: First, we call attention to the theoretical links between place branding and Porter's cluster theory. These links should be subjected to further research in order to strengthen the theoretical foundations of place branding theory. Second, the impact of place branding on clusters requires further research in order to ascertain the influence of place branding initiatives on the economic performance of clusters. Third, more research is needed in order to explicate the differential impact of place branding on discrete clusters. In addition, deeper analysis of place branding and cluster theory is required. Does the impact of place branding, for example, vary according to cluster type or is the impact homogeneous across clusters from different sectors?

Extant theory tells us little about such questions. Our study indicates that further theory development is required in this domain.

Managerial implications

While much terrain is yet to be uncovered by the previous studies in the investigation of the existing and potential linkages between place branding and image to influence the development of a place's key clusters, we have highlighted the need for research that is framed by a deep understanding of the research constructs in order to develop key clusters in the place investigated. Overall, the results indicate that the Dubai clusters have tended to offer the same value proposition, namely lower cost, reduction in administrative bureaucracy, excellent infrastructure, provision of support services, ability to have complete foreign ownership and exemption from corporation taxation and import duty. It can be believed that this value proposition was sufficient to attract and retain firm when Dubai had no regional competitors. However, with strong competition from other regional clusters can feel that Dubai needs to enhance its value proposition.

Additional managerial implications include the need for clearly defined governance of place branding initiatives regarding the promotion of clusters; the issue of deciding upon an appropriate brand architecture for the place and its clusters (for example, should Dubai's clusters utilize Dubai as a standalone brand or should the United Arab Emirates play a role as a 'parent' brand); the challenge of identifying and prioritizing stakeholders in the place brand; and the need to establish rigorous and objective measurement systems in order to evaluate the success or otherwise of place branding programmes designed to promote clusters. Another interesting finding of this research has been the strong correlation and interplay of the strengths of activities and its spill over impact on related clusters. Therefore in order to fully

leverage the place and image branding for clients, marketing/communication managers must consider the correlation and interplay of strength of activities amongst trading, tourism and logistics clusters and its implication in their sector.

Limitations and future research

Some researchers criticize the extensive use of single case studies with explorative character (e.g., Gertner, 2011; Lucarelli and Berg, 2011; Zenker, 2011). The present study serves as an initial attempt for more multi-method studies as a way of confirming, extending and validating the findings. Future research could be developed by using quantitative approaches to understand the level of importance of the research constructs. For example, future studies should be carried out in order to test the influence of place branding in developing key clusters in a comprehensive quantitative model. The generalizability of the study should be cautioned, as the study focuses on Dubai. Dubai is a very unique place and there is no question its image and brand have been extremely well managed. Yet, because of its geographic, historic, and economic conditions, the strategy Dubai adopted may not replicable in many other places. Further research is thus recommended to compare Dubai with other competing destinations, e.g. Abu Dhabi, to examine the extent to which its place brand offers a unique proposition and influence on place image and the extent to which it influences the development of key clusters. Finally, future studies may use other frameworks to develop a taxanomy, with for instance Kavaratzi's (2008) model of three different ways of place communication as an example for future studies.

This study fills the gap in the existing literature concerning the lack of qualitative studies into place image and its influence on the development of clusters. The collected data that this study has been able to generate may help to fill this void and persuade the local authorities of

the benefits and insights that can be gained from implementing exploratory place branding and image studies. Findings of this study have provided valuable strategic directions for the Emirate of Dubai to improve its place competitiveness through cluster development.

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Table I: Place Branding Concepts and Definitions

Concept	Definition	Author(s)
Place branding	"A network of associations in the consumers' mind based on the visual, verbal, and behavioral expression of a place, which is embodied through the aims, communication, values, and the general culture of the place's stakeholders and the overall place design."	Zenker and Braun (2010: 3)
Destination branding	A comprehensive definition of 'destination branding' involves four points: (1) to create a name, logo, symbol, word mark or other graphic to make the destination identifiable and differentiable; (2) to send cues of memorable travel experiences that are unique to the destination; (3) to create and strengthen the emotional connection between the visitor and the destination; and (4) to reduce consumer search costs and perceived risk.	Blain, Levy, and Ritchie (2005)
Nation branding	"The unique, multi-dimensional blend of elements that provide the nation with culturally grounded differentiation and relevance for all of its target audiences."	Dinnie (2008: 15)
Regional identity	"The extent to which people identify themselves with the region as the whole of institutionalized practices, discourses and symbols."	Messely et al. (2009: 3)
Country image	The picture, reputation and stereotype that people attach to a particular country as connotative cues for a country's product offerings.	Nagashima (1970) Narayana (1981)
Destination image	"An attitudinal construct consisting of an individual's mental representation of knowledge (beliefs), feelings, and global impression about an object or destination."	Baloglu and McCleary (1999: 870)
Place image	The image that is developed among target customer(s) of a particular place, given the place's unique identity.	Bose, Kumar, and Nguyen (2016)

Table II: Contextualizing Dubai's Traditional Cluster through the lens of Porter's Model

Key: Cluster is very strong ●●●   Cluster is moderately strong ●●   Cluster is weak   ●

	CHARACTERISTICS OF DUBAI'S TRADITIONAL CLUSTERS		
Porter's Model	**Trading**	**Tourism**	**Logistics**
Factor Conditions: such as: *Low cost and high quality of inputs such as natural resources;* *Skilled labor; and* *Developed physical transportation networks and communication technologies related infrastructure*	Trading cluster has benefitted from strong place branding of Arab trading skills. Dubai Image is developed through positioning it as the major shopping destination and world level trading events. Tourism has a positive impact on trading cluster. communication technologies for e-commerce supported by the provision of prompt and effective government services (e.g., Dubai smart government initiative)	Dubai branding (namely; "*Definitely Dubai*") as the number one tourist destination in the region has been developed. A range of entertainment and world level sport events attract global media attention. UAE holds more than 147 Guinness World Records titles, with Dubai having a lion's share in it. Many of the records are associated with tourist attractions. The growth of the airport into a major international hub. Tourism benefits from trading activity.	Dubai's location on map made it a natural stop over point for ships travelling around the globe. The development of sophisticated seaports was supported by advanced road and metro networks and airline industry has provided the logistics network to conduct global trade and local tourism. This cluster has benefitted from both the growth of trade and tourism sectors.
Rating of Cluster	●●●	●●●	●●●
Demand conditions: *The sophistication of local consumers in terms of demand for the industry's products or services.*	Demand of premium products and services is fuelled by the indigenous community as well as by professional western and regional expatriates; hosting the World Expo 2020, is expected to grow the size of its economy.	Sophisticated Tourist is met by up-market shopping malls, brand suppliers, exclusive hotels and restaurants, as well as leisure facilities (cruise, sky dive, golf, etc.).	Sophisticated Seaport, Aviation and Road network infrastructure for business and trade.
Rating of Cluster	●●	●●	●●●
Firm strategy and rivalry: *The nature and intensity of local competition, which affects the way*	Presence of all major global brands tend to be intensify rivalry amongst local, regional and internationally owned conglomerates to expand business to serve affluent local,	The presence of major global hospitality brands as well as local brands (e.g. Burj al Arab, Atlantis, and Jumeirah hotels), there is moderate rivalry amongst these high end hotels.	Sea and land ports are much in demand. Airline seats in high demand during peak tourist times.

33

firms do business with each other, their employees and the government.	expatriate and tourist segments.		
Rating of Cluster	●●	●●	●●
Related and supported industries *Represent the local extent and sophistication of suppliers and internationally successful competitors that stimulate cooperation and competitive rivalry?*	Logistics cluster goes hand in hand with trade. Sophisticated sea and air ports and road networks have helped to create local competition. Strong electronic networks govern the major collaboration and inter-connectivity.	Tourism results in and benefitted by the growing aviation industry and local road infrastructure. Some key local and international hotel brands in intense competition, particularly in down season. International brands are the major source of collaboration in the hotel and restaurant business.	Seaport and Road networks are highly connected within all seven Emirates of UAE. Air travel international competition is intensified by low-cost carriers Sophisticated electronic networks govern the collaboration amongst different modes of transports and government entities.
Rating of Cluster	●●	●●●	●●

Table III: Contextualizing Dubai's Cluster under the lens of Porter Model

Key: Cluster is very strong   ●●●   Cluster is moderately strong   ●●   Cluster is weak   ●

	CHARACTERISTICS OF DUBAI'S MAKE TO ORDER CLUSTERS			
Porter's Model	**Financial Services**	**Media and ICT Services**	**Health Care**	**Higher Education**
Factor Conditions: such as: *Low cost and high quality of inputs such as natural resources;* *Skilled labor; and Developed physical transportation networks and communication technologies related infrastructure*	Growth has been greatest noticeable in traditional corporate banking and retail, since capital markets remain less advanced. Dubai has established itself as a hub for international banks operating in the area. Recently, Dubai has expressed its intention of becoming a center for Islamic finance, setting up support institutions and research centers in this regard.	Various facilities such as Dubai Media City, and Dubai Silicon Oasis, Dubai studio city has the right mixture of planned talent pool, infrastructure, and a dynamic business environment to support the growth of movie, television, broadcast, or music production.	DHCC (Dubai Healthcare City) currently home to 2 hospitals, over 120 outpatient medical centres and diagnostic laboratories with over 4000 licensed experts occupying 4.1 million square feet in Dubai.	Dubai has two separate technology parks (Knowledge village and International academic city). These incentives have resulted in over 50 universities in Dubai.
Rating of Cluster	●●	●●●	●●●	●●●
Demand conditions: *The sophistication of local consumers in terms of demand for the industry's products or services.*	The quality of life for emigrants, have made Dubai the place of choice for foreign experts and worldwide banks intent on serving the GCC market. The sector is expected to benefit from the infrastructure works and preparations in relations to hosting of Expo 2020, as well as the growth of the Tourism sector.	Dubai has a large local demand for ICT services with one of the highest global penetration of smartphones. With the growth in the number of tourists and business visitors, the sector is expected to have an increased demand for media and ICT services.	The large white collar expat population of Dubai, along with the local population, all benefiting from comprehensive medical cover is a source of sophisticated demand for various medical services. In addition, Dubai is promoting the DHCC as a hub for medical tourism for regional patients.	There is an emphasis on local human resource development to enable the local population to play a key role in supporting the fast pace of economic growth. In addition, the large expatriate community from the region and other parts of the world create a demand for high level Higher education.

Rating of Cluster	●●	●●	●●●	●●
Firm strategy and rivalry: *Includes the nature and intensity of local competition, which affects the way firms do business with each other, their employees and the government.*	Due to the presence of major global brands in various industry sectors, there tends to be intense rivalry amongst local, regional and internationally owned conglomerates to expand business to serve affluent local, expatriate and tourist segments.	The market is characterized by the presence of major global media, TV, advertising, and ICT brands as well as local brands. There is moderate rivalry amongst these high end firms.	Given the large number of service providers there is moderate to high rivalry among the different service providers	With so many providers catering to the needs of a limited market, there is intense rivalry for students. The Universities are accredited by Scientific Research and the Ministry of Higher Education which are subjected to regular audits for compliance to quality standards.
Rating of Cluster	●●●	●●●	●●●	●●●
Related and supported industries *Represent the local extent and sophistication of suppliers and globally successful competitors that stimulate collaboration and competitive rivalry?*	The Financial services cluster benefits from the market dynamism associated to mega projects planned in Dubai in the coming years (Expo 2020 infrastructure, Dubai canal, mega real estate projects, hotel projects, etc.)	The growth in various economic sectors of Dubai supports demand for the ICT and Media services. The nature of many of ICT services also indicate that the supply chain may indeed be global and the logistics time for delivery of products and services may be quite short.	There are a few universities that offer medical or paramedical degrees to supply the sector. The medical services benefit from a range of medical laboratories. However, there seem to be some aps in the supply chain as regards R and D services as well as equipment maintenance services.	Given the recent set up of this cluster, the linkage and networking between universities as well as with industry, particularly with knowledge driven clusters (e.g. ICT and Media, Healthcare, etc.) is still in its infancy and growing.
Rating of Cluster	●●●	●●●	●●	●●