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Coming into fashion: Expanding the entrepreneurial ecosystem concept to the creative industries through a Toronto case study

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Key Messages

- The entrepreneurial ecosystem (EE) framework provides the foundation for an analysis of the institutions, actors, and organizations within the Toronto fashion industry.
- We found a fragmented, competitive EE composed of overlapping institutions and isolated fashion designers.
- There is a need for EE research to move beyond successful, high-tech and/or masculinized cases to consider a broader range of entrepreneurial spaces and actors.

This paper considers the entrepreneurial ecosystem concept, which in recent years has gained interest from a variety of perspectives including entrepreneurship, management, and economic geography. Specifically, the paper identifies a gap in the literature regarding the concept's sectoral or industrial focus. Prior applications to real-world case studies have focused on a fairly narrow range of industries and places. In this paper, we apply the concept to a case study of one creative and cultural industry, the fashion industry, to help us understand not only the performance and function of entrepreneurs and small businesses in this industries, but also potential policy supports. We map the institutions and spaces in Toronto's entrepreneurial ecosystem, drawing on extensive qualitative research to consider the dynamics and interactions therein. In parallel, we advance the concept theoretically, questioning its tenability and applicability in a wider range of economic systems by adding the perspective of cultural and creative industries.

Keywords: entrepreneurial ecosystems, creative and cultural industries, fashion industry

Devenir à la mode: étendre le concept d'écosystème entrepreneurial aux industries créatrices à travers une étude de cas à Toronto

Cet article étudie le concept d'écosystème entrepreneurial qui, au cours des dernières années, a suscité de l'intérêt dans différents domaines, y compris l'entrepreneuriat, l'administration et la géographie économique. La présente recherche relève plus particulièrement une lacune dans la littérature concernant le pivot industriel ou sectoriel du concept. Les études de cas antérieures ont mis l'accent sur un éventail relativement étroit d'industries et de territoires. Pour notre part, nous appliquons le concept à une industrie culturelle et créatrice,

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c'est-à-dire l'industrie de la mode, pour nous aider à comprendre non seulement le rendement et la fonction des entrepreneurs et des petites entreprises dans ces industries, mais également les appuis politiques potentiels. De plus, nous cartographions les institutions et les espaces dans l'écosystème entrepreneurial de Toronto en nous inspirant d'une recherche qualitative approfondie afin d'examiner la dynamique et les interactions que l'on y retrouve. Parallèlement à ces démarches, nous approfondissons le concept sur le plan théorique, remettant en question sa validité et son applicabilité à un éventail plus large de systèmes économiques, par l'intermédiaire de l'exemple des industries culturelles et créatrices.

Mots clés : écosystème entrepreneurial, industries culturelles et créatrices, industrie de la mode

Introduction

In recent years, the concept of entrepreneurial ecosystems (EEs) has proven popular with scholars with diverse interests, including gender and entrepreneurship (McAdam et al. 2019), evolutionary economic geography (Mack and Mayer 2016), regional policy (Stam 2015), academic spin-offs (Hayter 2016), digital entrepreneurial systems (Sussan and Acs 2017), and entrepreneurship and management (Acs et al. 2017; Spigel 2017b). The concept has also rapidly made its way into policy practice; for example, both the World Bank and the Organization for Economic Cooperation and Development (OECD) have employed the EE framework in their work supporting economic development (Mason and Brown 2014; World Bank 2018). Although a contested and fuzzily defined concept (Stam 2015; Malecki 2018), EEs encompass the unique combinations of social, political, economic, and cultural elements which impact entrepreneurship and economic growth (Spigel 2017a).

However, as researchers of cultural and creative industries (CCIs), interested in concepts that help us to explain, understand, and build better policy frameworks for local economic development, we see several gaps in this canon of work. Given what we know about the significance of CCIs to local and national economies in the contemporary post-Fordist knowledge economy (DMCS 1998; Florida 2002; Power 2002; Power and Scott 2004; Hesmondhalgh 2005), this omission is surprising.

Accordingly, with our focus on CCIs and the fashion industry specifically, we see this paper countering a trend in the EE literature. Current studies have been expanding the concept's applications within a global and wide sectoral perspective (Nordling 2019; Freire-Gib and Gregson 2020; Grobbelaar and Uriona-Maldonado 2020; Loots et al. 2020; Porras-Paez and Schmutzler 2020; Tsvetkova, Pugh, and Schmutzler 2020; Tsvetkova, Schmutzler and Pugh 2020). However, we believe that this research, with its narrow focus on high-tech industries, is missing out on important influences and dynamics in the contemporary economy. It is also limiting the concept's ability to help us understand a wider range of industries and places and devise effective policy recommendations. We propose that cultural and creative industries offer a fruitful field of research for scholars of local economic development and entrepreneurship, especially in terms of industry structure, firm size, symbolic knowledge base, and concentration of spatial granularity.

We apply the EE concept to a case study of the Toronto fashion industry, exploring the challenges and opportunities faced by independent fashion entrepreneurs operating small businesses. Analytically, we undertake a mapping of the Toronto fashion entrepreneurship ecosystem, considering the institutions and organizations that constitute it. We base this analysis on the framework for ecosystem mapping developed by Isenberg (2011).

In this paper, we find that applying the EE concept outside the high-tech industries reveals new insights, especially into how these ecosystems function and how we can design supports for the entrepreneurs and businesses therein. With this new knowledge, we see an opportunity to advance EE theory and make it more applicable and useful to a wider range of industries.

Theoretical foundations

Before presenting our case study of the fashion industry, we must first define the EE concept and dig deeper into its current applications. During this review, we examine how academic theory and policy practice already use an EE framework, and in doing so, we identify a number of gaps in the literature. These understudied areas allow us to propose a path forward.

What is an entrepreneurial ecosystem, and where does the concept come from?

The EE field is rapidly expanding and evolving, so providing an up-to-date summary is like hitting a moving target. While Spigel (2017a), Acs et al. (2017), Alvedalen and Boschma (2017), and Malecki (2018) provide substantial overviews of the concept and its evolution, we can trace the concept back to Spilling (1996). Spilling (1996) defined an entrepreneurial system as consisting of a "complexity and diversity of actors, roles and environmental factors that interact to determine the entrepreneurial performance of a region or locality." From the perspective of economic geography, the EE concept displays similarities with previously popular concepts such as industrial districts (Marshall 1920), clusters (Porter 1998), and innovation systems (Lundvall 2007). All of these ideas consider how localized competitiveness arises through the interaction of agglomeration economics, network economies, institutional embeddedness, and temporal change. Or, in plain terms, why certain economic activities cluster where they do. Yet, according to Stam and Spigel (2017), there is a critical difference. Although entrepreneurs and spin-offs are present in these other frameworks, they are not central as they are in EE. From the EE viewpoint, the actors and businesses within the ecosystem support the inception and growth of entrepreneurs and new firms (Acs et al. 2017; Alvedalen and Boschma 2017; Spigel 2017a; Malecki 2018).

Acs et al. (2017) identify the EE concept as having developed from literature in both business strategy and regional development. Seeing the parallels to previous modes of cluster-based approaches, Brown and Mason (2017) suggest that the EE framework encompasses several key actors: large firms, universities, financial institutions, and public organizations that support new and growing firms.

Despite this growing body of literature, the field has yet to produce an agreed-upon definition (Stam 2015). Indeed, descriptions of EEs abound because "such ecosystems are defined in very different ways, at different scales, and with different research designs and data" (Malecki 2018, 5). For this paper, however, we use Spigel's recent definition of EEs: "combinations of social, political, economic, and cultural elements within a region that support the development and growth of innovative start-ups and encourage nascent entrepreneurs" (Spigel, 2017a, 50).

We combine this broad definition with the specific elements of the EE identified by Isenberg (2011), which we elucidate below. Indeed, we found Spigel's (2017a) approach to EE especially useful because he developed his version of the concept through research into the (albeit high-tech) EEs of Waterloo and Ottawa, Canada.

We can view the EE approach as "holistic" because its activities take place within a local context rather than in isolation (Audretsch and Belitski 2017). This approach requires researchers to take a more systemic view of factors such as entrepreneurial networks, local culture, and access to and dissemination of information, as well as online spaces (Zacharakis et al. 2003; Isenberg 2011; Rodríguez-Pose and Garcilazo 2015; Sussan and Acs 2017).

As EE becomes established as a mainstream academic and practice-oriented concept (Alvedalen and Boschma 2017), more researchers with different scholarly interests will start to use, interrogate, and reflect on this framework. By situating our paper against the backdrop of this "gap identification" literature, we aim to broaden the concept and increase its rigour by adding in the creative and cultural industries.

What are the gaps in this rapidly evolving body of work?

Although this research field is rapidly developing, we will use this review to examine a number of gaps in the field thus far.

Exceptional cases and sectoral bias. One limitation of the literature is a tendency to focus on a narrow range of exceptional case studies (Cohen 2006; Hosper 2006; Feld 2012; Alvedalen and Boschma 2017). The research has not yet rigorously tested the EE concept in a range of industrial and locational settings, instead drawing heavily on a handful of unusual cases in urban high-tech clusters, both American (Mack and Mayer 2016; Auerswald and Dani 2017) and British (Spigel 2016). This focus on exceptionally successful cases continues in the fashion industry literature, where the research concentrates more on the "big four" global cities (Breward and Gilbert 2006) of London, Paris, Milan, and New York and much less on smaller fashion capitals although exceptions include Larner and Molloy (2007) and Hauge et al. (2009). The focus on isolated success stories in the fashion industry masks the challenges faced by actors operating in underfunded, averagely performing centres, such as Toronto.

This concentration on a relatively small number of case studies raises a concern because it suggests that theories and concepts speak only to small groups of people and narrow parts of the world. We know little about what an "average" or sub-optimal EE might look like, or even whether we can apply the concept analytically in these cases. In considering policy dimensions, Tödtling and Trippl (2005) argue that one-size-fits-all approaches applied insensitively across different regional settings can be highly problematic.

In terms of industry, the EE research includes minimal discussion of the CCIs, with Jeffcutt (2004) being the only reference we found to creative industries. Rather, we consistently see case studies of industries such as biotechnology clusters (Auerswald and Dani 2017), knowledge-intensive business services (Horváth and Rabetino 2019, and more broadly defined spheres such as "high-tech" (Ghio et al. 2019) or "technology entrepreneurship" (Spigel 2017b). Other contributions do not specify an industry but refer to factors such as "R&D" (Malecki 2011), "technology parks" (Cumming et al. 2017), the "digital" (Sussan and Acs 2017), and "spin-off" (Hayter 2016)—factors that also reveal a high-technology focus.

In particular, we need to study creative industries such as fashion because they showcase a rise in entrepreneurial and individualized patterns of work (Molloy and Larner 2013; Brydges and Hracs 2019b). For example, while the fashion industry offers firm-based pathways to employment (Stokes 2017), the desire for autonomy and creative control also leads many to start their own micro-enterprises where designers often work alone and/or in small groups (Brydges and Hracs 2019b).

Gender. To date, the main industries discussed in EE research are ones that are high-tech and male-dominated, but if we step outside this narrow realm into the world of creative and cultural industries, such as fashion, male domination ends. So far, research has ignored a clear need for gender analysis within EEs, a neglect due to what Hamilton (2013, 2014) exposes as a blindness to this issue which has long permeated entrepreneurship research as a whole. However, within EE debates, there is a pocket of research that relates to gender. As McAdam et al. (2019) identify, the concept has been "striking" in its lack of engagement with gender debates and perspectives. Brush et al.'s (2018, 2) review of the EE literature also points out gender-related shortcomings:

> Underlying most entrepreneurship ecosystem frameworks is the assumption that all entrepreneurs have equal access to resources, participation, and support, as well as an equal chance of a successful outcome (venture start-up) within the entrepreneurship ecosystem. In theory, this is a reasonable assumption, but in practice, we find this is not always the case. There is substantial evidence that women entrepreneurs' participation, access to resources, and outcomes in ecosystems vary from those of men.

This oversight in the EE literature is striking, given that entrepreneurship studies have already established the need to consider gender. For instance, Hamilton (2014) calls for no less than an epistemological shift to challenge the discourse of entrepreneurial masculinity which she sees as impeding our understanding of entrepreneurship. Additionally, Hamilton (2013) claims that research has ignored women's entrepreneurship and rendered it invisible; explicit analysis is rare.

Moreover, work in feminist economic geography (Hanson 2009; Hanson and Blake 2009; Werner et al. 2017) has drawn our attention to the fundamentally gendered nature of economic spaces, places, and interactions. A consideration of gender is especially important for our case of the fashion industry. CCIs such as fashion and design have different gender balances (Reimer 2016; Brydges and Hracs 2019b) from those in the scientific and high-tech industries usually discussed in the EE literature. For example, Stokes (2015, 2017), building on the work of McRobbie (1998, 2016), has demonstrated that even though fashion is a highly gendered industry across supply chains, men are far more likely to hold senior positions and to receive critical praise for their designs.

In industries with different gender balances, EEs may look different and perform differently. For example, when research focuses on particular ecosystem actors, such as venture capitalists (Cumming et al. 2017), the approach itself introduces gender bias, as we know that society perceives and rewards entrepreneurs in deeply problematic, gendered ways (Malmström et al. 2017). Geographically, the spaces discussed in the EE literature, such as the "science parks" identified as key nodes by Cumming et al. (2017), look quite different from the key spaces of interaction reported by female entrepreneurs in Ekinsmyth's work (2013), such as the school gate.

Lacking discussion of place and space. Geographically, EE research typically focuses on the regional (Stam 2015; Cooke 2016), the urban (Spigel 2016; Audretsch and Belitski 2017), and the local (Malecki 2011), with other frames such as the university (Miller and Acs 2017; Theodoraki et al. 2018) and digital ecosystems (Sussan and Acs 2017) recently gaining attention. Surprisingly, even though EEs are highly localized and context-specific, many studies take either a place-blind or a macro-level approach. These contributions tend to "bury" place, declining to discuss its specificities in favour of commenting generally on local entrepreneurial configurations and support structures (e.g., Brush et al. 2018; Theodoraki et al. 2018; Ghio et al. 2019; Hechavarría and Ingram 2019). Moreover, the literature rarely examines the performance of individuals or the spaces they occupy.

In contrast, research on CCIs often emphasizes the role of networks and social capital, and the effect of intermediaries and gatekeepers on individuals within these industries (O'Connor 2015). To understand how a creative industry EE functions, we also need to understand the nature of individualized versus community-based or collaborative work, because creative work is often performed (at least temporarily) in isolation (Hautala 2015) and/or in a range of public and private spaces (Ekinsmyth 2013).

Recent innovations in EE research. Nonetheless, recent studies have attempted to expand the EE concept beyond the usual cases (Freire-Gib and Gregson 2020; Loots et al. 2020; Tsvetkova, Pugh, and Schmutzler 2020; Tsvetkova, Schmutzler and Pugh 2020). We situate our paper within this body of work that seeks to make the framework more relevant to a wider set of people and places. Although we study CCIs, via the fashion industry, our research speaks to recent contributions unpacking the EE approach in various contexts, such as maternal healthcare in South Africa (Grobbelaar and Uriona-Maldonado 2020), Porto's cultural and creative economy (Loots et al. 2020), and efforts to orchestrate EEs in Colombia (Porras-Paez and Schmutzler 2020) and Finland (Nordling 2019).

We also recognize that a number of researchers have already applied the ecosystem concept to the case of fashion. Some of these studies examine the fashion industry in relation to urban "brand-scapes" and value ecosystems (Bellini and Pasquinelli 2016), innovation ecosystems (Lin 2018), and circular economy ecosystems (Wu 2020). Other studies investigate the specific role of educational institutions (Lazzeretti and Capone 2020) and private capital (Tervilä 2015) in fashion (entrepreneurial) ecosystems. We argue that the EE concept offers a more holistic approach to the study of the fashion industry because it accounts for a range of factors that shape the landscape for entrepreneurs (Isenberg 2011).

These combined recent efforts broaden the possible scope and applicability of the EE concept, moving it into uncharted waters. By examining how EEs work "on the ground" in different contexts and under different circumstances, we can not only test the framework but also improve it. We argue that when a wider range of researchers apply and interrogate a concept, it inevitably benefits, even if the research uncovers some fundamental tensions or shortcomings.

Building the analytical framework

To test the applicability of the EE concept outside its high-tech heartland, we have applied it to a case study of the Toronto fashion industry. We use the EE concept as an analytical tool to help us understand the strengths and weaknesses of the Toronto fashion EE, employing the concept to map the actors, institutions, and organizations of this industry, as well as the relations among them. In doing so, we aim to advance EE theory by testing its tenability and applicability in the case of a CCI.

Due to the scarcity of work on EEs in the CCIs, the literature could not point us towards an analytical framework. We settled on Isenberg's framework for

EE analysis (2011, 2018) as the most tangible approach for research purposes. Isenberg (2011), in his work on the *Babson Entrepreneurship Ecosystem Project* (see Figure 1), identifies six key domains of an EE: policy, finance, culture, supports, human capital, and markets. We apply these domains to the Toronto case (Figure 2).

Case study: Toronto's fashion industry

The City of Toronto (2019) estimates that 33,300 individuals are working in its fashion industry, contributing $1.1 billion in annual wages to the economy. Toronto is a hub for fashion media, public relations firms, retail buyers, and educational institutions (Brydges and Hracs 2019a). The City of Toronto is also a competitive and expensive city to live and work in (Brydges and Pugh 2017; Brydges and Hracs 2019a). The Toronto fashion industry has faced a number of setbacks in recent years, such as the repeated cancellation of Toronto Fashion Week (Brydges and Hracs 2019a), most recently in January 2020 (Newman-Bremang 2020). Indeed, this cancellation, alongside the closures of several established Toronto fashion brands, prompted us to investigate the issues facing the industry.

We were also inspired to launch this study because fashion is an understudied industry in

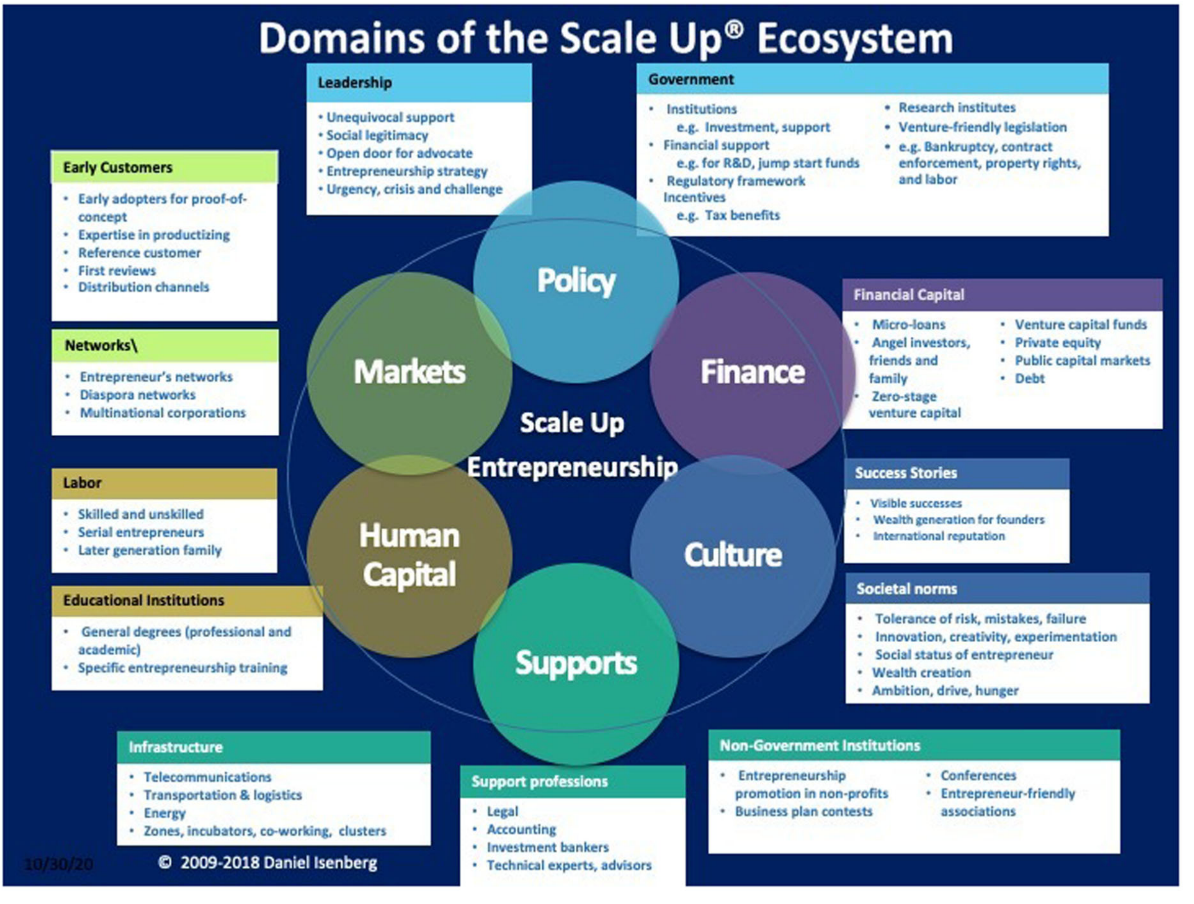

Figure 1
Domains of the Scale Up Ecosystem.
SOURCE: Reproduced with permission from Daniel Isenberg, who provided the authors with the original image.

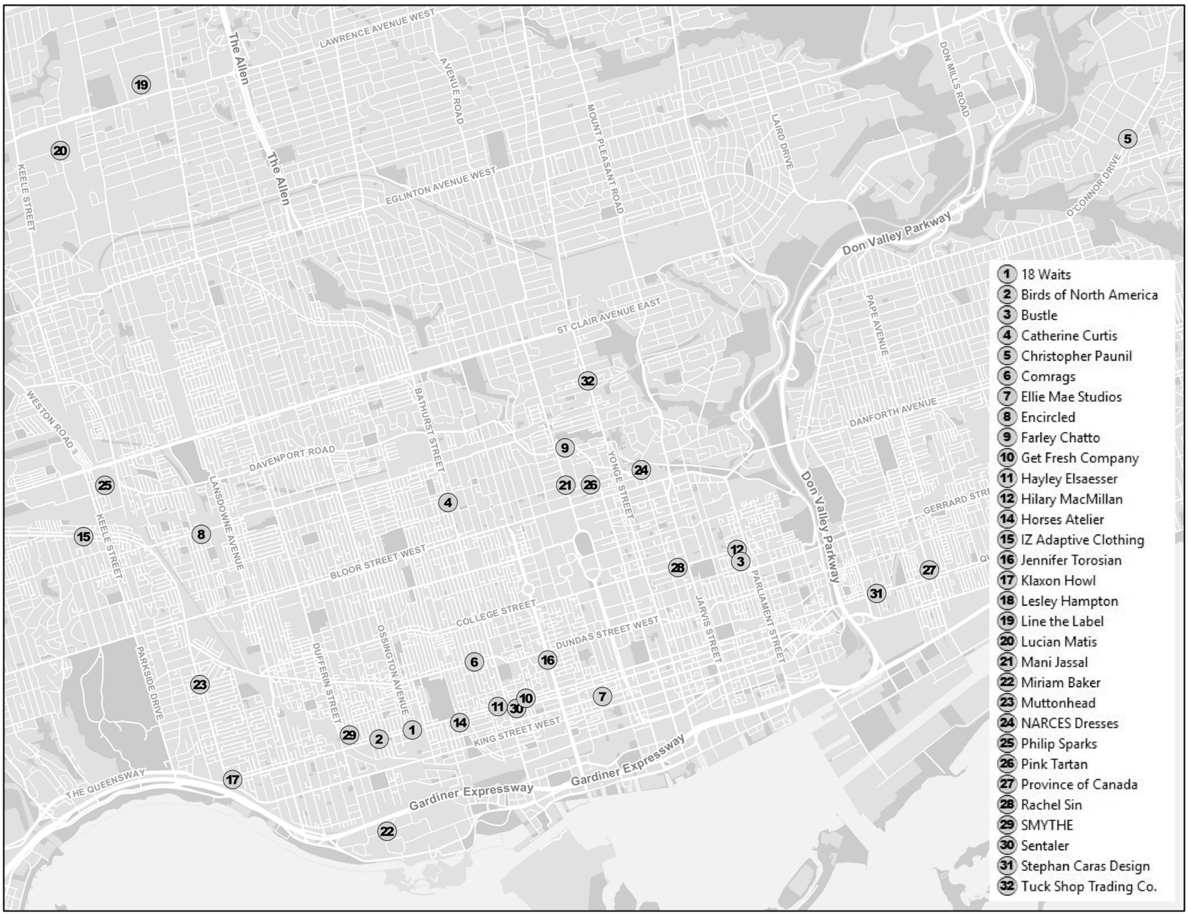

Figure 2
Mapping of a sample of independent fashion designers in Toronto.

both Toronto and in Canada, though notable exceptions to this rule exist (Palmer 2004; Leslie and Brail 2011; Leslie et al. 2014). In contrast, close competitor Montreal, Quebec—home to a unique fashion industry in terms of culture and policy support—has received considerably more academic attention in recent years (Rantisi and Leslie 2006, 2010; Rantisi 2011, 2014; Sark and Bélanger-Michaud 2016; Yagoubi and Tremblay 2016).

In a global context, Toronto belongs to a growing rank of "tier-two" or "not so global" cities of fashion (Larner et al. 2007; Leslie and Brail 2011; Brydges and Pugh 2017; Brydges and Hracs 2019a). Although studying fashion's biggest players can provide insight into how the industry works in each location, an empirical focus solely on global cities, as Larner and Molloy (2009) argue, is likely to be self-referential. Within the fashion industry's global dynamics, these cities are exceptions, not examples (Larner and Molloy 2009; Skov and Melchior 2011). An emerging literature is exploring the dynamics of unique, understudied fashion industries in places such as Australia (Craik 2015), Belgium (Teunissen 2011), Ireland (de Cléir 2011), Iceland (Sigurjónsdóttir 2011), and the Netherlands (Teunissen 2011).

Yet even within this category of tier-two fashion hubs, Toronto represents a non-exceptional or ordinarily performing case. For example, countries such as Sweden (Hauge et al. 2009) and New Zealand (Larner et al. 2007) have made significant efforts to support their domestic fashion industries and industry actors, enabling these entrepreneurs to find ways to insert themselves into the global fashion system (Brydges and Pugh 2017). On the other hand, the Canadian fashion industry has long lamented a lack of success stories as a challenge facing the industry (Palmer 2004). Accordingly, through the Toronto case, we advocate for a move away from looking at exceptional cases and a move towards understanding "average" and often struggling EEs: how they function, and how entrepreneurs live and work within them.

Research design

This research evolves from a larger project examining the Canadian fashion industry, in which we interviewed 54 independent fashion designers and 33 key informants from across the country between 2014 and 2017. Focusing on data within this sample for the Toronto case, this paper draws on 24 interviews with designers (19 women and 5 men) from Toronto, as well as cities in the Greater Toronto Area (GTA) such as Brampton, Mississauga, and Oakville, and 30 interviews with key informants from around the GTA (19 women and 11 men). Key informants include individuals from a wide range of industry-related functions, such as fashion journalists, retail buyers, educators, fashion week executives, and PR firms.

We identified fashion designers from a number of sources, including media articles and blog posts, designer rosters from fashion weeks, Google searches, and gatekeepers and/or key informants. We identified key informants by following a similar approach, although we often needed a gatekeeper (Campbell et al. 2006) to find individuals with a lower public profile. We recruited interviewees in one of three ways: personal email (introducing the project without previous contact), introduction from a gatekeeper (either via email or in person), or snowball sampling (Valentine 2005).

When conducting the interviews, we used a guide to promote consistency and prompt discussion (Valentine 2005). In the interviews with designers, most questions explored the person's background (e.g., education and previous experience) and reasons for entering the fashion industry, their design and decision-making process, and their experiences in the local/domestic fashion industry. In the interviews with key informants, the questions focused on their industry experience. By interviewing both designers and key informants, we could triangulate our data and build insights on the Toronto system from multiple perspectives.

We also analyzed both policy and media documents related to the fashion industry in Canada. As part of our document analysis, we examined creative industry policies in Canada in the period 2000–2015 in order to evaluate the level of institutional support available for both the fashion industry and other creative industries. With respect to media, we observed coverage of the Toronto fashion industry in major newspapers (e.g., *The Globe and Mail*, the *National Post*, and *The Toronto Star*), magazines (e.g., *Flare, Fashion, Elle Canada, Toronto Life*, and *Hello!*), and online sources (e.g., *blogTO, TheKit.ca*, and *Refinery 29)*. In recent weeks and months, we have updated our media coverage and analysis to reflect significant changes to the industry, such as the impact of COVID-19.

To analyze the qualitative data, we inductively adapted the Gioia method (Gioia et al. 2013), using the data to draw out themes and commonalities. Beginning with many categories, we began combining and refining codes until we reached a more manageable number. From these, we delved back into the literature, an approach that drew us to Isenberg's (2011) EE framework. We used its clear map of organizations, institutions, and factors as the foundation for our analysis.

Analysis: The institutions and components of the Toronto fashion EE

Our analysis of Toronto's fashion EE follows Isenberg's (2011) framework, with the aim of identifying the opportunities and barriers for both the industry and its entrepreneurs. Specifically, we analyze the resilience and growth of this ecosystem and of the individual livelihoods therein.

Human capital

First, Isenberg highlights the role of human capital in EEs. Independent fashion designers in Canada are a highly educated workforce, with the majority holding some form of post-secondary education (Brydges and Pugh 2017). Toronto is home to several fashion schools, including Ryerson University, Sheridan College, and George Brown College. A number of designers completed some or all of their education abroad at internationally recognized institutions, such as Central Saint Martins in London and Parsons in New York. All of the Toronto fashion designers interviewed held some form of post-secondary education. More specifically, the overwhelming majority had completed post-secondary education related to the fashion industry. This majority includes a few of the Toronto fashion designers interviewed who initially completed a degree in an entirely unrelated field, such as engineering or commerce, before returning to school for a fashion-related degree.

In addition to being highly educated, many designers also had international experience working (or interning) at leading European design houses, such as Erdem and Alexander McQueen. Many of the designers described the experience of hands-on training in a large fashion brand as highly formative. It helped them develop skills—from networking to creating design ideas to gaining expertise with sourcing and logistics—which they could then use to build their own brands. Clearly, as we learned, the Toronto fashion EE does not suffer from an education or talent problem.

Extending this analysis, we also wished to understand the geography of the Toronto EE by mapping a sample of independent fashion designers in Toronto (see Figure 1). To collect this sample, we first identified as many independent fashion designers as possible and mapped those whose studio address is available online.

We see that while designers are spread out across the city, the central downtown area includes small clusters. Designers work in a range of spaces, including private design studios, hybrid retail-studio spaces, and studios in shared incubator spaces. Significantly, this list of designers does not include businesses operated from home, as public sources rarely make those addresses available. As well, not all of these spaces are open to the public. Accordingly, in this type of analysis, these businesses may remain hidden.

Thus, the EE framework needs to include a range of locations (such as homes, shops, and studios) alongside the more formal business infrastructure typically discussed in the literature, such as science parks, incubators, and universities. Here, we also turn to work such as that of Ekinsmyth (2013) who highlighted the importance of everyday spaces (such as the school gate and neighbourhood) and networks (such as family) for female entrepreneurs in particular.

Institutional supports

To better understand the institutional supports in the Toronto EE, we first identified all of the relevant organizations in the city and their key functions (Table 1). We have grouped institutional supports based on their mandate and core function in the Toronto fashion EE, resulting in seven categories: fashion weeks and events (such as Toronto Fashion Week, Fashion Art Toronto, and Indigenous Fashion Week Toronto); other fashion industry trade shows and events (such as the One of a Kind Show, the Apparel Textile Sourcing Conference, and INLAND); fashion design associations (such as Fashion Group International of Toronto and Canada Fashion Group); fashion industry-related organizations (such as the Retail Council of Canada and Fashion Takes Action); public relations firms; fashion incubators; and fashion higher-education institutions.

In interrogating the mandates and activities of these institutions, we found a great deal of overlap. As a result, institutions often compete with one another to “claim” their space in the EE. As a prime example, the Toronto fashion industry currently has eight fashion weeks. The ninth event, Toronto Fashion Week, was put on pause in January 2020. Toronto Fashion Week, which was purchased by the global sports, events, and talent agency IMG in 2012, was previously cancelled in 2016 due to a lack of funding (Newman-Bremang 2020). New ownership subsequently bought the event and began rebranding by expanding from a focus on runway shows to the inclusion of “pop-up brunches,” podcasts, and talks with industry insiders, relocating from David Pecaut Square to Yorkville Village, and reconfiguring from seven days to three days (Newman-Bremang 2020).

For those designers who do decide to participate in fashion weeks, the situation is filled with uncertainty, as the following quotation suggests:

Table 1
Institutional supports in the Toronto fashion industry ecosystem.

Name	Year	Mandate	Function
		Fashion weeks and events	
Fashion Art Toronto	2005	"Arts & fashion week that celebrates contemporary art + design through runway shows, live performances, fashion films, photography exhibits and art installations." (https://fashionarttoronto.ca/)	Runway shows and events
African Fashion Week Toronto	2013	"To promote and improve public understanding and appreciation of the African Fashion industry through leadership in quality and taste ... to support the overall growth of African fashion industry in Canada and the Diaspora." (https://www.facebook.com/africanfashionweektoronto/)	Runway shows and events
TOM* Toronto Men's Fashion Week	2014	"Toronto Men's Fashion Week (TOM*) is the most influential platform in Canada for menswear designers and brands. TOM* is a semi-annual event showcasing Spring/Summer and Fall/Winter collections with cutting edge runway presentations, TOM* Talks, power brunches, industry meet n' greets, trunk shows and showrooms. Finally, men's fashion has a face and a name: TOM*." (www.blogto.com › toronto-mens-fashion-week-toronto)	Runway shows and events
Startup Fashion Week Toronto	2014	"We are disrupting the concept of a Fashion Week to provide a range of events in our Program that focus on Fashion, Business and Technology!" (https://www.startupfashionweek.com/)	Runway shows and events
Toronto Women's Fashion Week	2016	"Modern, relevant high-tech fashion week devoted solely to women's wear. Toronto Women's Fashion Week (TW) truly celebrates Canadian Fashion and is proud to be the home to Canada's most iconic designers and the Next Generation of Emerging Talent." (https://www.tw-fw.com/)	Runway shows and events
Toronto Fashion Week	2017-2020	"Toronto Fashion Week, an event showcasing fashion, art and culture takes place in Yorkville, Toronto's revitalized and most prestigious luxury retail neighborhood. ... As the leading fashion event in Canada, Toronto Fashion Week creates a catalyst for media engagement, retail activity and global connectivity." (https://torontofashionweek.to/)	Runway shows and events
Toronto Kids Fashion Week	2017	"With the vision of being recognized globally in kids fashion industry, Toronto Kids Fashion Week is dedicated to featuring kids fashion designers, alongside the most iconic kids wear brands in Canada and around the world." (https://www.tkfw.ca/)	Runway shows and events
RE/SET Showroom at Toronto Fashion Week	2017-2019	"Retail experience curated and produced by Toronto-based fashion group THE COLLECTIONS[1]... aims to provide designers a platform which allows them to build relationships with the industry and sell direct to consumer." (https://torontofashionweek.to/re-set/)	Showroom and events
Indigenous Fashion Week Toronto	2018	"IFWTO – Indigenous Fashion Week Toronto presents Indigenous-made/designed fashion, crafts and textiles in runways, curated exhibitions, artist talks, panels, lectures, hands-on workshops, and a marketplace for all audiences." (https://ifwtoronto.com/)	Runway shows and events
		Other fashion industry trade shows and events	
Association of Footwear and	1966	"AFA Canada is the country's premier source for sales and	Trade show (not open to

(Continued)

Table 1
(Continued)

Name	Year	Mandate	Function
Apparel Canada (Formerly The Toronto Shoe Show) (spring summer/fall winter)		marketing assistance to retailers and wholesalers within the footwear, apparel and accessory industries through events and education." (https://www.afacanada.com/)	the public)
One of a Kind Show (SS/FW)	1975	"Since 1975, the One Of A Kind Show has been the flagship event to support craft and its makers. For a truly unique shopping experience, visit us twice a year or online!" (https://www.oneofakindshow.com/)	Public trade show
Canada′s Bridal Show	1984	"Canada′s Bridal Show is the most prestigious bridal show of the year. ... No other bridal show will bring as many potential and affluent clients to your doorstep." (https://canadasbridalshow.com/)	Public trade show
Mode Accessories Show (SS/FW)	1987	"Mode is Canada′s largest fashion, jewelry, and accessories tradeshow; a true business-to-business tradeshow for buyers to source from wholesalers, artisans, and importers." (https://www.modeshow.ca/)	Public trade show
INLAND	2014	"INLAND is Canada′s leading pop-up destination to shop emerging and contemporary fashion and apparel ... 100% of all collections presented at INLAND are ethically made or manufactured in Canada." (https://madeinland.ca/)	Pop-up
Apparel Textile Sourcing Conference	2015	"The largest international sourcing event focused on the Canadian and North American Apparel, Textile, and Fashion sectors." (https://www.appareltextilesourcing.com/)	Public trade show
Toronto Fashion Industry	2017	"We are a diverse group of creatives and fashion professionals who believe in creating a platform to promote our industry in Toronto, through our monthly networking and brand launch events." (https://www.meetup.com/Toronto-Fashion-Industry-Meetup/)	Networking events
FashionTech Toronto	2018	"The goal of FashionTech Toronto is to bring together Toronto′s thriving tech and fashion communities to foster discussion and explore how we can support more synergy between these communities." (https://fashiontech.ca)	Speaker series
Toronto Fashion Collective	2019	"The Toronto Fashion Collective was founded by a group of Canadian designers ... with the objective to build a community of talents that honours craftsmanship, design and fashion." (http://torontofashioncollective.ca/)	Pop-up
The Profile Show (SS/FW)	Not specified	"The new merged Profile Show brings together the best selection of apparel and accessories that includes all segments of today′s fashion industry – men′s, women′s, young contemporary & junior labels, children′s and lifestyle brands." (https://www.tfocanada.ca/events)	Trade show
		Fashion design associations	
Fashion Group International of Toronto (FGI)	1956	"FGI Toronto is the only Canadian chapter of Fashion Group International, a global non-profit networking organization dedicated to the vibrant growth of the Toronto fashion industry." (https://www.fgitoronto.org/)	Membership organization
Fashion Design Council of Canada	1999	Non-profit, non-governmental organization. Produced Toronto Fashion Week from 1999 to 2012.	Policy advocacy
Canadian Arts and Fashion Awards	2014	"A national platform to foster the next generation of Canadian talent through an annual awards show and	Awards show

(Continued)

Table 1
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Name	Year	Mandate	Function
		year-round economic development initiatives." (https://www.cafawards.ca/)	
Canada Fashion Group[2]	2017	"Canada Fashion Group (CFG) is committed to nurturing and promoting the Canadian Fashion industry by providing a national and international platform for Canada fashion designers and brands to showcase their talent and innovation through impactful fashion initiative."	Membership and events
Black Designers of Canada	2020	"Black Designers of Canada exists to highlight and amplify black designers across Canada. The first-ever comprehensive Canadian index celebrating black excellence in design."	Not-for-profit industry association and registry of designers
		Fashion industry-related organizations	
Canadian Jewelers Association	1918	"Since 1918, we have provided a single source for information on this vibrant and diverse industry to consumers, government, media and businesses. The CJA is the national trade association for the Canadian jewelry industry, comprised of retailers, suppliers, and providers of goods and services."	Membership organization
Retail Council of Canada	1963	"Our mission is to advance the interests of the retail industry through effective advocacy, communications and education."	Not-for-profit association
Art of Fashion	1998	"Art of Fashion (AOF) is an award-winning not-for-profit organization that champions high-quality Canadian fashion. In 1998, Michelle Planche, CMP, President of Paradigm Events, launched Art of Fashion with the goal of facilitating the professional development of Canada's rising fashion talent. Since, the organization has sought to provide a superior level of early-career support modeled after fashion hubs New York, Paris and Milan. Through critically acclaimed events, Art of Fashion has dramatically influenced the careers of hundreds of designers."	Not-for-profit association
Fashion Takes Action	2007	"Fashion Takes Action (FTA) is a non-profit organization established in 2007 to advance sustainability in the fashion industry through education, awareness and collaboration." (https://www.linkedin.com/company/canadafashiongroupinc/about/)	Not-for-profit association
Canadian Association of Wholesale Sales Representatives	Not specified	"The Canadian Association of Wholesale Sales Representatives (CAWS) is a non-profit National Association that represents commission apparel sales agents." (http://caws.ca/)	Not-for-profit association
		Public relations firms	
NKPR	2002	"NKPR is a full service communications agency who specializes in providing ongoing strategic counsel to our clients." (https://nkpr.net/)	Public relations
Magnet Creative Management	2010	"Magnet Creative Management is a boutique management and publicity agency specializing in fashion and beauty." (https://www.magnetcreative.ca/)	Public relations
THE COLLECTIONS	2010	"THE COLLECTIONS™ is a Toronto based brand consulting and production firm specializing in visual	Consultants, brand representatives

(Continued)

Table 1
(Continued)

Name	Year	Mandate	Function
		communications and fashion related services." (https://www.linkedin.com/company/the-fashion-collective/about/)	
Power of Privé	2012	" Power of Privé (POP) brings a bespoke attitude to luxury label launches in the North American market." (Website no longer active)	Public relations
Matte PR	2016	"Matte PR is a full-service public relations agency that executes creative and effective campaigns for lifestyle and design clients." (https://mattepr.com/)	Public relations
		Fashion incubators	
Toronto Fashion Incubator	1987	"TFI is an award-winning and highly-acclaimed non-profit organization dedicated to supporting and nurturing Canadian fashion designers and entrepreneurs." (https://fashionincubator.com/)	Incubator
Fashion Zone	2013	"At the intersection of fashion and technology, The Fashion Zone is an interdisciplinary incubator that provides growth and funding opportunities that ignite and inspire fashion innovation in Canada." (https://www.ryerson.ca/fashion-zone/)	Incubator
Joe Fresh Center for Fashion Innovation	2015	"The mission … is to accelerate Canadian start-ups in all fashion-related fields, including design, production, technology and professional services." (https://www.facebook.com/JoeFreshCentre/)	Business accelerator
Suzanne Rogers Fashion Institute	2016	"The goal of SRFI is to educate, support, promote, and advocate for new talent at Ryerson University in fashion craftsmanship and design under the School of Fashion's guiding principles of diversity, heritage, and innovation." (https://www.ryerson.ca/fashion/research-creative/the-suzanne-rogers-fashion-institute/)	Fellowship program
		Fashion higher education institutions	
Toronto Fashion Academy	2013	"Toronto Fashion Academy (TFA) was designed on the basis of perfecting and extolling the true quality of our artist's within the Fashion Industry." (https://www.torontofashionacademy.ca/)	Academy
George Brown College Fashion Exchange	2016	"A vibrant, urban, manufacturing hub where fashion education, design, entrepreneurship, engagement, and efficient production services come together under one roof in the heart of downtown Toronto."	Manufacturing facility
George Brown College Fashion Studies	N/A	"We cover the entire spectrum of fashion design and fashion business education from technology to the fundamentals of design, marketing, merchandising, manufacturing and fashion management. In class you'll learn from instructors with industry experience and you'll have the opportunity to gain you your own experience through field education opportunities." (https://www.georgebrown.ca/arts-design-information-technology/fashion-jewellery/fashion)	College programs
Ryerson University Fashion Program	N/A	"One of the top undergraduate fashion schools worldwide … the School's academically and artistically demanding program focuses on fashion as art, as a business and as an intellectual challenge." (https://www.ryerson.ca/fashion/)	College programs

(Continued)

Table 1
(Continued)

Name	Year	Mandate	Function
Sheridan College Craft & Design (Textiles) Program	N/A	"Our textiles Studio provides a range of traditional and contemporary techniques and methods. E.g: "hands-on experience in 2D and 3D fibre-specific approaches, including printing, weaving, dyeing, off-loom techniques, digital design and sewing." (https://academics.sheridancollege.ca/programs/bachelor-of-craft-and-design-textiles)	College programs
Humber College Fashion Arts and Business Program	N/A	Program places an emphasis on retail operations from both domestic and international perspectives, including marketing, store planning and merchandising, brand management, cosmetic marketing, event planning, and retail buying.	College programs
Seneca College School of Fashion	N/A	Home to a number of programs including Fashion Arts, Fashion Business, Fashion Business Management, Fashion Studies, Event Management, and Visual Merchandising Arts.	College programs
OCAD University	N/A	Material Art and Design program with specializations in textiles or jewelry.	University programs

[1]The Collections broke up in June 2019 and have splintered into a new range of fashion industry events. The Collections were credited with "helping the world see how cool Canadian fashion can be" (deCarufel 2019).
[2]The founder of Canada Fashion Group passed away in spring 2019. The website of Canada Fashion Group has since been rebranded as "a site dedicated to all things beauty—reviews, product launches and more." The full description of the website, which is currently active, is as follows: "Canada Fashion Group is a website solely dedicated to beauty—the products we use, love, adore, sometimes abhor, complete with the stories and people behind them. We like to think that the subject of beauty is a fascinating, complex and never ending tale, and just like you we can't get enough of the latest launches, cult products or celebrity must-haves; the difference is we can't help but document our adventures along the way and hope you'll join us in discoveries both old and new."

> There's always been competition between events. It is hard to know which to pick and invest in. You try to make the best decision. I don't want to say I've made mistakes but looking back, I've wondered about some choices that were the right decision in the moment …

This competitive environment is a disincentive for many fashion designers, who have opted out of fashion week events altogether, preferring instead to show their collections in their own studios and/or online.

Moreover, despite having high levels of physical proximity, this spatial closeness has not translated into a tightly connected EE with significant collaboration or interdependency. Rather, the Toronto EE is a cluttered and overlapping ecosystem, which we argue is performing sub-optimally because organizations and institutions are competing with one another. These antagonistic interactions also contribute to the ecosystem's competitive culture, discussed in more detail below. Thus, the Toronto case supports Stam's (2015) argument that EEs need not only the *presence* of key systemic conditions but also *interaction* between actors.

Policy

Previous research has found that limited policy support of the fashion industry in Canada has led to minimal public investment (Brydges and Pugh 2017). There were signs of optimism in 2017 when the federal government launched a new "Creative Canada Policy Framework" (Government of Canada 2017). For the first time, the policy included fashion in its definition of creative industries alongside design, architecture, video games, digital media, and multi-platform storytelling (Government of Canada 2017). However, the 38-page report mentions fashion only once, and the industry's hopes of a dedicated strategy remain unmet.

At the municipal level, the City of Toronto has a Fashion/Apparel Sector Development Officer in the Economic Development & Culture division, with a website that includes basic information. For example, even though the site acknowledges that its list of firms is not “comprehensive,” it includes only three Toronto fashion brands: Canada Goose, Joe Fresh, and Roots. These large international brands do not represent the dominant industry structure, which is a small independent firm employing fewer than five people (Brydges 2018). Moreover, under “key sector assets,” the website lists only the Toronto Fashion Incubator, overlooking many other organizations and resources that we highlight in Table 1.

However, the city could play a larger leadership role in the fashion industry. For example, an opportunity arose in July 2016 when IMG cancelled Toronto Fashion Week (La Rose 2016). The City of Toronto, along with other key industry stakeholders, expressed concern following this cancellation, and it looked as if action would be taken. In response, the City’s Economic Development Committee released a Report for Action to support the growth of Toronto’s fashion industry, set up a fashion industry roundtable, created a working group, and conducted an online survey with industry stakeholders (City of Toronto 2017). The report identified a number of well-known industry challenges, including access to consumer markets, access to new technology, lack of data on the industry, and lack of support for the industry. It also listed opportunities for city support, including export programs, marketing expertise, tax credits and grants, a new advisory committee, and a new role for the city as industry champion.

In addition, the report recommended that an industry advisory panel be put in place to take action on these issues (City of Toronto 2017). The resulting Fashion Industry Advisory Panel, founded in 2018, was largely inactive until September 2020, when it launched its first campaign, called #SupportTorontoFashion, with a “message of support” from Mayor John Tory.

This new campaign aims “to shed a light on stories within Toronto’s fashion industry while calling upon consumers to shop local and show their support on social channels” (FIAP 2020). The panel brings together diverse industry actors, including representatives from institutions such as the Canadian Arts and Fashion Awards, the Fashion Design Council of Canada, Toronto Fashion Incubator, and Toronto Fashion Week, as well as from the City of Toronto. While still in the early stages, the campaign seems to focus on educating Toronto consumers and encouraging them to shop local, rather than on broader policy development or advocacy around investment for the industry.

Finance

Access to financial capital is a key challenge facing female entrepreneurs (Brush et al. 2018), and fashion designers are no exception (Jonsson 2008; Jonsson and Lindbergh 2013; Brydges and Pugh 2017). To begin, the City of Toronto offers designers limited public investment. We could identify only one program: the City of Toronto New Grant Program Starter Company Plus – Fashion Business (Startup Here Toronto 2017). Offered in partnership with the Toronto Fashion Incubator, the program awards grants ranging from \$2,500 to \$5,000, in addition to “training, mentorship and advisory support” (Startup Here Toronto 2017). However, it is unclear how many designers know about this program and have accessed it. It is also unclear whether the program is still running.

Many designers face another challenge. The Toronto Fashion Incubator is aimed at emerging designers, meaning that more established designers, who have grown beyond the incubator or start-up phase, have little support or investment. A number of these designers (often in business for five to seven years) expressed their frustration. They described difficulties in gaining access not only to investment but also to mentorship and advice—expertise they needed to take their business to the next level.

This lack of public investment has profound repercussions. First, according to City of Toronto documents, private funding usually follows public investment in for-profit CCIs, such as fashion (Brydges and Pugh 2017). Second, the financial sector’s own view of the fashion industry has restricted available funds; studies show that banks rarely see fashion design businesses as attractive candidates for loans and financing (see Jonsson 2008; Jonsson and Lindbergh 2013; Tervilä 2015). As a result, fashion designers typically rely on alternative means to build their businesses, including family, friends, and personal savings. Although these resources vary from individual to individual, they do not usually help designers to raise enough capital to grow (Jonsson 2008; Jonsson and Lindbergh 2013).

We did find examples of investment into the fashion industry through competitions run in partnership with corporate sponsors (such as best new designer competitions), and through private benefactors (see also Whitwell 2020). For example, before the cancellation of Toronto Fashion Week in 2016, designers who enrolled in the Mercedes-Benz Start-up Competition were eligible for a $5,000 CAD prize, in addition to mentorship. However, it is important to note that prize-winners do include designers from outside Toronto, such as 2013's dual-winners Matière Noire from Montreal and Malorie Urbanovitch from Edmonton (Morra 2014).

More recently, a Toronto philanthropist, Suzanne Rogers, who has personally donated over $3 million to the industry (Whitwell 2020), announced The Suzanne Rogers Designer Grant for International Development. This grant—intended for more established designers, in business for at least five years—appears to fill a gap in the ecosystem's funding.

The ongoing impact of COVID-19 on the Canadian fashion industry has exacerbated these challenges (Whitwell 2020). For example, made-in-Canada label Judith and Charles, which has been in business for nearly 30 years, made an urgent appeal to customers on Instagram in May 2020. The brand, facing a cash crisis, wrote, "despite the BDC [Business Development Bank of Canada] approving our government-sponsored loan, our long-term bank, TD Bank, has refused to support us on the account that the future of retail is too risky, effectively nullifying the BDC loan" (Judith and Charles 2020a). The brand has since been negotiating the terms of a refinancing deal and continues to face an uncertain future (Judith and Charles 2020b). At the time of writing, new government investment in the industry in response to the pandemic—by any level of government—appears unlikely (Whitwell 2020).

This lack of investment has had various consequences. For example, during interviews, designers described the need to focus on short-term financial concerns (such as the upcoming collection) rather than long-term goals (such as three- or five-year plans). Designers have also lamented how a limited access to capital has hindered them from scaling up their business, such as expanding into new domestic and international markets. The lack of investment has also suggested to designers that their work somehow matters less than the work of CCIs that have received support. This negative perception has often pushed fashion designers to consider relocating the business, interviews found.

Culture

Despite Toronto's prominent role in Canada's national fashion system, if we consider success stories, which Isenberg (2011) highlights as a key component of EE culture, Toronto has few to tell. In order to "make it," designers share a common idea that they must leave Toronto and base their business abroad, at least temporarily. Once they gain international recognition, they believe, they will earn respect in Canada. The designer Tanya Taylor, who runs a successful womenswear label in New York City, exemplifies this approach. As a consequence of this common idea, some aspiring designers, rather than investing their time and energy into Toronto's ecosystem, view it as a stepping stone. Thus, the Toronto EE has a brain drain problem that is largely unacknowledged and unaddressed.

Designers who do decide to stay in Toronto must navigate a competitive, conservative culture. Many of our interviewees believe that the Toronto EE has a small inner circle of influential decision makers who tend to pick winners. They pointed to multiple instances of one designer monopolizing limited prize winnings over several seasons. While industry gatekeepers often seem risk-averse, they may also be acting pragmatically: given the lack of funding available to designers and the relatively small cash prizes, a designer would have to win several awards in order to invest meaningfully in the business.

However, this pattern leaves many other designers feeling excluded from the industry's inner circle, a perception that one interviewee tried to explain: "there are a few people that we can turn to who are really supportive, but it's difficult. It's political. Everyone is rooting for the same cause but have different affiliations. You have to know who to ask."

This mutual suspicion frustrates independent designers, who repeatedly described feeling as if they were operating on the margins of the industry. As another designer told us,

> We've never had any support from the community. It means we've built our own thing in our own way, and we just function in this separate world of our own making. I think there's a way for us to fit in that larger fashion world—outside of Toronto—but I haven't found a way to engage locally that feels good yet.

As a result, rather than trying to join the Toronto EE, designers instead retreat to their studios to focus on their businesses. Designers rarely collaborate with one another and usually work in isolation, describing the need to "be selfish" in prioritizing and investing their time and limited resources. As one interviewee described it,

> [T]here are some designers in the industry, who we would consider our peers, that we can go to when we are looking for advice. For example, if they have attended a certain event and how it worked. But I wouldn't say we've always taken that approach.

Or as another designer told us,

> [W]e can get along with the other Toronto designers and be friendly. You might see someone at an event where you talk and say hi, but you don't ask them for their opinion. Things like bouncing ideas off of each other or collaborating … there's less of that.

Thus, as our research reveals, competition and isolation—rather than collaboration—define the Toronto fashion EE.

Markets

While Toronto is arguably Canada's largest consumer market for fashion, independent fashion designers face several challenges reaching customers. Concerning large department stores, the interviews revealed a common theme. Even though some fashion buyers for these stores live in Toronto, the designers reported that selling their collections at these retailers was extremely difficult. They believed that fashion buyers had conservative tastes and preferred to stock well-known international brands, rather than taking a chance on an emerging local designer.

As a result of this barrier, fashion designers try to gain market access within the Toronto EE by developing their own retail channels. However, most of them cannot afford to open a stand-alone retail space, particularly when first starting out. One designer had been in business for nearly ten years as a wholesaler before making the leap to retail:

> I had been talking about opening a store forever. I built the business solely off of wholesale [selling to independent fashion retailers across Canada] and knew if I wanted to grow, I needed my own retail space. I found my dream space with a dream landlord on West Queen West. The visibility is incredible but so was the investment … it takes time to get to the place where you can commit to signing a lease.

Because they face barriers to market access in both department stores and stand-alone retail spaces, designers often look for like-minded independent fashion retailers to stock their collections (Leslie et al. 2015). Independent fashion designers are found primarily in popular retail districts, such as along Queen Street West or Dundas Street West, and at events such as INLAND, a bi-annual Canadian design pop-up (Leslie et al. 2015; Brydges and Pugh 2017). These neighbourhoods and events become known destinations for lovers of local design and thus help designers to reach their target consumers (Leslie et al. 2015). However, these niche spaces can also create challenges for brands hoping to find a more mainstream clientele.

Increasingly, independent fashion retailers build their business through establishing an online shop and social media presence. Supported by the growth of e-commerce platforms such as Shopify and social media platforms such as Instagram (now shoppable), independent fashion designers can work to overcome barriers to retail markets within the local EE by creating their own direct online retail channels to consumers.

Although an online presence is increasingly vital (Brydges and Hracs 2019b), online retailing does not always provide access to radically new markets. In interviews, designers observed that the location of online customers lived near physical stores or stockists. For example:

> Our online customer base is located either in Toronto, where we have our retail location, or in Montreal, where we do our manufacturing. It's not uncommon for someone to come by the store, try something on, think about it, and then order it online. We

> occasionally get some sales from smaller Canadian cities. I'm always surprised when we get a sale from the United States. I'm not really sure how they find us to be honest …

Thus, while retailing online offers endless possibilities in theory, in reality consumer markets can still be geographically bound.

However, a new collaboration between INLAND, a marketplace for independent Canadian designers, and Hudson's Bay Company, Canada's oldest department store, is a sign of hope. Announced in October 2020, the three-month partnership will showcase 44 Canadian brands, almost 40% of which are run by BIPOC (black, indigenous, and people of colour) designers, on a new online platform hosted on INLAND's website (Glendinning 2020).

Despite these challenges, the ongoing impact of COVID-19 on the fashion industry may reinforce the role of online sales. As long as a risk remains that public-health-mandated lockdowns will close retail shops, e-commerce platforms may become increasingly crucial to companies' success. E-commerce platforms are already playing an important role in industry responses to the COVID-19 pandemic. One example was the Wear Canada Proud campaign initiated by the Canadian Arts and Fashion Awards (CAFA) and FASHION Magazine. The campaign consisted of a two-day online shopping event aimed at showcasing over 100 Canadian fashion brands by offering exclusive discounts and insider access to designers.

Discussion and conclusion

Inspired by the recent interest in EEs and determined to explain local and regional economic growth via proximity and agglomeration, we have used the EE concept as a tool to help us analyze the configuration of the Toronto fashion industry. By applying this concept—one developed with high-tech industries in mind—to cultural and creative industries, we have discovered some fundamental tensions. Notably, our research suggests that if the concept applies only to a narrow range of industries and places, it may not have the universal explanatory power that scholars hope.

We found some benefit in applying the EE framework to our case because it helped us to pinpoint challenges facing the industry. Through our application of the concept, we identified a number of factors that may explain the unexceptional performance of this EE. We found gaps in public policy and governance to support the fashion industry. We observed institutional fragmentation, with overlapping organizations trying to support fashion without collaboration. Finally, we uncovered an exclusive and conservative network culture that fails to support talent, both emerging and established.

We also found that geographical proximity, certainly a feature of the Toronto fashion EE's configuration, does not necessarily create a cluster. Rather than discovering a collaborative and co-evolving ecosystem strengthened by interaction, we found a fragmented ecosystem composed of overlapping institutions and isolated fashion designers. We noticed key differences between the Toronto fashion EE and the kind of coordinated ecosystems reported in previous EE literature. These differences, we argue, advance the concept into more industries and places, questioning normative assumptions about what an EE looks like.

In spite of these tensions, we see this application of the EE concept to a CCI as a useful and productive exercise. Isenberg's (2011) framework has allowed us to conduct a wide-ranging analysis of the Toronto fashion industry's institutions, actors, and organizations, as well as the interactions among them. Moreover, we believe that our research not only expands the idea of EEs, but also enhances analysis within the field of fashion studies.

Through discussing gender in the fashion industry, we have found that many typical characteristics of an EE do not necessarily hold. Indeed, beyond successful and high-tech cases, these characteristics rarely apply. Even within fashion-industry studies, a focus on successful cases such as Paris or Milan masks many challenges faced by actors operating in underfunded, averagely performing centres, such as Toronto. Exploring new case studies also leads to examining new sites of EEs. For example, the Toronto fashion ecosystem does not take place in science parks, incubators, or universities. Instead, we see homes, shops, and studios as the key sites of entrepreneurial activity. Independent fashion designers have more porous and fluid boundaries between home and workplace than the extant EE theory recognizes. The EE geography—in terms of the spaces and places where entrepreneurship takes place—is thus quite different.

Correspondingly, we find that our case raises questions about mainstream economic geography. In particular, we observe that work theorizing local economic growth from the perspective of agglomeration and proximity dynamics has suffered from a blindness to industries and people outside of high-tech and masculinized industries. This blindness has widened economic geography's gender problem (Pugh 2018), an issue too complex to discuss here but one that helps to explain the paucity of work in female-dominated industries such as fashion. We found the entrepreneurship literature more advanced in this respect (Hamilton 2014), and we believe that gender dynamics need more consideration (McAdam et al. 2019).

And finally, by applying the EE concept to an industry where work is highly individualized, this research has revealed certain sticking points. While Toronto still has successful independent fashion designers, these entrepreneurs are not firmly embedded in an ecosystem. The ones who succeed do so by bypassing local structures, and the ones who leave do so to escape the confines of an averagely performing system (Brydges and Pugh 2017). Even when they work outside an optimally performing ecosystem, entrepreneurs clearly find ways to create successful fashion businesses. Thus, we wonder whether the Toronto EE would generate more success stories if it functioned more effectively.

The Toronto ecosystem is at a crossroads. The local municipal government has expressed interest in advocating for the fashion industry and can perhaps bring together key actors and institutions. However, follow-up research must investigate the implications of both specific events, such as the repeated cancellation of Toronto Fashion Week, and global crises, such as the pandemic (Whitwell 2020). For example, can the Toronto EE recover from the ongoing shock of COVID-19? While we have pointed out some instances where the pandemic has complicated the situation at time of writing, the industry is in flux, and future research will need to explore the Toronto fashion EE's evolution over time.

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