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**ANALYSIS OF DESIGN
IN SLOVENIA
THE SUPPLY SIDE**

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Analysis of Design in Slovenia – The Supply Side

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Abstract

This working paper presents the results of the analysis of the design services supply in Slovenia. Several methodological issues accompany the analysis of all creative industries, including design. In order to improve the reliability of results, we combined different approaches. Existing secondary data, including industrial and occupational statistics, were merged with primary data acquired through interviews of 12 recognised designers and a survey of 56 designers. The main conclusion of the analysis is that the supply of design services in Slovenia is sufficient in terms of its quality and quantity. On the supply side, the basic precondition for the exploitation of the innovative potential of design is therefore met.

JEL Classification: D29, O39, C18

Key words: design, designers, supply analysis.

Introduction

In the last decade, throughout the world, the creative industries (CI) and especially design have moved from marginal debates about culture rights into the centre of the discussions regarding competitiveness. Slovenia is, however, lagging behind in this field. While the issue of creativity and the CI has been in and out of policy discussions in the last years, there is still no programme or systematic support for the CI or design on a national level or even a strategic document. In addition, the research on CI and design in Slovenia lags far behind.

In 2010, however, the Ministry of Education, Science, Culture and Sport, the Ministry of Economic Development and Technology, and the Slovenian Research Agency issued a call for proposals for a Target Research project entitled *The state of design, with focus on industrial design, as a part of creative industries, and best international practices as a foundation for fostering this sector in Slovenia*. Within this project, the supply of design services in Slovenia was analysed. In order to maximise the innovative potential of design, a sufficient quantity and quality of available design services is an essential prerequisite.

This working paper briefly presents the results of the analysis of the design services in Slovenia, which was carried out within this project.

Theoretical framework

The word “design” is often being used in everyday speech when we talk about the products’ aesthetics. However, in its evolution, design has by far surpassed the mere aesthetical criteria. It presents the crossing of different factors which impact the product, message and identity of the firm. Good design will shape the product for ease of use, reliability and costs of production and maintenance. Decisions made during the design phase will affect the quality and ease of manufacture of the product. Elements of design, particularly graphic design, will form part of product, service and company branding and advertising strategy (DTI, 2005).

Design is often understood in relation with products, however, service design is a most important element of design. For services, design can affect how customers will experience a service, such as a bank or a fast food restaurant, including their experience in the queue. Design can therefore play a very important role in public services as well. The public sector is facing several challenges which require radical changes in public services, and the use of design methods can play a key role in enabling innovative and cost effective solutions, which will meet the complex needs of users (Design Council briefing, 2008).

Each product or service is designed, even if not by a professional designer. Much design implicitly takes place outside of a formal design function and is not done by a professional designer. This is often known as “silent design” (Gorb, Dumas, 1987). Design includes architecture as well, despite the fact that architecture is usually treated as a separate category.

While design has many different, comprehensive definitions, and is being understood in different ways, there is still a question whether design can be rigorously defined. There is no generally-accepted and precise definition of design as a concept. In 2009, academics made an attempt to formalise a synthesized definition of design activity as “a process, executed by an agent, for the purpose of generating a specification of an object based on: the environment in which the object will exist, the goals ascribed to the object, the desired structural and behavioural properties of the object (requirements), a given set of component types (primitives), and constraints that limit the acceptable solutions” (Ralph, Wand, 2009).

Design encompasses a wide range of disciplines, each offering its own specialist skills and services. The Designers Society of Slovenia (www.dos-design.si) classifies their members into the following disciplines: graphic design, industrial design, interior design, clothing design, unique design, illustration, photography, scenography and costume design.

Design, and above all, industrial design, can have a very important influence on the economy. It is being more and more recognised as a key component of the economic prosperity and a key factor of the national competitiveness. It presents an important driver of innovation, and can also be understood as a bridge between creativity and innovation (HM Treasury, 2005). As R&D, design also presents a way to channel creativity for commercial purposes. Design can play a crucial role as a source of innovation and added value specially in those industries where R&D investments tend to be low (e.g. furniture or textile industry) (DTI, 2005) and can therefore be a valuable tool for restructuring of companies in traditional industries.

Design can be used to determine a variety of non-price characteristics of products and services, such as style, durability or waiting times. Besides, the use of design makes it easier for companies to build a recognisable image, marketing, create brand loyalty or reduce production costs through optimisation of product processes. A variety of evidence supports the role of design in enhancing firm performance. (DTI, 2005).

As well as boosting firm competitiveness, there is scope for creativity and design to generate wider economic gains. Consumers can benefit from greater variety and improved products and services. Ideas can be adopted or adapted to improve the performance of other firms (DTI, 2005). Furthermore, design can increase the quality of life and play a beneficial role in the wider social context as it can be involved in all managerial and planning processes dealing with solutions

including a wide range of topics such as public transport, city infrastructure, environmental projects, inclusion of people with special needs, social cohesion, etc. (Klinar, 2008).

Methodology and data

Since there is no generally-accepted definition of design or any framework for its measurement (Finbarr, Moultrie, 2008), analysis of design is not an easy task. Several methodological issues and challenges need to be taken into account when interpreting the results. Therefore, in order to improve the reliability, we combined different approaches.

The first methodological issue is the classification of design in the industrial statistics and occupational statistics, where the predefined categories do not completely fit the definition of design as an industry/occupation. The numbers acquired can therefore be substantially different. To minimise the impact of this problem, we used two different databases, following two of the most commonly used approaches for the CCI analysis – industrial and occupational (FORA, 2010).

Industrial statistics were calculated based on the Annual Reports Database (AJPES, 2009). According to NACE (statistical classification of economic activities in the European Community), design is classified as category 74100 (Specialised design activities). Occupational statistics was based on the Statistical Registry of the Employment database (SURS, 2008), where occupations are classified according to the Standard Classification of Occupations (SKP-V2). Category 3471 includes decorators and commercial designers. Besides that, we also used the data acquired from the Designers Society of Slovenia (www.dos-design.si).

The analysis of secondary data was upgraded with primary data, acquired with interviews and a survey. In May 2011, in-depth interviews with 12 recognised designers and connoisseurs of design were carried out. The aim of using in-depth interviews was to provide context to statistical data, offer a more complete and detailed picture and provide input for the survey. The general interview guide approach was used in order to enable the exploration of issues that elucidate and illuminate the particular subject but at the same time, enable the respondents to express their views and experiences in their own words (Patton, 1990; McNamara, 1999; Gall et al., 2003; Kvale, 2007). The gathered data was compiled into themes or codes; consistent phrases or ideas that were common among research participants (Creswell, 2003, 2007; Kvale, 2007).

Based on the interviews, a survey questionnaire was developed. In June 2011, the questionnaire was sent to the addresses of 180 designers in Slovenia. The response rate was 31%, and the summarised results of the 56 respondents are presented in the next section.

Results

The results of industrial statistics, based on the Annual Reports Database, show that in 2009, there were 415 companies in the design industry (statistically defined as NACE Rev 2. category 74100). There were 294 people employed in the design industry and created 8.152.835 euros of Gross value added (GVA), which presents 0,046% of the total GVA.

While the average profitability (EBIT margin) as well as average gross value added (GVA) per employee in CI were far above average and even close to high-tech industries, design was lagging far behind (see Table 1). This could however, only partially be considered as a consequence of the current situation in the field of design, since important methodological issues need to be taken into account here as well (for example also activities such as flower arranging are included in the NACE category 74100 – Specialised Design Activities).

Table 1: Profitability indicators and gross value added

	EBIT* MARGIN	Average GVA** per employee
CREATIVE INDUSTRIES	4.07%	44,867 €
DESIGN	-0,21%	27,756 €
HIGH-TECH INDUSTRIES	14.30%	58,218 €
MID-HIGH-TECH INDUSTRIES	2.53%	32,063 €
OVERALL ECONOMY	2.77%	33,173 €

*EBIT – Earnings before interest and taxes

**GVA – Gross value added

Occupational statistics (Table 2) based on data from the Statistical Registry of Employment (SURS, 2008) shows that there are 2771 designers, decorators and arrangers. Among them, graphic designers present by far the greatest share (59%), followed by industrial designers (14%).

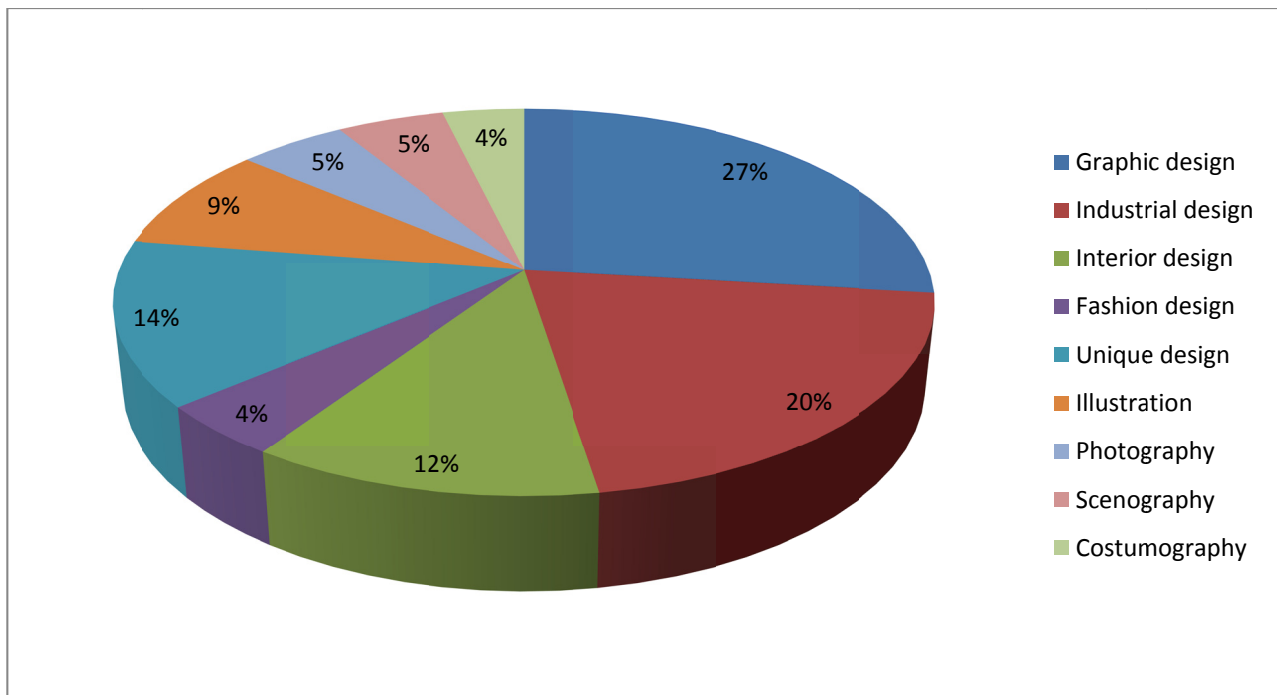
The Designers Society of Slovenia (www.dos-design.si) has 198 members. While all designers are of course not their members, they however believe that the majority of active designers is, and estimate the total number of active and qualified designers in Slovenia to be 250. The structure of their members is presented in Figure 1. Despite an obvious difference in numbers, graphic designers present the greatest share here as well (27%), again followed by industrial designers (27%).

Table 2: Occupational statistics

CODE	OCCUPATION	NUMBER
3471.00	Designers, decorators, arrangers, etc. (uncategorised)	47
3471.01	Arrangers	252
3471.02	Decorators	62
3471.03	Graphic designers	1640
3471.04	Industrial designers	394
3471.05	Fashion designers	196
3471.06	Theatre and film scenography designers	180
3471	SUM	2771

SURS, 2008

Figure 1: The structure of the Designers Society of Slovenia members



In Figure 2, the structure of the surveyed designers is presented. Despite the fact that the categories of design are formed differently here (in accordance with the inputs from the interviews), the results again confirm that graphic designers (identity design and visual communication design) present the biggest share, followed by industrial designers (product design). Besides that, important information is also that there are no designers (in our sample), who would consider service design to be their main field of work.

Figure 2: The structure of the surveyed designers by their main field of work

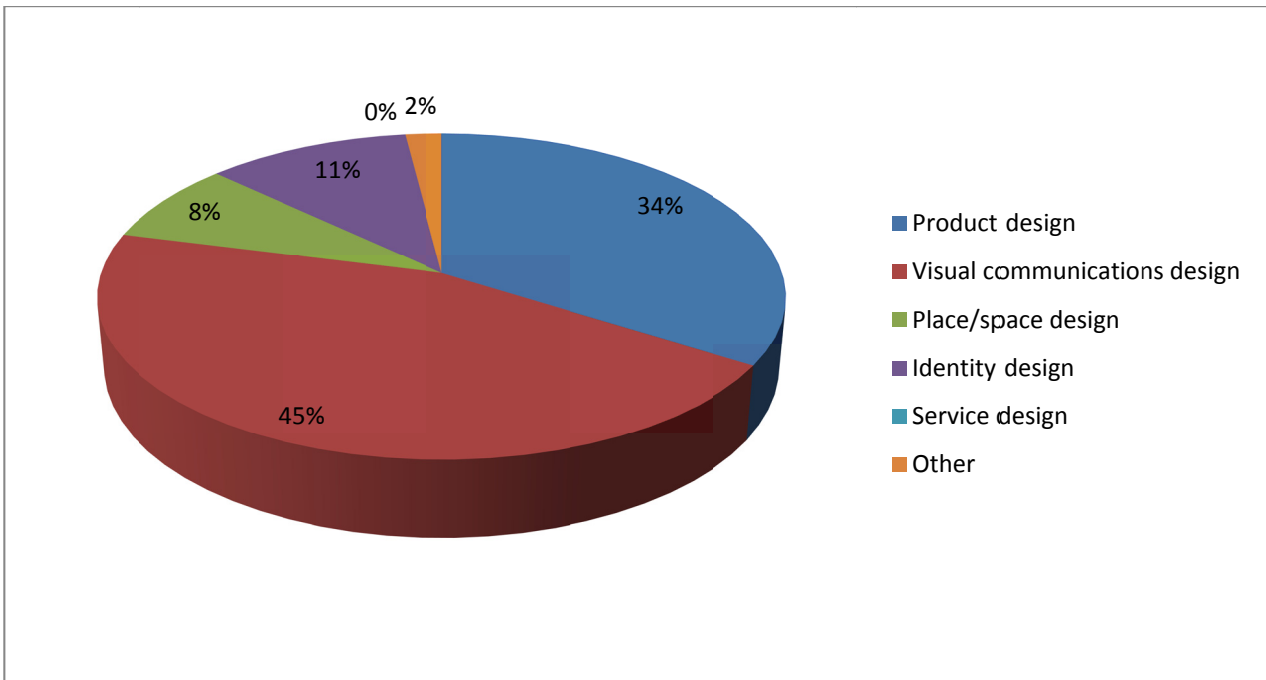
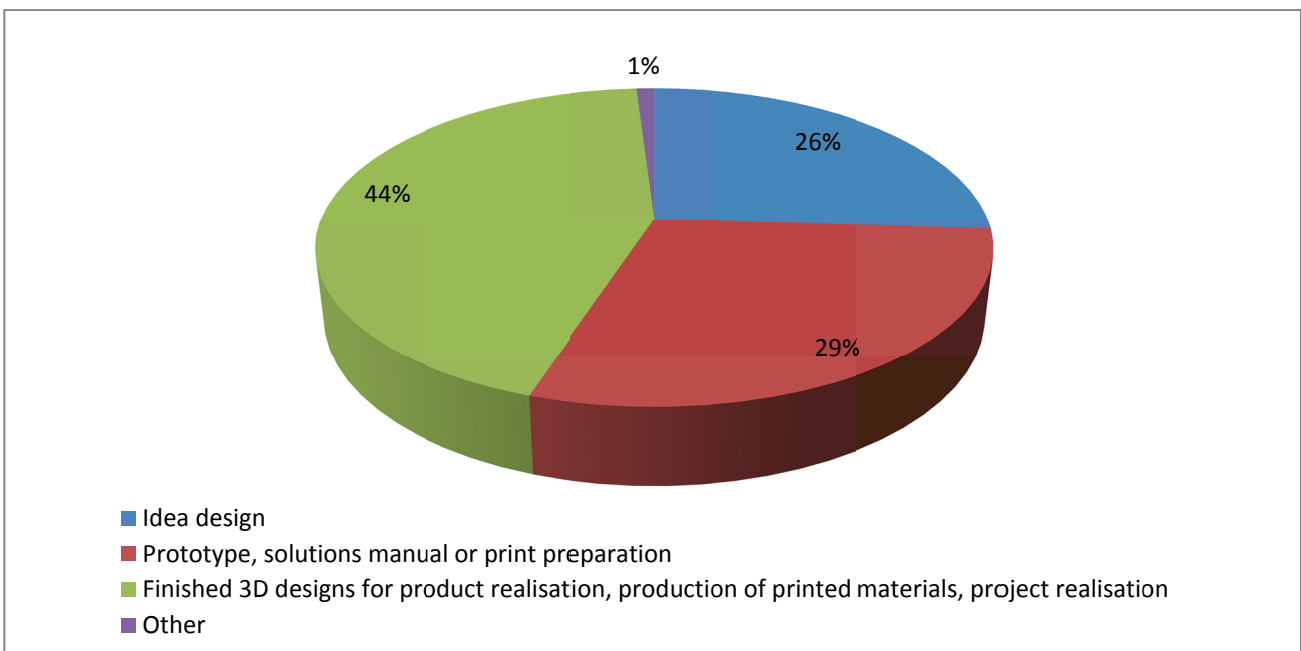


Figure 3 demonstrates, that the designers' most common outputs are in more than a quarter of cases merely the category of ideas. This is of course far from the desired outcome, speaking in economic terms. In order to exploit the potential of design, the designers should bring their work to the final phase, which means for example finished 3D designs for product realisation, production of printed materials or project realisation (e.g. web page).

Figure 3: Designers' outputs



The surveyed designers were asked to express their agreement with different statements about the supply and quality of design services in Slovenia on a scale from 1 (I completely disagree) to 7 (I completely agree). Their results are presented in Table 3. The highest average marks confirm the heterogeneity of supply and problems related to low quality and unqualified providers. Still, based on self estimation, the average quality of design services in Slovenia is good.

Table 3: Supply and quality of design services in Slovenia

Statement	Average
In Slovenia, there are enough quality designers to answer the current demand.	5.87
The competition amongst designers is strong.	5.76
In Slovenia, designers are usually not specialised and offer different services.	6.11
The lack of specialisation of designers lowers the quality of their services.	5.44
The price of the services is usually one of the key deciding factors for clients.	6.09
Clients are satisfied with quality of the services, provided by Slovenian designers.	5.53
There are relatively many talented designers, working in Slovenia.	5.53
The fact, that in Slovenia anybody is allowed to provide designer services (no proof of qualification is required) presents a problem.	6.04
The average quality of provided design services is low.	3.98
Low quality providers ruin the image of all designers.	6.13
Low quality providers lower the price of the design services.	6.11
The general quality level of graphic design services is slightly higher compared to other fields of design in Slovenia.	4.49
Designers often encounter problems regarding intellectual property rights.	5.96

In Table 4, the average agreement with different statements about the international position of Slovenian design is presented. The results of the self estimation show that the quality of Slovenian designers is internationally comparable. In fact, more than a half of the surveyed designers already received one or more awards abroad for their designer work (54.5%) or achieved other notable accomplishments abroad (invitation to important fairs, media attention, interest of foreign clients, etc.) (52.7%).

Table 4: International position of Slovenian design

Statement	Average
The quality of Slovenian designers is internationally comparable.	5.82
In general, Slovenian designers do not have specific international competitive advantages.	5.45
International providers of design services are present in Slovenia mainly as low quality providers on the internet.	4.33
The foundation of good quality design is close contact with the client, which decreases the chances for competition on distant markets.	4.98
In order to improve the performance of Slovenian designers on foreign markets, the promotion of Slovenian industry abroad must be improved and the export must be increased.	6.09
In order to improve the performance of Slovenian designers on foreign markets, a presentation of Slovenian designers together with commercial products/services which are results of their work, is necessary.	6.02
Due to lack of financial support (high costs of collaboration on design fairs and competitions), it is difficult for Slovenian designers to prove themselves abroad.	5.96
The major obstacle for the presentation of Slovenian designers on foreign markets is their lack of motivation and courage.	5.07

The surveyed designers also expressed their agreement with statements regarding different obstacles for the development of the design industry in Slovenia. The results are presented in Table 5.

Table 5: Key obstacles for the development of design industry in Slovenia

Statement	Average
Slovenian companies are usually subcontractors and do not develop their own final products.	5.89
Slovenian companies do not invest enough in the development of their own recognisable identity.	6.36
Slovenian companies do not understand the importance of design and do not include design appropriately in their development processes.	6.11
Promotion abroad (fairs, awards) presents a too big financial burden for the designers.	5.89

There is not enough quality designers in Slovenia.	3.75
University programmes in Slovenia do not offer appropriate knowledge to the designers.	4.25
Slovenia has no design strategy or design support policy.	6.53
There is no national design centre in Slovenia.	5.83
The awareness of the Slovenian managers about the importance of design is too low.	6.33
The awareness of the Slovenian consumers about the importance of design is too low.	6.13
Other	6.47

Other factors that were mentioned by 18 surveyed designers could be merged into two main groups. In the first group, there are problems in the supply side, which were already mentioned (heterogeneity, unqualified providers). The second group includes problems on the demand side (low innovation, low export, little final products, no recognisable brands, low awareness about the potential of design). Besides that, designers also mention problems of the small Slovenian market and preference of consumers to either buy foreign design or low price products.

Discussion and conclusion

As demonstrated in the results section, the estimations of the design supply quantity differ substantially, according to the estimation methodology used.

The problem of the estimations, based on the industrial statistics is, that in the category of design according to NACE classification, also other services or companies, that are not really dealing with design, are included (decorators, arrangers). Furthermore, the estimated number of employees includes all people employed in this industry, even if they are not employed as designers (for example secretaries, maintenance staff,...) Still, the estimation based on occupational statistics is incomparably higher, specially in the case of graphic designers. At this point, it has to be noted that the interviewed experts agree that the actual number of qualified designers is incomparably lower than the estimation based on occupational statistics. Such high estimated numbers (1640 graphical designers, 400 industrial designers, etc.) reveal one of the important problems of design in Slovenia, which is a high number of unqualified designers working in the field.

Despite the differences in statistical estimations, it is clear that graphic and industrial designers are prevailing. The survey results confirm this. The survey results also show that the supply of quality designers in Slovenia is sufficient. Thus, the essential prerequisite for exploitation of the innovative potential of design is fulfilled.

The interview results and the survey confirm that the most important obstacles for the development and exploitation of design potential are not on the supply side, but on the demand side and support policy side. In terms of design policy, Slovenia is lagging at least 10-15 years behind developed European and Asian countries. Slovenian design policy should be one of the foundations of the future development of the country, since the efficient use of design presents a powerful tool for restructuring of firms and traditional industries into globally competitive firms and industries. Furthermore, it enables an upgrade of R&D projects into innovative products and services with high added value. Unfortunately, it seems that the potential of design has so far not really been recognised by the Slovenian firms either.

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