Area Play

Revista de investigación en diseño para el ocio.

Nº 12. Diciembre de 2013

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Grupo de Investigación y Gestión del Diseño
Camino de vera, s/n.
46022 VALENCIA, ESPAÑA
Tel: 0034 963 877 464

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Editorial.

Gestión de la información y competitividad internacional.

En este número 12 presentamos las características comunes de los productos infantiles que hemos visto en la feria de Nuremberg, en la feria de Sao Paulo y en la feria Kind+Jugend de Colonia, que nos dan una visión global del sector de equipamiento para la infancia desde el mobiliario, hasta los juguetes y ropa.

Algunas impresiones comunes de lo que estamos observando en las diferentes ferias del juguete y equipamiento infantil se podría resumir en los siguientes puntos:

- El poder de la ilustración. El recurso gráfico de la ilustración a gran tamaño está presente en tiendas y stands de un gran número de empresas.
- Productos inteligentes. La inclusión de la tecnología oculta que hace a los productos más amigables.
- Oferta de estilo de vida. Los productos se configuran conjuntos de elementos en torno a determinados estilos de vida.
- Pequeños editores. La iniciativa de creativos y diseñadores que dan el salto a la edición de sus propios productos se percibe como una salida natural al emprendedurismo.
- Explosión de color. La presencia del color en sus contrastes, efectos y nuevas gamas se evidencia en todo tipo de producto y soporte gráfico de comunicación.

El segundo semestre de 2013 ha estado caracterizado por las presentaciones de las primeras aplicaciones de la tecnología TrendMatrix fuera de nuestro país. Por otra parte ha sido utilizada por el grupo de estudiantes Erasmus alumnos del Máster en Ingeniería del Diseño en la Escuela Técnica Superior de Ingeniería del Diseño de nuestra universidad, para el análisis de las políticas de diseño de sus respectivos países y de empresas representativas de sus entornos.

Por otra parte, si una de las primeras aplicaciones sectoriales ha sido Spora tendencias de juguetes, desarrollado para AEFJ Asociación Española de Fabricantes de Juguetes, en Noviembre de 2013 se presentó a la Toy Industries Association de los Estados Unidos en su sede en Nueva York.

La tecnología Trends Matrix ha sido desarrollada por Innoarea Design Consulting en base a metodologías creadas por IGD Grupo de Investigación y Gestión del Diseño, y se oferta en la Enterprise Europe Network desde 2012.

Gabriel Songel
Editor

Categoría 0-2 años

Categoría 3-5 años

Categoría 6-10 años

Categoría más de 10 años

Categoría Toys 3.0

Impresiones en la Feria del Juguete de Nuremberg y de la infancia de Colonia.

Gabriel Songel

La entrega del premio ToyAward de la Feria del Juguete se ha disputado entre las 227 empresas que han presentado en total 380 productos (2012: 371). Las cifras muestran que el interés de las empresas por el ToyAward ha crecido en comparación con el año anterior (179 participantes). Un jurado especializado de representantes de comercio, pedagogos sociales y de juego ha nominado 15 novedades innovadoras en cinco categorías en total. Así, en cada categoría se presentan tres novedades de juguetes. El premio se anunció en la ceremonia de apertura de la Feria del Juguete International Toy Fair Nürnberg. Los criterios que ha manejado el jurado han sido el placer de juego, la creatividad, la seguridad, el material y la comprensibilidad.

Fueron nominados los siguientes productos para el ToyAward 2013 en cinco categorías:

- Categoría Baby&Infant (0-2 años):

Gran Set de juego Im Zoo / Habermaaß GmbH (En el zoo), Stacking Wood Set C / GOTOY ApS, Tobbles Neo / Fat Brain Toy Co. (Toy Innovation Award 2013)

- Categoría PreSchool (3-5 años):

JoJo See You Simon Says / Silverlit Toys Manufactory Ltd, KORXX 56 / KORXX Patricia Kuch, Nacht der Magischen Schatten / Habermaaß GmbH (Noche de las sombras mágicas) (Toy Innovation Award 2013))

- Categoría SchoolKids (6-10 años):

4D Cityscape Time Puzzles / 4D Cityscape Inc., Globo Bumm Bumm Ballon / Schmidt Spiele GmbH (Toy Innovation Award 2013), Kakerlakak / Ravensburger Spieleverlag GmbH

- Categoría Teenager&Family (más de 10 años):

EVOLUTION. The Origin of Species / RBG GbR, Live Kicker / Felix Finger & Marcel Führer GbR, SIKU Racing / Sieper GmbH (Toy Innovation Award 2013)

- Categoría SpecialAward del Toy Fair Specials Toys 3.0:

iPawn® Pool Billiards / Jumbo Spiele GmbH, RoboMe / SABLON Germany GmbH (Toy Innovation Award 2013), Sphero / Orbotix, Inc.

En www.toyaward.com se encuentran todas las informaciones sobre el ToyAward, el jurado y sobre los ganadores de los años pasados.

Por otro lado, el estudio Toys 3.0 presentado por la Feria del Juguete de Nuremberg demuestra que los niños y jóvenes de 8 a 30 años juegan de manera tanto analógica como digital.

Evolución digital en vez de revolución: la exposición especial de este año en la Feria del Juguete de Nuremberg, Toys 3.0 – The Next Generation, trata sobre las costumbres de juego digital en cinco mercados representativos del juguete. La empresa de investigación de mercado iconkids&youth muestra en el estudio que se le ha encargado que los jóvenes entre 8 y 30 años de Alemania, Gran Bretaña, USA, Corea del Sur y Brasil están completamente socializados con juguetes electrónicos. Como era de esperar en un estudio en línea, entre los 2.500 encuestados se constata una gran afinidad hacia los ordenadores y símiles. El 96 por ciento de ellos indican que juegan con aparatos electrónicos como consolas, ordenadores o smartphones. Sin embargo, en un 90 por ciento los participantes siguen siendo fieles a los juguetes clásicos. Una mayoría del 89 por ciento usa aparatos electrónicos y juguetes reales, de modo que el estudio demuestra una coexistencia pacífica en vez de una oposición de las formas de juego. Combinar las ventajas de los juguetes clásicos y electrónicos.

'(...)el estudio Toys 3.0 presentado por la Feria del Juguete de Nuremberg demuestra que los niños y jóvenes de 8 a 30 años juegan de manera tanto analógica como digital.'

Cuando juegan en la consola, los encuestados quieren acción, al jugar en el ordenador quiere sumergirse en mundos complejos de juego. En móviles y tabletas prefieren de momento los juegos sencillos para un rato: rápidos de aprender y con secuencias de juego cortas y claramente diferenciadas. La industria y el comercio pueden aprovechar la tendencia de ampliar los juguetes clásicos con funciones digitales de juego, si por la combinación de ambas formas de juego crean un valor adicional claro para los jugadores. Según el estudio Toys 3.0, los encuestados buscan:

- Mejores posibilidades de jugar respecto a la variación de la duración de los juegos.

- Más complejidad por más niveles o más grados de dificultad.

Dice.

Concept Car Kosmos.


Greentom Upp.

- Más variación por modos de juego para varios jugadores o componentes aleatorios.
- Mayor atractivo y mayor vivencia de juego por efectos adicionales. Hasta efectos 3D o de Realidad Aumentada.
- Hasta efectos 3D o de Realidad Aumentada.

El interés por los iToys en Alemania aún se puede ampliar. Todos los países estudiados muestran que existe un interés claro por la combinación de juguetes clásicos y electrónicos – sólo Alemania se muestra más reticente al respecto. Los encuestados en Brasil (68%), Gran Bretaña (65%), Corea del Sur (65%) y los Estados Unidos (70%) estarían dispuestos a gastar más dinero por juguetes si pudieran utilizar éstos con un aparato electrónico. En Alemania, de momento, sólo un 44 por ciento de los consumidores estaría dispuesto a gastar más por ello.

Para el estudio Toys 3.0 fueron encuestadas 2.590 personas entre 8 y 30 años de edad en septiembre y octubre de 2012 en Brasil, Alemania, Gran Bretaña, Corea del Sur y USA.

Más información www.toyaward.com y www.toyfair.de/toys30.

Impresiones en la Feria Kind+Jugend.

Año tras año la feria Kind+Jugend está poniendo en valor el trabajo discreto de diseñadores y jóvenes emprendedores como una apuesta de futuro para los jóvenes, para las empresas y para el sector. En un sector donde, como en todos los sectores, operan grandes empresas, con grandes márgenes, para un mercado que está sobredimensionado de oferta, los pequeños nichos son la oportunidad de pequeñas empresas. Así este año podemos encontrar una selección del mejor diseño para niños en la exposición de KidsroomZOOM, Afilii y los propios premios de innovación.

> 'Todos los países estudiados muestran que existe un interés claro por la combinación de juguetes clásicos y electrónicos.'

Los premios de innovación en la feria de equipamiento infantil de Colonia. Ideas innovadoras, tecnología de vanguardia, altos niveles de funcionalidad o un diseño extraordinario han sido los criterios argumentados para tomar las decisiones de los miembros del jurado internacional, independiente y especializado que van desde profesionales de esta industria, periodistas y expertos en seguridad. Este año se han presentado 145 empresas de 24 países con un total de 183 productos en ocho categorías.

> 'Año tras año la feria Kind+Jugend está poniendo en valor el trabajo discreto de diseñadores y jóvenes emprendedores como una apuesta de futuro para los jóvenes, para las empresas y para el sector.'

En la categoría de "movilidad infantil" ha ganado el carrito Greentom Upp por su carácter de diseño universal. Está hecho enteramente de plástico reciclado y puede reciclarse otra vez. El carro se construye en tres minutos, en cuatro materiales sin el uso de tornillos o tuercas. Además se puede producir localmente sin importar componentes adicionales y se puede vender al mismo precio en todos los países.

Mingo es el juguete multifuncional hecho por Educational Toy Design de Austria que ha ganado en la categoría de "El mundo de los juguetes". El jurado quedó impresionado por las diversas posibilidades de construcción que estimulan las habilidades creativas y de psicomotricidad fina. Desde un coche, un scooter, un caballo o una silla son algunos de los múltiples modelos que se pueden construir.

En la categoría "el mundo del mueble" la trona Evolu del fabricante belga Childhome ha sido la premiada. La silla se caracteriza por su alta funcionalidad en tres posiciones para las distintos requerimientos de los niños. El diseño fue otra de las razones del voto, tal y como ocurrió en la edición de 2011.

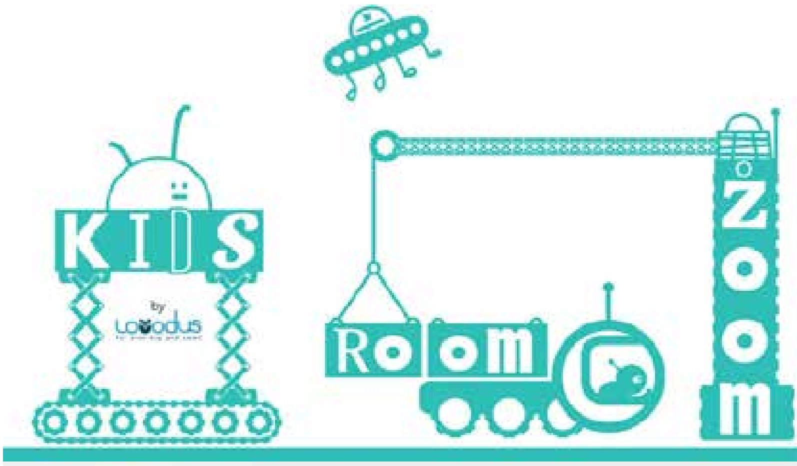
También pudimos ver otros diseños interesantes como el orinal de la marca Rotho y el patín de Quinny.

Sin duda, de las acciones novedosas de la feria, ha sido la creación de espacios para nuevos diseñadores. El primero de ellos con el nombre de KidsroomZOOM, organizada por la empresa de Milán unduestrella, presentaba una relación de objetos de diseño en los que han participado unos 40 diseñadores internacionales, algunos de los cuales se presentaban por primera vez en Alemania. Como representación española el estudio Menut de Maria Baldó y David Ortega. Es digno de resaltar que los proyectos seleccionados en esta sección están en producción

Mingo.

Orinal de la marca Rotho.

Patín de la marca Quinny.



básicamente gestionados por los propios diseñadores. Otra iniciativa ha sido la alemana Afilii con una selección muy interesante de buen diseño (si no el mejor) para niños.

De nuevo la autoedición como salida al nuevo diseño y como forma de aflorar la innovación más fresca.

KidsroomZoom, estudio Menut, Afili y alumnos del máster Master of Design Engeneering Marketing Design de la UPV.

Design and innovation in Germany.

Christina Reitze

A way to make business

Like many other countries in Europe, there is a lot of interest in Germany for high-quality design in many different fi elds of business. Indeed it is more than only interest and enthusiasm – Germans live in a design culture. There you can fi nd various kinds of companies that deal in design products or brands of many famous designers, design management companies as well as – last but not least – organizations and institiutions by supporting, developing and promoting their work and their results.

The German Design Council

To promote German design and represent it, the German Design Council was initiated in 1953 by the German Bundestag and put into action by German manufacturing industry. It is tasked with supporting the competitiveness of the German industry. Today the German Design Council has more than 180 design orientated companies as members and it has become one of the world's leading center of expertise on design. Members of the organization include: Audi, BMW, Porsche, WMF, Leonardo, Vitra, Dornbracht, Grohe, Braun, Miele and Erco. As a business service provider, it offers a unique platform for intersectorial knowledge transfer in competence in brands and design. This platform helps companies in the development of their brands and design. The platform also communicates the importance of design and the additional benefi t it creates in Germany and the rest of the world. Furthermore, the German Design Council promotes design exhibitions, conferences, competitions and publications. It also support and give advice to young talents.

One of the conferences, mentioned above, is the congress "Design. Innovation. Europe." which will take place in Frankfurt in June 2013 to celebrate the Council's 60th anniversary. The aim of this event is to demonstrate the relevance of design as an European economic and innovation factor to lobbyists of politics, economy and media. Additionally, it acts to promote the targets of the European Design Leadership Board. These are: to raise the awareness of design as an engine of innovation, to integrate design into the prospective european innovation policies, and to create a common platform for design politics.

The Council hosts various design awards to underline the competence of companies and their products. The international German Design Awards are the most prestigious prizes, and are awarded every year to the trend-setting designers of industrial and communication design, leading design personalities and the best newcomer designers. Special design awards exist for young talents such as the D3 Contest for young newcomer desingers and the Festo Challange, a competition for students. Other awards are in the fi eld of interior design, automobiles, architecture and mobility.

'Today the German Design Council has more than 180 design orientated companies as members and it has become one of the world's leading center of expertise on design.'

How to promote design.
The example of Sieger Design.

Sieger Design is a German design agency, which designs products that have won many German Design Council awards, for industrial companies. Sieger Design develops, designs and realises corporate brand strategies for national and international companies. The family enterprise, lead by Christian and Michael Sieger and founded in 1964 by Dieter Sieger, stands by its highly qualitfi ed staff for a multitude of competences, long-term working relationships and ambitious designs. Synergies occur each time a product is developed right through from the first sketches to its market launch, communication and beyond. Marketing strategies and product design therefore go hand in hand from the very beginning.

The 40-man team offers and supervises the whole design process, as illustrated on the left, concisting of design, architecture, communication, marketing, public relations and design management. First of all, they create a synthesis of form, functionality and aesthetics to give good concepts a physical form to represent the most important attributes of the product and the brand. They demonstrate their architecturial competences by creating individual rooms with an ambience with which you can build a relationship. Another issue Sieger Design deals with is the orchestration of brands and products: they create attractive and exciting, understandable and emotional brands by following the corporate identity.

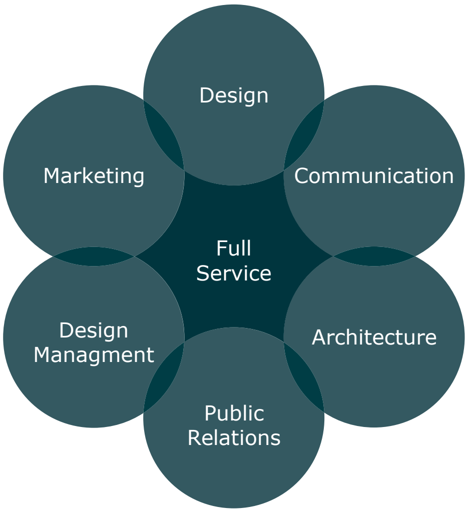
sieger design

Members of Sieger Design.

The agency is responsible for the detection and the strategical utilisation of market opportunities: they do market research by fi guring out the distribution channel, the market situation and the customer's behaviour. In the fi eld of public relations they produce signifi cant exposure in media and public. Finally they control and manage the whole design process and the teamwork of all participants.

On top of the creation of design for their partners, they have a brand to promote their own statement of design: SIEGER. SIEGER was founded in 2005 and represents luxury, quality, culture and style and offers diffenrent products like clothes, porcelain, crystal and leather goods. They are defi ned by a characteristic design, namely high quality, creative decors and bold colours.

Sieger Design is located in the Harkotten Castle in Sassenberg, close to Münster, which gives the team the best atmosphere for creativity. The premises are also perfect for social and cultural events. Over the last 16 years there have been several classical concerts to support top young musicians and to place both them and the agency into public conscience.



Sieger products.

Finland designs.

Turku University of Applied Sciences.

Pekko Honkasalo

Finnish design is known around the world from design products and works of art from the mid 20th century. It is very similar to other Scandinavian design, which is modern and simplified. ”Master designers” has been skilled craftsmen and artisans, who knew material features from their own personal experiences. The common Finnish attitude towards design is mostly based on this thinking, that design was and still is just artists doing without restrictions anything that pops in their minds and that design is more about ornaments and decoration. For regular people it is very hard to explain that design is almost everything around us, and it’s been done by people from many fields.

Design promotion in Finland might have started 1875 when Suomen Taideteollisuusyhdistys-Konstflitföreningen i Finland ry (Organization of Finnish Industrial Arts) was founded. Organization maintained handicraft school which is since year 2010 Aalto University. 1987 Teollisuustaiteen yhdistys and Teollisuustaiteen Liitto Ornamo (Industrial art union) form Design Forum. Finnish design image was boosted (as being low during 1970’s depression and oil crisis) in 1980’s when Design Forum and Ornamo organized Suomi muotoilee –exhibitions. Design Forum’s web site provides for example event calendar for different design action days, expositions and more.

'Finnish design is known around the world from design products and works of art from the mid 20th century.'

Helsinki was a design capital of the World 2012. I think this was a sort of a boost for Finland (and Finnish designers and design organizations) to show-off what we got there, but too often the concept of design is remains very difficult to understand for the ones that are not involving in the business (directly or ”behind the scenes”).

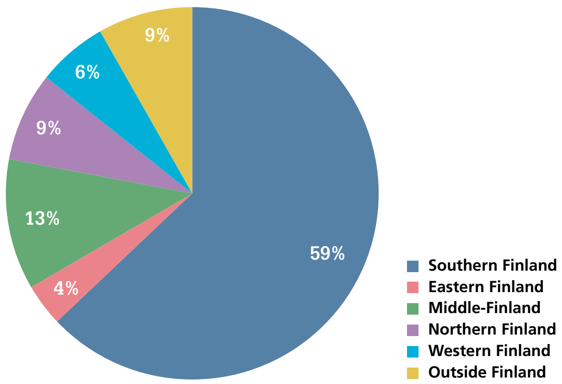
This is a direct quote from ”Muotoile Suomi” (”Design Finland” or ”do design, Finland”) –national design promotion program, which was published March 22nd 2013: ”Companies improve their competitiveness by investing to design more than today. In the eyes of consumer, design adds desirability and usability to products and services. The public sector will improve its services and customer orientation by the ways of design. Companies and the public sector are in great need of design know-how to reach these goals.”

In this program there are 29 procedures for reasserting design know-how and means to make good use of it. Vision of this design promotion program is that at 2020 design has enabled growth of welfare in the unsure world. Design will be a core know-how and crucial part of economic life and public sector.

'Helsinki was a design capital of the World 2012. (...) this was a sort of a boost for Finland (...) to show-off what we got there.'

In Finland there is good basis for utilizing design. Only problem is that the promotion is often coordinated weakly so the resources are underutilized. ”Muotoile Suomi” states a new Finnish Design Center operations model, which gathers clustered resources together.

Ornamo holds online portfolio for its members here's a figure that shows location of companies and designers in Finland:



Creadesign is an internationally awarded design agency from Finland that is interesting company in this field. It is participating in the steering group of Muotoile Suomi program and very good example of promotioning its design as an important part of business. From Creadesign’s web site you can explore their projects and portfolio, which has very nice introduction about what they’ve done, what is the effect in market and how the design has played crucial part in new user and environmental friendly products and services.

Poland Design.
Jakub Grzyb

In the 20th century Polish Design had different faces, mainly due to the historical events. During the communist dominance, around 1950's to 1970's, Polish designers were creating great products, characterized by its functionality and simplicity. Once communistic period was over, free market was created. Private companies, freshly created, had to compete with the international companies. Although, Poland has a great heritage of product and graphic design, the companies focus more on technical aspect of their products rather than human-centered design, aesthetics. As a result, design of Polish products is not up to ranks, which was to be changed in mid 2000's.

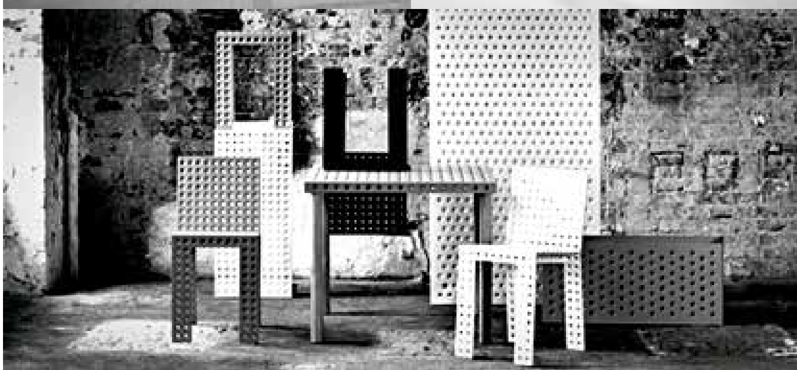
Government starts the campaign *Innovative Economy*. Unders tands that through innovation and design polish companies will be a better competition and will create an image of the country thanks to the products and services offered. The Ministry of Economy proudly points out the fact that quite significant financial resources are allocated to fund Innovation among the companies. The funding is distributed on the regional level, nevertheless, the resources are obtained from the Ministry. The objective of such financial support is to give a competitive edge to the enterprises, by making their product innovative on an international scale. Thus, the Research & Development sector have had significant rise in the resource allocation. Ministry of Economy along with two most important design associations, namely Institute of Industrial Design and The Association of Industrial Designers, had carried out a project in order to highlight the importance of design.

Design your Profit, was a project which main objective was to allow companies and designers to network. Moreover, a large number of didactic materials was made available online, but also through workshops, which were taking place all over Poland. Participants could learn about different tools and methods to promote innovation through design. Not only, the project was directed to the enterprises of any size, but also to the designers. Polish design education is at a pretty good standard, yet there is still need for people to understand that designer is an important part of each company.

Apparently only ~15% graduates work in the field of studies. This is due to lack of employment opportunities. However, it is estimated that the market is big enough to intake all the graduates. It is just







Poland design and products.

Polish designs.

the fact that companies still do not understand how important designers are. From what was found during the research, the programme occurred to be a great success and further series are to be expected.

Beside the nationwide promotions and programs, like Design your Profit, one can also find a design institutions on the regional level, supporting the design discipline and designers themselves. First, and foremost important initiative is Lodz Design Festival. This event is the most significant of this kind in Poland, and could be compared to a 'Milan Design Fair of Poland'. Its aim is to present the current design trends abroad in regards with the Polish design. On top of this are workshops, seminars, competitions. It allows for designers and non-designers to meet and exchange ideas and understand design.

Another initiative is a Good form is a competition organised by the Institute of Industrial Design. The competitions is aimed at the products or services available on the Polish market, from Polish as well as foreign companies. Primarily researched and assessed by experts in the design field, chosen products and services are then permitted to compete for the main prize. In addition, there is also a prize given out for the Best Polish Designer.

The events are to promote design and designers on the Polish market. However, there are also regional institutions, which promote design. The promotions does not only limit to gathering all the designers in one place or organising contests. These institutions actually organize talks, workshops and events for people from the region. Moreover, some of them can be hired to carry out workshops on creativity by the companies. This seems like a very good idea to point out to the enterprises that creativity can provide a competitive edge within the business.

'During the communist dominance, around 1950's to 1970's, Polish designers were creating great products, characterized by its functionality and simplicity.'

Code

CODE Design is a design studio/consultancy located in Katowice, south of Poland. The company gathers a group of professionals skilled in wide range of areas within the design field. They also cooperate with engineers and scientists during development of some projects. Thus, as a multidisciplinary studio, they are able to take on variety of projects and provide design solutions, expertise and innovative thinking.

As a collective of designers, they are covering a wide range of skills. As they express it in their philosophy, they have a holistic approach to every project. Moreover, they not only want to provide design and innovation services, but also help their clients in generating strategies with a constant market trend monitoring.

The company expresses their desire to create things which provides an unforgettable experience to their clients' customers. This shows new mind set of young generation of Polish designers. Having a multidisciplinary team, CODE design can provide services throughout a whole product development. What is more, some members have also their side projects/companies which they look after. This shows how experienced, knowledgeable and hardworking they must be.

In Poland, a lot of manufacturers of home appliances hire designers for creating new lines of e.g. fridges or vacuum cleaners. One of the CODE design's clients is Amica, manufacturer of kitchen appliances. In this cooperation the design studio have designed an oven, in which design they applied humancentered design. This resulted in creation of ZEN Oven, a simple to use, aesthetically pleasing oven.

The CODE design has done such a great job, that the studio was awarded Red Dot Award. This cooperation of two companies has definitely shown how significant an industrial design suppose to be to the manufacturers of goods. Not only the products are more userfriendly but can get a very good promotion of their products thanks to visual effect and award-winning. It could be only a wish that more enterprises will acknowledge such state of things. In addition, one should hope that all the design services will provide high quality work having main principles of design in mind, so the design could promote Polish culture and innovation.

Designs associations and companies.

Portfolio of assignments on Danish design policies.

Jesper Bøgh Petersen

Introduction

Around the world, Denmark is known for its design competencies and for names such as Panton, Wegner and Jacobsen. The Danish government is pushing design and innovation through the introduction of design policies in order to create focus, awareness and opportunities for Danish companies to build a success upon.

The general idea behind integrating design as part of a company's business strategy is to focus on developing new ways of creating products or services and new ways to create more value for the customers. Design-driven innovation complements technology-driven innovation very well, and its application has been known to increase a company's competitive capabilities, productivity and overall economic growth. The reason behind incorporating a design strategy in a company is to achieve growth and better products, which is the main driver for innovation and promotion of Danish design.

This portfolio of assignments is made during the course "Marketing Design", and the purpose of the first part of the portfolio is to elaborate on the topic of design policies in Denmark. Secondly, the portfolio contains a case study of a specific company that has been aided by the design policies. The last part of the portfolio is an elaboration of how the Danish design policies has helped drive design and innovation and how Danish companies can use these policies to promote themselves.

First, the Danish design policies will be presented briefly both in regards to its historical development and the overall purpose from the Danish government to initiate these policies.

Part 1. Desgin policies in Denmark

The Danish design policies are introduced and managed by the Danish Ministry of Economic and Business Affairs. The political situation in Denmark throughout the very first introduction of a design policy has not been stable and focus has shifted from here to there, up and down depending on which policies the sitting government chose to focus.

- 1st design policy - 1997

The first Danish design policy, which is the first of its kind in the world as well, was introduced in 1997. It was introduced primarily to create awareness and focus on design. The target group was the sector of "small to medium sized enterprises" (SME's) and the public, hoping that it would have beneficial value to the general level of entrepreneurship within the design sector. Included in the introduction of the policy was a promise by the Danish government that up to 450 SME's per year should receive grants in order to support their design projects.

- 2nd design policy – 2003

With the introduction of the second design policy in 2003, the idea was to move the focus from design's traditional role in styling (aesthetically) consumer goods, to incorporating design thinking in to business strategies in order to promote Danish companies internationally and boost the competitiveness. This also meant enhancing the interaction between designers and businesses.

Along with the design policy, the INDEX award was established. The INDEX awards gives monetary prizes to "design that improves life", and the main price is 500.000 euros, which is the most lucrative design price in the world to date.

- 3rd design policy – 2007

The third, and newest, Danish design policy was introduced as a natural "next level" of design thinking. At that time, 90% of the businesses in the design sector were one-man driven companies, and the focus was to give further aid to bigger companies in order to be more internationally competitive. It increased the focus on user-centred innovation, service-design in the public sector and innovative public-private partnerships. The focus on the user-centred innovation was the highest priority, with a funding of $16.5 million, with the purpose of making Denmark a pioneer in that field.

A year later, there was added some changes to the previous policies, as the companies no longer were asking why they should integrate design-thinking in their business strategies, but rather how they would successfully do so. The design centres established in Denmark were to become consultants to the companies, offering free guidance in design-thinking, giving the companies specific tools to work with and encouraging collaboration between companies in the same sectors to maximize their potentials [1].

- 4rd Future design policy focus – 2020(?)

The Danish Design 2020 Committee consists of six carefully selected representatives of different sectors with the obj ective of formulating a vision for Danish design up to 2020. They identify areas in which Danish design faces substantial challenges over the next years. The major issues identified for focus are:

1) Design as a driver for innovation

2) Design competencies

3) Design research and knowledge sharing

4) Branding of Danish design[2]

This was a brief introduction to how Denmark has managed its design policies that had a natural start in creating awareness. Through creating focus on establishing small companies to later on focusing on big companies, it is now almost a priori knowledge that integrating design-thinking can provide companies with solutions that pays off economically (of course created by bettering products, services, strategies – the main driver will always be judged on its effects on the bottom line in the budget).

The next part of the portfolio will go into detail with a specific company who has been aided by the Danish design policies.

Part 2 Company case

For this case, I have not chosen a specific company because a vast number of companies have had success on foreign markets in the past decade, which can partially be accredited to one of the Danish design policies initiatives – Innovation Centre Denmark (ICDK).

ICDK is an institution under the Danish Ministry of Foreign Affairs and the Danish Ministry of Science, Innovation and Higher Education, and serves as a "knowledge bank" about the countries and locations they are situated in: Hong Kong, Munich, Shanghai, Silicon Valley and Sao Paulo (because of success, they are establishing facilities in Seoul and Bangalore as well [3]). It consists of teams of consultants from commercial innovation, research and science and economy, who serves a purpose of distributing foreign knowledge to Danish companies in order to open doors to new markets.

A company who has identified market potential in a market that one of the ICDK centres has knowledge about, can consult them on the feasibility of their business plan and iterate on it. Already existing companies has the opportunity to consult ICDK about promoting their research projects, finding research and development partners and connecting to investors or potential business partners. In addition to this, they continuously collect knowledge in their respective locations and present this knowledge on conferences, doing workshops etc. with the Danish companies in order to drive innovation. The overall goal is a continued improved competitiveness for Danish companies.

A concrete example of how they have helped Danish companies crossing the border to investigate foreign markets is the company TRE-FOR. They are one of the largest utility companies in Denmark, providing electricity, heat, water and optical fibre broadband. They wanted to commercialise a product in Munich, Germany. The Innovation Centre Munich helped them establish a partnership with a German research and development partner, and to develop a sustainable business model for the German market. The Innovation Centre Munich is now working as TRE-FOR's extended arm in coordinating the company's relationships with five potential partners, all with know-how and declared interest in launching TRE-FOR's product.

The initiative is regarded as highly successful. However, no specific estimates have calculated the beneficial factor on the bottom line of the budget. ICDK aims to extend Denmark's reach to foreign markets, and collecting market knowledge to which we can compare ourselves. I regard it as highly in line with one of the purposes of the Danish design policy; to regain and maintain the position of being the world's leading knowledge society[4]. This means, that the primary benefiter of this initiative is the "company" Denmark.

In the next part of this portfolio, I will give a brief explanation on how Denmark's national design policies have helped promote design and innovation and what companies do to promote themselves.

Part 3 Promotion and application

Along with the introduction of the design policies, a vast amount of initiatives have seen the light of day and have been developed to sustain Denmark's focus on being a knowledge society. As the previous assignments in this portfolio states, the enrolment of design thinking has had an increased focus since

Danish designs.

1997, and is now a well-integrated way of thinking in the Danish society. Over the last decade it has really boomed. I am myself a master student at The Technical University of Denmark as an engineer, and my field is called “Design & Innovation” and was established in 2003. The company DesignIt has had success in consulting companies on how to carry out design and innovative measures, and companies such as InnoLab, EyeD etc. have proven themselves as a competent and capable partner in consulting on innovative product development.

Almost all companies integrate design-thinking in their business strategies, and the main traits to be had are as follows:

1) Higher innovation in processes and better results

2) The probability of feasibility is higher

3) The users become more satisfied

4) The possibilities of launching is increased[5]

Danish Design Centre has been established as a collaborative institution for the companies in Denmark. The design centre is located in the centre of Copenhagen and is open to the public. Its function is to highlight design in the everyday Danish life, as well as being a support structure for companies to incorporate design-thinking. They regularly host conferences and workshops for the business sector where the companies collaborate on bringing more ideas to the knowledge bank for everyone to use. It is a very popular medium and during my personal trips to the design centre, I have noticed representatives from all of the major companies; Maersk, Lego, Carlsberg, etc.

For an outward look in promotion of Danish design to the market, the previous assignment described the function of Innovation Centre Denmark (ICDK). They do extensive research in order to find out how and where to promote the specific Danish design products.

I would like to work for ICDK as it is an international institution which business is to introduce new technology and push design and innovation. As I am a student of Design and Innovation I am naturally very interested in their work and somewhat familiar with the processes they go through. It is an opportunity to travel and become acquainted with different ways of design-thinking around the world, which would be highly beneficial to me as perspective is always an important factor. Since I am about to finish my studies, it could be opportunistic for me to do an internship at ICDK. I have already worked for DDC with great success (according to my superiors) and that could very well be a good possibility of entry to ICDK, taking in to account that I am going to be working in that field when I graduate. Networking is regarded as one of the most important factors in getting a new job, so I would pull strings at DDC in order to have them recommend me to ICDK. I expect to gain a lot of experience in design-thinking, innovation, research and development and consulting at ICDK which would be extremely attractive to other design companies. In that way, an internship at ICDK could be my way to successfully start my career as a design engineer.

Conclusion

This portfolio has shed light on Danish design, design-thinking and innovation processes. Denmark is highly regarded as a knowledge society, and the governments focus is to bring Denmark back to the position of being the leading knowledge society in the world.

A vast amount of initiatives have been developed by the government, and during the last 15 years, design and innovation has been promoted widely in Denmark, especially among Danish companies. The effect of design-thinking is regarded with such esteem, that it is considered a necessity to incorporate design-thinking when developing business-strategies.’

Since I am myself a Design and Innovation student, I have identified an opportunistic option for me to seek out. Through my previous work at DDC I could ask for a recommendation to ICDK for an internship upon the completion of my studies, which would without a doubt be a strong angle of approach to my professional career afterwards.

[1] *C. Scherfig, M. Brunander and C. Melander – ”From the world’s first design policy to the world’s best design policy”. http://www.dmi.org/dmi/html/publications/news/viewpoints/10214MEL06.pdf*

[2] *The Danish Business Authority – ”The Vision of the Danish Design 2020 Committee – 2011”. http://erhvervsstyrelsen.dk/visiondanishdesignpubl/0/7*

[3] *Silicon Valley Tech talk – ”Three Additional Innovation Centres”. http://svtechtalk.com/general/additional-innovation-centres/*

[4] *Innovation Centre Denmark http://icdk.um.dk/*

[5] *Danish Design Centre http://www.ddc.dk/*

Bundesministerium für Wirtschaft, Familie und Jugend

CREATIVWIRTSCHAFT.AT


Austria companies.

Design and innovation in Austria.

Laurin Suske

National context

Many countries in Europe are highly interested in quality design. When we are talking about design, not only creative and graphical products are meant. Also technical design – often called industrial design – and process or service design is included. The outstanding European countries in design work and development are Spain, France, Italy and Germany. Especially those countries are very aware of the importance of the resource design knowledge, encouragement and support. Nevertheless a design culture is lived in Austria also. Due to the small size and its close geographical location to Germany as well as the common language, Austria is closely connected to Germany not only but especially in the field of design.

Even though Austria has its own design organizations, councils and ministries, their size and impact are not comparable with German once. Almost all the Austrian designers are sharing and seeking for information, knowledge and support in Germany as a second base. Due to this fact, the demand in Austria is limited.

Ministry of economy, family and youth

The Austrian "Ministry of Economy, Family and Youth" for example is directly supporting innovative ideas, young startup companies and companies in general. It offers support in various areas like economic politics, research and development, foreign trade, companies, education, energy, technique and measurement, tourism, family and youth. Design plays a main role in all of those fields. To make companies and society aware of the importance of design, the ministry invites producers, clients, designers and design teams every two years to compete against each other in order to win the Austrian Design Award.

'Design plays a main role in all of those fields.'

In addition a workgroup, established in 2011 by Ministry of Economy, Family and Youth, is working on a concept of the "Austrian Brand". Its main aim is to improve Austria's image in foreign countries – first, to be more attractive as business location and second, to support local companies to export goods using their national branding. The creation of "Austrian Brand" also leads to a strong and consistent appearance of companies in all fields.

Evolve

Evolve is an initiative of the Ministry of Economy, Family and Youth. Evolve is there to help entrepreneurs to further a creative idea in the early stages of its evolution and then set it on a financially profitable path. The palette presented covers the areas of financial support, basic and advanced training, service and consulting, as well as networking.

"Our ultimate goal is to make the most of the high potential for innovation in the increasingly vital creative sector in order to secure and even improve Austria's already excellent innovation performance." – Mission statement, *evolve.or.at*

Creativ Wirtschaft Austria (CWA)

CWA is a trade association based within the Economic Policy Department of the Austrian Federal Economic Chamber. CWA holds as its remit the interests of the Austrian creative industries, both at a national, European and international level. It is part of the Evolve project.

Their activities include three areas: Skills development, representation of interests and information and awareness.

Solar industriy.

Kioto Solar.

Patrik Langkammer

Design Brief Kioto Solar

Design project objective

I analysed the structure of the Austrian company KIOTO Photovoltaics especially took a closer look on their photovoltaic solar panel sector. They are located in the south of Austria, in structural weak region with only a little of high tech industry.

Their production capability of photovoltaic panels is about 120 MWp (Mega Watt peak) compared to Jinko Solar with 1200 MWp, only a tenth of production.

The main problem of their placement in the market is not the lesser production capability but far more the price of energy. As we know the big share of the production cost of these panels is the raw material, which doesn't differ so hugely for country to country, more does the cost of the energy that is used to produce them.

The dangerous development in the last few years was: The governments are increasing the taxes for energy (green energy tax in Austria, Germany), which have to be paid by every customer – hand in hand with this raising the subventions for the building of renewable energy sources. A good thought to make us less dependent of oil, but also increasing the production costs of panels made in Europe, opening the market further for the global players from the Far East like Jinko. This situation is a good example for a self-inhibiting control cycle.

My reason for this analysis is who to ensure the continuous survival, no far more the growth of the company – after looking into it, the solution cannot be pricing, also the technology of production and panels is already on a very high standard.

I see opportunities in the fact that KIOTO Photovoltaics is an original equipment manufacturer (OEM) and does not sell its products directly to the costumer, but through distributors – the second opportunity is that KIOTO Photovoltaics has a sister company called Kioto Clean Energy, which is specialised on solar thermal applications.

'The governments are increasing the taxes for energy (...), which have to be paid by every customer.'

Because of this I see their future in improving their share of the value chain, in direct marketing and of course in cooperation with their sister, to maximize efficiency.

Trend Matrix & strategic maps

(See figure 1, 2 and 3 on page 17)

Explanation

Strategy

In their slogans someone can easily discover the philosophies of the different companies, for example Jinko solar with "Building your trust in solar" means they want to build solar panels for everybody in a large scale and for an acceptable price.

On the other hand Sunpower explains with their parole that they are the leader in high technology applied in mass production of panels and that they set the standards for future developments, like for example Intel with their CPU architecture design did.

Trend generators

The trend generators in the application of solar panels are following to distinct philosophies – the first one is the production of fairly decent panels in huge quantities, whit a result in decreasing costs. The leader in this field of application is among others Suntech from China but it should be said that kind of tactic does not have to be the key to success – At the moment Suntech has enormous money problems and is more or less bankrupt.

The second philosophy includes improvement of efficiency and design – Kioto Solar tries to unite efficient and reliable solar panels in an aesthetical design, examples for this are in-roof panels and highly innovative soldering procedures. At the moment the most efficient panels come from TSMC from South Korea, but only Sunpower has the necessary production facilities to produce them in large scale and is for me there for the leader in that.

Diffusion means

Kioto is using very traditional methods of advertising their product – they present online, at every larger fair and of course through their partners in the Solarcap group. Another obvious method of reaching the customer is sponsoring football clubs – Kyocera for Atlético Madrid, Jinko for the FC Valencia or Sunpower for Bayern 04 are only some of the sponsorships.




Other ways are through projects – Sunpower build a plane called "Solar Impulse", only powered by the sun. At the moment there is another one under construction, with which will be tried to round the world, of course only fuelled by solar power.

Kyoerca on the other hand invests in projects which are like thinking outside the box, like wheelchairs which are only running solar power.

Most rep. Product

With project like Macael in Spain Kioto shows their ability to construct big solar plants, while Jinko does not have a leading product with which they advertise, they are only advertising their ability to produce panels for less than 1$/Watt.

On the other hand Kyocera is known for their full turnkey plants – from planning over construction until the maintenance of the plant are organised and executed by their company. Kyocera is also known for their cooperation with Toyota – they have supplied a solution for solar powered ventilation for the Toyota Prius, a very interesting solution which also benefits from the eco-friendly image of the Prius.

The flagship of Sunpower is the E20 series, highly efficient panels – a true example for their leading role in the production and development in this sector.

Trend research methods

The vision for the future of the four companies correlates largely with the strategy they have – they all try to improve their strengths, in case of Kioto the combination of efficiently and design, for me the right decision because they cannot keep up extremely cheap production, mostly a conclusion that their production lines are in Europa, also it is not a very big company.

Distribution channel

Kioto mostly distributes through fairs and their partnership within the Solarcap group, while Jinko is one of the only sellers of solar panels, which are easily available online and they have no restrictions of the selling of their panels through partners. Quite different like Sunpower, who only allowed certain authorised partners to sell their panels and for me quite interesting – it is possible to have an in-home consultation, in which an expert will calculate the costs and amortisation time of panels you might will or will not buy and install in your home.

Kyocera on the other hand, relies on sales offices all over the world, resulting out of their specialisation on large scale photovoltaic plants. Someone will easily understand that if you order a bigger plant a more thorough consulting is necessary.

Project information – Integration of a direct sale concept

Conceptual data

The evolution of a direct sale for Kioto Solar must be done in multiple steps, starting with the improving of the public awareness of the company. This can be easily done with advertisement, probably in TV or in subject specific magazines, a sponsorship for sports will also be advisable. The public awareness at this moment is practically zero.

Secondly the recruitment/development of consultants for both photovoltaic and solar thermal should be pushed forward; a subcontracting through selected companies is possible but not advisable. Evolution of an in house consulting process should be done hand in hand with the development of the executing staff.

Finally integration of an online marketing system will complete the development of the direct marketing. Also development of blueprint models for the targeted customer.

Technical data

For the first phase a strategy for the advertisement of the company will be needed, secondly a plan for the development of the consultants and also a process description which describe the home consultations that will be done. R&D must develop user friendly prearranged systems that should come close to the idea of the customer. The evolution of the online sales system will be specified and subcontracted.

Marketing data

The whole reason of this project is the reach the small customer sector, people who have the money to invest into green energy for their home, is this case middle to high purchasing power.

Financial data

Is difficult to determine without better knowledge about the company's finances.

Solar industriy and products.

Strategy information

The different steps of the evolution of the project must proceed hand in hand. In this case the improving of public awareness and the company, the development of basic system and the recruitment of consultants. The product and service will be promoted through the internet and branch specific magazines, the actual selling of the product will be done through consultants and directly online through the company.

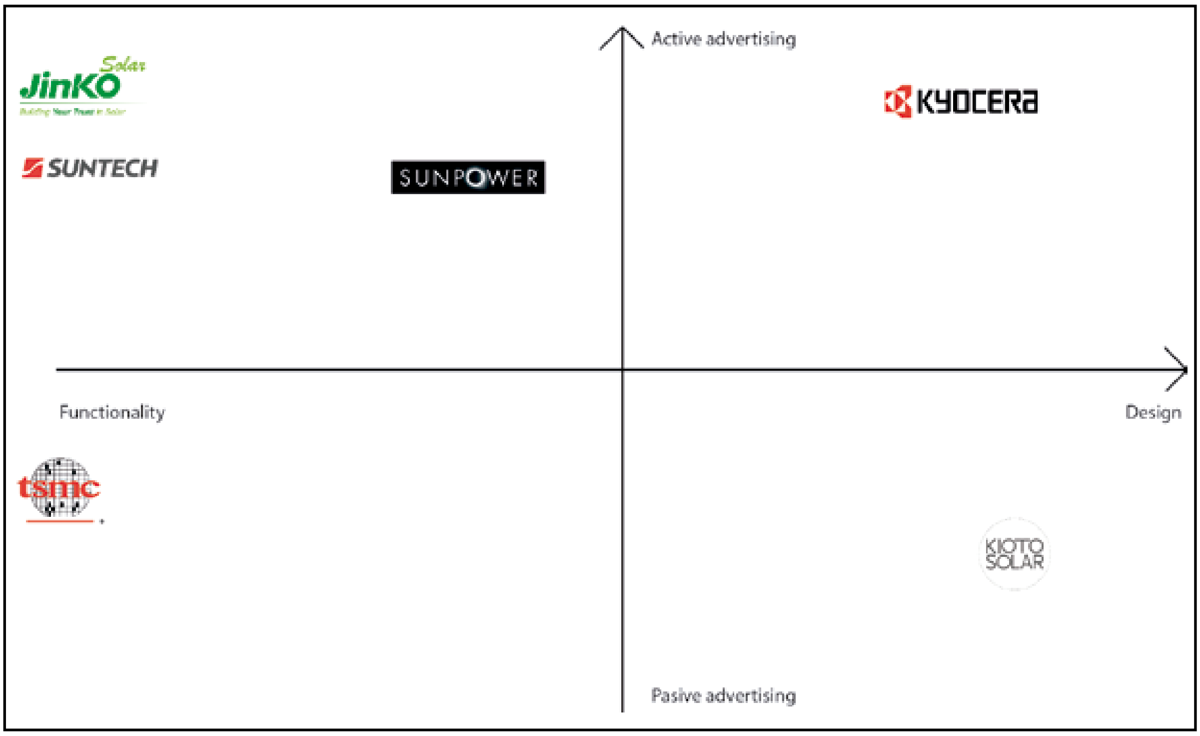
Figure 1: Trend Matrix

	Kioto Solar (Austria)	JinkoSolar (China)	Kyocera (Japan)	Sunpower (US)
	KIOTO SOLAR	JinKO Solar	KYOCERA	SUNPOWER
Strategy	Reliable like the sun	Building YOUR trust in solar	"The New Value Frontier"	SunPower - the World's Standard for Solar™
Trend generators	SUNPOWER	SUNTECH	SUNPOWER	tsmc SUNPOWER
	Fairs, online, through partners	Online, Sponsor of Valencia FC, DFB, etc.	Online, TV spots, projects (wheel-chairs run on sunshine...)	Online, TV spots, projects (Solar Impulse...), football (Bayern 04)
Most rep. Product	Project "Macael" Spain, etc.	Panels for less than 1$/W	Integration of Panels in Toyota Prius for Vent., Full turnkey Sys.	Sunpower E20 Series (eff. ~ 20%)
Trend research methods	Combine efficiency & astatic	Cheap panels for everyone, cost reduction through expansion	Evolution to a provider of plants spanning from planning to maintaining	High scale production of high efficient panels, available for everyone
Distribution channel	Fairs, promotion through Solarcap Group	Online, Partners	Sales offices around the world	Authorised partners, in-home consultations

Companies analyzed

Figure 2: Strategic Map 1

Figure 3: Strategic Map 2



Trade fairs.

Design and innovation in Poland.

Klaudia Bogacz

Polish institutions related to design

The oldest institution created for design promotion is the Institute of Industrial Design (founded in 1950). For years it remained an organisation of research and development, financed from the state budget. Since 2008, maintaining the status of the research unit, the company became a state shareholding. IID is currently the only nationwide organization which main task is to promote design.

IDD Is a member of two important international non-profit organizations: Design Management Institute (DMI) and the International Council of Societies of Industrial Design (ICSID),

DMI is an international authority on design management supporting the awareness of design as an necessary element in building business strategy.

ICSID promotes design, bringing together over 150 institutions from over 50 countries. it conducts standardization activity, promotes good designs, and supports cooperation between designers and business.

IDD flagship activities in the area of design promotion are:

- The design monitoring programme and the exhibition "Good Design"(created in 1992).
- Gdynia Design Days - a series of events promoting contemporary design of the Baltic Sea region countries, (since 2008).
- Fortis Young Design - an exhibition of achievements of young designers and (Wanda Telakowska's scholarship).
- Polish Designers Dictionary, containing biographies and photographs illustrating the achievements of designers' work during the postwar period.

Regional Strategies of Innovation

Regional Strategies of Innovation help to support existing as well as future regional design centres and other design-related activities. The leading examples are:

- Silesian Castle of Art and Enterprise in Cieszyn (created in 2005)
- Wielkopolska Design Center in Poznan

There is also a plan of creating a Design Center in Cracow

Silesian Castle of Art and Enterprise

The main objective of this initiative is to exploit the potential of designers and artists to stimulate economic growth and enhance the competitiveness of Silesian companies.

In the initial stage of the existance of the Castle it realized a project named "Silesian Network for Design", which spread the awareness of the importance of design to improve the competitiveness of companies, the ability to create new jobs and improve economic growth.

In 2006 was the first edition of the "Silesian Thing" a competition promoting the best products and graphic projects carried out by companies from Silesia

Trade fairs

Polish designers take part and present their projects at almost every trade fair it the world, for example:

- Premiere Vision, Paris
- Orgatec w Cologne
- IFA, Berlin
- Clinical Lab Expo, Frankfurt
- Ambiente, Frankfurt
- Heimtextil, Frankfurcie

Promotion of design in media

- Magazine devoted only to design - "2+3D"
- Magazine supplements added to:
- "Architektura-Murator"
- "Elle Decoration"
- "BusinesWeek"
- "Newsweek"
- "Gazeta Wyborcza"
- "Rzeczpospolita"

Internet – design section in every bigger polish portal (Gazeta.pl, Interia, WP).

Financing

In 2006 the Association of Industrial Designers developed a document entitled “Strategies for the Development of Design in the years 2007-2020”, in which postulates were formulated to the ministries of the economy, culture and external affairs concerning support for design and its optimal exploitation in the process of the country’s economic and cultural development, and its promotion abroad.

Financial resources were assigned. The main emphasis was set on decentralization and regional economic support.

Design has been also included in the main governmental programme 'Innovative Economy' for the period 2007–2013, with the overall objective being “the development of Polish economy based on innovative enterprises.”

This covers the 'Design Your Profit' programme, With a budget of €18 million (85% subsidised by the European Union), to be delivered by the Institute of Industrial Design in Warsaw.

The project has two target audiences, entrepreneurs and designers. It provides them expertise, methodologies and practical solutions to effectively create innovative product designs and get them onto the market. A significant aspect of this project is its systematic evaluation process. The programme is free for participants. DYP offers four types of workshops. The recommendation of which one is the best for the employees of a particular company comes from the self-assessment questionnaire. It contains questions and a ranking system that helps to diagnose the ‘design implementation maturity’ in specific fields, such as awareness of design strategy, cooperation with designers, marketing strategy, design project management, resources and so on.

'The oldest institution created for design promotion is the Institute of Industrial Design (founded in 1950).'

Designing companies on the polish market

It is not known exactly how many designers there is on the market. However it is estimated that there are 300 industrial designers working actively. That includes around 10 design companies employing from 3 or more workers. These companies include:

Triada in Kraków.

The main designers are three graduates of the Faculty of Industrial Design at the Academy of Fine Arts in Krakow. On the market there exist over 250 products designed by them. The projects cover a wide variaty of industrial production, ranging from automotive and electronics to furniture, technical articles and house equipment.

Inno Projekt in Warsaw, in cooperation with Nowy Produkt Design.

The team consists of lecturers and graduates of the Faculty of Design at the Academy of Fine Arts in Warsaw.

INNO + NPD develops projects related to:

Industrial design (product design)

Packaging

Creating a brand image

Visual information systems

Wierszyłłowski i Projektanci in Poznan.

Projects of Wierszyłłowski & Designers include designs of interiors and products with very different specifications. Studio created designs of interiors of hotels, shops, law firms, shopping malls, coffee shops, restaurants and tennis clubs. Created projects of the products consist of lamps, sofa sets, chairs, office chairs and packaging.

Autorskie Studio Projektowe Chróscielewski and Włodarczyk in Łódz.

The area of its business is industrial, graphic and interior design. The studio also creates design market analysis and develop programs for improving the performance of companies. Additionally it deals with restyling and upgrading of products already in production. Designers prepare sketches, renderings, 3D computer models and mock-ups of products in rapid prototyping technology.

NC Art.

From almost ten years, the company has been one of the most important Polish specialists in the design of buses and rail vehicles. Earlier its main activity was designing and producing lamps and home appliances.

Marad in Gdasnk.

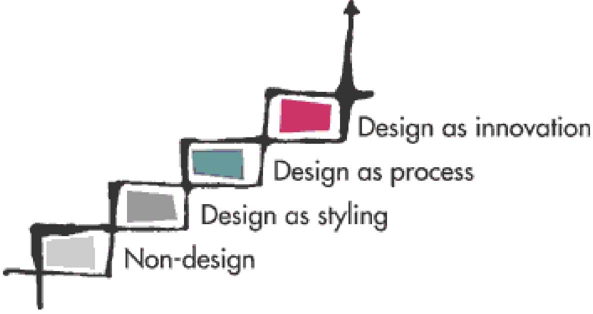
A company experienced in the art of print, interactive and identity design. The offer includes web sites, advertisments, packaging, branding and publication design.

Moho Design.

Created in 2004 company offering regular collections of carpets and carpets made on order, offering the clients a sense of connection and personalization. The winner of many international competitions. One of the firm's design (carpet Mohodia- Hej!) is considered one of the best polish designs of past couple of years.

Polish studios products.

Publicación.



Modelo Design Ladder.


Trend matrix Innoarea Design consulting.

El sector cerámico.

Miguel Bartolomé Álvaro

Situación general del sector de baldosas cerámicas. Empresas fabricantes de baldosas cerámicas y contexto geográfico.

España es el 2º país productor y exportador europeo y el 3º exportador mundial de azulejos sólo superado por Italia y China.

En 2011, la facturación global de la industria española alcanzó los 2.597 millones de euros,de los cuales, el 73% se destinó al exterior, a un total de 182 países (ASCER).

En su conjunto, se estima que el sector cerámico español daba empleo directo en a unos 16.200 trabajadores en empresas que, en su mayoría, son de pequeño y mediano tamaño. Se calcula que la industria genera más de 5.000 empleos indirectos.

Una de las principales características del sector azulejero español es la alta concentración geográfica de la industria en la provincia de Castellón, en especial en el área delimitada al norte por Alcora y Borriol, al oeste por Onda, al sur por Nules y al este por Castellón de la Plana. Aproximadamente el 94% de la producción nacional tuvo origen en esta provincia, donde se ubica el 81% de las empresas del sector.

En la Comunitat Valenciana, la industria cerámica representa aproximadamente: un 2% del total de empresas industriales, emplea a cerca del 7% de los trabajadores y genera un importe neto de negocios del 6% de la industria total valenciana.

En el total nacional, la Comunitat concentra un 41% del total de empresas de la industria cerámica española, emplea a un 70% de los trabajadores y genera un importe neto de negocios del 71%. Para los azulejos, en particular, esos porcentajes se elevan a un 76% de las empresas españolas cerámicas, un 91% del empleo y un 93% del importe neto de negocios. (*Ver tablas 1, 2 y 3 en la pág. 27)*

Objetivo

El objetivo principal radica en el análisis de aquellas empresas cerámicas más representativas de los distintos modelos de negocios existentes en el sector cerámico.

Este análisis nos dará una visión global sobre:

- Como afrontan las empresas su situación actual.
- Si realmente están desarrollando productos acorde con su público objetivo.
- Si las herramientas que utilizan para el diseño, desarrollo y promoción de su empresa son los adecuados.
- Cuales son sus fuentes de influencia a la hora de generar tendencias en producto y servicios.
- Y qué canales de venta y distribución están utilizando actualmente.

Pensamos que el diseño es una de las competencias clave para la competitividad de las empresas en el actual mercado globalizado y ultraconectado. Por ello, se decide utilizar los resultados obtenidos del informe "El papel del diseño en el sector cerámico", para la selección de las empresas más representativas.

Matriz de tendencias en el sector cerámico.

La matriz de tendencias es una herramienta utilizada tanto para el análisis de tendencias y detección de oportunidades, como para nuevos productos y servicios. A través de esta herramienta, analizamos a cinco empresas cerámicas que engloban los modelos de negocio más generales del sector de la baldosa cerámica.

Dentro de este grupo de empresas, se recogen las que van desde la utilización del diseño esporádicamente hasta las más avanzadas que se encuentran en la fase de integración del diseño como proceso dentro de la estratégia empresarial.

> 'España es el 2^{do} país productor y exportador europeo y el 3^{er} exportador mundial de azulejos sólo superado por Italia y China.'

No se ha encontrado ninguna que pudiera estar en lo más alto de la escalera, basando su modelo de negocio a partir del proceso de diseño.

Empresas analizadas.

El Barco S.L

- Estrategia (Expresión)

El Barco se dedica a la fabricación de azulejo cerámico y dispone de amplio catálogo de revestimientos y pavimento. Empresa dedicada a la fabricación cerámica de alto diseño, piezas artesanales, cerámica imitación de mármol y pizarras, con amplio catálogo a su disposición para decorar paredes y suelos.

- Agente (Gurú tendencias)

El Barco centra su atención a la hora de marcar sus líneas de producto en dos eventos anuales, Cevisama y Cersaie, ferias de cerámica. La empresa tiende a seguir las nuevas tendencias marcadas por las empresas italianas más importantes, que posteriormente son plasmadas en diseños de producto por los grandes proveedores de diseño del sector, "el colorificio".

- Producto (Características comunes)

Producto de formato pequeño desde 10x10 hasta 31x48, de carácter artesanal e imitación a mármol y piedra. Divide su producto en la Web por formatos, normalmente la mayoría de empresas dividen su producto por material (porcelánico, pasta roja, gres y pasta blanca, no habiendo una homologación estandarizada en la nomenclatura a utilizar para denominar al material).

- Tendencias (Métodos de generación)

Como la mayoría de empresas en el sector, El barco se abastece de los colorificios (80%) y algún gabinete de diseño (20%) especializado en el sector para conformar su porfolio de productos. El proceso de selección de futuros diseño es, en este caso, el siguiente: El gerente de El Barco y sus comerciales, llega a la exposición del colorificio, eligen según su criterio, los diseños que les parecen más interesantes para sus mercados de venta y posteriormente, el colorificio les prepara toda la información y material necesarios para su producción.

- Canal de distribución (Puntos de venta)

Dos son los canales de distribución utilizados por El Barco:

-Tiendas o almacenes distribuidores especializados en productos de construcción, donde además de producto cerámico existen accesorios de baño y otro tipo de revestimientos.

-Otros fabricantes de cerámica que complementan su oferta con los productos de El Barco.

Undefasa S.A

- Estrategia (Expresión)

UNDEFASA fabrica revestimientos cerámicos, pavimentos de gres y porcelánico. Plantea como filosofía de empresa "Servicio, Honestidad, Innovación y Calidad son las bases que han guiado nuestro camino desde hace más de 40 años, y lo seguirán haciendo en el futuro. En UNDEFASA hemos sabido avanzar hasta situarnos a la vanguardia de la industria cerámica, siempre desde la máxima cercanía a nuestros clientes". Cliente, innovación, medioambiente y garantía son sus estandartes de empresa.

- Agente (Gurú tendencias)

Undefasa centra su atención a la hora de marcar sus líneas de producto en varios eventos anuales, Cevisama, Cersaie, Coverings y Mosbuild, ferias de cerámica. Intenta marcar sus propias tendencias, aunque sigue de cerca a las empresas punteras del sector presentes en estas ferias.

- Medios (Promoción)

Undefasa, centra sus medios de promoción en soportes tradicionales: catálogos, folletos, expositores, stands de feria y Web. Aunque incorpora nuevos soportes digitales como programas de renderizado 3D (DECOR 3D) con sus productos, ambientes 3D, newsletter, campañas promocionales donde a través de sus 10 garantías promociona la misión de la empresa e indirectamente sus productos.

- Producto (Características comunes)

La mayoría de su producto está decorado con tecnología inkjet, formato desde 25x25 a 50x50, destacando sus formatos rectangulares. En líneas generales es un producto homologado con la mayoría de empresas del sector, destacando sus motivos florales y tonalidades vivas en sus despieces.

- Tendencias (Métodos de generación)

Undefasa utiliza una formula mixta donde el 80% de su diseño proviene de varios colorificios, 15% de empresas de tercer fuego y solo un 5% de su departamento interno de diseño. Este último se nutre de diferentes revistas y dossier de tendencias, aunque por su poca presencia en el producto final, no llegan a influir en el estilo de la empresa.

- Canal de distribución (Puntos de venta)

Su principal canal de distribución es la tienda o almacén distribuidor especializado en productos de construcción, centrando todos sus esfuerzos en ofrecer un servicio de entrega en 24-48 horas.

Vives S.A

- Estrategia (Expresión)

VIVES Azulejos y Gres es una empresa dedicada a la fabricación de productos cerámicos para pavimentos, revestimientos, porcelánicos y piezas especiales , con el fin de ofrecer un producto innovador y eficaz.

- Agente (Gurú tendencias)

Vives, como uno de los casos excepcionales en el sector, analiza las tendencias a través de diferentes ferias (cerámica, mueble, moda, etc.), dossier de tendencias (Nelly Rody, OTH, etc.), y una vez extrae sus opiniones, plantea su estrategia para obtener diseños de producto.

- Medios (Promoción)

Vives, además de promocionarse a través de soportes tradicionales: catálogos, folletos, expositores, stands de feria. Potencian su Web como centro de información sobre todas sus actividades. Desarrolla campañas promocionales que giran entorno a sus novedades Videos promocionales, anuncios publicitarios, artículos sobre sus colaboraciones con creativos, etc. Promociona sus instalaciones y productos, a través de visitas de arquitectos, periodistas, diseñadores a sus instalaciones.

- Producto (Características comunes)

Todo el producto de Vives intenta transmitir en su presentación, la filosofía de empresa y el significado de su diseño. Aunque como la mayoría de empresas del sector se apoya en la imitación de piedras, maderas, tejidos y metales para introducir su producto en los diferentes mercados. Desde sus inicios ha trabajado con formatos pequeños 20x20 y 15x15, ampliando sus formatos hasta el 60x60 porcelánico. Como la gran mayoría de empresas, intenta abarcar todo el abanico de materiales existentes en cerámica: porcelánico, gres, azulejo en pasta roja y pasta blanca.

- Tendencias (Métodos de generación)

La formula utilizada por Vives para la generación de tendencias pasa por el análisis de dossier de tendencias, visita a diferentes ferias, posterior extracción de conclusiones, visita a colorificios y agentes externos de diseño, adquiriendo posibles ideas de producto que finalmente dentro de su departamento de diseño, modifican, retocan, rediseñan o utilizan como inspiración, obteniendo sus productos finales.

- Canal de distribución (Puntos de venta)

Sus canales de distribución son: el distribuidor especializado en productos de construcción y la tienda venta público de revestimientos. Por otra parte, utilizan el canal del prescriptor para fomentar el uso de sus novedades. En algún momento tuvieron tienda propia pero no llego a asentarse dentro de la empresa como estrategia de distribución y venta.

Ceracasa S.A

- Estrategia (Expresión)

Ceracasa es especialistas en la fabricación y comercialización de revestimientos y pavimentos cerámicos de alta calidad, gres cerámico y baldosas de porcelánico de última generación.

- Agente (Gurú tendencias)

Según propias palabras de la empresa, siguen las ferias comunes de cerámica, están suscritos a varias revistas de diseño, arquitectura, decoración, analizan los productos de las empresas punteras en el sector a nivel mundial. Incluso en su Web plantean las tendencias venideras según Ceracasa (http://www.ceracasa.com/51394_es/DESCUBRE-LAS-TENDENCIAS-ENCERAMICA-PARA-2012-Y-2013/#contenido).

- Medios (Promoción)

Ceracasa, además de los soportes tradicionales: catálogos, folletos, expositores y stands de feria. Centra la mayoría de su promoción en aplicaciones digitales, participa en proyectos de investigación conjuntamente con escuelas de arquitectura, se promociona a través de realizar visitas para prescriptores, charlas y a través de medios de comunicación se encarga de informar sobre sus proyectos, eventos, exposiciones, etc... Además, a través de su página Web y las redes sociales esta en contacto directo con sus clientes potenciales.

Medios de promoción.

• Producto (Características comunes)

Ceracasa centra el hilo conductor de sus productos en la innovación, el medio ambiente y la calidad, se dirige a un público medio alto y todo su producto se presenta como técnico y preciso. Destacan sus submarcas: *(Ver figuras "x")*

• Tendencias (Métodos de generación)

Ceracasa centra su esfuerzo en la comercialización y promoción del producto, por esto su método de generación de productos se desarrolla a través de los diseños suministrados por colorificios y la adquisición esporádica de proyectos de diseño externos. El departamento de diseño de Ceracasa se encarga de filtra los diseños adquiridos y se centra en su correcta promoción y comunicación. Todas sus novedades siempre van acompañadas por un producto obtenido de alguna investigación a modo de gancho publicitario. Cuenta con la línea *Emotile* donde cada proyecto es personalizado a petición del cliente.

• Canal de distribución (Puntos de venta)

Sus canales de venta son sus distribuidores, tiendas comerciales y en el caso de *Emotile* son ellos mismos los que se encargan de su venta y distribución. Aunque en los últimos años están cada vez más desvinculados de sus distribuidores, realizando ellos mismos la labor comercial y de venta.

Peronda S.A

• Estrategia (Expresión)

EL grupo Peronda, centra su actividad en la fabricación de pavimentos y revestimientos cerámicos, cuenta además con participación en la propiedad de las firmas Atomizadora S.A, Arcilla Blanca S.A y Pulionda S.A, dedicadas a actividades complementarias de la producción de baldosas; así como diversas delegaciones comerciales, tanto en España como en otros países. Desde una gestión profesional, el objetivo básico de la compañía se define en un crecimiento sostenido y eficiente que garantice su desarrollo, con la oferta al mercado de productos diferenciados, de un alto nivel de innovación y calidad, a través de un óptimo servicio de carácter integral.

• Agente (Gurú tendencias)

Peronda expresa en su porfolio de empresa como desde su departamento de producto siguen de cerca las tendencias estéticas en todos los campos de la actividad social (moda, equipamiento del hogar, textil...), con el fin de componer una oferta de piezas que marquen la diferencia y abran nuevos caminos. Además de visitar y analizar distintas ferias de cerámica, moda, etc...

• Medios (Promoción)

Peronda desde hace unos años planteo una estrategia donde a través de eventos y participaciones en el mundo de la moda, pudieran reposicionar la marca y darle una identidad propia. Por otra parte, y con el mismo fin, cambian toda su imagen y la estética y discurso de sus soportes promocionales tradicionales: catalogo, stands, expositores, presentación del producto en tiendas, etc... Aprovechan este nuevo rumbo para promocionarse en otros canales de visibilidad.

• Producto (Características comunes)

Peronda ha destacado tradicionalmente por sus imitaciones a maderas y por su cerámica pulida. Hoy en día sigue siendo la número 1 en estos productos pero lanza nuevas colecciones que intentan abrir un nuevo camino más centrado en las tendencias del momento.

• Tendencias (Métodos de generación)

Como ya comentábamos en el apartado de Agente, Peronda investiga y analiza tendencias en distintas disciplinas, destilando desde el departamento de producto su esencia con el fin de obtener nuevos productos. Por otra parte también cuenta con el apoyo de colorificios en el desarrollo de nuevos acabados, texturas y demás que abastecen su porfolio de producto más estándar.

• Canal de distribución (Puntos de venta)

Peronda centra su venta en el distribuidor especializado e intentando educar a este profesional en la forma de vender su producto mediante charlas, soportes específicos y cursos a medida.

Conclusiones

Aunque el análisis no es concluyente y simplemente refleja de forma general cual es el sentimiento del sector cerámico, se podría marcar una serie de conclusiones generales, reforzadas en parte por 14 años de experiencia en el sector cerámico. Planteadas según los apartados de la matriz de tendencias, estas son las conclusiones:

• Estrategia

La mayoría de empresas cerámicas concentran su marco de actividad y en su defecto, su estrategia, en la fabricación de cerámica de recubrimientos (pavimentos y revestimientos, con distintos tipos de pastas, aplicadas a diferentes entornos). Debemos resaltar que en los últimos años, debido a la fuerte presión económica, algunas empresas plantean dentro de su marco de actividad la comercialización de sus productos.

• Agente

Como estudios anteriores corroboraban, el diseño no es parte fundamental en la estrategia empresarial, utilizándose de forma esporádica y para solucionar temas puntuales, sobre todo relacionados con el producto.

Esta actitud sigue vigente en la actualidad y justifica que muchas empresas sigan teniendo como referente para la generación de ideas de producto a agentes como:

-Ferias consolidadas de cerámica como Cevisama y Cersaie.

-Empresas italianas punteras como Mutina, Ceramichelea, Granitifiandre, etc...

-O algunos dossieres de tendencias del sector del mueble, textil, decoración o moda.

• Medios de promoción

En este aspecto podemos observar como existe una homogenización en los medios utilizados promocionar la empresa, productos, etc. La mayoría de empresas siguen utilizando medios tradicionales como: catálogos, expositores de producto, stands de feria y Web.

Algunas comienzan a adentrarse en las redes sociales, aprovechando de momento este canal para ofrecer campañas de promoción, presentar sus novedades o publicar eventos realizados.

La mayoría de empresas son conscientes de la importancia de la imagen de marca, aunque las mismas no llegan a superar la frontera de los clientes (en su mayoría distribuidores) y en contados casos llegan al campo visual de los consumidores finales.

• Productos

Existe una clara homogenización del producto, debida en su mayor parte al fenómeno de los colorificios como fuente inagotable y a coste cero de diseños inspiradores.

Todas las empresas del sector en mayor o menor medida, plantean más del 90 % de su cartera de productos con imitaciones a mármol, piedra y madera. Productos justificados por la durabilidad y resistencia de la cerámica frente a estos materiales.

Solo en casos puntuales, algunas empresas utilizan características exclusivas de la cerámica como su gama cromática, su capacidad para generar múltiples efectos superficiales o su versatilidad en formatos, con el fin de generar un porfolio de productos puramente cerámicos con acabados cerámicos y propiedades cerámicas.

• Tendencias

La dependencia de las empresas fabricantes con respecto a las industrias de colorificios, es un factor determinante en la caracterización de los rasgos distintivos, ya que el diseño de cada uno de los modelos de las distintas gamas está ampliamente estandarizado y disponible para la totalidad del sector. Por ello las competencias de diseño son las de particularizar y diferenciar en lo posible las piezas a través de introducir matices de color, grafismo, etc., asumiendo los conceptos emanados de los colorificios y verificados por los clientes.

Un pequeño número de empresas adquiere diseños provenientes de estudios externos para generar las novedades que presentará en las ferias de Cevisama o Cersaie. Y solo una pequeñísima porción de las empresas, genera sus propios diseños, a través del análisis de dossieres de tendencias, visitas a ferias y seguimiento de revistas.

• Canal de distribución

En el caso del sector cerámico, el distribuidor / cliente, es decir, el agente que hace de intermediario entre la empresa y el usuario final, prescriptor y constructor, controla la distribución y venta del producto.

Durante años, dicha figura ha tenido un peso decisivo en los precios, la comunicación con el cliente y el producto que había que desarrollar, sin necesidad de evolucionar demasiado en técnicas de venta, presentación y puesta en valor de producto para conseguir ventas.

Productos de todas las empresas.

En la actualidad, aunque siguen siendo el mayor canal de venta, también sufre las consecuencias de la crisis. Por esto, hay empresas cerámicas que son conscientes de la necesidad de dotar de herramientas adecuadas a distribuidores y comerciales, con el fin de mejorar la comunicación y promoción de sus productos y mantener las cuotas de mercado tanto en exportación como en nacional.

'El primer paso para la solución de los problemas es el optimismo. Basta creer que se puede hacer algo para tener ya medio camino hecho y la victoria muy cercana.'

John Baines (1935-?) Filósofo y científico chileno.

Tabla 1: El sector cerámico español en 2011

Producción -392 millones de m2 -Segundo país productor europeo y séptimo mundial (datos de 2010)	**Exportación** -1.892 millones de€ a 182 países -Segundo país exportador europeo y tercero mundial (datos de 2009) -Tercer sector industrial que más superávit comercial aporta a España, y primero en cobertura comercial
Empleo -15.500 empleos directos estimados	**Ventas totales** -2.597 millones de € (estimación)

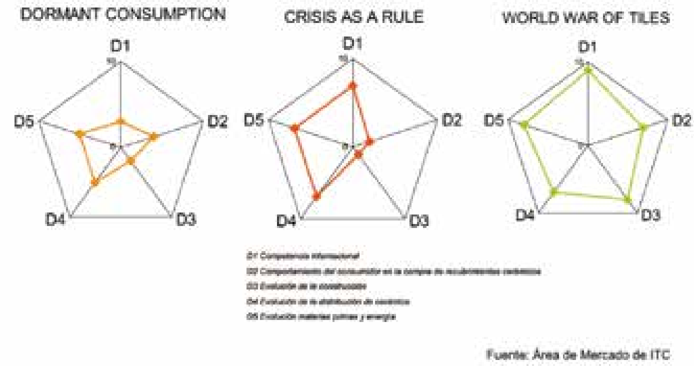
Tabla 2: Producción y ventas del sector

PRODUCCIÓN Y VENTAS DEL SECTOR

	2007	2008	2009	2010	2011
Producción	584,70	495,20	324,40	366,00	392,00
Ventas mercado nacional	1.871,00	1.460,30	918,00	801,00	705,00
Exportación	2.295,00	2.210,90	1.673,20	1.746,80	1.892,00
Ventas totales	4.166,00	3.671,20	2.591,20	2547,80	2597,00

Ventas en millones de Euros y producción en millones de metros cuadrados

Tabla 3: Escenarios prospectivos del sector cerámico 2016



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Investigación y
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Universidad Politécnica de Valencia
Camino de vera, s/n.
46022 VALENCIA, ESPAÑA
Tel: 0034 963 877 464

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