

IDA World Design Survey Pilot Project

South African findings

SABS
DESIGN INSTITUTE



IDA World Design Survey South African partners

Front row: Jacques Lange (Icograda Past President 2007-2009 – lead project advisor), Adrienne Viljoen (Manager, SABS Design Institute – project lead), Brenda Sanderson (MD, International Council of Graphic Design Associations [Icograda] – international project lead) and Pieter van Heerden (COO, Consulta Research – lead researcher). **Back row:** Bernard Smith (Chairperson, Industrial Design Association of South Africa – project partner), Des Laubscher (Chairperson, Institute of Interior Design Professions – project partner), Amanda Breytenbach (President, Design Education Forum of Southern Africa – project partner), Esmé Kruger (SABS Design Institute – project leader), and the David Blyth (Chairperson, South African Communication Design Council – project partner).

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- **Adrienne Viljoen:** Manager
T: +27 (12) 428 6328
- **Esmé Kruger:** Information
T: +27 (12) 428 6332
- **Zenobia Norval:** Awards co-ordinator
T: +27 (12) 428 7038
- **Bongani Ntombela:** Design for Development
T: +27 (12) 428 7607
- **Portia Mposula:** Projects administrator
T: + 27 (12) 428 6655
- **Vuyiswa Daniel:** Secretariat
T: +27 (12) 428 6326
F: +27 (12) 428 6546
E: design@sabs.co.za
W: www.sabs.co.za & www.designinstitute.org.za
Private Bag X191, PRETORIA 0001, South Africa

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- **Editors:** Esmé Kruger (SABS Design Institute) and Jacques Lange (University of Pretoria)
- **Research:** Consulta Research
- **Language editing:** Jennie Fourie
- **Design and production:** Blueprint Design
- **Commissioned photography:** Eyescape Studio

PREFACE

South Africa's participation in the IDA World Design Survey (WDS) pilot project transpired due to collaboration between the Design Institute and four professional design associations representing design education, industrial, interior design and communication: Design Education Forum of Southern Africa (DEFSa), Industrial Design Association of South Africa (IdeasA), Institute of Interior Design Professions (iida) and the South African Communication Design Council (think).

The eventual task of compiling the survey was considerably larger than originally anticipated. It was clear that the information was ground-breaking and timely and that the end result should be in a format that would facilitate the quantification of the impact of the design industries on the South African economy. The WDS

clearly points towards the huge potential of nurturing South African creativity and design ingenuity.

The Design Institute is indebted to the design associations for their valuable input. Special mention should be made of the huge contribution of Jacques Lange. During his tenure as co-chair of the IDA and President of Icograda from 2005 to 2007, he was instrumental in formulating this visionary international survey and he was to a large extent responsible for the monumental task of formatting the South African results into a final report. Esme Kruger, who acted as the WDS project leader on behalf of the Design Institute and who was also responsible for the difficult and time-consuming task of verifying information, also deserves special recognition.

The survey came about through the financial backing of the South African Bureau of Standards. A special word of thanks goes to the SABS Executive for their continued support for South African design since 1969.

Adrienne Viljoen

Manager SABS Design Institute

Icsid Regional Advisor

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Contents

Foreword	2	8.4. Design support	30
The international importance of the World Design Survey	3	8.5. Profiles	44
1. Introduction	4	8.6. Design education	58
2. Scope of the project	4	8.7. Open questions	60
3. Aim of the project	4	9. Project partners' insights and recommendations	68
4. Objectives of the project	4		
5. Research methodology	4	Appendices	
6. Challenges of the study	5	Appendix A: IDA World Design Survey Baseline Questionnaire	79
7. Sampling, sample realisation and contact statistics	6	Appendix B: South African WDS CATI Questionnaire	86
8. Baseline report	9	Appendix C: List of SETAs	92
8.1. Participants' profile	9	Appendix D: List of institutions offering design education	93
8.2. Design sector profile	9	Appendix E: Presentation by Brenda Sanderson, Icograda Managing Director	97
8.3. Representative organisations	18		

Foreword



It is indeed a privilege for the South African Bureau of Standards (SABS) and in particular, the SABS Design Institute to present the South African pilot project of the *IDA World Design Survey*.

As main sponsor and overseer of this highly significant survey, the SABS Design Institute is fulfilling its mandate of design promotion for the benefit of all South Africans. Since its establishment more than 40 years ago in 1967, the SABS Design Institute has been the only national institution with a dedicated mandate relating to design in South Africa. This institution has been active with industry, education and design for development initiatives that have changed the destiny of many local designers.

South Africa's professional design sector is expanding rapidly and the time has come to place the role played by design in the spotlight. The contribution of design to the national economy and design's socio-cultural contribution to development should be quantified in order to add to the stature of the profession and to place a real value on its contribution.

This pilot survey is the first step towards creating a national design strategy that will not only benefit South African designers, but the country as a whole.

Mr Martin Kuscus

CEO: South African Bureau of Standards (SABS)

The international importance of the World Design Survey



The *World Design Survey* pilot project is the beginning of a significant undertaking. The *IDA World Design Survey* document will facilitate the understanding of the magnitude, impact, characteristics and unique cultural differences of the design economy in an international context. It will increase the core base of policy and relevant research, encourage and support research partnerships and facilitate the sharing of best practises and transfer of knowledge regionally and internationally.

Creating a global framework to measure design's economic, social and cultural contribution requires partners with vision, willing to invest in time, energy and resources. The International Design Alliance (IDA) is grateful to our major collaborators in this undertaking.

In the case of South Africa, this partnership is particularly important as it will shed new light on the scope of the design economy in a part of the world where there was previously little published data. Significantly, it does not shy away from the work that remains ahead of us all to gain clarity and understanding so that design's value and contribution can be effectively leveraged. In context, this understanding has taken on new meaning since design is now understood as the leading sub-group in the world market for creative goods.¹

Answering the challenge put forward in the *Creative Economy Report 2008*, "that quality and coverage of data are improved and that an effort will be made to compile accurate statistics allowing for a comparative analysis at the global level" by the United Nations will take continued commitment and the *IDA World Design Survey* can provide critical insight.

For an international framework to be effective, its indicators must be consistent, relevant and measurable. The challenge ahead of us is to come together – as a prominent profession working with government and industry – and facilitate collaboration to manage our continued contribution to overall economic, cultural and social well-being of our society. South Africa has a valuable continuing role to play as we consider the diverse economies and cultures that make up the international design profession.

On behalf of the IDA, I would like to acknowledge our South African partners for their vision and investment in this phase of development of the *IDA World Design Survey*. The information presented in this report is a foundation for the future and we look forward to continued collaboration in the years ahead.

Don Ryun Chang

Icograda President 2007-2009

IDA Co-Chair 2007-2009

¹ *Creative Economy Report 2008*, UNCTAD. p. 130.

1. Introduction

The *IDA World Design Survey* aims to map the generic design sector in 12 countries (or economic development communities) as a pilot project to determine the contribution of the design economy and the level of strategic engagement of design as a socio-economic and cultural developmental imperative at government level.

The *IDA World Design Survey* pilot project thus aims to create a clearer understanding of the global design sector. Participants contributed by mapping the characteristics of their national design sectors – its strengths and contributions to the overall economy and its socio-cultural contribution to development.

Following a Call for Expression of Interest by the IDA, five of South Africa's most prominent organisations engaged in design promotion and profession management – SABS Design Institute (DI), Design Education Forum of Southern Africa (DEFSA), Industrial Design Association of South Africa (IdeaSA), Institute of Interior Design Professions (IID), and the South African Communication Design Council (think) formed a partnership and submitted a common Expression of Interest as a research partner on behalf of South Africa. This partnership was subsequently elected to participate in the *IDA World Design Survey* pilot project.

This report serves as an outline for the ensuing research conducted as the South African partnership stipulated in its Expression of Interest that; "it (South Africa) would outsource the actual research service to an external contractor while the SABS

Design Institute will maintain the project oversight in collaboration with its project partners, DEFSA, IdeaSA, IDD, think and other consultative stakeholders".

2. Scope of the project

The scope of the South African Design Survey was to map the characteristics of the South African design sector – their strengths and contributions to the South African economy and the contribution of design to socio-cultural development in South Africa.

3. Aim of the project

Within the scope of the project, the following four questions were addressed:

- What are the structure/systems that define the design economy in South Africa and what changes could lead to the recognition and promotion of design's contribution to the overall economy in the long run? (An attempt was made to look at ways to determine value-add but it ended up being too complex to accommodate in the scope of this pilot study.)
- Who are the participants in the design economy, what are their numbers and what is needed by particular populations, such as professional design associations, design promotional agencies, design management consultancies, design ('lifestyle') trade (retail and manufacturing – such as design quarters) and tertiary design educators to support their successful participation in the long term?

- How can approaches to governance, as well as particular programmes, services and initiatives strategically contribute to the enduring growth of capacity within the design community to foster and promote design's contributions in the long term, and what are viewed as impediments/stumbling blocks/constraints?
- How does design contribute to socio-cultural development?

4. Objectives of the project

In order to develop an understanding of the rapidly expanding professional design sector the overall objectives of the study were to develop an understanding of:

- The national design economy;
- design's strengths and contributions to the national economy; and
- design's socio-cultural contribution to development.

5. Research methodology

In order to effectively address the aim and objectives of the study a two-tiered approach was used:

5.1. Exploratory research

Secondary data were sourced and dissected to provide insight into aspects such as:

- Representation of design sectors;

- the number of patents, trade marks and designs registered in the previous 12 months (also looking at alternative ways of protecting intellectual property);
- design employment (designers as well as people working in design sector);
- overall contribution of design to the Gross Domestic Product (GDP);
- government (national, provincial, local) policy on design;
- government funding of design;
- design education institutions;
- formal design training output;
- national design organisations;
- national professional representative bodies;
- the impact and size of design exports (including services); and
- incidence of foreign students studying at South African institutions.

5.2. Descriptive research

Primary data were collected during this phase – again using a two-tiered approach:

5.2.1. In-depth interviews

In-depth interviews, using a structured questionnaire (see Appendix A and B), were conducted with, *inter alia*, government, professional bodies, design education institutions and

national design organisations. This was used to supplement and validate data collected during the exploratory phase.

5.2.2. Telephonic interviews

Telephonic interviews using computer-aided telephonic interviews (CATI) (Appendix B) was conducted using the baseline questionnaire supplied, but slightly adjusted, for the South African situation with a representative sample of selected design practitioners belonging to the following disciplines:

- Communication designers
- Motion graphics, animation and new media designers
- Industrial designers (including glass and ceramics)
- Interior designers
- Multidisciplinary designers (including eventing and architects working as furniture designers)

Contact lists were provided by the South African project partners. The sample was designed to ensure a statistical significance of 95% with a margin of error of 5% and was based on initial figures provided by the project partners.

5.3. Changes to the *International Baseline Questionnaire*

The South African questionnaire was adjusted slightly to reflect the local situation. The major change was in the field of the Sector Profile (8.5) where the following disciplines were excluded from the study – although information that was stumbled

upon or sourced through desk research was, however, included for the sake of perspective:

- Architecture
- Fashion design
- Jewellery design
- Landscape architecture
- Textile design
- Urban planning design

This might have been an oversight as some of these sectors are huge in South Africa and play an important role in the bigger picture – especially on the economic and labour fronts of design in South Africa.

6. Challenges of the study

Once the project got under way the research team was faced with some challenges (more will be said about each aspect later where applicable).

- The lack of availability of respondents due to work pressure.
- The lack of available secondary data.
- A general lack of a clear understanding of and knowledge about the design sector amongst all its stakeholders.
- A lack of structure and organisation within the sector – no single definition or classification system exists.

7. Sampling, sample realisation and contact statistics

7.1. Sampling

As mentioned above sampling was done to ensure a statistical significance of 95% with a 5% margin of error. The approved sample design was based on figures provided by the project partners and was calculated as per Table 1 below.

Table 1: Sample design

Research activity	Sub-sample	Population (assumed)	Sample
In-depth interviews	Government	35	10
	Professional bodies and design organisations	10	5
	Educational institutions	50	5
Sub-total		95	20
CATI	Graphic designers	3500	347
	Motion graphics, animation and new media designers	50	45
	Industrial designers	613	237
	Interior designers	1200	292
	Multidisciplinary designers	50	45
Sub-total		5413	966

To ensure a statistical significance of 95% with a 5% margin of error for each sub-sample

7.2. Sample realisation

Based on contact lists provided by the project partners, the populations proved to be vastly different from what was originally estimated and was mainly the reason for not reaching the sample of 966 for the CATI component of the study. See Table 2 below for the actual sample realisation.

As mentioned before, one of the main challenges the researcher faced were unavailability of respondents and this posed to be a serious hurdle in sourcing data from government departments. The only departments that were available to be interviewed were the Department of Trade and Industry (dti), The Presidency and The Department of Arts and Culture (DAC). Despite numerous attempts, no interview could be scheduled with the Department of Science and Technology (DST) – a department deemed to be an important role-player in this discipline. Secondary data were sourced from government websites.

Lower than anticipated sample realisation on the side of the CATI were mainly due to significantly smaller population sizes than were anticipated by the project partners, as well as to reasons supplied as per Section 7.3 below.

Another important aspect to keep in mind is that interviews were conducted on an **organisational** level and only one

interview per organisation was allowed. Many of the respondents indicated that an interview was already conducted and led to the higher than normal non-response rate (see Section 7.3).

In two instances where no contact data could be provided by the project partners, all attempts were made to source lists and to elicit responses. Categorisation into these disciplines was, however, based on 'self declaration' and cannot be verified as being technically correct.

Based on the revised populations for each sector (*assuming a population size of 35 for each of the motion graphics, animation and new media designers and multidisciplinary designers*) and the overall sample completion of 212, the statistical significance of the study is calculated as 90% allowing for a 4.6% margin of error.

It must be kept in mind that the significance and margin of error quoted above will only be true for the total responses of 212 and would be somewhat lower for each of the sub-samples. Although the statistical significance for the communication, industrial and interior design portions of the study remains at 90% the margin of error for graphic design increases to 8.5%, for industrial design to 7.3% and to 11% for interior design. For the motion graphics and multidisciplinary portions of the study the margin of error increases to 16.5%. This is due to the lower sample realisation but still within (or close to) the general acceptable norm of a 90% statistical significance with a 10% margin of error. The statistical significance and margin of error for the

in-depth interview portion of the study are not relevant as it was more of a qualitative approach.

Table 2: Sample realisation

Research activity	Sub-sample	Population (assumed)	Sample	Population (after cleaning of lists supplied)	Sample realised
In-depth interviews	Government	35	10	35	3
	Professional bodies and design organisations	10	5	9	5
	Educational institutions	50	5	24	11
Sub total		95	20	68	19
CATI	Graphic designers	3500	347	220	64
	Motion graphics, animation and new media designers	50	45	20	15
	Industrial designers	613	237	360	74
	Interior designers	1200	292	183	44
	Multidisciplinary designers	50	45	20	15
Sub total		5413	966	803	212

7.3. Contact statistics

As mentioned earlier this portion of the study also posed to be a challenge and non-realisation of the sample was mainly due to lack of availability and unwillingness to participate, as indicated and confirmed by the contact statistics from the CATI portion of the study (see Table 3). Of the major findings were:

7.3.1. Interior design

- It took 683 calls to realise the 44 interviews. This translates to a hit-rate of 1 in 15.5.

- A total of 122 of the respondents requested to be called back at a later stage. This is an indication of the highly intense, hands-on, stressful and deadline-driven industry of interior design, and therefore the convenience of unscheduled

interviews played a large role, as many interior designers were not available in their offices during standard working hours.

- In 240 of the attempts the respondents were not available and in a further 123 attempts the phone just rang. This again emphasises the point above.
- A total of 54 of the respondents refused to participate.

7.3.2. Industrial design

- It took 1 168 calls to realise the 74 interviews. This translates to a hit-rate of 1 in 15.8.

- A total of 126 of the respondents requested to be called back at a later stage. As with the interior designers this was due to the factor of inconvenience of unscheduled interviews.
- In 379 of the attempts the respondents were not available and in a further 269 attempts the phone just rang. Industrial designers are also not always available in their offices during normal working hours.
- A total of 106 of the 360 numbers provided no longer existed – database error.
- A total of 22 of the respondents refused to participate.

7.3.3. Communication, motion graphic, animation and new media and multidisciplinary design

- It took 3 029 calls to realise the 94 interviews. This translates to a hit-rate of 1 in 32.2.
- A total of 407 of the respondents requested to be called back at a later stage. As per above – again an indication of the inconvenience of unscheduled interviews.
- In 1 010 of the attempts the respondents were not available and in a further 567 attempts the phone just rang. Apart from availability in offices, it might also be due to the fact that these were in many instances small and micro enterprises with little or no back-up support, thus leaving offices unmanned when the primary designers/business owners were out of the office.
- A total of 306 of the numbers provided no longer existed. In 149 of the cases the respondent was no longer at the number and a further 107 of the attempts were to a wrong number. This is most probably due to high mobility in the sector or as a result of businesses failing.
- A total of 107 of the respondents refused to participate.

Table 3: Contact statistics

Contact codes	Interior designers	Industrial designers	Graphic, communication, motion graphic, new media and multidisciplinary designers
Completed	44	74	94
Contacted (cost incurred)			
Mid-term termination	7	10	34
Agree but do not qualify	11	21	59
Call back	122	126	406
Has been contacted	1	5	32
No longer at the number	1	17	149
Wrong number	5	43	107
Not available	240	379	1010
Deceased	0	1	1
Refusal - not ever	28	13	47
Refusal - not now	26	9	60
Left the country	1	5	12
Respondent supplied alternative tel	12	45	138
Alternative contact request	13	5	9
Unreachable (no cost)			
Discontinued number	4	106	306
Engaged	43	27	118
Fax number	2	13	24
Just rings	123	269	570
Statistics (totals)			
Completed	44	74	94
Contacted (cost incurred)	467	679	1917
Unreachable (no cost)	172	415	1018
Error Propensity	23	201	646
Total attempts	683	1168	3029
Statistics (percentage)			
Completed	6.44%	6.34%	3.10%
Contacted (cost incurred)	68.37%	58.13%	63.29%
Unreachable (no cost)	25.18%	35.53%	33.61%
Error propensity	3.37%	17.21%	21.33%
Response ratio (cost incurring) 1 to . . .	10.61	9.18	20.39
Response ratio (all attempts) 1 to . . .	15.52	15.78	32.22

In a further attempt to elicit responses the project partners sent e-mails to all their members urging them to complete the online questionnaire but the response from this attempts proved to be disappointing as a mere 12 responses were received. This would definitely be as a result of the timing of the project as the bulk of the data collection occurred during December 2007 to January 2008. This is traditionally the time of year when most people take their annual summer break. Complications around the technology were also reported, such as not being able to submit the completed questionnaire.

8. Baseline report

8.1. Participants profile

8.1.1. Country

- This survey covers the Republic of South Africa.
- The country spans 1.2-million square kilometres.
- South Africa is a nation of over 46 million people of diverse origins, cultures, languages and beliefs. Around 79% are Black, 9% White, 9% Coloured and 2.5% Indian/Asian. Just over half of the population live in the cities.

Source: www.southafrica.info/overview/english/quickguide-english.htm

8.1.2. Commissioned researcher

Detail of the lead researcher for the information contained in this report:

Consulta Management Consultants (Pty) Ltd t/a Consulta Research

- Contact person: Pieter van Heerden
- Position: Chief operating officer
- Address: Central Park, Building 1, Highveld Techno Park, Centurion
- Telephone: +27 (0)12 665-6200
- Fax: +27 (0)12 665-6499
- E-mail: pieter@consulta.co.za
- Web: www.consulta.co.za

8.1.3. Survey Lead

SABS Design Institute (DI)

- Contact person: Adrienne Viljoen
- Role: Main sponsor and overseer
- Position: Manager
- Address: 1 Dr Lategan Street, Groenkloof, Pretoria
- Telephone: +27 (0)12 428-6328
- Fax: +27 (0)12 428-6546
- E-mail: viljoeb@sabs.co.za or krugere@sabs.co.za
- Web: www.sabs.co.za www.designinstitute.org.za

8.1.4. Project partners

8.1.4.1. Design Education Forum of Southern Africa (DEFSa)

- Role: Project partner
- Address: P O Box 12313, Clubview 0014
- Telephone: +27 (0)12 644-1075
- Fax: +27 (0)86 514-2112
- E-mail: smitta@telkomsa.net
- Web: www.defsa.org.za

8.1.4.2. Industrial Design Association of South Africa (IdeaSA)

- Role: Project partner
- Address: P O Box 1801, Jukskei Park 2153
- Telephone: +27 (0)83 654-6832
- Fax: +27 (0)11 462-3154
- E-mail: industrial.design@telkomsa.net

8.1.4.3. Institute of Interior Design Professions (IID)

- Role: Project partner
- Address: P O Box 10642, Fourways Crossing Centre 2055
- Telephone: +27 (0)11 465-9732
- Fax: +27 (0)11 465-9802
- E-mail: md@iidprofessions.com
- Web: www.iidprofessions.com

8.1.4.4. South African Communication Design Council (think)

- Role: Project partner
- Address: P O Box 1887, Fourways Gardens 2068
- Fax: +27 (0)86 510-9735
- E-mail: think@think.org.za
- Web: www.think.org.za

8.2. Design sector profile

8.2.1. Definition of the design sector

One of the main hurdles the design sector in South Africa faces is the fact that design straddles numerous sectors of the economy and generating one single definition would not be possible without a stringent consultative process including government and private sector stakeholders.

Another point of concern is that the private sector generally uses the term design, whereas the public sector refers to innovation in all official communication and programmes. There is a clear confusion regarding the use of the terms 'innovation' and 'design'. This further complicates generating data and/or intelligence about government's involvement in and focus on design, in particular.

The rightful focus of government on job creation, sustainability, black economic empowerment, upliftment and income generation is also evident in the focus of their programmes on and interest in innovation.

Design stakeholders each have their own definition of design, resulting in the fact that there are '*so many people, so many definitions*'. For example, DAC uses the following definition as a point of departure which should be seen in the light of government's mandate and focus, as stated above: "*Design uses human power to conceive plans and real products that serve human beings in the accomplishment of any indirect or collective purpose. It is a tool to address social and economic development issues in order to create greater wealth and higher market share.*" (Lindi Ndebele-Koka, Director of Multimedia [Audiovisual, Design and Visual Arts] – DAC)

Based on the above, the South African government's huge emphasis on the crafts industry could, therefore, be understood.

For purposes of this study, however, the **design sector** is defined as: "*Any person and/or organisation functioning within the disciplines of communication design (excluding advertising),*

motion graphics, animation and new media design, industrial design (including glass and ceramics), interior design and multi-disciplinary design (i.e. eventing, and architects working as furniture designers)."

8.2.2. Use of a defined innovations/creativity index

No evidence of a defined innovations/creativity index from the side of government (StatsSA or dti) could be found that is applied throughout the industry.

Some of the promotional programmes to stimulate research and development and eventually innovation do, however, use some or other evaluation criteria to assess worthy causes, although this example is predominantly applicable to the information technology (IT) and engineering sectors.

8.2.2.1. The Innovation Fund

The Innovation Fund, the funding leg of the National Research Foundation (NRF) which supports and promotes research for innovation, uses the following criteria when evaluating applications for recipients of their Missions in Technology Programme (MiTech). Looking at the criteria and weighting applied, it is again a reflection of the government's point of departure with regard to design (or **innovation** as it is commonly referred to in government) as the focus is predominantly centred around "... *that (which) serves human beings in the accomplishment of any indirect or collective purpose*" and to "... *address social and economic development issues in order to create greater wealth and higher market share.*"

The guidelines further state that: "*The proposed technology must have a strong potential to generate substantial economic benefits to the nation. This must be clearly distinguished from the benefits that would accrue to the 'for profit' industry partner, in the absence of IF (Innovation Fund) funding. Applicants must justify the need for IF funding and elaborate on the plan to commercialise the technology and how the technology diffusion within the economic sector will be achieved.*"

"... *The proposal must clearly indicate real empowerment initiatives (not tokenism or window dressing), to be considered for funding. Proposals lacking this component will not be considered for funding.*"

Criteria used:

- Technology, novelty: Weight 30
- Market need, competitiveness and commercialisation potential: Weight 20
- National/social benefits: Weight 20
- Consortium: Weight 30

[With regard to the latter it is stipulated that: "*Consortia must adequately reflect the multi-company and multi-disciplinary composition necessary to address the market-driven research agenda of the Technology Missions. It also **must** have a black empowerment component. This may be in the form of a small or large business, or in the form of planned activities to develop necessary skills required in the economic sector. Only consortium proposals with a significant industry component, backed by industry funding will be considered for co-funding by the IF. Several industry partners can be part of the consortium. The minimum is for at least two separately owned, for profit*

companies. Their commitment to the Technology Mission must be demonstrated through cost sharing and a pledge to commercialise the technology when the Technology Mission successfully realises its objectives".]

Utilising a ranking between 1 and 5 where: 1 = Poor; 2 = Fair; 3 = Good; 4 = Very Good; and 5 = Excellent. ... an overall rating (or index score) is calculated upon which the decision to fund then rests: Poor = 100-150; Fair = 151-250; Good = 251-350; Very Good = 351-450; and Excellent = 451-500".

Sources: www.innovationfund.ac.za/downloads/html/tapmitech.html
Guidelines for Preparation of A 15-page Pre-proposal
Missions In Technology Programme (MiTech) Evaluation Template

8.2.3. Current activities in the field of design sector statistics

Research activities and the generation of design sector-related statistics are few and far between and only occur on an *ad hoc* basis.

8.2.3.1. SABS Design Institute

The South Africa Bureau of Standards (SABS) Design Institute is the only national institution with a dedicated mandate relating to design in South Africa. It was founded in 1967. The Treasury made funds available for the Design Institute and it functioned as an autonomous organisation for a few years, and reported directly to the Minister of Trade and Industry. The stated mandate of the Design Institute was to be the National Design Promotion organisation of South Africa.

The Standards Act was amended in 1972 to allow the Design Institute to be integrated into the administration of the SABS but still reporting to the Minister of Trade and Industry. In 1994 the amendment with reference to the Design Institute was omitted. Currently the Design Institute enjoys no legislative protection.

The continued role and function of the Design Institute has been the focus of a number of think tanks, meetings and strategy development sessions over the years in response to the changing Southern African circumstances. Two significant surveys followed with similar conclusions.

In 2001 the SABS commissioned a comprehensive review into the role, place and strategies of the Design Institute. The Bentley West organisation conducted the survey. The final report *Strategic review of the role of a design promotion body for South Africa* was published in March 2002 and was of a strategic nature. It looked at the need for design promotion in South Africa, and the various ways in which this could be achieved. International trends and developments were considered. The situation of the time was assessed. This included an assessment of the scope and relevance of activities based on the current and potential needs of various stakeholders, a review of the position of the Design Institute, and assessment of resource requirements and funding sources, and an evaluation of the required and available competencies of staff for such an institute.

The SABS top management decided in March 2002 that design promotion did not form part of the core business of the organisation and that the Design Institute should be relocated to a more relevant environment. This decision was in line with the conclusions and recommendations by the Bentley West survey.

In August 2002 the Department of Science and Technology held a workshop, the National Advisory Council on Innovation (NACI) Workshop on design in South Africa. The conclusions included that a comprehensive national policy on design in South Africa is needed and that an independent promotion body governed by design stakeholders should be established, building on the work already established by the SABS Design Institute, to implement the strategy. Main recommendations of the NACI report included that there is a need for the promotion of design in South Africa. The over-arching objective, namely contribution to the competitiveness of South Africa should be kept in mind.

The NACI report concluded that the Design Institute has well-established strengths and has had numerous successes. It recommended a re-position of the Design Institute to play an even more meaningful role in the socio-economic development of South Africa. It recommended continued government funding, but with a clear roadmap to reduce reliance on government funding through systematic increase of private sector contribution.

The 2002 SABS management decision was reversed in 2005 and the Design Institute remained as part of SABS. No reasons were given for the reversal of the decision.

No statistical data regarding the design sector in South Africa was gained through the mentioned surveys.

8.2.3.2. Department of Arts and Culture (DAC)

Specific research to gain information on design was commissioned by the Department of Arts and Culture (DAC) to assist with developing a policy for creative industries and to collate a comprehensive database of industry players. This report has

been compiled by Lindi Ndebele-Koko, Director: Multi-media, but she is waiting for permission from the Director General to share the results with the design industry.

8.2.3.3. Communication Design Council of South Africa (think)

Another, more recent and relevant research initiative is *The Sappi State of Design in South Africa 2008 Survey*, which was commissioned by the Communication Design Council of South Africa (think), executed by Ipsos Markinor and sponsored by Sappi. It is relevant to note that this was a pilot study which will be expanded upon in the near future. The initiative intended to close the gap between what designers think and their clients' views and attitudes towards design service provision. The aim of the project was to examine clients' perceptions around the value of design. Graeme Futter, Sappi's marketing manager: Brand Communications stated that: *"We are confident that the survey will reveal perceived or real gaps between the designer and client relationship and become a useful tool to address these issues."* The methodology involved an initial qualitative phase of in-depth interviews with clients and design consultancies followed by a second phase of the study which involved approximately 400 telephonic interviews.

Even though the focus of the survey was very specific (communication design) and its investigation into buyers of design covered a wide range of aspects of the design industry – from design's perceived influence in South Africa's economy to how a company apply design, to the link between design and better business performance, this study aimed to provide a detailed map of design's location in the country.

Think anticipates that the South African survey will show promising results for the design industry. David Blyth of think said: *"We hope to heighten our clients' awareness of how integral design is to each and every facet of a business. At the same time we will gain valuable insight into how we better tailor the design industry's offer to better suit clients' needs and expectations."* The survey will thus provide an important platform for future think initiatives. As Blyth maintains, *"As a body that represents communication designers in this country, we want to know exactly where we are so we know where to from here."* The results of this initiative were published in October 2008 and served as a supplementary study to this survey.

As a closing comment on this matter this extract from the *Creative Economy Report*, published by UNCTAD, clearly summarises the problem: *"Furthermore as for all creative industries the data for copyrights, trademarks, brands etc., makes it difficult to assess the overall economic impact of each sub group of creative industries on national economies."*

Source: UNCTAD XII, Creative Africa Initiative, *Creative Economy Report 2008 – The challenge of assessing the creative economy towards informed policy making*. ISBN 978-0-9816619-0-2

8.2.4. Institutions responsible for statistics related to the design sector

As mentioned earlier in this report, there is no centralised body in South Africa with the explicit mandate and/or responsibility to look after the design sector in a legislated context, and in fact, **there is not even a defined design sector per se within the South African governmental framework.**

8.2.4.1. Government

Design or innovation-related statistics could be found in the following national government departments (additional insights are only provided for the most prominent departments):

8.2.4.1.1. Department of Arts and Culture (DAC)

- The vision of the DAC is to develop and preserve South African culture to ensure social cohesion and nation-building.
- The mission of the DAC is to:
 - Develop and promote arts and culture in South Africa and mainstream its role in social development.
 - Develop and promote the official languages of South Africa and enhance the linguistic diversity of the country.
 - Improve economic and other development opportunities for South African arts and culture nationally and globally through mutually beneficial partnerships, thereby ensuring the sustainability of the sector.
 - Develop and monitor the implementation of policy, legislation and strategic direction for the identification, conservation and promotion of cultural heritage.
 - To guide, sustain and develop the archival, heraldic and information resources of the nation to empower citizens through full and open access to these resources.

Source: www.dac.gov.za/vision_mission.htm

8.2.4.1.2. Department of Science and Technology (DST)

- The DST strives toward introducing measures that put science and technology to work to make an impact on growth and development in a sustainable manner in areas that matter to all the people of South Africa. This includes focused interventions, networking and acting as a catalyst for change in terms of both productive components of our economy, making it competitive in a globally competitive liberalised environment, and also in respect of the huge development backlog existing among the poorest components of our society. The goal of realising this vision is underpinned by development and resourcing strategies for the formation of science, engineering and technology, human capital, democratisation of state and society, promotion of an information society and ensuring environmental sustainability in development programmes.
- The DST's vision is to create a prosperous society that derives enduring and equitable benefits from science and technology.
- The DST's mission is to develop, coordinate and manage a national system of innovation that will bring about maximum human capital, sustainable economic growth and improved quality of life.

Source: www.dst.gov.za/about-us

8.2.4.1.3. Department of Trade and Industry (dti)

The dti's vision is of a South Africa that has a vibrant economy, characterised by growth, employment and equity, built on the full potential of all citizens. To achieve this, the dti has become an outwardly focused, customer-centric organisation.

The purpose of the dti is to:

- Provide leadership to the South African economy through its understanding of the economy, its knowledge of economic opportunities and potential, and its contribution to ASGISA.
- Act as a catalyst for the transformation and development of the economy and respond to the challenges and opportunities of the economic citizens, in order to support the government's economic goals of growth, employment and equity.
- Respond to the challenges and opportunities in the economy and society.
- Provide a predictable, competitive, equitable and socially responsible environment for investment, enterprise and trade.

One of the most important new policy developments for the dti was the release of five key medium-term strategic objectives over the 2006 to 2009 period. They are to:

- Promote coordinated implementation of the accelerated and shared growth initiative;
- Promote direct investment and growth in the industrial and services economy, with particular focus on employment creation;
- Contribute towards the development and regional integration of the African continent within the Nepad framework;
- Promote broader participation, equity and redress in the economy; and
- Raise the level of exports and promote equitable global trade.

These five strategic objectives will be achieved through the collective effort of the dti's divisions and agencies, which are linked through a value chain to generate public value for economic citizens and to deliver products and services for their clients and stakeholders. These products and services include policy, legislation and regulation, finance and incentives, information and advice, and partnerships. The dti will also achieve its objectives through the pursuit of a more targeted investment strategy; improved competitiveness of the economy; broadened economic participation of previously disadvantaged individuals to the mainstream economy; and, policy coherence.

Source: www.dti.gov.za/thedti/overview.htm

8.2.4.1.4. Department of Public Works

The Department of Public Works aims to promote the government's objectives of economic development, good governance and rising living standards and prosperity by providing and managing the accommodation, infrastructure needs of national departments, by leading the national Expanded Public Works Programme and transformation of the construction and property industries.

8.2.4.1.5. The Presidency

As the executive manager of government The Presidency is at the apex of the system of government in the Republic of South Africa. The Presidency's key role in the executive management and co-ordination of government lies in its responsibility to organise governance. In this regard, a key aim is the facilitation of an integrated and co-ordinated approach to governance. This is

being achieved through creative, cross-sectoral thinking on policy issues and the enhancement of the alignment of sectoral priorities with the national strategic policy framework and other government priorities.

Source: www.thepresidency.gov.za

8.2.4.1.6. Government Communication and Information Service (GCIS)

GCIS is located in The Presidency and is responsible for setting up the new Government Communication System and transforming the communication functions in government.

Vision, mission and objectives

- GCIS's vision is helping to meet the communication and information needs of government and the people, to ensure a better life for all.
- GCIS's mission is to provide leadership in government communication and to ensure that the public is informed of government's implementation of its mandate.

GCIS is primarily responsible for communication between government and the people. A high premium is placed on development communication that emphasises direct dialogue, especially with people in disadvantaged areas. GCIS is involved in drafting communication strategies and programmes for the whole of government at national level, and integrating the communication operations of all government departments.

GCIS' strategic objective:

The overarching strategic objective of GCIS, is to enhance the government communication system and its operations, in ways that contribute to the process of further consolidating our

democracy and taking the country onto a higher growth and development path.

GCIS' approach:

This objective will be achieved through the following strategic approach:

- Providing leadership in government communication and ensuring better performance by the communication system
- Building a framework of communication partnerships informed by an encompassing vision around common development objectives
- Promoting awareness of the opportunities that democracy has brought, and how to access them
- Promoting awareness of the institutions and programmes of continental and regional integration and development
- Providing Communication research and information.

Source: www.gcis.gov.za/about/index.html

8.2.4.1.7. Statistics SA

One of the main agencies responsible for the generation of design sector statistics is StatsSA. Data from this source are mainly of an economic nature and are collected on an ongoing basis. Historic data are also available although it is difficult to determine exactly how far back data can be assessed. Specific reports can, however, be requested from StatsSA at a minimal fee. Data are, however, extremely fragmented and due to the use of the SIC system, not very user-friendly, making it almost irrelevant and useless to the design sector.

In terms of human resources and training, two specific institutions are relevant: the Sector Education Training Authority

(SETAs) and, indirectly, SAQA (The South African Qualifications Authority).

"It is difficult to give specific support to design because it is so integrated in all areas." (In-depth interview with a government department).

8.2.4.1.8. Department of Labour Sector Education and Training Authorities (SETAs)

SETAs promote education and training in the different sectors of the economy. It is based on the principle that organisations have to pay their respective SETA a skills levy, which is channelled towards education and training for the specific sector in the form of learnerships. Participating organisations can then re-claim their levies based on learnerships implemented. Due to the fact that it is 'hidden' in most industry sectors, design might fall under different SETAs.

MAPPP-SETA

One of the prominent SETAs relevant to this report is the Media, Advertising, Publishing, Printing and Packaging SETA (MAPPP-SETA). The MAPPP-SETA is a non-profit organisation that supports and facilitates education and training in the media, advertising, publishing, printing and packaging sectors. The MAPPP-SETA assists organisations, which pay levies in the particular economic sector, to raise the skills levels and making the sector more competitive and sustainable in the global marketplace. This is achieved by increasing the capacity of organisations in the sector, as well as the training providers to deliver quality education and training interventions for the workforce and employers. The MAPPP-SETA is gazetted as SETA 15 with a detailed scope of coverage. In order to register

with the MAPPP-SETA, employers must contribute a levy (unless exempt), as specified in the Skills Development Levies Act, to the South African Revenue Service, specifying the sector and component in the scope of coverage to which they belong. The MAPPP-SETA generated two relevant reports: *The Advertising Skills Needs Analysis Research Report* (published in November 2005) and the *National Skills & Resources Audit* (published in November 2003).

Source: www.mappp-seta.co.za/reports.htm

It is evident from the dates of the publications above that little else has come from the side of the MAPPP-SETA. To date it has implemented only one initiative that is relevant to the design sector – Create SA, the MAPPP SETA's creative industries' skills development programme. This programme was launched in partnership with DAC with funding from the Department of Labour's national skills fund.

8.2.4.1.9. Create SA

Create SA was formed to develop a new approach to education and skills training for those involved in a wide range of creative industries, including visual arts and craft; design; music; the performing arts; heritage; film, video and multimedia production; technical production services for events and arts and culture management.

Training programmes have been designed to meet the specific needs of participants. For example, an artist or crafter may need help with marketing their product, assistance with legal issues or basic business skills in order to pursue entrepreneurial opportunities. They may also need to upgrade their skills.

The goal of Create SA is to invest in people – the sector's most critical resource. While it is hoped that some learners will find jobs at the end of their training, the aim of the initiative is also to maximise the learners' ability to be self-sufficient and give them the skills needed to create sustainable work for themselves.

Create SA believes that South Africa's creative industries have the potential to develop into a major growth industry in the local economy and be competitive in the global marketplace.

Dawn Robertson, Create SA programme director, said: *"The support of this project by the Department of Labour's National Skills Fund demonstrates the conviction by government that the creative industries have the potential to develop into a major growth industry, be competitive and most importantly create sustainable work and meaningful livelihoods for thousands of South Africans. Never before in this sector has an initiative of this nature or magnitude been implemented. Create SA has set up the systems and we are ready to roll!"*

In 2003 Create SA implemented 14 learnerships and a large number of associated skills programmes across the country. Learnerships are work-based training programmes developed by SETAs and registered with the Department of Labour. They comprise a theoretical and a practical, work-based component.

Create SA hoped that 6 000 people from around the country would have benefited from this ambitious programme by 2005. **(It was not possible to determine whether this happened by the time this report went to press.)**

Source: www.createsa.org.za

8.2.4.1.10. Department of Education

The Department of Education is responsible for general education and training, further education and training (FET), higher education, social and school enrichment, system planning and monitoring, and education administration.

SAQA

SAQA is a body of 29 members appointed by the ministers of Education and Labour. The functions of the authority are essentially twofold:

- To oversee the development of the National Qualification Framework (NQF) which is the set of principles and guidelines by which records of learner achievement are registered to enable national recognition of acquired skills and knowledge, thereby ensuring an integrated system that encourages life-long learning. This is achieved through formulating and publishing policies and criteria for the registration of bodies responsible for establishing education and training standards or qualifications and for the accreditation of bodies responsible for monitoring and auditing achievements in terms of such standards and qualifications.
- Secondly, to oversee the implementation of the NQF by ensuring the registration, accreditation and assignment of functions to the bodies referred to above, as well as the registration of national standards and qualifications on the framework. It must also take steps to ensure that provisions for accreditation are complied with and where appropriate, that registered standards and qualifications are internationally comparable.

In 1998 SAQA published the *National Standards Bodies Regulations* whereby provision was made for the registration of National Standards Bodies and Standards Generating Bodies.

In 2005 the NSBs were replaced by Consultative Panels. The Consultative Panels consist of subject-matter experts, as well as qualifications experts and their role is to evaluate qualifications and standards from the perspective of the sector for which the qualifications or standards have been developed using SAQA criteria. The Standards Generating Bodies are responsible for generating standards and qualifications and recommending them to the Consultative Panels. The Education and Training Quality Assurance (ETQA) regulations were also published in 1998 and provided for the accreditation of ETQA bodies. These bodies are responsible for accrediting providers of education and training standards and qualifications registered on the NQF, monitoring provision, evaluating assessment and facilitating moderation across providers, and registering assessors.

Source: www.saqa.org.za/

A major challenge for the design industry remains access to information by accredited institutions offering design education programmes. Furthermore, little attention is given to the development of design as a subject at primary and secondary school levels which hampers the process of demographic transformation in tertiary education as well as the design industry.

8.2.4.1.11. Provinces

Each of the nine provinces in South Africa also has provincial departments and one should, therefore, also be able to source statistics on the design sectors on a provincial level from the provincial departments of Trade and Industry, Science and Technology, Arts and Culture and Communication. Currently, only the Western Cape has a vaguely applicable policy, mainly focuses on craft. Gauteng has an innovation strategy which

again can only vaguely be related to the design sector. It is curious that the Western Cape and Gauteng highlight technological development related to the design sector, yet they completely ignore the fact that the design, advertising and fashion sectors are significant components of their economic activities. This is obviously a major oversight in provincial economic, strategic and policy planning. The Cape Town Metropole should be credited for supporting the Design Indaba but this is unfortunately miniscule considering the actual need for investment and the potential return on investment of a more visionary plan/strategy.

8.2.4.1.12. SABS Design Institute (DI)

Another source of design information is the SABS Design Institute (positioned at the South African Bureau of Standards, a statutory science council falling under the dti's mandate). The DI is seemingly the only dedicated governmental instrument tasked with the promotion of design in South Africa and where design-related information can be sourced. This report is evidence of an attempt to initiate statistical data on the South African design sector. However, the DI is under-resourced by comparative international standards for national design promotion agencies. In addition, the DI focuses mainly on developing the industrial design and education sectors, resulting in other design sectors 'looking after themselves' with little institutional support from government.

8.2.4.2. Academic institutions

On a provincial level one would find the following respective public tertiary institutions offering design education.

- The University of Pretoria, Tshwane University of Technology, the University of Johannesburg, and the Vaal University of Technology in the Gauteng;
- The Central University of Technology in the Free State;
- The Durban University of Technology in KwaZulu-Natal;

- Stellenbosch University and the Cape Peninsula University of Technology in the Western Cape;
- The Nelson Mandela Metropolitan University and the Walter Sisulu University of Technology in the Eastern Cape; and
- The University of North West in the North West province.

8.2.4.3. Non-governmental organisations

Other important initiatives related to the design sector include professional bodies such as DEFSA, IdeaSA, IID – formerly SAGID and Design South Africa, think, the South African Institute of Architects (SAIA), the South African Council for the Architecture Profession (see note below), the Institute of Landscape Architects of South Africa, the Kitchen Specialists Association, South African Fashion Week (several of these exist), the Engineering Council of South Africa (ECSA), the Jewellery Council of South Africa, the Government Designers Forum (an informal forum for designers employed by government departments and agencies), the Universities of Pretoria and Stellenbosch Seminar Group, the SA Publication Forum and the South African Institute for Intellectual Property Law.

Note: *“The South African government has announced plans to abolish the South African Council for the Architectural Professions and usurp all its assets and powers.”*

“According to the recently released policy document on the proposed amendments of the statutory regulatory framework of the built environment professions, South African architects will be stripped of their autonomy and self-regulating powers before the end of 2008, according to the timetable published by the Department of Public Works.”

“All other built environment professions are to be equally abolished.”

"A single state-controlled mechanism, to be called the South African Council for the Built Environment (SACBE) will be established to assume the roles and responsibilities of the current built environment professional councils: Architecture, Engineering, Quantity Surveying, Project & Construction Management, Property Valuers and Landscape Architecture."

Source: *Architectafrica.com*, Built environment news & information network for Africa, <http://architectafrica.com/NET/?q=node/332>

Some of the other promotional organisations (mainly on the craft side and operating on a provincial level) that could be identified were:

- The Cape Craft & Design Institute (CCDI);
- The Craft Council of South Africa (CCSA), and
- Southern African Crafts

Private design sector promotion initiatives that mainly focus on events and trade expos include:

- Design Indaba;
- Decorex;
- Jewellex, and
- Loerie Awards.

8.2.5. Availability of electronic statistics

The only statistics that could be sourced electronically would be from the national department responsible for statistics in the country is Statistics South Africa (StatsSA). As mentioned earlier, StatsSA publishes regular reports, mainly on economic activity but is prepared to run specific queries at a nominal fee of ZAR300 per query.

Specific research reports will also be available electronically once they are published. It is, however, a challenge to become aware of such reports due to the fact that design is not centralised and does not fall within a specific sector or have one owner or champion.

8.2.6. Defined framework and/or classification system to collect and report design sector statistics

Normal economic activities are monitored through StatsSA but due to the fact that no design specific Standard Industrial Classification (SIC) code is allocated to design, design statistics from this source is, at best, nothing more than guesswork as it is hidden in the broader economic activities of organisations operating in these sectors and might even fall outside the scope of this report.

The SIC codes that contain an element of design are:

SIC Code	Description
38100	Amphibian motor vehicle manufacturing (designed to negotiate unusual terrain)
37420	Apparatus and instruments designed for telecommunication, like cross-talk meters, manufacturing
96140	Art design services
88211	Boat designing service
88999	Boot and shoe pattern designing service
38410	Building of vessels designed for ocean, coastal and inland waters
38410	Building of vessels designed to be stationary (e.g. lightships)

38309	Car seat upholstery by manufacturer, materials and design supplied
86200	Computer system software design services
35740	Conveyers manufacturing (designed for mining/quarrying/construction - underground)
88999	Costume designing services
50230	Design and construction of Koi fish ponds and water features
35690	Design and installation of ducting and fans in mines (on site)
88999	Design services
88999	Dress designing services
36200	Electrical control boards or control boxes manufacturing (empty box/board only for one such manufacturing concern on request with own materials and design)
88999	Fashion designing services
35690	Furniture designed to accommodate refrigeration or freezing equipment manufacturing
88999	Furniture designing services
11400	Garden design implementation
88312	Graphic design services
35620	Hand pumps and pumps manufacturing (designed or fitting onto internal combustion engines, concrete pumps and other)
35790	Heat-using machinery, specially designed for for the pulp, paper and paperboard industry, manufacturing
95110	Industrial design council operation
37420	Instruments designed for telecommunication manufacturing
88999	Jewellery designing services
32299	Kitchen cabinet design, manufacture and installation

11400	Landscape planning and design in connection with planting, stocking, trimming, supervise
11400	Landscaping design services
35720	Machine tools for design manufacturing
35720	Machine tools of simple, traditional or advanced design manufacturing
35690	Manufacture and design of fans and ducting by third party concerns on behalf of manufacturer
88999	Pattern designing services
88211	Product design service (furniture, fittings, machinery or equipment)
88211	Provision of engineering designs for metal harvey roofing systems
96140	Scenery and lighting design
96140	Set designer, own account
96140	Set designing services
36100	Sheet metal transformer boxes manufacturing (empty box only for one such manufacturing concern on request with own materials and design)
88999	Shoe designing services
88999	Shoe-pattern designing services
88319	Showroom design
88999	Textile designing services
35710	Trailers - self-loading or self-unloading manufacturing (designed for agricultural purposes)
38200	Trailers and semi-trailers manufacturing (designed to be drawn by vehicle; the caravan type or the type for the transport of goods)
32520	Transfer design lithographing
32510	Transfer design printing
86200	Web page designers
88211	Yacht design services

8.3. Representative organisations

8.3.1. Professional organisations

The following list of professional organisations applicable to the definition and scope of this report was found to be active in South Africa.

8.3.1.1. Design Education Forum of Southern Africa (DEFSA)

DEFSA is a professional organisation of design educators, spanning most design disciplines such as industrial, communication/graphic, interior, clothing, ceramic, textile, jewellery, as well as commercially-focused photography.

Vision

DEFSA shall be a forum consisting of design educators and design practitioners furthering the interests of design education.

Mission

- DEFSA establishes appropriate links with industry, government departments, professional bodies and similar design organisations.
- It strives to foster and promote all facets of design through design education initiatives in southern Africa in particular, on the continent of Africa and further abroad.
- Furthermore, DEFSA endeavours to promote relevant research with the focus on design.

Aims

The aim of DEFSA is to foster design education in the southern African region. The forum will strive to fulfil its aim by:

- Ensuring that liaison is maintained between relevant

primary, secondary and tertiary levels of education in matters pertaining to design education, between universities of technology, further education and training institutions (FETs), private institutions, education authorities and the design industry.

- Promoting excellence in design education at all levels in both the formal and informal educational environments by:
 - Setting goals and formulating objectives for design education;
 - Addressing issues regarding the quality including quality assurance, relevance and viability of curriculum structure and content;
 - Identifying needs and initiating, encouraging and co-ordinating research and development programmes;
 - Raising the general level of design literacy and awareness;
 - Acting as a catalyst/mediator for development in design education;
 - Giving greater credibility to the recommendations, requests and demands made by design educationists within their individual institutions.
- Keeping abreast of information, research and development relating to design education and design practice both locally and internationally.
- Encouraging the development and utilisation of local design skills so as to enable the southern African region to develop its manufacturing industry at all levels in the formal, as well as the informal sectors.
- Acting as the authoritative voice for design educators and to represent professionally, responsibly and democratically the interests and concerns of design education in the southern African region.

- To maintain the fundamental and reciprocal links between design education, the visual arts and art education in order to enhance the creative essence of the designer's formative training.

Contact details:

- DEFSA Secretariat – Tanya Smit
- Postal: PO Box 12313, Clubview, 0014
- Tel: +27 (0)12 644-1075
- Fax: +27 (0)86 514-2112
- E-mail: smitta@telkomsa.net
- Web: www.defsa.org.za

8.3.1.2. Industrial Designers Association of South Africa (IdeaSA)

A process of working towards the establishment of a representative body for industrial design called 'Fast Forward' was started at a meeting held at the SABs Design Institute in 2006. On 9 June 2007 the Industrial Designers Association South Africa (IdeaSA) was incorporated through an inaugural Annual General Meeting held at the Faculty of Art, Design and Architecture, University of Johannesburg.

IdeaSA is registered as a non-profit Section 21 company and is managed by a board of directors, drawn and voted in from its eligible membership and assisted by member volunteers on various committees. The responsibilities of the directors are defined by Corporations Law and by the Constitution of the association. IdeaSA professional members are bound by a Code of Conduct for the benefit and protection of the organisation, its members, their clients, society and the environment.

IdeaSA is partially funded by membership subscription fees and funds generated by IdeaSA-managed events. However, industry and government sponsorships are necessary to ensure financial sustainability of the association.

Although still a very young association, already in January 2008 IdeaSA made its voice heard and presented a paper to parliament concerning industrial design and the proposed Technology Innovation Agency Bill. IdeaSA has collaborations with the DESIGNation national initiative for industrial design as a sponsored mechanism for industrial design education in South African schools.

Contact details:

- Contact: Bernard Smith
- Postal: P O Box 1801, Jukskei Park, 2153
- Tel: +27 (0)83 654-6832
- Fax: +27 (0)11 462-3154

8.3.1.3. Institute of Interior Design Professions (IID)

The South African Institute of the Interior Design Professions (IID) was founded in 2006 through the amalgamation of the South African Guild of Interior Designers (SAGID) and Design South Africa (DSA). The IID is a national non-governmental organisation and a Section 21 company and as such is a non-profit organisation.

It represents the interests of the interior architecture, interior design and interior decorating professions in South Africa. It operates on a national basis through a head office in Gauteng and regional liaison offices in KwaZulu-Natal and the Eastern and Western Cape.

IID's aim is to promote high standards throughout the profession and to expand the contribution of the interior professions in society through the exchange and development of knowledge and expertise in education, practice and fellowship.

Mission

The IID exists to promote and support the interior architecture, interior design and interior decorating professions in South Africa. It is committed to the advancement of the professional practice of the interior design professions and to the creation of a comprehensive vision for the design challenges of the future.

The core objectives of the IID are to:

- Maintain a membership institute for the interior professions that is dedicated to improving their expertise, professionalism and status.
- Foster high standards in design and increase public awareness of the importance of good design in all aspects of daily life.
- Emphasise the environmental and aesthetic implications of design.
- Encourage excellence in design through education, training and continuing development of individual practitioners.
- Grow the membership base, improve and extend its services and increase its influence in South Africa.
- Support the mentoring of students and new designers in order to create a solid foundation for the future strength of the profession.
- Encourage the commitment of members to make interior design more accessible to the public at large by participating in voluntary community programs.
- Achieve the registration of all practicing designers.

Contact details:

- Physical: Suite 124 first floor, Design Quarter, Leslie Avenue, Fourways, Johannesburg
- Postal: PO Box 10642, Fourways Crossing Centre, 2055
- Tel: +27 (0)11 465-9732
- Fax: +27 (0)11 465-9802
- E-mail: national@iidprofessions.com
- Web: www.iidprofessions.com

8.3.1.4. South African Communication Design Council (think)

Think was established in 2001 to serve the needs of communication design professionals in South Africa. Think is the only organisation in South Africa that specifically caters for the communication design industry. Members have the opportunity to make their voices heard and to set trends and shape the direction of the industry.

As a non-profit Section 21 company, think is governed by a Code of Ethical Conduct that sets the standards of practice for the specific industry sector. Think is a member of the International Council of Graphic Design Associations (Icograda), the world body for professional communication design practitioners. Think's membership includes most of the country's foremost strategic branding and design studios, communication design professionals and tertiary institutions.

As such, the organisation:

- Works to provide an appropriate voice for the profession of communication design in South Africa;
- strives to advance excellence in the communication design profession;
- endeavours to influence and improve the procedures followed in procuring design;

- works in conjunction with other organisations in the broad design community and with related areas to achieve shared goals in respect of the industry;
- encourages educational institutions to develop qualified communication design students who are well-trained and prepared for a professional career in the industry; and
- endeavours to develop platforms to showcase its industry, people and design products to its members, the public, government, and the business community.

Programmes, actions and activities:

- The Sappi thinkahead Awards is an annual student awards programme that aims to set the standards for communication design graduates, promote design as a career choice and present opportunities for winners to fast track their careers. In 2007 think, in conjunction with Sappi and Woolworths, started the thinkahead Workshop to encourage dialogue between secondary and tertiary level design educators.
- The Loerie Awards: Think has a controlling interest and is an integral part of the Loerie Awards company.
- Hall of Fame: This programme honours the country's most illustrious branding and design luminaries.
- Research: In 2008, Think and its founding sponsor Sappi initiated the *Sappi State of Design Survey* to gauge the value which clients place on communication design. Think is also a partner in the South African pilot of the *IDA World Design Survey* sponsored by the SABS Design Institute.
- International profession management: Think contributes actively to the development of the profession on an international level through its membership of Icograda. Since

2001, Think members have consistently served on the Icograda executive board of directors.

- Advocacy: One of the key objectives of Think is to raise the levels of professionalism in the local design industry and it has engaged in an aggressive advocacy programme regarding the ethics of speculative practices (free-pitching).
- Collaboration: Think actively supports collaboration with peer professional bodies and is one of the founding partners in the One Voice Design Alliance, which aims to create a unified voice for all design in South Africa.
- 26 Letters Project: Think is a partner in this travelling exhibition that promotes literacy awareness in South Africa.
- The 2010 World Cup: FIFA sought the advice and expertise of Think in choosing the South African communication design firm that won the right to design the 2010 World Cup emblem.
- Bursary scheme: Think annually awards three 'top-up' bursaries to deserving students who demonstrate financial need as well as the potential to succeed in the communication design profession.
- Advisors to education: Many Think members serve on the advisory boards of tertiary institutions and thereby provide insight into current professional requirements.
- Advisors to government: Think regularly consults government on pertinent issues relating to the structure and practices of the industry. One such issue is transformation – through ongoing involvement in the development of a BEE scorecard for the industry; and procedures for government tendering. Think is a signatory on the recently drafted MAPPP SETA MAC charter, which outlines transformation imperatives for the industry.

Contact details:

- Operations manager: Sarah Beswick
- Postal: PO Box 1887, Fourways Gardens, 2068
- Tel: +27 (0)11 467-7945
- Fax: +27 (0)86 510-9735
- E-mail: think@think.org.za
- Web: www.think.org.za

8.3.1.5. The Kitchen Specialists Association (KSA)

The mission of the Kitchen Specialists Association (KSA) is to create a professional and stable trading environment in which the industry can prosper and consumers can enjoy complete peace-of-mind.

As an independent body and non-profit organisation, the KSA is able to offer the potential kitchen, bathroom and built-in cupboard purchaser advice with regard to choosing a suitable company.

Members have satisfied a stringent checking procedure before they can join, and more importantly, have to maintain the high standards the KSA insists upon or risk being expelled from the association.

The KSA has a broad membership representation including affiliate members who supply to the kitchen, bathroom and built-in cupboard industries.

Contact details:

- Postal: P.O. Box 411108, Craighall 2024
- Tel: (011) 325-6039
- Fax: (011) 325-6309

- E-mail: info@ksa.co.za
- Website: www.ksa.co.za

8.3.1.6. SA Publication Forum

The SA Publication Forum is committed to improve and promote corporate publications in South Africa. Through the forum, publication practitioners get together to network and share ideas. The main activities of the forum are the annual Corporate Publication Competition and training opportunities in the form of training courses, workshops and seminars.

Contact details

- Postal: P O Box 14029, Hatfield, 0028
- e-mail: jennie@sapublicationforum.co.za
- www.sapublicationforum.co.za

8.3.1.7. The South African Institute of Intellectual Property Law (SAIPL)

SAIPL was established in 1954 and represents some 140 patent attorneys, patent agents and trade mark practitioners in South Africa who specialise in the field of Intellectual Property Law.

Intellectual Property Law embraces the law relating to patents, trade marks, registered designs, copyright and unlawful competition (passing-off of trade secrets). It also includes litigation, licensing and franchising.

The members of the SAIPL represent the majority of national and international businesses who have built their businesses on brands, innovation and technology, and who protect their interests through our country's intellectual property laws. Members

of the SAIPL also represent the interests of their individual firms and clients at a number of local and international organisations such as WIPO, LES, INTA, AIPPI, PTMY, FICPI, AIPLA, ITMA and MARQUES.

Contact details:

- Physical: 1st Floor Enterprize Building, The Innovation Hub, Pretoria
- Tel: 012 844 0564
- Fax: 012 844 0599
- e-mail: saipl@icon.co.za
- Web: www.saiipl.org.za

Although the following professional organisations fall outside the scope of this report it was felt that their existence and involvement in the design sector need to be acknowledged and is thus included for the sake of completeness.

8.3.1.8. The South African Council for the Architectural Profession (SACAP)

SACAP is the regulatory body for the architectural profession. SACAP provides for the registration of architects, senior architectural technologists, architectural technologists and architectural draughtspersons.

Contact details:

- Physical: First Floor, Lakeside Place, Cnr. Ernest Oppenheimer Drive and Queen Street, Bruma
- Postal: Private Bag x02, Randpark Ridge, 2156
- Tel: +27 (0)11 417-0900
- Fax: +27 (0)86 530-9084
- Web: www.sacapsa.com

8.3.1.9. The South African Institute of Architects (SAIA)

SAIA is a voluntary association of affiliated and regional institutes established in 1996 and incorporates the previous national Institute of South African Architects (established in 1927) and the regional Institutes of Architects of the former Cape (founded 1899), Eastern Province (founded in 1900 as the Port Elizabeth Society of Architects), Border (founded in 1946 as the East London Chapter of the Cape Provincial Institute), KwaZulu-Natal (founded in 1901), Orange Free State (founded in 1921) and Transvaal (founded in 1909). The Pretoria Institute of Architects was established in 1993 and the following new regional institutes were established in 1996 Northern Cape, North West, Limpopo (founded as Northern Province) and Mpumalanga.

The institute is a member of the Africa Union of Architects, the Commonwealth Association of Architects, the International Union of Architects and the International Commission on Monuments and Sites.

Membership of the institute is open to all architects, the only prerequisite being a recognised academic qualification, a minimum of 24 months practical experience and an examination in professional practice.

The fundamental principles of equality and justice are implicit in the Constitution. In terms of the constitution the institute is committed to the principle of striving to be an outstanding professional organisation, which upholds the dignity of the profession and its members. It aims to promote excellence in architecture and it seeks to contribute to the enhancement of society and the environment.

Contact details:

- Physical: Bouhof (Ground Floor), 31 Robin Hood Road, Robindale, Randburg
- Postal: Private Bag x10063, Randburg, 2125
- E-mail: admin@saisa.org.za
- Tel: +27 (0)11 782-1315
- Fax: +27 (0)11 782-8771
- Web: www.saia.org.za

8.3.1.10. Sanlam South African Fashion Week (SSAFW)

SSAFW was established in 1997 out of a need to showcase the abundance of fashion talent that was going unnoticed in South Africa. In 2007, SSAFW was significant for two reasons: firstly South African fashion designers came of age and, secondly, South African business saw for the first time a valuable industry developing.

Vision

- Grow and strengthen the South African fashion industry by facilitating dialogue between all its major players; the designers, manufacturers, textiles, accessories, retail and the media.
- Nurture an appreciation of local fashion in the minds of the South African public and strengthen international interest in South African fashion.
- Highlight the creativity of South African designers and develop the growth and business potential of the industry.
- Develop a sustainable platform for designers to showcase their collections, independent of subsidies.
- Function as a centre for information exchange where the current knowledge can be shared by those with experience and hindsight, with those who are just entering the industry.

- Celebrate South Africa's diversity and forge an indigenous fashion identity by celebrating our established designers, while nurturing and launching fresh talent.

SSAFW consists of the following activities and initiatives:

- The Sanlam SA Fashion Week stages the Spring/Summer and Autumn/Winter Designer Collections, respectively in August and March each year. These annual events are timed to dovetail with the international fashion week circuit.
- The SSAFW Exhibition runs along side the annual Spring/Summer Designer Collections and is open to the public. It serves as a hardworking trading floor where fashion designers and brands, accessories suppliers and textile companies can launch their collections to the trade, consumers and the media, at relatively low cost.
- Arts & Culture Fashion Seminar: The Department of Arts and Culture Seminar is the country's only fashion-specific seminar. Conceived as a think tank for industry development and a forum for continuing and expanded learning and debate within the designer community, speakers are drawn from a cross-section of relevant disciplines such as retail, the media and research and include both top local and international experts.
- The Arts & Culture Fashion Fusion Project: In partnership with the Departments of Arts and Culture, SSAFW, launched the Fashion Fusion project in 2006. To date, this initiative, which actively promotes collaboration between rural crafters and designers, has established a national network of collaborative groups in all nine provinces and has empowered nine hundred crafters and assisted forty designers to develop collections with a uniquely contemporary 'made in RSA' signature.

Contact details:

- Tel: +27 (0)11 442 7812
- Fax: +27 (0)11 442 0177
- E-mail: safashionweek@icon.co.za
- Web: www.safashionweek.co.za

8.3.1.11. African Fashion International (AFI)

AFI, founded, owns and operates some of the African continent's most respected and directional fashion weeks, namely Virgin Mobile Cape Town Fashion Week, MTN Durban Fashion Week (50% ownership), Audi Joburg Fashion Week (autumn / winter) and Joburg Fashion Week (spring / summer), in addition to other fashion-related strategic marketing initiatives.

AFI's values are:

- Excellence
- Innovation
- Transformation
- Development
- Relationships
- Integrity

AFI's vision is to be globally recognised as the leading authority on African fashion-related strategic marketing initiatives and African fashion brands. AFI aims to improve the quality of fashion design output from Africa, to promote African brands, and to dramatically raise the profile of fashion designers from the continent.

Contact details:

- Cape Town
- Tel: +27 (0)21 422 0390

- Fax: +27 (0)21 422 0396
- Johannesburg
- Tel: +27 (0)11 779 1190
 - Fax: +27 (0)11 779 1037
 - E-mail: info@africanfashioninternational.com
 - Web: www.africanfashioninternational.com

8.3.1.12. Engineering Council of South Africa (ECSA)

The ECSA is a statutory body established in terms of the Engineering Profession Act, 2000 (Act No. 46 of 2000). ECSA's predecessor was established by the Engineering Profession of South Africa Act, 1990 (Act 114 of 1990).

ECSA sees itself in partnership with the government and the engineering profession to promote a high level of education and training of practitioners in the engineering profession to facilitate full recognition of professionalism in the engineering profession, both locally and abroad. It enjoys full autonomy although it is accountable to the government, the profession and the public for the fair and transparent administration of its business in the pursuit of its goals.

However, in pursuing this goal, ECSA has an implied responsibility to ensure that the interests of the profession (the practitioners) are also promoted. The interest of the public and the country can only be served properly if a profession is healthy and strong. For this reason ECSA promotes the wellbeing of the voluntary societies who are active in engineering. Since the societies are the instruments through which the interests of the practitioners are served, a good balance between 'public interests' (ECSA) and 'own interests' (Societies) should be maintained.

Vision

South Africa enjoys all the benefits of a strong, competent, growing, sustainable and representative engineering profession, able to provide all the expertise necessary for the socio-economic needs of the country and exerts a positive influence in the southern African region.

Mission

To create the circumstances in which society is confident that the engineering profession in South Africa is able to carry out the functions necessary for the socio-economic growth in the country through:

- Setting and monitoring internationally accepted standards;
- assessing the competence of individuals (registration);
- growing the profession (quantity and quality); and
- communicating with professionals and other stakeholders.

Contact details

- Physical: 1st Floor, Waterview Corner Building, 2 Ernest Oppenheimer Avenue, Bruma Lake Office Park, Bruma, Johannesburg, 2198
- Postal: Private Bag X691, Bruma 2026
- Tel: +27 (0)11 607-9500
- Fax: +27 (0)11 622-9295
- E-mail: engineering@ecsa.co.za
- Web: www.ecsa.co.za

8.3.1.13. Jewellery Council of South Africa (JCSA)

The JCSA plays a diverse role in representing the interests of wholesalers, manufacturers and retailers. Activities are specific to the three sectors and include marketing (local and international), representation to government, organisation of local and

international trade fairs, seminars and training courses, the operation of an internationally recognised Diamond Certification Laboratory and the dissemination of information to the industry.

Vision

The JCSA vision is to create an enabling environment in which the South African jewellery industry becomes Africa's jewellery trading hub.

- To achieve this vision most participants in the South African jewellery industry must become members of the JCSA due to its added value and credibility.
- The JCSA must play a pivotal role in the South African jewellery industry by:
 - Becoming a central point of contact on all jewellery related matters;
 - Becoming a more dominant player in the world market;
 - Drastically facilitating local beneficiation of precious metals, gemstones, and semi-precious stones; and
 - Facilitating local sales and exports.

The core purpose of this vision is to facilitate the creation of jobs and earning of foreign exchange through local beneficiation of precious metals, gemstones and semi-precious stones.

Mission

The JCSA's mission is to provide an enabling platform in which to grow the South African jewellery industry. It does so by:

- Providing strategic direction for the South African jewellery industry;
- promoting the beneficiation and clearing of precious metals; and
- providing an enabling platform for communication, research,

training, and financing for the manufacture and distribution of jewellery products and services in South Africa.

Contact details:

- Physical: Suite 102, SA Diamond Centre, 225 Main Street, Johannesburg, 2000
- Tel: +27 (0)11 334-1930
- Fax: +27 (0)11 334-1933
- E-mail: admin@jewellery.org.za
- Web: www.sacapsa.com

8.3.1.14. The Association for Communication and Advertising (ACA)

The ACA is a representative body for the advertising profession in South Africa. Advertising has evolved into an exciting hybrid of interactive, brand activation, new content and more, and the ACA represents companies in this profession to government, media and the public. It is a voluntary body formed both by, and for the industry, focused on and committed to self regulation, and to defend the highest standards of ethical practice.

The ACA has committed itself to improving and strengthening the advertising profession through counseling and shared experiences. The ACA works with national and provincial government to promote agency and industry transformation, and is committed to its communities and the development of new talent through corporate social responsibilities.

Within the profession, the ACA is committed to:

- Improving and strengthen the advertising agency business in South Africa by counseling members on operations and management and by providing the shared experience of

many to each.

- Representing and promote the interests of member advertising agencies as principals in business.
- Encouraging the highest creative and business standards and service associated with a professional body.

The ACA enforces self regulation, and is steadfast in its promise to:

- Promote agency and professional transformation in order to remove barriers that may prevent access for disadvantaged groupings (see ACA Transformation Charter).
- Discourage dishonest and undesirable practices in advertising and related fields of activity, and to promote self-regulation of advertising standards.
- State commonly accepted practice in the profession, so that both advertisers and agents are aware of their respective rights and obligations.
- Encourage fair remuneration for advertising agencies.
- Be an advocate of advertising and freedom of commercial speech.

Representing companies within our profession to government, media and the public, the ACA vows to:

- Work with national and provincial government in an open forum to help achieve desirable social and development goals.
- Provide helpful information in Government policy and decision making in matters of mutual concern, and to resist unwise or unfair legislation and regulations.
- Play a positive role in the reconstruction and development of South Africa, by assisting in the planning and carrying out of government communication campaigns, providing education and training opportunities, etc.

- Represent the agency point of view to advertisers, helping solve mutual problems, helping improve our members' value to them, helping resolve collectively those issues that individual agencies and clients cannot resolve independently.
- Represent the agency point of view to various other bodies involved in research, production etc., which are important to our profession.
- Serve our members' needs for information, agency management counsel, professional development, legal guidelines etc. and to be alert to new needs as they arise.
- Represent the agency point of view to media; providing constructive suggestions, solutions to problems, and technical help – while receiving and acting upon similar information from them.

Contact details:

- Physical: Bond Street Centre, Corner Bram Fischer Drive & Bond Street, Kensington B, Randburg
- Postal: P O Box 2289, Parklands 2121
- Tel: +27 (0) 11 781 2772
- Fax: +27 (0) 11 781 2797
- E-mail: ceo@aaaltd.co.za
- Web: www.acasa.co.za

8.3.1.15. Creative Circle (CC)

The CC are the official organisation representing and elected by the greater creative community. The organisation aims to encourage and promote creative excellence that is relevant and meaningful in South Africa.

The Creative Circle is dedicated to raising the standard of South Africa's creative work. It is a forum where the creative minds

of the communications and advertising profession get together to share ideas, showcase creativity and discuss issues of common interest.

Contact details:

- Tel: +27 11 250 7940
- Fax: +27 11 250 7941
- Web: www.creativecircle.co.za

8.3.1.16. Communications and Advertising Forum for Empowerment (CAFE)

One of the core goals of CAFE is to facilitate demographic transformation of the design and advertising sectors. CAFE is made up of Imagination Labs that were set up to inspire goals and then help to turn those goals into a reality.

8.3.1.17. The Commercial Producers Association of South Africa (CPA)

The CPA is the professional association of companies specialising in the production of television commercials.

The Association was founded in the late 1970's and currently has 40 members. It is run by an executive committee and has offices in Johannesburg.

The industry encompasses two sectors:

- South African Commercials: Based primarily in Johannesburg, the home of South Africa's advertising sector, is a vibrant industry which produces world-class commercials for both South Africa and international territories. South African directors are known throughout the world for their high creative standards and innovative techniques.

- International Commercials: South Africa is home to a busy foreign commercial sector which is primarily Cape Town based. A number of experienced companies facilitate hundreds of commercials each year from different parts of the world. In the last 15 years South Africa has established a solid reputation as one of the finest film locations in the world.

Key benefits and services of the CPA

- The CPA co-ordinates meetings and workshops for producers.
- The CPA communicates and advises producers on all important issues.
- The CPA provides an advisory service to members.
- The CPA provides an exclusive on-line resource to members whereby they are able to instantly access all the CPA's information, documentation and intellectual property.
- The CPA negotiates standard agreements with suppliers and clients.
- The CPA provides a legal framework through which to operate – the production agreement.
- The CPA negotiates with crew & cast to formulate recommended working guidelines and contracts.
- The CPA provides legal advice to members on a range of issues, including labour & tax, VAT, work permits & visas, child labour legislation & permits, health & safety, locations, insurance, copyright etc.
- The CPA promotes transformation and training within the industry and facilitates training courses and programs.
- The CPA mediates disputes between members, clients and suppliers.
- The CPA researches the size and scope of the industry

and identifies new trends, opportunities and challenges.

- The CPA lobbies government and other interest groups to ensure that legislation is favourable and in the best interests of the industry.
- The CPA lobbies for a film friendly and conducive production environment.
- The CPA is represented on a number of other boards and organisations, thereby promoting the interests of commercial producers in the wider context of the film and advertising industries.
- The CPA is a trouble-shooter which identifies and resolves problems before they impact negatively or become barriers to entry to the Industry.
- The CPA professionalises the industry by inculcating a culture of ethics and promoting standards of professionalism and accountability to which members subscribe.
- The CPA promotes its members to advertising agencies and international agencies and production companies.
- The CPA is a dynamic think tank which proposes new ideas and practices within the industry.

Contact details:

- Postal: P O Box 413005, Craighall, 2024, South Africa
- Tel: +27 11 673 6809
- Fax: +27 86 674 8321
- E-mail : bobby@cpasa.tv
- Web: www.cpasatv

8.3.2. Design promotion agencies

The following design promotion agencies was found to be active in South Africa.

8.3.2.1 SABS Design Institute (DI)

The DI promotes the benefits of good design in order to stimulate the economic and technological development of South Africa. It fosters the economic and technological development of South Africa through the promotion of the benefits of design. The ultimate aim is to improve the prosperity of the entire population.

The DI pioneered design promotion in South Africa by placing good design on the agenda since 1969. Through tireless efforts the institute has encouraged South African designers to meet industry needs and to respond to changing technological, economical and social demands through innovative design thinking. The basic belief is that South Africans, as a nation, are inventive and resourceful and that if the collective creative forces around us are harnessed, we could overcome many obstacles and be a winning design nation.

The DI has also taken design promotion across borders into Africa with concerted design promotion efforts. At the same time, extensive cooperation exists with global design initiatives.

Design initiatives run by the DI

- Channelling brilliant young minds: Through the DI's education initiatives design is promoted as a career of choice. Young designers are groomed into leadership roles by the Design Achievers programme and exhibitions and publications take the design message out there to schools

and universities.

- Awarding design excellence: By evaluating and awarding South African designed products, the DI believes that the bar will be lifted and that South Africa can become a major player in product design globally. The flagship award scheme, the SABS Design Excellence Awards, has placed excellent South African industrial designs and designers on the map for the past 40 years.
- Harnessing design for development: Projects like the Prototype initiative where fledgling designers are pointed in the right direction, Idea to Product seminars and participating in global Interdesign workshops, have positioned the DI as a champion for design for development initiatives.
- Looking into Africa and beyond: The DI has been the driving force behind the Network of Africa Designers (NAD). By organising regular African Design Days and including design students from all over the continent in the Design Achievers workshops, the DI is spreading the word that design will make a difference in the way the world perceives the African continent.

Contact details:

- Physical: No 1 Dr Lategan Street, Groenkloof, Pretoria
- Postal: Private Bag X191, Pretoria, 0001
- Tel: +27 (0)12 428-6326
- Fax: +27 (0)12 428-6546
- E-mail: design@sabs.co.za
- Web: www.sabs.co.za/Business_Units/Design_Institute

8.3.2.2. The Design Indaba – Conference, expo and magazine

The Design Indaba has grown exponentially since its inception in 1995 – comprising a conference, expo, magazine and a

number of community-orientated initiatives. Design Indaba aims to drive South Africa's creative industries in meeting competitive global standards. Design doyens from all fields participate in knowledge sharing at the conference, while the expo offers an international platform for the best in local design. The magazine continues the dialogue and generates momentum between the annual events.

Mission:

Design Indaba recognise design as:

- a communication fundamental
- a business imperative
- one of the most powerful tools available to industry and commerce

To encourage progress in design, it is important to:

- celebrate the designer
- equip the marketer
- demonstrate commercial gain through effective design
- reveal the true potential of design
- mobilise local and international design expertise

Design Indaba aims to add value to those who:

- practise design
- commission design
- rely on design to build a brand

Design Indaba addresses:

- indifference and ignorance of the value of good design
- the divide between designers and marketers in understanding design

Contact details

- Physical: 16 Mill Street, Gardens, Cape Town
- Tel: +27 (0)12 465-9966
- Fax: +27 (0)12 465-9978
- E-mail: michelle@interactiveafrica.com
- Web: www.designindaba.com

8.3.2.3. National Research Foundation (NRF)

Since the NRF is not involved in the promotion of design *per se* (as is the case with the DI and the Design Indaba), but in the promotion of research that might lead to innovation, it is included in this section. The objective of the NRF is to support and promote research through funding, human resource development and the provision of the necessary research facilities, in order to facilitate the creation of knowledge, innovation and development in all fields of the natural and social sciences, humanities and technology. In so doing, it contributes to the improvement of the quality of life of all the people of the country. The organisation was established in 1999 as a result of the NRF Act.

As the government's national agency responsible for promoting and supporting basic and applied research as well as innovation, the NRF upholds excellence in its investments in knowledge, people, products and infrastructure. The NRF provides services and grants to support research and postgraduate research training, vital to the development of South Africa. It is the NRF's vision to be a key instrument in the creation of an innovative, knowledge-driven society where all citizens are empowered to contribute to a globally competitive and prosperous country.

Funding from the NRF is largely channelled through the Innovation Fund and directed towards academic research, developing

high-level human resources, and supporting the nation's national research facilities. The NRF's task is to advance research in all fields of the humanities, social and natural sciences, engineering, and technology; including indigenous knowledge. By forging strategic partnerships locally and internationally, it extends the resources that researchers need to foster and expand South Africa's research capabilities and, ultimately, to improve the quality of life for all.

Other areas of its core business are to promote research capacity development (RCD), to unlock the full creative potential of the research community and to establish equity and redress. The NRF fosters strategic partnerships and knowledge networks to make South Africa globally relevant and competitive. It provides research information and strategic advice.

The most prominent initiatives related to design specifically are:

- Technology Missions (MiTech): The goal of the Innovation Fund (IF) Technology Missions is to fund high risk, early stage, technology development research with a potential for broad economic benefits. The research to be funded is likely to focus on the development of commercially relevant technologies, the lack of which currently retards the entry of new products into the market place. It is for the support of accelerating the development of critical pre-competitive technologies to the point at which product development begins. The distinction to be made is that the IF will only fund the research and development to the point where the technology can proceed without IF support. The IF cannot subsidise the research and development budgets of industry.

The operational mechanism is of a centre of excellence comprising a partnership between industry and academia,

with a significant broad-based black economic empowerment component. The research agenda should be conceived in collaboration with industry, the latter being extensively involved in directing the course of the project. In the proposal, applicants must clearly identify the scientific and technological barrier to product development and elaborate on the economic benefits that would accrue as a result of its removal. Industry also commits to the commercialisation of the technology upon commercialisation of the project. It is envisaged that the partnering of small and black empowerment firms with large companies will ensure skills and technology transfer to the smaller companies. It will also create access to downstream markets for the smaller firms.

- Technology Advancement Program (TAP): The Innovation Fund invests in novel research ideas with vast potential for commercial success, and seeks technological solutions that will yield significant national benefits. In terms of the Technology Advancement Programme, the Innovation Fund assists in the conversion of research ideas into commercially useful end-products by funding items such as equipment, research and development expertise, managerial skills, securing of intellectual property rights and construction of a prototype.
- Patent Support Fund for Research Institutions (Higher Education Institutions and Science Councils): The securing of intellectual property in publicly funded research is an important aspect in the economic growth strategy for the knowledge economy in which we participate, globally. A large portion of publicly funded research innovations and inventions emanating from state funded research institutions in South Africa (i.e. Higher Education Institutions and Statutory Science Councils), have not made their way to

the marketplace as effectively as possible, in part, because of a lack of support mechanisms, largely financial, for patent protection. Thus, the Patent Support Fund is aimed at providing financial support for patent portfolios of inventions emanating from Research Institutions.

- Areas of funding: The NRF would allocate funds in the following areas:
 - Business and commercialisation;
 - New materials;
 - Information and Communications Technology (ICT);
 - Electronics and Electrical Engineering;
 - Process and Chemical Engineering;
 - Metallurgy and Materials Engineering;
 - Biotechnology and Biochemistry;
 - Microbiological Sciences;
 - Medical devices;
 - Human diagnostics;
 - Treatment and drug development;
 - Physics;
 - Biological Sciences;
 - Mechanical Engineering; and
 - Civil and Constructional Engineering.

Contact details:

- Physical: Meiring Naudé Road, Brummeria, Pretoria
- Postal: PO Box 2600, Pretoria, 0001
- Tel: +27 (0)12 481-4000/4001
- Fax: +27 (0)12 349-1179
- E-mail: info@nrf.ac.za
- Web: www.nrf.ac.za

8.3.2.4. National Arts Council of South Africa (NAC)

The NAC is not involved in the promotion of design *per se*, but certain promotional activities such as exhibitions might qualify for support if it is framed in a cultural context.

The National Arts Council of South Africa (NAC), formed in 1997, is a statutory public entity with the DAC as its executive authority. The institution is subject to a complex governance framework that includes the NAC Act (1997) and the Public Finance Management Act (PFMA) amongst others. The NAC is governed by a council whose members are appointed by the Minister of Arts and Culture after a process of public nominations.

Vision

To promote, through the arts, the free and creative expression of South Africa's cultures.

Mission

To develop and promote excellence in the arts.

Disciplines supported (mainly through funding)

- Craft
- Dance and choreography
- Literature
- Multi-discipline
- Music and opera
- Theatre and musical theatre
- Visual arts

Contact details:

- Physical: 66 Margaret Mcingana Street, Newtown, Johannesburg

- Postal: PO Box 500, Newtown, 2113
- Tel: +27 (0)11 838-1383
- Fax: +27 (0)11 838-6363
- E-mail: info@nac.org.za
- Web: www.nac.org.za/

8.3.2.5. Business & Arts South Africa (BASA)

BASA was founded in 1997 as a joint initiative of government and the business sector, to secure future development of the arts industry through increased corporate sector involvement. Established as a Section 21 company BASA is accountable to both government and its business members.

The Supporting Grant Scheme was founded by BASA with funding from the Department of Arts and Culture, and aims to encourage and increase business sponsorship of the arts. It is designed as an incentive scheme for business sponsors, not as another source of public subsidy for arts organisations.

Contact details

- Physical: 3rd Floor, The Mills, 66 Carr Street (corner Quinn), Newtown
- Postal: P O Box 42865, Fordsburg 2033
- Tel: + (0)11 832-3000/3041
- Fax: +27 (0)11 832-3040
- E-mail: info@basa.co.za
- Web: www.basa.co.za

8.3.3. Trade and industry associations

The following list of trade and industry associations and initiatives was found to be active in South Africa.

8.3.3.1. The Design Indaba Expo

The Design Indaba Expo takes place each February at the Cape Town International Convention Centre. Design Indaba Expo is South Africa's premier showcase of local design in all sectors.

The Expo is unique, insofar as:

- It is multi-sectoral, featuring advertising, architecture, craft, decor, film, fashion, communication design, interior, jewellery, new media, publishing, product design and visual media;
- it showcases the best of local design – original, contemporary and innovative product that is quintessentially South African – no derivatives, and no imports;
- it is curated, not filled. The advisory panel of the best South African designers, stylists, critics and industry experts, curates the Expo floor and decides who is represented there. The panel is representative of the Expo's positioning. Where a designer is not known by the panel, a process of submission is engaged where the designer's work is circulated for the panel's input;
- in addition to encouraging exhibitors to trade directly to the South African public, the Expo also brings out several international buyers to stimulate the export market.

In 2004, the Design Indaba Expo was inaugurated in association with the dti. The Expo provides a commercial platform for the finest South African designers to leverage local goods and services to the global market. It introduces the most influential international buyers to South African creative products to encourage export. There is also an impact on the local market. The Expo aims to create discerning consumers through exposure to the principles and products of good design, resulting in

the demand and production of innovative, evolving and excellent South African creative product.

Contact details:

- Physical: 16 Mill Street, Gardens, Cape Town
- Tel: +27 (0)12 465-9966
- Fax: +27 (0)12 465-9978
- E-mail: diexpo@interactiveafrica.com
- Web: www.designindabaexpo.com

8.3.3.2. Decorex SA

Celebrating 15 years in the décor and design industry, Decorex SA is South Africa's premier décor and design expo. Trade professionals and consumers can indulge in limited-edition luxury, beautifully presented have-to-haves, curated art-happenings, handmade collectables and the creative energy of the design industry's most talented style masters. The expo focuses on furniture, kitchens and bathrooms, fabrics, décor accessories, lighting, the finest finishes, essentials for indoor and outdoor living, colour and form.

Decorex is hosted in Durban, Cape Town and Johannesburg.

Contact details:

- Physical: Medscheme Building, 10 Muswell Road South, Bryanston
- Tel: +27 11 549 8300
- Fax: +27 11 549 8503
- Web: www.decorex.co.za

8.3.3.2. Jewellux

The Jewellux International Trade Fair attracts exhibitors from all over the world, including exhibitors from Europe, USA, the

East and the SADC countries for four days in August. This is the time when new merchandise lines and the most exclusive and extensive product ranges of watches, clocks, fine jewellery, pearls and precious stones, jewellery packaging, machinery, accessories and services available are offered to the local and international retail jewellery industry.

Contact details:

- Tel: +27 (0)11 334-1930
- Fax: + 27 (0)11 334-1933
- E-mail: ivonah@jewellery.org.za
- Web: www.jewellex.co.za/

8.3.3.3. Sanlam South African Fashion Week (SSAFW)

See 8.3.1.10.

8.3.3.4. African Fashion International (AFI)

See 8.3.1.11.

8.3.4. Design facilities

8.3.4.1. Design centres

- SABS Design Institute (see 8.3.2.1)
- Tshumisano Trust's Technology Station Programme based amongst others at:
 - Tshwane University of Technology: Electronics and Electrical Engineering, Complemented by IT
 - Central University of Technology: Metals Value Adding and Product Development
 - Tshwane University of Technology: Chemistry and Chemical Engineering

- Vaal University of Technology: Materials and Processing Technologies
- Nelson Mandela Metropolitan University: Automotive Components
- Nelson Mandela Metropolitan University: Downstream Chemicals
- Cape Peninsula University of Technology: Clothing and Textile
- University of Johannesburg: Metal Casting Technology
- Durban University of Technology: Reinforced and Moulded Plastics
- Cape Peninsula University of Technology: Agri-food Processing Technologies

8.3.4.2. Design museums

- Gold of Africa Museum

Contact details:

- www.goldofafrica.com

8.3.4.3. Design galleries

- Multi-purpose galleries exist at several education institutions which mainly feature annual end of year design exhibitions of student work.
- Several specialist commercial design stores also operate as design galleries.

8.3.4.4. Design libraries/archives

- SABS Design Institute holds an archive of its own activities spanning almost 40 years.
- South Africa's first digital design archive was established in May 2008 at the University of Pretoria with the *X-ings: Shaping culture through design* exhibition. Although the

resource is in its infancy, it consists of around 2 000 design projects produced by South African designers.

- Most education institutions that present design programmes have design libraries.

8.4 Design support

8.4.1. Design policy

Although no formal national design policy could be sourced, a *National Industrial Policy Framework (NIPF) and Action Plan* were published by the dti in August 2007.

The main objectives of the NIPF are (p.1):

- To facilitate diversification beyond South Africa's current reliance on traditional commodities and non-tradable services. This requires the promotion of increased value-addition characterised particularly by movement into non-traditional goods and services that compete in export markets as well as against imports.
- To accelerate the long-term intensification of South Africa's industrialisation process and movement towards a knowledge economy.
- To promote a more labour-absorbing industrialisation path with a particular emphasis on tradable labour absorbing goods and services and economic linkages that catalyse employment creation.
- To promote of a broader-based industrialisation path characterised by increased participation of historically disadvantaged people and marginalised regions in the mainstream of the industrial economy.

- To contribute to industrial development on the African continent with a strong emphasis on building its productive capabilities.

The Industrial Policy Action Plan identifies a range of sectoral actions, including (p.4):

- Fast-tracking implementation of the four lead sectors that have emerged from research and intensive interaction with stakeholders:
 - Capital/Transport equipment and metals;
 - Automotives and components;
 - Chemicals, plastic fabrication and pharmaceuticals;
 - Forestry, pulp and paper, and furniture.
- Maintaining momentum on implementation of Accelerated Shared Growth Initiative for South Africa (ASGI-SA) sector priorities: Business Process Outsourcing & Offshoring, tourism and biofuels,
- Implementing other substantive sector projects in diamond beneficiation and jewellery; agro-processing; film and crafts.
- Further strategy work needs to be developed in a range of other sectors including: Mining and mineral beneficiation; agriculture/agro-processing; ICT (services and products) and creative industries and white goods.

Of the Key Action Plans (KAPs) related to design that could be identified in this document include:

- Jewellery: the establishment of a Jewellery Manufacturing Centre in the Industrial Development Zone at Oliver Tambo International Airport (p.26)
- Textiles: the implementation of design incentive protocols (p.24)

- Film and television: rebate schemes and the establishment of a centre of excellence (p.30)
- Crafts: the establishment of integrated metropolitan hubs and rural satellites to perform the role of enterprise development, research and development, market access and trade support. The hubs will be set up in partnership with provincial and local authorities and will receive joint funding (p.31).

Although it is explicitly stated in the document (p.33) that: “*During 2007/08 more comprehensive strategies will be developed in the following sectors: ... (amongst others) – Creative Industries.*” No detail project plan, project or KAP could be found in the document relating to the creative industries.

Source: *National Industrial Policy Framework*. ISBN 1-920106-10-3

An example of the way in which development strategies can contribute to the achievement of developmental goals is provided by the *Creative Industry Development Framework* in the Gauteng province of South Africa. This framework makes explicit the contribution of the creative industries to social development goals such as community participation in cultural activities; regional integration across Africa; poverty alleviation, particularly in previously disadvantaged communities and among the youth; and public-private partnerships in community-based cultural programmes much as indigenous dance and music, carnivals and festivals.

Source: *Creative Economy Report 2008 – The challenge of assessing the creative economy towards informed policy making*, ISBN 978-0-9816619-0-2

8.4.2. Government spending on design

Based on what was reported above, it must be clear that it is an almost impossible task to even begin to assess the investment and spending of government on design. All attempts to establish this was met with a comment along the lines that a detailed audit of government departments will have to be done to establish this.

Some of the figures that can however be reported are:

- Total government budget for the 07/08 financial year amounted to R557 962 billion.
- The DAC quoted an amount of R6 million earmarked for the promotion and development of design.
- The total budget for the SABS Design Institute (the only formal design promotion agency funded by the dti through the South African Bureau of Standards) for the 08/09 financial year amounts to R 7 000 000.

In addition to investing in the promotion and development of the design sector, government supports local industry as a buyer of design and design services. Even though no statistics are available, it is generally agreed by industry that government is one of the biggest buyers of design services in South Africa, especially communication and interior design services. In addition, many government departments and agencies employ designers in in-house studios, of which the Government Communication and Information Service's (GCIS) studio is the largest. In addition, the GCIS provides coordination services for procurement of design and production for large projects on behalf of all government departments and agencies where in-house capacity does not exist.

8.4.3. Government grants available

There are very few programmes that could be earmarked as *providing direct support for the development of the design sector* as per the definition of the scope of this project. Most grants are directed at individuals or organisations and not for the sector as a whole.

Crafts, film and television, fashion, jewellery and textiles receive the most attention from government and could thus be viewed as the areas that receive direct support for development. These, to a large extent, fall outside the scope of the project.

The research team could source no proof of governmental support programmes for the development of the communication and interior design sectors, therefore highlighting an important gap in developing these substantially-sized sectors.

8.4.3.1. National Arts Council (NAC)

As mentioned under 8.3.2.4. the National Arts Council provides funding for the development and promotion of excellence in the arts, in craft, dance and choreography, literature, multi-discipline (a mix of the disciplines), music and opera, theatre and musical theatre and visual arts. Most of these also fall outside the scope of this project.

8.4.3.2. NRF – Innovation Fund

The same could be said for the NRF and the Innovation Fund (see 8.2.2.1) where funding is directed to support and promote research, human resource development and the provision of the necessary research facilities, in order to facilitate the creation

of knowledge, innovation and development in all fields of the natural and social sciences, humanities and technology. This is predominantly achieved through the MiTech, TAP and the Patent Support Fund.

– Support Programme for Industrial Innovation (SPII)

The Support Programme for Industrial Innovation (SPII) is a dti innovation support programme that is administered by the Industrial Development Corporation (IDC). The SPII currently consists of three schemes: the Product Process Development, Matching and Partnership Schemes.

- The Product Process Development Scheme: Financial assistance is provided for small, very small and micro enterprises (employees <50; turnover <R13 million; assets <R5 million) in the form of a grant of between 50% and 85% of the qualifying cost incurred during the technical development stage with a maximum grant amount of R500 000 per project. For enterprises with <25% black shareholding – the grant is 50%, for enterprises with >25% ≤50% female/physically challenged shareholding – the grant amount is 50% for enterprises with >25% ≤50% black shareholding or >50% female/physically challenged shareholding – the grant amount is 75%, and for enterprises with black shareholding >50% – the grant amount is 85%.
- The Matching Scheme: Financial assistance under the Matching Scheme is provided to SMEs (employees <200; turnover <R51 million; assets <R19 million) in the form of a grant of up to between 50% to 75% of the qualifying cost incurred during the technical development stage – up to a maximum grant amount of R1 500 000 per project. For enterprises with <25%

black shareholding – the grant is 50%, for enterprises with >25% but ≤50% black shareholding or >50% female/physically challenged shareholding – the grant amount is 65%, and for enterprises with black shareholding >50% – the grant amount is 75%.

- The Partnership Scheme: Financial assistance under the Partnership Scheme is provided in the form of a conditionally repayable grant of 50% of the qualifying cost incurred during development activity with a minimum grant amount of R1 500 000 per project, repayable on successful commercialisation of the project. In considering support for a project under SPII, there should be a clear indication of the causality (additionally) that will follow from the support.

South African-registered enterprises engaged in pre-competitive development activity focused on commercialisation of the product being developed, are eligible to apply for SPII assistance. In the case of companies and close corporations, South African individuals or companies need not necessarily hold a majority shareholding.

8.4.3.3. Sector Education and Training Authorities (SETAs)

The SETAs that promote education and training in the different sectors of the economy, function on the principle that organisations have to pay their respective SETA a skills levy, which is channelled towards education and training for the specific sector in the form of learnerships. Participating organisations can then re-claim their levies based on learnerships implemented. Thirty-five SETAs promulgated under the Skills Development Act are currently operational in South Africa (see Appendix C).

With regard to the MAPPP-SETA (Media, Advertising, Publishing, Printing and Packaging SETA), Table 4 below provides a list of Standard Industrial Classification (SIC) codes as well as the estimated number of organisations in 2005 that were eligible to pay levies to the SETA and should thus ideally benefit from the learnerships and training implemented by the SETA. As mentioned earlier the SETA concept is very idealistic and still needs to prove its worth.

8.4.4 Other national bodies

A brief description of other forms of government support for design not mentioned above:

8.4.4.1. National Advisory Council on Innovation (NACI)

NACI has been created by legislation to advise the Minister of Science and Technology of South Africa, and through the

Contact details:

- Physical: Building 53, CSIR Campus, Meiring Naude Road, Brummeria, Pretoria
- Postal: The NACI Secretariat, Private Bag X894, Pretoria 0001
- Tel: +27 (0)12 843 6511
- E-mail: charlotte.mzolo@dst.gov.za
- Web: www.naci.org.za

Table 4: Estimated number of potential levy payers (by SIC code) of the MAPPP-SETA

SIC Code	Description	No of Organisations
9003	Production of craft art	77
9004	Production of traditional art	16
9005	Production of designer goods	48
9006	Production of functional wares	9
9007	Production of souvenirs	4
32430	Publishing of recorded media	30
32600	Reproduction of recorded media	57
88313	Commercial design	2 787
88940	Photographic activities	263
96140	Dramatic arts, music and other arts activities	99
96141	Activities of artists and entertainers	207
96142	Activities of theatre and entertainment technicians	28
96143	Production of 'live' theatrical and artistic events	28
96144	Activities of arts councils and other related institutions	9
96190	Other entertainment activities n.e.c	230

It must be emphasised here that the figures in Table 4 are based on estimates obtained from available data and are not actual. These figures also applied to 2005.

Source: *Trade and Investment South Africa*, CSP Craft, May 2005

minister, the ministers committee and the cabinet, on the role and contribution of science, mathematics, innovation and technology, including indigenous technologies, in promoting and achieving national objectives.

8.4.4.2. Advanced Manufacturing Technology Strategy (AMTS)

The thrust of the AMTS is to strengthen the competitiveness of the manufacturing sector through the implementation of targeted, high-impact projects in areas such as industry development, world-class manufacturing, innovation and research and development (R&D) as well as the development of human resources. The strategy is being expedited through the AMTS Implementation Unit, established and supported by the Department of Science and Technology.

Contact details:

- Physical: Building 10, Room E101, CSIR Pretoria Campus, Scientia, Pretoria
- Postal: PO Box 395, Pretoria 0001
- Tel: +27 (0)12 841 3139
- Fax: +27 (0)12 842 7616
- E-mail: enquiries@amts.co.za
- Web: www.amts.co.za

8.4.4.3. Technology and Human Resources for Industry Programme (THRIP)

THRIP is a partnership programme which challenges companies to match government funding for innovative research and development in South Africa.

Contact details:

- Postal: P O Box 2600, Pretoria, 0001
- Tel: +27 (0) 12 481 4078
- Fax: +27 (0)12 481 4197
- E-mail: thrip@nrf.ac.za
- Web: www.nrf.ac.za/thrip

8.4.4.4. The Small Enterprise Development Agency (seda)

Seda was established in December 2004 in terms of the National Small Business Act. This law merged the previous small enterprise development agencies Ntsika Enterprise Promotion Agency, NAMAC Trust and the Community Public Private Partnerships (CPPP) into a single small enterprise support agency.

SEDA Technology Programme (stp)

The seda Technology Programme (originally the Godisa Trust), a special initiative of the national Department of Trade and Industry (the dti), is responsible for technology transfer and business incubation. GODISA was meant to incubate and nurture SMME's to play an increasingly vital role in the development of sustainable employment and the advancement of essential skills and technologies. The stp currently provides financial assistance to 17 technology business centres, located throughout South Africa – each focusing on the support of small enterprises in a specific industry sector. These sectors include bio and life sciences, medical devices, bio-diesel, essential oils, chemicals, construction, floriculture, furniture, ICT, small-scale mining, stainless steel, aluminium and platinum, as well as metal beneficiation served by the National Technology Transfer Centre (NTTC) and the Technology Advisory Centre (TAC). The three dti incubators, namely Mpumalanga Stainless Steel Initiative

(MSI), Downstream Aluminium Centre for Technology (DACT) and Furntech, were also incorporated into stp.

Institutions incorporated into the stp

- National Technology Transfer Centre (NTTC): The NTTC is an initiative by the dti to facilitate technology transfer and diffusion to Small Medium and Micro Enterprises (SMMEs) with a specific focus on the Second Economy.
- GODISA: The GODISA Trust was partnered by the DST and the dti. Deriving its name from the Setswana word meaning 'nurturing or helping to grow', GODISA as such incubates and nurtures small, medium and micro-sized enterprises to play an increasingly vital role in the development of sustainable employment and the advancement of essential skills and technologies. The GODISA Trusts is helping South Africans to cultivate their innovations and business ideas, and in the process uplifting and empowering individuals and their communities.
- Mpumalanga Stainless Initiative (MSI): The MSI is an incubator funded by the dti. As an attempt to address the problem of unemployment in the province, a need was identified to expose a large number of interested SMMEs to the possibilities of the manufacturing sector. Potential candidates are screened and selected for technical and business training. The programme equips them to take up stainless steel product manufacturing opportunities.
- The Down Stream Aluminium Centre for Technology (DACT): DACT is a dti-funded project. DACT is set to gain stature in the casting industry for sound financial, social and environmental management, providing a sound training and incubating facility and establishing successful small businesses to benefit the community in which it operates.
- FURNTECH: The government, through its National Skills

Development Strategy (NSDS), identified training and skills development as significant drivers of international competitiveness and organisational development. In response to these requirements, the dti funded the establishment and operationalisation of FURNTECH as a world-class service provider to South Africa's wood products and furniture industries in the fields of incubation, training, technology transfer and technology demonstration.

- National Fibre, Textile and Clothing Centre (NFTCC): As a technology partner to industry, the NFTCC of CSIR Manufacturing and Materials Technology promotes the growth and global competitiveness of the South African textile pipeline. Through awareness of relevant technological developments globally and the acquisition or development of technologies, the centre aims to be the best provider of knowledge and innovative solutions to the textile pipeline in southern Africa.

Contact details:

- Physical: the dti Campus, Block G, 77 Meintjies Street, Sunnyside, Pretoria
- Postal: P O Box 56714, Arcadia 0007
- Tel: 0860 103703 or +27 (0)12 441 1000
- E-mail: info@seda.org.za
- Web: www.seda.co.za

8.4.4.5. Venture Capital Fund

The Venture Capital fund is an initiative that would primarily focus at financing the first two stages of development of new technology-based firms: that is the seed stage (which involves concept development, prototyping, and product development) and early stage (marketing, production of goods and/or services),

with some investment in later stages. Venture Capital is considered to be funds invested in a venture at high risk to the investor, usually in situations where the venture is unable to secure the required funds from traditional lending sources, such as commercial loans from a bank, or the public equity market.

Contact details:

- Physical: Industrial Development Corporation of SA LTD, 19 Fredman Drive, Sandown
- Postal: P O Box 784055, Sandton 2146
- Tel: +27 (0)11 269 3000
- Tel: +27 (0)11 269 3116
- E-mail: callcentre@idc.co.za
- Web: www.idc.co.za/Venture%20capital.asp

8.4.4.6. Technology Linkages

The objective of the programme is to facilitate the establishment of industrial sector needs and offer support as required by the dti sectors. The Unit (Innovation & Technology), together with Trade and Investment South Africa (TISA), interacts with industry on integrated manufacturing strategies and technology issues.

Contact details:

- Tel: +27 (0)12 394 1272
- Tel: +27 (0)12 394 2272
- Web: www.dti.gov.za/offerings/offering.asp?offeringid=629

8.4.4.7. Danida Business-to-Business Programme, Credit Guarantee Scheme

The objective of the Business-to-Business programme is to develop and strengthen business opportunities and create jobs

for eligible entrepreneurs from the previously disadvantaged communities. This is achieved through support to the development of commercially viable businesses, based on formation of business partnerships between South African and Danish companies.

Contact details:

- Web: www.dti.gov.za

8.4.4.8. Dutch funds available for investments in South Africa

South Africa is a new market that is expanding rapidly. This provides opportunities for businesses to expand investments and trade relations. The Dutch Ministry of Foreign Affairs finances companies who wish to invest in South Africa, together with a local South African company. These companies can receive a contribution of 50 percent of the total project costs.

Contact details:

- Web: www.dti.gov.za

8.4.4.9. Department of Arts and Culture (DAC)

Investing in a cultural programme as part of the contribution of DAC towards the Expanded Public Works Programme. Projects must be arts-, culture- and heritage-related.

Contact details:

- Web: www.dac.gov.za

8.4.4.10. Thsumisano Trust

The DST has identified technological innovation and related skills upgrading as being of vital importance to the competitiveness of South African SMMEs. The Thsumisano Trust provides technical and financial support to technology stations, which are

based at universities of technologies. The technology stations in turn offer technical support to existing SMMEs in terms of technology solutions, services and training. Thsumisano Trust, through its Technology Station Programme, acts as an implementation agency for the DST and its main focus is on improving and facilitating the innovative capacity and competitiveness of SMMEs in selected economic sectors. Refer to 8.3.4.1 for the complete list of technology stations.

Contact details:

- Web: www.thsumisano.co.za

8.4.4.11. AMTS FabLab Programme

The FabLab concept has had an impact around the world, bringing practical technology solutions to diverse communities, each attaining its own unique identity, while retaining the FabLab stamp. The AMTS Implementation Unit recognised the benefits FabLab could bring to South Africa, a country as diverse as the earlier sites implemented by MIT. From innovative exposure to science and technology for children, to an enabling infrastructure for innovators from industry, academia and SMEs, the FabLab aims open up the application and development of digital manufacturing technology in South Africa. FabLab is a hands-on laboratory with advanced equipment that enables one to make just about anything from inexpensive and readily available materials. The goal of the FabLab is to help people use advanced information technologies to develop and produce solutions, products or solve local problems. The FabLab is very different from ordinary rapid product development organisations. The focus is on manufacturing of the total product, which includes design, fabrication, testing and debugging, monitoring and analysis and documentation of the process.

Contact details:

- Physical: Building 10, Room E101, CSIR Pretoria Campus, Scientia, Pretoria
- Postal: PO Box 395, Pretoria 0001
- Tel: +27 (0)12 841 3139
- Fax: +27 (0)12 842 7616
- E-mail: enquiries@amts.co.za
- Web: www.amts.co.za

8.4.4.12. Technology Innovation Agency (TIA)

TIA is envisaged to operate as an investment vehicle that will facilitate research findings to go into the commercial space. It will not be a commercial entity and has not been established yet. A proposal for establishing the TIA is currently before parliament.

8.4.5 Private sector support

The private sector is spearheading support for the development of the design industry as articulated in sections 8.3.1, 8.3.2.5, 8.3.3, 8.4.5, 8.4.6, 8.4.7 and 8.4.8. Private sector support consists of sponsorships for the running of professional bodies and their diverse activities, training and development programmes, bursary schemes, exhibitions and awards schemes, large trade events, as well as venture capital and business support for new product development.

However, few of the private sector actions mentioned in sections 8.3.1, 8.3.2.5, 8.3.3, 8.4.5, 8.4.6, 8.4.7 and 8.4.8 are co-ordinated with, linked to, and/or financially supported by government. One of the main reasons for this is that government

focuses on innovation while the private sector focuses on design and design thinking. Although it is a known fact that design by default implies innovation, it is not necessarily true that innovation involves design.

The following initiatives stand out for their innovation and utilisation of design to facilitate socio-economic development in South Africa:

8.4.5.1. Woolworths Making the Difference Through Design (MTDTD)

The Woolworths MTDTD initiative is a unique design education programme because of its focus on the development at grass-roots and pre-tertiary level (grades 10–12). The initiative is firmly rooted in the belief that design education at such a young age and at grassroots level is not only going to develop designers for the future, but could also develop design-literate citizens, discerning consumers of good design, top-quality entrepreneurs and creators of products, services, systems, processes and environments. This early development as a focus is believed to be critical and much needed to develop a future and quality workforce that could greatly contribute to the future development South Africa in many areas of expertise. In short, all competitive businesses require creative thinkers!

This programme consists of:

- A 600-page design resource manual featuring more than 80 case studies of South African designers from various fields. The content supports the National Design Curriculum (NDC) and is a valuable and much needed teaching tool to support and assist mostly unqualified educators to teach design on a daily basis. Studies divided in four

broad categories: visual communication; surface, product and environmental design;

- An annual national design competition for high school design students (grades 10 – 12) to motivate original and innovative design ideas with a priority focus on the use of waste that also develops a much needed awareness of environmental issues and social development;
- MTDTD exposure to opportunities in the professional and corporate arenas;
- Woolworths MTDTD Design Bursary, and
- Other forms of collaboration.

Impact:

- 400 schools in South Africa already participating in programme: Three classes per school of average 15 students per class = 18 000 students.
- The design resource manuals have been distributed free of charge to participating schools and there is a high demand for it by non-participating schools.
- The MTDTD programmes have been implemented in three of South Africa's nine provinces and has huge potential for growth but funds restricted.

MTDTD is a unique collaboration between corporate, private/professional and educational sectors with a priority focus to educate, develop and grow a better South Africa for all through design education.

As a leading retailer in South Africa, Woolworths is dedicated to the upliftment of design education in the country. Woolworths, together with the Western Cape Education Department, Design Indaba and Sappi, launched the MTDTD education initiative

in 2005 as part of their corporate social investment programmes. Initially piloted at some 120 schools in the Western Cape during the 2006 school year, MTDTD has received accolades from curriculum developers, administrators and teachers.

Contact details:

- Penny Luthi
- E-mail: pennyluthi@woolworths.co.za
- Tel: +27 (0)83 399 2278
- Suné Stassen
- E-mail: sune2000@mweb.co.za
- Tel: +27 (0)84 623 2466

8.4.5.1. Sappi Ideas that Matter

The Ideas that Matter is a programme from Sappi to support design for the public good. Sappi awards monetary grants to designers throughout the world to help them create and implement projects that serve the causes that are closest to their hearts. The aim of the project is to encourage ideas that have the potential to change lives, communities, and the world.

The programme

Ideas that Matter is an initiative that was launched world-wide in 1999 to provide substantial grants that enable the implementation of creative ideas designed to support social and environmental causes.

Sappi invites communication designers from Europe, North America and southern Africa, to create printed communication campaigns for causes they want to support and has made US\$1 million available for successful applicants around the world to realise their creative concepts and campaigns.

The philosophy behind the programme is as follows: As the world's leading producer of coated fine paper, Sappi has a long tradition of supporting communication designers who share a belief in the power of ideas on paper. With the Ideas that Matter programme the company hopes to inspire designers to produce more and better communications for the benefit of society.

The rationale behind the programme is that designers possess unique talents that can help transform and develop society. Communication designers have consistently demonstrated their desire to do work for the benefit of society. The Sappi initiative is a way to assist them to make a difference by providing them with the financial support they need to implement their Ideas that Matter.

Individual designers, design agencies, in-house design departments and individuals or groups of design students are all eligible to apply. Independent selection committees in Europe, North America and South Africa review all applications in their respective region. These committees comprise graphic federation representatives, leading communication designers, public service professionals and representatives of Sappi.

More than 225 projects have been funded with grants exceeding \$8 million.

Contact details:

- Web: www.sappi.com/ideasthatmatter

8.4.6 Awards

There are numerous awards and recognition schemes applicable to the design sector. Only the most prominent ones that are applicable to the scope of this study are mentioned.

8.4.6.1. SABS Design Excellence Award

The SABS Design Excellence Awards scheme aims to acknowledge the achievements of South African designers. It was established in 1969 to encourage local product design and manufacture and also promote international competitiveness of local products.

Contact details:

- Web: www.sabs.co.za/Business_Units/Design_Institute/Awards/

8.4.6.2. SABS Design Achievers Award

This award scheme embraces the entrepreneurial spirit and leadership potential of student designers studying in any design field at a South African tertiary institution. It also promotes and stimulates our country's design and manufacturing industries. The Design Achievers programme celebrated its 20th anniversary in 2007.

Contact details:

- Web: www.sabs.co.za/Business_Units/Design_Institute/Awards/

8.4.6.3. Design for Development Initiative

The Design for Development Initiative gives recognition to products that exemplify the concept that good design is a major

contributory factor in offering solutions to various problems that face developing communities in rural as well as urban areas. The awards focus on the important role design can play in the industrial development and economic prosperity of the southern African region as a whole.

Contact details:

- Web: www.sabs.co.za/Business_Units/Design_Institute/Awards/

8.4.6.4. Sappi thinkahead awards

The Sappi thinkahead awards, organised by the South African Communication Design Council (think), honours final-year students from all around the country who submit outstanding pieces of communication design and promising portfolios.

The thinkahead awards were first launched in 2002, in conjunction with Sappi, think's primary sponsor, when think was a fledgling organisation. One of the priorities of the newly-formed council was a strong focus on the communication design education sector. The members wanted to provide design graduates with the opportunity to bridge the gap between study and career, by awarding work that showed both originality and professionalism, which are key ingredients design agencies expect from their creatives. It was from this desire that the thinkahead awards were created.

Contact details:

- Web: www.think.org.za

8.4.6.5. Construction New Media Awards (CNMA)

In January 2001 the Design Indaba launched the Construction New Media Awards (CNMA). Work entered into the CNMA is

judged across five disciplines, irrespective of subject matter or target market: web sites, intranets, .exe files, CD-ROM's and online advertising. The CNMA was established to become South Africa's most coveted award within the medium. Credibility was enhanced by placing internationally renowned professionals such as Neville Brody, Tom Roope and Thomas Mueller on its judging panel, something made possible through the CNMA's association with the Design Indaba®.

Contact details:

- Web: www.constructionaward.com/

8.4.6.6. The South African Institute of Architects awards (SAIA)

An important function of the SAIA is to recognise and promote excellence in architecture and to create public awareness and debate on architectural issues. The SAIA Award for Excellence programme support these goals and run over a two-year period.

– Regional Award of Commendation

This award is made to members of the regional institutes to encourage and recognise good design or to those who made a significant contribution in the field of architecture. It may be for:

- A new building or group of buildings;
- A work of technological importance;
- The conservation, restoration and/or rehabilitation (refurbishment) of existing buildings, historic precincts or areas;
- A work of social importance, other than a building, for which the member was appointed as the architect.

There is no restriction on the building type, use or size. It is also intended for small-scale alterations or interiors if they are of exceptional quality and contribute to the current discourse on architecture. Although the work may contain flaws, it should be clearly identifiable as having specific attributes that are worthy of commendation.

– Corobrik SAIA Award of Merit

This award is made to members of SAIA to encourage and recognise good design or a significant contribution in the field of architecture. Although the work may contain minor flaws, it should be clearly identifiable as a work of architectural merit. Work, having been submitted to the region, may be selected by the regional panel of assessors for national adjudication, and is submitted by the Regional Committee.

– Corobrik SAIA Award for Excellence

The Award for Excellence is made only for an exceptional achievement in the field of architecture. Projects that have received an Award of Merit are eligible for this award.

Contact details:

- Web: www.Corobrick.co.za

8.4.6.7. Technology Top 100 (TT100)

TT100 is a national awards programme that acknowledge the success that today's organisations enjoy through their development and use of technology. More importantly, it encourages, measures and honours these organisations for the value their use of technology brings to the South African economy.

Whether they are small, medium or large businesses or technology organisations such as science councils and universities, the TT100 are acknowledging the enterprises that optimise

technology to maximise profits, gain market share, create niche markets and add value for their stakeholders.

Started in 1990, TT100 today has the strong support of both government and the private sector. TT100 is mandated by the DST to celebrate South Africa's role-models in science and technology. Eskom is the premier corporate partner and additional private sector partners include the South African Academy of Engineering, TBM Communications, and *Financial Mail Innovations*.

The TT100

- recognises the way organisations use technology and innovation to achieve their objectives;
- gives organisations an opportunity to benchmark themselves against your peers;
- gives expert third-party appraisal for efforts in using and developing technology;
- enables organisations to broadcast their achievements to the nation; and
- gives organisations the prestige of being associated with South Africa's longest running, highly credible business excellence award, recognising technology and innovation.

TT100 is open to all organisations that skilfully manage technology, be it through their products, services and/or processes. Any organisation registered in South Africa is eligible, whether or not generally regarded a technology organisation.

Entrants must be:

- A developer of new technologies; and/or
- An innovative user of existing technology (where it is used

in a way that is more sophisticated than 'everyday' use), and where it can be demonstrated how using it has brought the organisation clear and tangible benefits.

TT100 distinguishes between:

- The Established TT100 organisations, who have been operating for three years or more, and
- The Emerging TT100 organisations, who have been operating for less than three years.

Accolades and awards presented to all TT100 qualifying enterprises:

- Established TT100

The Minister's Awards are the highest achievements in the annual TT100 awards programme. They are presented to the overall best large/medium enterprise and to the overall best small enterprise. Finalists and leaders (most outstanding recipient in each category) are announced in:

- Leader in Innovation
 - Leader in Research and Development
 - Leader in Commercialisation
 - Leader in Empowerment
 - Leader in Portfolio Management
 - Leader in Social Innovation
 - Emerging TT100
- The 'Most Promising Emerging TT100 Enterprise' is the highest accolade presented to the most outstanding Emerging TT100 qualifying enterprises.

Contact details:

- Web: www.tt100.co.za

8.4.6.8. Loerie Awards

The Loerie Awards are best described by its slogan: Recognising, rewarding and fostering creative excellence in advertising, communication and design.

The Loerie Awards were first held in 1978, as a mechanism to support and grow television advertising. Since then the awards have expanded to encompass every area of brand communication including radio and print advertising, design, architecture, direct marketing, non-broadcast video, live events, and digital media. The awards are now regionally focussed on Africa and the Middle East, and entries from outside of this region are not eligible.

The Loeries has become far more than a single awards ceremony – since 2005 it has grown to incorporate activities throughout the calendar year, including a biannual magazine, and the hard-cover printed annual and DVD of the year's leading brands and agencies. The annual has become a major reference amongst marketers and agencies, and includes an index by brand, agency and individual credits.

Additionally, the Travelling Exhibition was launched in 2006. The exhibition showcases the year's winning work and has travelled throughout South Africa, including several educational institutions, corporate headquarters, the Rand Show, the Grahamstown Festival, and the Aardklop Festival – as well as international destinations including Namibia and the One Club in New York.

The Loerie Awards stands by its founding values – the company is all about recognising, rewarding and fostering creative excellence. The Loerie Awards is now a Section 21 company. This

means it's a non-profit organisation serving the best interests of the industry; so all funding goes right back into the industry to be put towards promoting the industry and nurturing potential creatives, especially in disadvantaged communities.

The Loerie Awards is internationally recognised and is the only award endorsed by the Association for Communication and Advertising (ACA), Creative Circle (CC), South African Communication Design Council (think), Commercial Producers Association (CPA), Digital Forum, and the Communication & Advertising Forum for Empowerment (Café).

Judging creative excellence

The Loerie Awards represents the pinnacle of communication media in our region, and entries are judged according to five criteria:

- An innovative concept, bringing new and fresh thinking
- Excellent execution
- Relevance to the brand
- Relevance to the target audience
- Relevance to the chosen medium

Work that excels in all the above criteria – work that is judged to be effective communication by the jury – represents creative excellence, and is rewarded with the highest accolade – a Loerie Award.

Contact details:

- Web: www.thelorieawards.co.za/home/

8.4.6.9. Mondi Shanduka Newspaper Awards

Mondi Shanduka Newspaper Awards is co-organised by the Newspaper Association of South Africa and Mondi Shanduka Newsprint. It honours the South African newspaper journalism industry in the following categories: hard news, analysis and commentary, feature writing, investigative journalism, creative journalism, graphical journalism, popular journalism, news photographs, feature photographs and presentation (layout and design).

Contact details:

- Web: www.mondishanduka.co.za

8.4.6.10. SA Publication Forum's Corporate Publication Competition

The SA Publication Forum's first corporate publication competition took place in conjunction with the National Press Club in 2002. The aim of the competition is to reward excellence in internal and external corporate communication media. The thorough feedback by our expert judges also makes the competition an excellent training opportunity.

Entries are received across the board, from government to corporates to one-man-shows and agencies. The competition grows in stature annually and the SA Publication Forum strives to continuously fine-tune and streamline the competition to meet the needs of corporate communicators.

Entries are divided into the following categories:

- Newspapers
- Internal newsletters
- External newsletters

- Internal magazines
- External magazines
- Electronic newsletters.
- DVD newsletters and corporate DVDs
- Annual reports
- Once-off or special occasion publications
- Best publication with limited resources (with reference to budget and manpower)
- Most improved publication since the previous competition
- Editor of the Year

Judging criteria

All the publications are assessed and moderated by experts in the various fields. Criteria include the effective use of project budgets, writing, communication, design and page layout and photography amongst others.

Contact details:

- Web: www.sapublicationforum.co.za

8.4.6.11. PG Bison Student of the Year Award

The Award is recognised for identifying students who have become luminaries within the local interior design and architecture industry and as such celebrates local design excellence.

Now in its 13th year, this award is the one most sought after in the interiors industry. It not only carries with it the prestige of winning and a trip to Milan, but also the opportunity to elevate participants' career opportunity prospects immeasurably.

Students are adjudicated based on their interpretation of a brief set annually by a prominent industry expert. The judging

criteria for the awards are made up of three different elements, namely:

- Commodity
- Firmness
- Delight / WOW Factor

Prizes

- 1st Prize: A trip for the winning student to the 2009 Milan Furniture Fair. This prize includes a return ticket, accommodation, and entry to the show and a contribution to daily expenses. Value of the first prize is R80 000.
- The lecturer of the winning student will accompany the respective student to the Milan Furniture Fair. This prize includes a return ticket, accommodation, and entry to the show and a contribution to daily expenses. Value of the prize is R80 000.
- Merit Award: An all expenses paid trip to the 2009 Design Indaba in Cape Town. The prize includes a return ticket, accommodation, and entry to the show and a contribution to daily expenses.
- 3rd Prize – R5000 cash.

Contact details:

- Web: www.pgbison.co.za

8.4.6.12. Pendoring Awards

The Pendoring advertising competition and project, established in 1994 by the most important role players in the South African media world, focus on the promotion of outstanding Afrikaans advertising.

Pendoring has over the past 13 years developed into a continuous campaign with the aim of creating a greater awareness

among the public of the importance of Afrikaans advertising and marketing, although the Pendoring advertising competition remains the highlight of the year.

Pendoring is unique to South Africa because it is the only competition where competitors in the media put aside their differences and work together for mutual aims – the acknowledgment and awarding of excellent Afrikaans advertising and design and the emphasis on the importance of Afrikaans marketing messages.

South Africa can boast the best creative and executive artists in the business and the international awards that local people in the media profession annually win, is a testimony to this. Pendoring is, therefore, offering the opportunity to agencies and companies who realise the value of Afrikaans to show their mettle and become the cream of the crop.

However, Pendoring is also a proud member of the South African landscape and annually awards the campaign that embodies this pride best. Greater co-operation with advertising representatives of other indigenous languages is invaluable for Pendoring and this has led to a special category, called Genuine South African, for indigenous languages. The role of the Afrikaans consumer is just as indispensable in the advertising value chain. That is why the public also gets an opportunity to let themselves be heard by voting for their favourite advertisement for the People's Choice Award.

The Pendoring advertising competition has, since its inception, grown to a prestigious event on the advertising calendar with considerable cash prizes for category winners, bursaries for students and a study tour abroad for the Prestige Award winner.

Contact details:

- Web: www.pendoring.co.za

8.4.6.13. ADvantage ADmag Awards

The *ADvantage* ADmag Awards recognises magazines and editors for excellence in publishing. Initiated by John Farquhar, *ADvantage's* Editor-in-Chief, the awards recognise outstanding and innovative consumer publishing. Only ABC certified consumer publications are eligible to enter.

Contact details:

- Web: www.advantagemagazine.co.za

8.4.6.14. APEX awards

The Association for Communication and Advertising (ACA) hosts the annual APEX awards. Since its inception in 1995, an APEX symbolises the achievement of communications campaigns' performance excellence in an industry that is constantly refining and redefining creativity.

The adjudication process for APEX is stringent because entrants are required to prove that their campaigns achieved performance excellence by contributing a measured return to their client's bottom line. An APEX is not an award for creativity as such because 'effectiveness' is not positioned against 'creativity' – if however, entrants show as part of their APEX submissions that creativity contributed their campaign's effectiveness, so much the better. It is therefore incumbent on advertisers that have won creative awards to put the real seal on their achievements by demonstrating that their creative award winning campaigns effectively contribute to their clients' profitability.

An APEX represents a demonstration of both strategic and creative effectiveness and showcases award winners as being leaders in their field.

Over the years APEX has grown into a formidable industry event. The annual awards ceremony is a gala event that brings together captains of industry from the communications industry, the media and Government. The event provides a platform for marketers to network with relevant stakeholders and in particular, to endorse the importance of effective communications campaigns in an era where accountability and return on investment is of key importance.

Contact details:

- Web: www.acasa.co.za/apex.aspx

8.4.7. Events

The following organisations stage regular design events:

8.4.7.1. SABS Prototype Initiative

As part of their Prototype Initiative, the SABS Design Institute hosts consultation sessions and 'From Idea to Product' seminars as a means to foster new product development in South Africa.

Objectives

- To encourage the incorporation of the services of professional industrial designers in the process of product development.
- To bring product developers into contact with the technical assistance available to them.

- To provide an opportunity for product developers for an individual consultation with product development experts.
- To encourage consultation with patent attorneys to protect the designers' / inventors' intellectual property and to optimise the commercial benefit of inherent intellectual property.

Consultation sessions

- Applicants are provided with an opportunity to present their prototype to a panel of product development experts. Consultations are confidential and focus on the design aspects of the prototype. Applicants receive expert design advice and opinions.

From idea to product seminars

- The seminars take place in various centres throughout South Africa and focus on the following common challenges experienced by product developers:
 - Pitfalls in the development of a new product
 - The protection of intellectual property
 - Available financial incentives and how to access them
 - Available technical assistance and how to access it
 - The role of the industrial designer
 - Business strategy and entrepreneurship

Contact details:

- Web: www.sabs.co.za/Business_Units/Design_Institute/Awards/Prototype_Initiative/index.aspx

8.4.7.2. Africa Design Day

The Network of Africa Designers (NAD) was established in 1999. The SABS Design Institute has been the driving force behind

the development of NAD and has since 2007 organised regular African Design Days. The Africa Design Days provide a platform for designers and educators from all over the continent to network, share best practices, experiences and knowledge regarding the role of design in Africa's socio-economic development.

Contact details:

- Web: www.sabs.co.za/Business_Units/Design_Institute/Initiatives/Africa/nad.aspx

8.4.7.3. The Design Indaba – Conference and expo

The Design Indaba has grown exponentially since its inception in 1995, comprising a conference, expo, magazine and a number of community-orientated initiatives. Design Indaba aims to drive South Africa's creative industries in meeting competitive global standards. Design luminaries from all fields participate in knowledge sharing at the conference, while the expo offers an international platform for the best in local design.

8.4.7.4. South African Publication Forum

The SA Publication Forum is committed to improve and promote corporate publications in South Africa. Through the forum, publication practitioners get together to network and share ideas. The main activities of the forum are the annual Corporate Publication Competition and Conference and training opportunities in the form of training courses, workshops and seminars.

Contact details:

- P O Box 14029, Hatfield, 0028
- e-mail: jennie@sapublicationforum.co.za
- Web: www.sapublicationforum.co.za

8.4.7.5. Sanlam South African Fashion Weeks

The Sanlam SA Fashion Week stages the Spring/Summer and Autumn/Winter Designer Collections, respectively in August and March each year. These annual events are timed to dovetail with the international fashion week circuit. See 8.3.1.10. for more information.

Contact details:

- Web: www.safashionweek.co.za

8.4.7.6. AFI Fashion Weeks

AFI, founded, owns and operates some of the African continent's most respected and directional fashion weeks, namely Virgin Mobile Cape Town Fashion Week, MTN Durban Fashion Week (50% ownership), Audi Joburg Fashion Week (autumn/winter) and Joburg Fashion Week (spring/summer), in addition to other fashion-related strategic marketing initiatives. See 8.3.1.11. for more information.

Contact details:

- Web: www.africanfashioninternational.com

8.4.7.7. Rooms On View

Rooms on View offers exclusive insight into the status of South African décor and design. It is South Africa's foremost decorating show and is firmly established as the benchmark by which the South African décor industry is measured, both at home and abroad, and it has joined the ranks of other international décor fairs as a fixture in the diaries of decorators, buyers and tastemakers, the world over.

A top-end show devoted specifically to the décor industry – interior decoration, the design of furniture, ceramics, fabrics and

other household items. Viewers can expect to see cutting edge thinking in the world of design, incorporating local and international designers, lifestyle merchants, and the best new names to watch in the future.

Rooms on View's sponsors are *Condé Nast House & Garden* and Home Fabrics. The support of such market leaders ensures the continued high visibility of the show. The necessity of providing a regular décor showcase in South Africa is obvious. The international decorating world has been alerted to the potential here in South Africa, bringing even greater rewards for those creating and accessorising the private worlds in which we live at home.

Rooms on View is a themed event. Room settings, from living rooms and dining rooms, to studies and bedrooms, will provide a tangible view of what is possible using the wide range of merchandise available to the decorating world and its pool of talent.

Contact details:

- Web: www.roomsonview.co.za

8.4.7.8. Decorex

See 8.3.3.2. for more information.

Contact details:

- Web: www.decorex.co.za

8.4.7.9. Decorators on Display

Traditionally an annual event held in KwaZulu-Natal, they are in the process of negotiating with a sponsorship partner who will facilitate in taking the show nationally.

Contact details:

- Web: www.decoratorsondisplay.co.za/site/

8.4.8. Media

The following media provide coverage or have some element of design content:

Trade magazines:

- *AdFocus*
- *ADvantage*
- *AFI Fashion Tabloid*
- *Art South Africa*
- *DESIGN> magazine*
- *Design Indaba*
- *Designing Ways*
- *B©AND magazine*
- *Enjin*
- *Engineering News*
- *KBB Design magazine*
- *Leading Architecture & Design*
- *Migrate Magazine*
- *Plascon Colour*
- *Pursuit Magazine*

Specialist publications:

- *AfroMag* (experimental)
- *FADA Research News* (academic)
- *i-jusi* (experimental)
- *Image & Text, Journal for Design* (academic)

Consumer magazines that regularly feature design:

- *Absolute*
- *De Kat*
- *CLASSIC feel*
- *Condé Nast House & Garden*
- *Cosmopolitan*
- *Elle Decoration*
- *Habitat*
- *Highveld Living*
- *House and Leisure*
- *ie Magazine*
- *InStyle*
- *VISI*
- *One Small Seed*
- *SL Magazine*
- *Style*
- *Top Billing*

Online portals and blogs:

- *African Fashion International*
(www.africanfashioninternational.com)
- *art.co.za* (www.art.co.za)
- *Art South Africa* (www.artsouthafrica.com)
- *ARTTHROB* (www.artthrob.co.za)
- *Bizcommunity.com*
- *Blueprintmag* (www.blueprintmag.co.za)
- *DESIGN>* (www.designmagazine.co.za)
- *Design Indaba Online* (www.designindaba.com)
- *DesignMind* (www.designmind.co.za)
- *DesignMuti* (www.designmuti.com)

- *Design Sponge* (www.designspongeonline.com)
- *Futurespace.co.za* (www.futurespace.co.za)
- *HIPPnotic* (http://blog.hippnotic.co.za)
- *ifashion* (www.ifashion.co.za)
- *SOAK. South African Arts and Creative Community*
(www.soak.co.za)
- *South African Street Style*
(http://southafricanstreetstyle.wordpress.com)
- *ZA@Play* (http://www2.mg.co.za/section/arts)

Television programmes that regularly feature design:

- *Pasella* (SABC2)
- *Kwêla* (kykNet)
- *Dekor* (kykNet)
- *Morning Live* (SABS2)
- *Artcha* (SABC2)
- *Eastern Mosaic* (SABC2)
- *Top Billing* (SABC3)
- *Design Indaba* (SABC3)
- *Africa Rise and Shine* (SABC Channel Africa)

A large selection of pay-per-view channels that focus on design are available via DSTV.

Radio

- *Safm* (MEDIA @ SAfm)
- *RSG*

Newspapers featuring regular design-related articles:

- *Beeld*
- *Business Day*
- *Financial Mail*
- *The Mail & Guardian*
- *The Star*

8.5 Profiles

The lack of secondary data and statistics has been well established and argued throughout the document and relevant data for this section had to be sourced by means of telephonic interviews. Primary data from this source were then extrapolated based on expert knowledge of the industry and adjusted according to the margin of error calculated as per the sample realisation.

Refer to 7.2., Table 2 which indicates the realised population sizes on which this section's data is based. Data were relevant to the year of 2007.

As stated in section 5.2 only the following disciplines (with the respective activities included) were included in the study and would form the basis for this section of the report:

- Communication designers;
- Motion graphics, animation and new media designers;
- Industrial designers (includes glass and ceramics);
- Interior designers; and
- Multidisciplinary designers

8.5.1. Overall sector profile

8.5.1.1. Revenue

The question posed to the respondents was: "In which of the following annual turnover categories did your organisation fall during the last financial year (2006-2007)?"

The international turnover categories provided by the WDS baseline questionnaire were as follows:

- Less than R1 mil
- Between R1 mil and R2.5 mil
- Between R2.5 mil and R5 mil
- Between R5 mil and R10 mil
- More than R10 mil

For purposes of the South African revenue calculation for the applicable sectors the above categories were converted to the following estimated figures:

- Less than R1 mil – R 750 000
- Between R1 mil and R2.5 mil – R 1750 000
- Between R2.5 mil and R5 mil – R 3 750 000
- Between R5 mil and R10 mil – R 7 500 000
- More than R10 mil – R 12 500 000

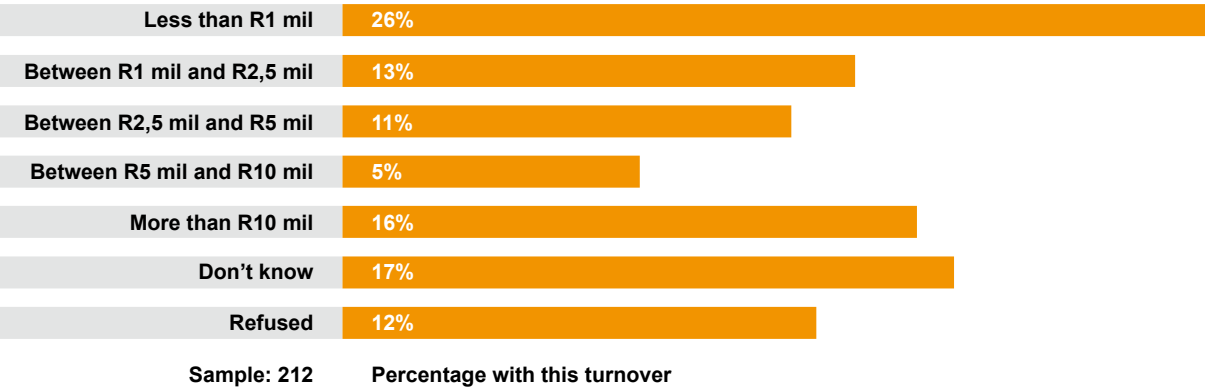
Based on the above, the adjusted calculation per discipline is as per Table 5. Only actual responses were taken into consideration and for this reason the sample completion would differ from the quoted completion per discipline.

The frequency distribution for all disciplines is as per the graph in Figure 1.

Table 5: Revenue profile of selected disciplines

Discipline	Number of businesses	Sample	Annual revenue (2007) – R mil	Average	Total annual revenue – R mil (Minimum)	Total annual revenue – R mil (Maximum)
Graphic designers	220	40	R 129,000	R 3,225	R 214,609	R 254,482
Motion graphics, animation and new media designers	35	7	R 43,500	R 6,214	R 65,381	R 91,220
Industrial designers	170	52	R 284,000	R 5,462	R 446,007	R 516,252
Interior designers	183	39	R 155,000	R 3,974	R 246,501	R 307,434
Multidisciplinary designers	35	13	R 60,750	R 4,673	R 82,611	R 115,260
TOTALS	643	151	R 672,250	R 4,452	R 1,055,109	R 1,284,647

Figure 1: Frequency distribution of declared revenue of selected disciplines



8.5.1.2. Labour

The question posed to the respondents was: **“What is the total number of employees that are employed by your organisation?”**

The categories provided were as follows:

- 1 to 5
- 6 to 10
- 11 to 20
- More than 20

For purposes of the calculation for the applicable sectors the above categories were converted to the following estimated figures for number of employees (i.e. if respondents selected the category 1 to 5 employees, it was calculated as 3 employees on average, meaning that the .5 person would disappear in the bigger calculation):

- 1 to 5 – 3
- 6 to 10 – 8
- 11 to 20 – 15.5
- More than 20 – 25

Based on the above, the adjusted calculation per discipline is as per Table 6. Only actual responses were taken into consideration and for this reason the sample completion would differ from the quoted completion per discipline.

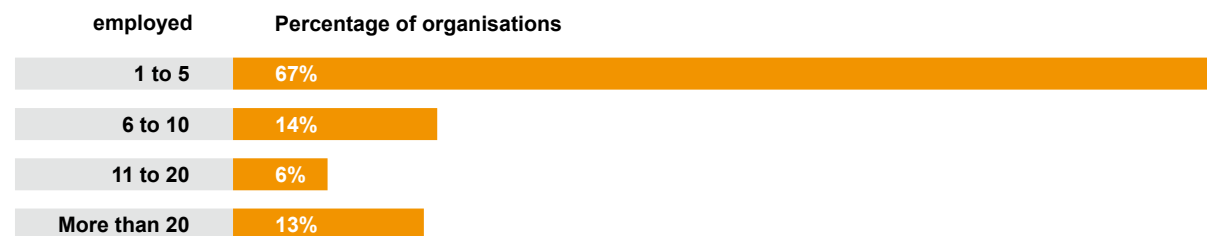
The frequency distribution for all disciplines is as per the graph below (Figure 2). It is clear that the majority of organisations operate in the micro (1 to 5 employees) to small (5 to 20 employees) organisational types with 87% of the respondents falling in these categories.

Table 6: Employment profile of selected disciplines

Discipline	Number of businesses	Sample	Employees (2007)	Total employees (Minimum)	Total employees (Maximum)
Graphic designers	220	59	1 172	1 857	2 202
Motion graphics, animation and new media designers	35	12	245	338	472
Industrial designers	170	58	1 145	1 761	2 038
Interior designers	183	40	529	838	1 045
Multidisciplinary designers	35	15	266	348	486
Totals	643	184	3 356	5 142	6 243

Figure 2: Frequency distribution of employment categories of selected disciplines

Number of people



Sample: 187

8.5.2. Structure

The question posed to the respondents was: **“What is the legal form of your business?”**

Table 7 provides an overview of the disciplines by organisation type (legal form of business).

It is clear from the result that the majority of the organisations surveyed opted for a formal business structure that implies some statutory requirements, i.e. Closed Corporations and Private Companies (66.5% of the respondents). These two options are the best suited to smaller organisations that require the security of a formal business structure with less personal liability as is the case in, for instance, Sole Proprietorships.

Table 7: Discipline by legal form of the business

DISCIPLINE	Article 21 (Non profit)	Closed Corporations (CC)	Incorporated (Partnership)	Private Company (Pty)	Public Company (Pty (LTD))	Sole Proprietor (Including Freelance)	Listed Company (JSE/AltX)	Other
Graphic designers	1	22	0	20	11	5	0	3
Motion graphics, animation and new media designers	0	4	0	3	2	3	0	1
Industrial designers	0	22	2	17	13	16	0	2
Interior designers	0	32	0	5	2	2	1	2
Multidisciplinary designers	0	8	0	4	1	2	0	0
TOTALS	1	88	2	49	29	28	1	8
PERCENTAGE	0.5%	42.7%	1.0%	23.8%	14.1%	13.6%	0.5%	3.9%

The occurrence of Public Companies was surprisingly high at 14.1% and this, together with the 66.5% mentioned above, gives an indication of the level of formalisation with regard to business structure to be found in the sector with 80.6% of the respondents reported to have a more formal form of business.

8.5.3. Years in operation

The question posed to the respondents was: “**How many years has your organisation been in operation?**”

The categories provided were as follows:

- 5 years or less
- Between 5 and 11 years
- 11 to 20 years
- More than 20 years

Table 8: Discipline by years in operation

DISCIPLINE	5 or less years	Between 5 and 10 years	11 to 20 years	More than 20 years
Graphic designers	16	24	13	9
Motion graphics, animation and new media designers	4	5	4	0
Industrial designers	10	26	14	21
Interior designers	10	11	9	14
Multidisciplinary designers	3	6	3	3
TOTALS	43	72	43	47
PERCENTAGE	21.0%	35.1%	21.0%	22.9%

Table 8 provides an overview of the years in operation by discipline and is a clear indication of the stability in the sector with more than 79% of the respondents having been in business for five or more years and 22,9% being in business for 20 years or longer.

8.5.4. Ownership

The South African focus on black economic empowerment (BEE) urged us to ask the question in a slightly different way in order to get a feel for the movement towards BEE at the same time. Respondents were asked to provide percentage ownership for the following categories of Ownership:

- Total percentage MALE ownership
- Total percentage FEMALE ownership
- Total percentage PDI MALE ownership
- Total percentage PDI FEMALE ownership

(Note: PDI was defined as a previously disadvantaged individual as per the relevant Acts).

It is obvious that this is still predominantly a male dominated sector (as far as ownership is concerned) of the economy. It was only in the discipline of interior designers where female ownership (55.5%) exceeded that of male ownership (44.5%) (see Figure 3). Black economic empowerment is fairly low but given that the majority of these organisations might be exempted on turnover, it should not be a problem.

8.5.5. Annual revenue

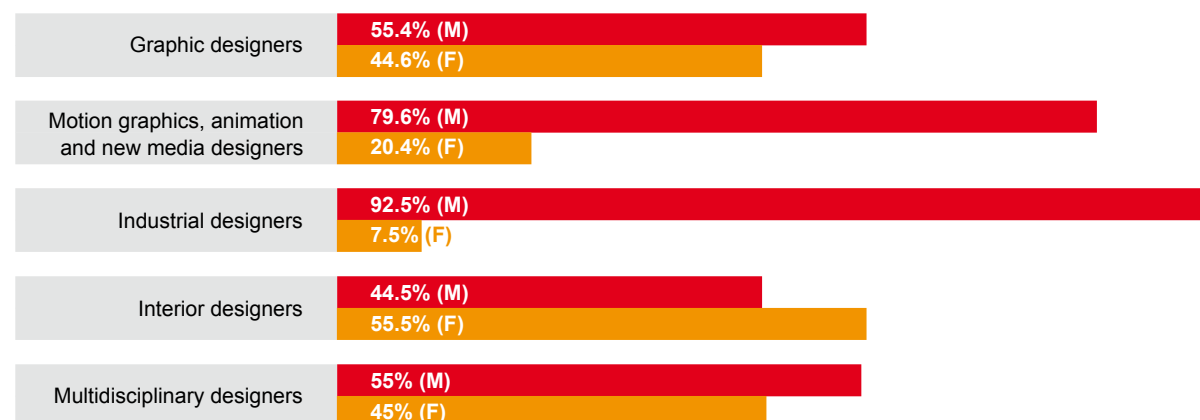
In order to determine the annual revenue of organisations, the following question was asked: **“In which of the following annual turnover categories did your organisation fall during the last financial year (2006-2007)?”**

The categories as was provided in the international baseline questionnaire had to be adjusted to reflect the South African

Table 9: Ownership by gender

DISCIPLINE	% Male Ownership	% Female Ownership	% PDI Male Ownership	% PDI Female Ownership
Graphic designers	49.2%	41.4%	6.3%	3.1%
Motion graphics, animation and new media designers	79.6%	9.9%	0.0%	10.5%
Industrial designers	84.6%	7.5%	7.9%	0.0%
Interior designers	38.2%	47.4%	6.3%	8.1%
Multidisciplinary designers	42.3%	37.3%	12.7%	7.7%

Figure 3: Discipline by total male versus female ownership



situation. The following categories of turnover were provided:

- Less than R1 mil
- Between R1 mil and R2,5 mil
- Between R2,5 mil and R5 mil
- Between R5 mil and R10 mil
- More than R10 mil
- Refused or don't know

The latter two categories were removed from the calculations but it should be noted that 11.8% of the respondents “refused” to answer the questions and 17% said they “did not know” – this brought the number of responses down to 151.

Given a rate of exchange of around R7 per US\$ during the time of the study, the categories in US\$ terms would be as follows:

- Less than \$142 857
- Between \$142 857 and \$357 143
- Between \$357 143 and \$714 286
- Between \$714 286 and \$1 428 571
- More than \$1 428 571

The results can be seen in Table 10 and it is interesting to note that 70.9% of the organisations can be classified as small (or even micro) enterprises and also fall below the R5 million threshold that is required for compliance to BEE.

In order to get more insight into their business confidence and the state of the economy, a question to the following effect was added: **"Has your turnover increased, decreased, or remained static during the past two years (2006-2007 and 2007-2008)?"**

Respondents could select from the following options provided:

- Increased
- Decreased
- Remained static
- Do not know or do not want to divulge

It is encouraging to note that the majority of the respondents (72.6%) reported either an increase in their turnover or a turnover that remained static (see Table 11).

8.5.6. Revenue source

In order to determine the source of the revenue of organisations, the following question was asked: **"What percentage of your turnover is generated from the following sources?"**

Table 10: Annual revenue by discipline

DISCIPLINE	Less than R1 mil	Between R1 mil and R2,5 mil	Between R2,5 mil and R5 mil	Between R5 mil and R10 mil	More than R10 mil
Graphic designers	20	3	9	5	3
Motion graphics, animation and new media designers	3	0	1	0	3
Industrial designers	18	11	3	2	18
Interior designers	11	11	8	3	6
Multidisciplinary designers	4	3	2	1	3
TOTALS	56	28	23	11	33
PERCENTAGE	37.1%	18.5%	15.2%	7.3%	21.9%

Table 11: Movement in turnover from '06 to '07

DISCIPLINE	Turnover increased	Turnover remained static	Turnover decreased	Did not know or did not want to divulge
Graphic designers	31	8	7	18
Motion graphics, animation and new media designers	6	3	1	5
Industrial designers	39	15	7	13
Interior designers	28	9	2	5
Multidisciplinary designers	12	3	0	0
TOTALS	116	38	17	41
PERCENTAGE	54.7%	17.9%	8.0%	19.3%

Once again the categories as was provided in the international baseline questionnaire had to be adjusted to reflect the South African situation. The following categories were provided:

- Fees for professional services
- Income derived from production management on behalf of clients

- Licensing and royalty fees
- Government grants

Except for multidisciplinary designers who generate more income through production management (38.2%), the biggest source of income for the other disciplines is derived from professional services. As could be expected, the fees from production are also quite high for the interior design discipline (See Table 12).

8.5.7. Revenue by client profile

This aspect was not covered in the South African baseline study.

8.5.8. Revenue by market

In order to determine the revenue by market, the following question was posed: **“What percentage of your turnover is derived from each of the following markets?”**

The following categories of markets were provided:

- Local (your city and province)
- National (this includes national government-related institutions)
- International

It is not surprising to notice that the majority of the disciplines rely mainly on the local market, i.e. their own immediate vicinity. It is only really the motion graphic, animation and new media designers who operate on a national level with 38% of their turnover coming from this source. The international market is

Table 12: Source of revenue

DISCIPLINE	Services	Production	Licensing	Grants
Graphic designers	55.6%	15.8%	3.4%	0.8%
Motion graphics, animation and new media designers	57.6%	21.9%	17.7%	0.0%
Industrial designers	54.1%	25.6%	3.3%	0.6%
Interior designers	51.4%	32.7%	0.8%	0.0%
Multidisciplinary designers	34.5%	38.2%	1.0%	0.5%

Table 13: Markets

DISCIPLINE	Local	National	International
Graphic designers	78.8%	15.5%	3.4%
Motion graphics, animation and new media designers	53.3%	38.0%	8.8%
Industrial designers	62.5%	19.1%	17.3%
Interior designers	65.9%	21.6%	10.0%
Multidisciplinary designers	84.0%	9.1%	6.1%

not really a source of income for most disciplines with the industrial designers showing the largest penetration of this market with 17.3% of their turnover generated internationally (See Table 13).

8.5.9. International markets

Although this aspect was not covered in the empirical part of South African baseline study, some secondary data could be sourced to provide some insight into the situation.

Looking at Figure 4 it is clear that there are industries where South Africa has a comparative advantage (Quadrant 1 and 4). This means that we are relatively better than the rest of the world in those industries and that would explain why we export more than we import in those industries. Not many design-related industries fall into these quadrants.

In most of the design-related industries South Africa has a comparative disadvantage (these may be industries where we import more than we export) such as printing and publishing. This does not mean that these industries are not profitable as we can see from Figure 5.

These industries and products are important – or we would not import them. We need to export our raw materials to pay for the products we need to import. Currently we may not be

strong in producing these products, when measured against other countries but there is definitely potential for growth and scope for design in South Africa.

This also shows that these are important industries for the country and it can be assumed that design is important for South Africa due to its relation to these industries.

Figure 4: Current account surpluses or deficits within the comparative-absolute advantage framework for South African three-digit manufacturing industries. (Current account values in billions of US\$)

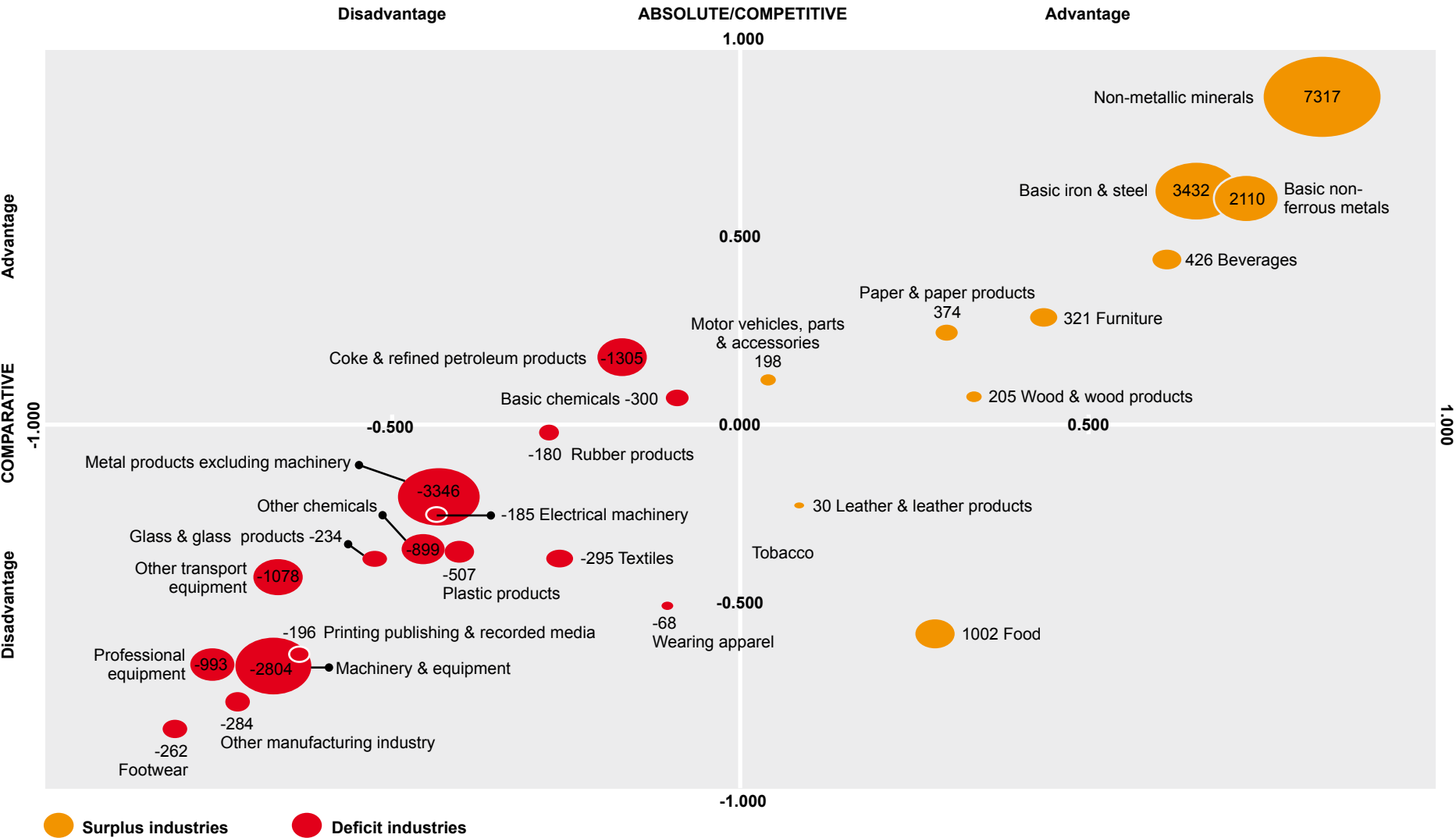
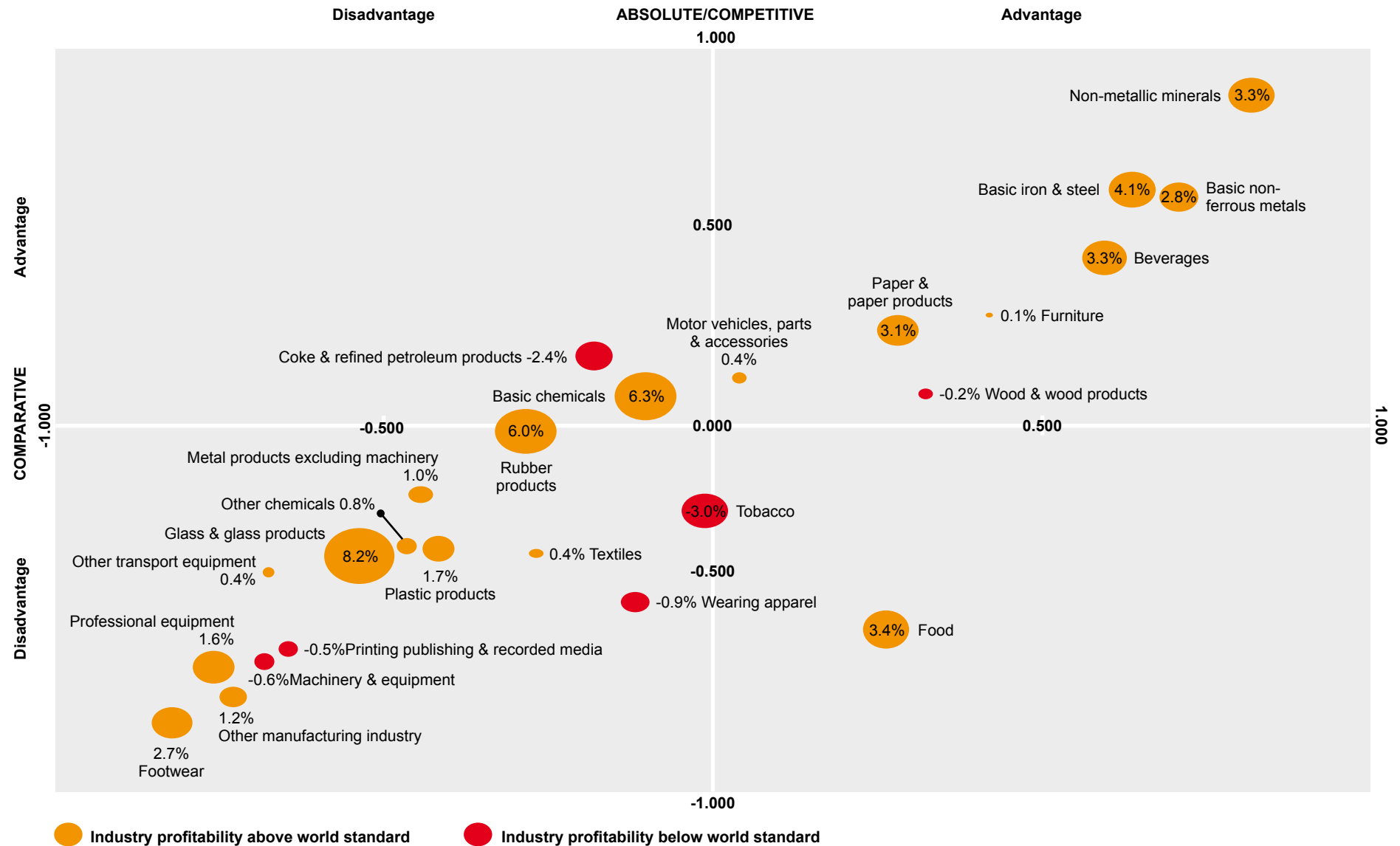


Figure 5: Industry profitability above world standard within the comparative-absolute advantage framework for South African three-digit manufacturing industries (percentage difference)



From the interview with the chairperson of IdeaSA, it was learnt that the South African government is currently involved in a tri-lateral agreement with Brazil and India. This partnership aims to share technology and development amongst the three countries. This is generally a way for developing countries to say “how can we pool and share our knowledge to be able to grow?” This may lead South Africa becoming competitive with other countries.

8.5.10. Total employment

Table 14 provides the data as per the sample. Table 15 is an extrapolation as per the population taking the margin of error into account to calculate the most likely maximum number of employees per category.

8.5.11. Designers employed

Table 16 provides the data as per the sample. Table 17 is an extrapolation as per the population taking the margin of error into account to calculate the most likely minimum number of employees, whereas Table 18 provides the same calculation with the most likely maximum number of employees per category

Table 14: Employment as per the sample

DISCIPLINE	1 to 5	6 to 10	11 to 20	More than 20	Total
Graphic designers	104	21	14	19	158
Motion graphics, animation and new media designers	17	9	3	3	32
Industrial designers	80	21	4	27	132
Interior designers	80	10	7	4	101
Multidisciplinary designers	28	2	1	6	37
TOTALS	309	63	29	59	460
PERCENTAGE	67.2%	13.7%	6.3%	12.8%	

Table 15: Employment as per the population – Maximum

DISCIPLINE	1 to 5	6 to 10	11 to 20	More than 20	Total
Graphic designers	165	33	22	30	250
Motion graphics, animation and new media designers	24	12	4	4	44
Industrial designers	123	32	6	42	203
Interior designers	127	16	11	6	160
Multidisciplinary designers	37	3	1	8	49
TOTALS	475	97	45	90	706
PERCENTAGE	67.2%	13.7%	6.4%	12.7%	

Table 16: Designers employed as per the sample

DISCIPLINE	1 to 5	6 to 10	11 to 20	More than 20	Total
Graphic designers	195	39	26	36	297
Motion graphics, animation and new media designers	33	17	6	6	62
Industrial designers	142	37	7	48	235
Interior designers	158	20	14	8	200
Multidisciplinary designers	51	4	2	11	68
TOTALS	580	118	55	108	861
PERCENTAGE	67.4%	13.7%	6.4%	12.6%	

Table 17: Designers employed as per the population – Minimum

DISCIPLINE	1 to 5	6 to 10	11 to 20	More than 20	Total
Graphic designers	136	10	6	5	157
Motion graphics, animation and new media designers	18	10	0	0	28
Industrial designers	91	12	3	8	114
Interior designers	89	8	0	0	97
Multidisciplinary designers	26	0	0	3	29
TOTALS	360	39	9	15	424
PERCENTAGE	84.9%	9.3%	2.2%	3.6%	

Table 18: Designers employed as per the population – Maximum

DISCIPLINE	1 to 5	6 to 10	11 to 20	More than 20	Total
Graphic designers	162	11	8	6	186
Motion graphics, animation and new media designers	25	14	0	0	39
Industrial designers	105	14	4	9	132
Interior designers	111	10	0	0	121
Multidisciplinary designers	37	0	0	4	40
TOTALS	439	49	11	18	517
PERCENTAGE	84.9%	9.5%	2.1%	3.5%	

Figure 6: Comparison between total employees and designers per discipline

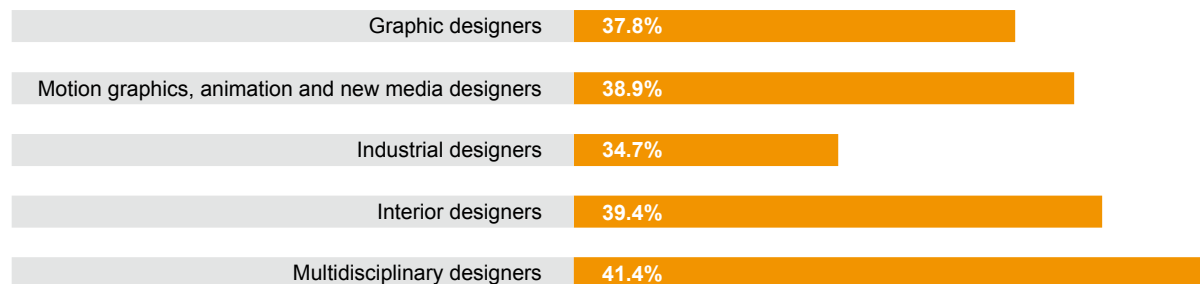


Figure 6 provides details of the designers employed as percentage of the total number of employees. It is interesting to note that the percentage of designers employed is fairly constant, irrespective of the disciplines.

8.5.12. Average annual income

In order to determine the income of designers by number of years' experience, the following question was posed: **"What is the average annual income (salary) earned by designers, by their number of years' experience?"**

The following categories of markets were provided:

- 0 to 5 years experience
- Between 5 and 9 years experience
- Between 10 and 14 years experience
- More than 15 years experience

As could be expected, a large portion of the sample refused to answer this question.

Table 19 provides a comparison between years' experience and discipline.

Table 19: Average annual income of designers by year's experience

DISCIPLINE	0 - 5 years experience	5 - 9 years experience	10 - 14 years experience	More than 15 years experience
Graphic designers	R 114 903	R 176 944	R 293 375	R 515 000
Motion graphics, animation and new media designers	R 89 920	R 110 000	R 180 000	R 174 000
Industrial designers	R 142 176	R 220 455	R 281 600	R 360 143
Interior designers	R 121 941	R 208 636	R 280 182	R 344 000
Multidisciplinary designers	R 167 775	R 232 400	R 281 333	R 600 000

Figure 7: Trend of average income by year's experience

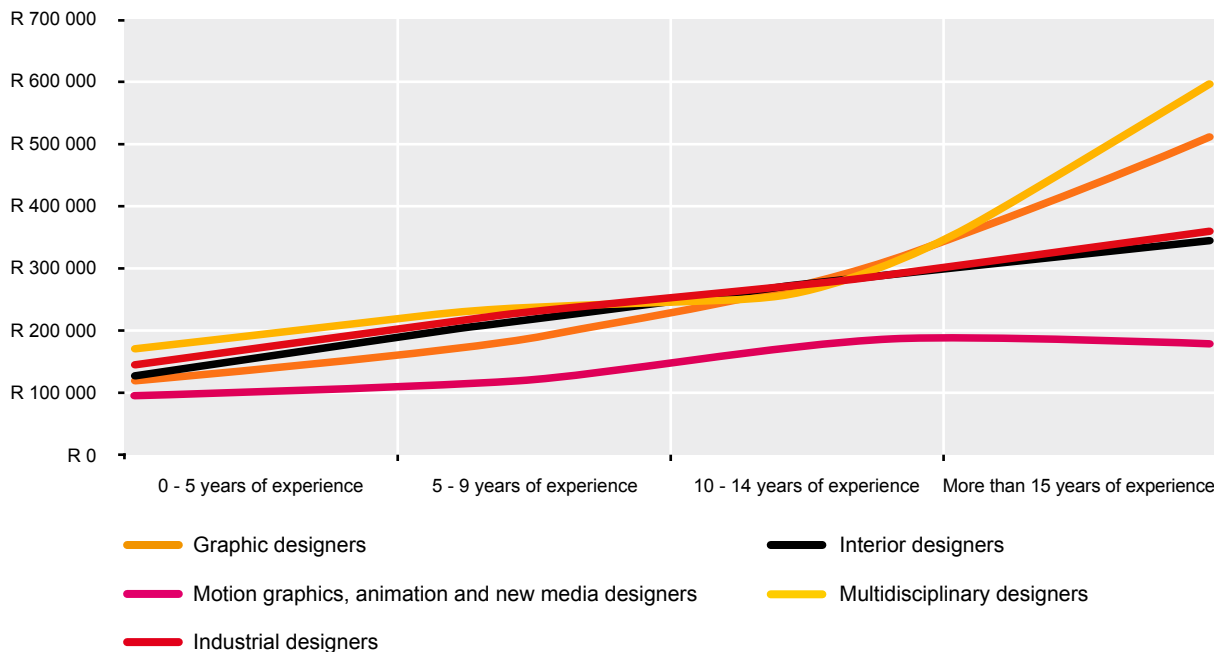


Figure 7 shows the trends per years' experience. It is interesting that all disciplines start off in a fairly narrow band but after 15 years' experience there is more discrimination between the years. The salaries of motion graphics, animation and new media designers tend to be lower than the other disciplines across all years and might be due to the fact that it is a younger discipline (supported by the downward trend in the graph), over-supply of designers (people most probably want to work in this medium) or less demand for the service.

8.5.13. Level of training

In order to determine the level of training, the following question was posed: **"How many designers in your organisation have the following qualifications?"**

The following options were provided and are again slightly different from those proposed in the international baseline questionnaire due to the uniqueness of the South African situation:

- No formal qualification (self-taught designers)
- A certificate (less than three-year qualification)
- Undergraduate (BTech and three-year BA degrees)
- Graduate (four-year BA, MTech and Hons-level degrees)
- Postgraduate (MA, DTech and Phd-level degrees)

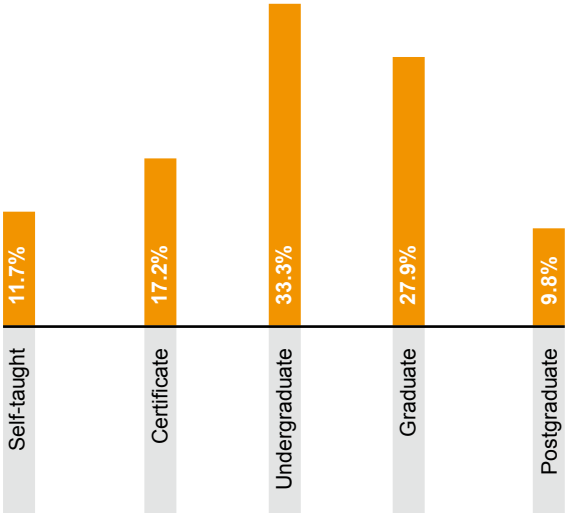
From Table 20 it is clear that the design sector favours formal training, as 88.3% of the designers are either qualified in a tertiary institution or in the process thereof. See Figure 8 for the percentage split between the qualification categories.

Table 20: Level of education of designers by discipline

DISCIPLINE	Self-taught	Certificate	Undergraduate	Graduate	Postgraduate
Graphic designers	34	59	91	39	11
Motion graphics, animation and new media designers	7	17	24	25	9
Industrial designers	30	33	58	55	28
Interior designers	24	32	103	117	34
Multidisciplinary designers	6	8	12	5	3
TOTALS	101	149	288	241	85

Note: The accuracy of this data could not be verified. The high figures provided for designers with graduate and postgraduate qualifications do not correspond with estimates from the design education community, indicating the probability that many might have qualified in other related disciplines such as engineering, architecture and fine arts, or that their highest qualification obtained were not in the design field.

Figure 8: Percentage split between levels of qualification



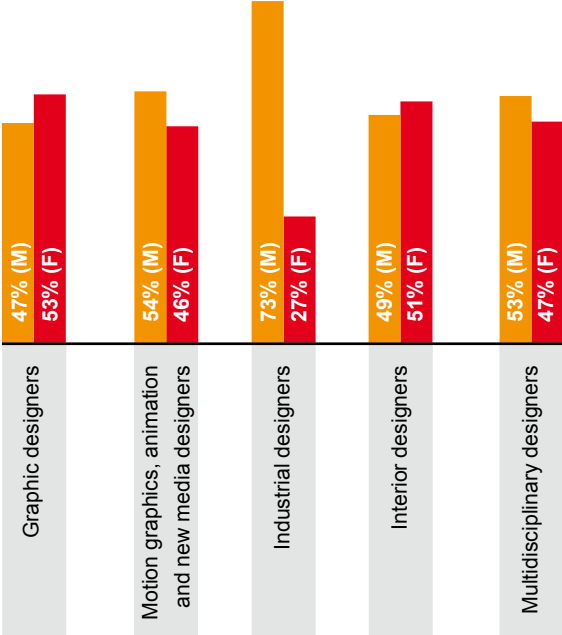
8.5.14. Gender

Table 21 and Figure 9 provides the split between male and female designers employed per discipline. Except for industrial design, the split is more or less even with females in the majority in the disciplines of interior design and communication design.

Table 21: Designers employed by gender

DISCIPLINE	MALES (Sample)	FEMALES (Sample)	MALES (Population)	FEMALES (Population)	TOTAL
Graphic designers	208	235	360	407	767
Motion graphics, animation and new media designers	51	44	85	73	157
Industrial designers	290	107	481	177	659
Interior designers	101	107	180	191	371
Multidisciplinary designers	58	52	91	82	173
TOTAL	708	545	1197	930	2127
PERCENTAGE			56.3%	43.7%	

Figure 9: Percentage split between genders



8.5.15. Job creation

This aspect was impossible to determine due to reasons cited earlier in terms of difficulty to, *inter alia*, obtain reliable statistics and the lack of a centralised coordinating body. It is therefore excluded from the report.

8.5.16. Nature of work

In order to determine the level of training, the following question was posed: “Of the designers you employ how many of them are . . .?”

The following options were provided to choose from and are again slightly different from those proposed in the international baseline questionnaire due to the uniqueness of the South African situation:

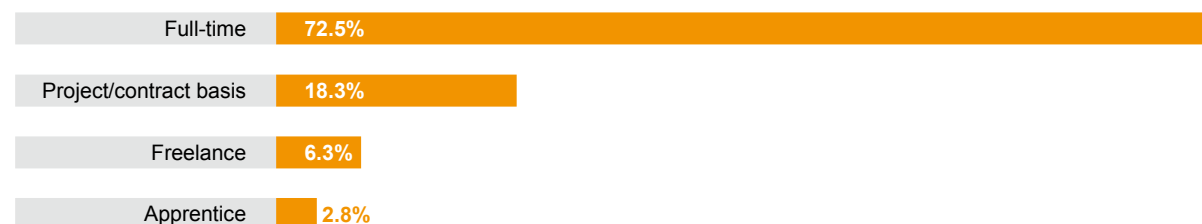
- Full-time employees
- Employed on a project/contract basis
- Freelance
- Apprenticeships (where they do practical as part of their studies)

Table 22 and Figure 10 is a report on the types of jobs currently held by designers. The majority of the positions are full-time with 72.5% of the designers occupying such positions. The lower incidence of the other types of positions should not be confused with the availability of them, as it is more in the nature of South African businesspeople to employ people on a full-time basis.

Table 22: Types of employment by designers

DISCIPLINE	Full-time	Project/ contract basis	Freelance	Apprentice	Total
Graphic designers	187	41	28	2	258
Motion graphics, animation and new media designers	60	22	2	1	85
Industrial designers	222	25	15	4	266
Interior designers	216	3	17	7	243
Multidisciplinary designers	35	91	1	14	141
TOTALS	720	182	63	28	993

Figure 10: Percentage split between types of positions



8.5.17. Intellectual property

The closest we could get to answer the question on intellectual property was through the *Innovation Survey* undertaken by the dti in 2005. This survey showed that 52% of all the so-called ‘innovating companies’...

- 2.5% applied for a patent;
- 10.6% registered a trademark;
- 4.3% registered an industrial design; and
- 4.5% claimed copyright.

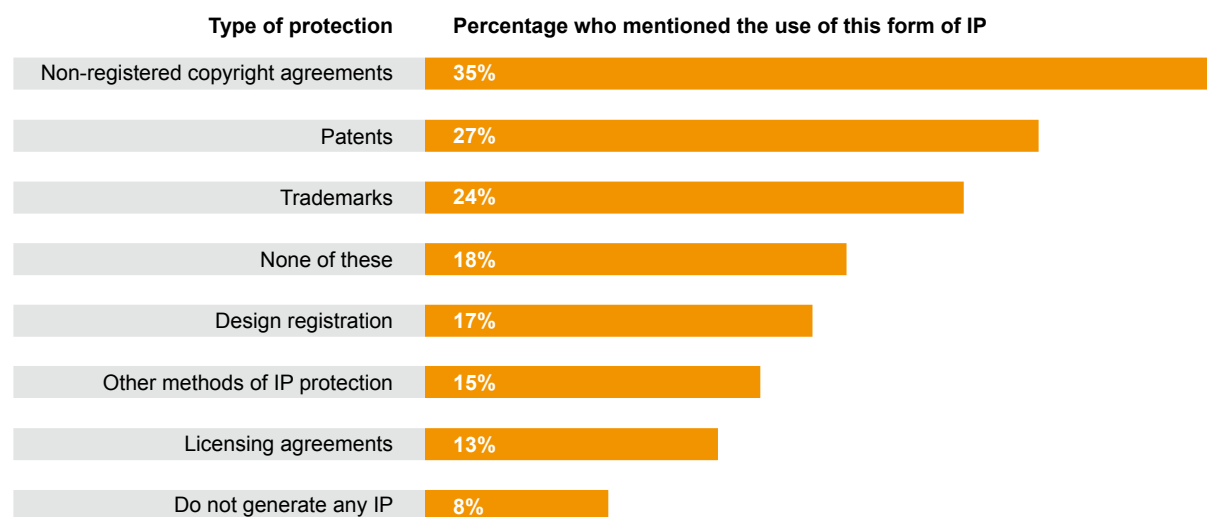
In order to shed more light on the matter, the following question was put to the respondents: “Which of the following do you use for the protection of your intellectual property?”

The following options were available to choose from:

- Trademarks
- Patents
- Design registrations

- Non-registered copyright agreements with clients
- Licensing agreements
- None of these
- Do not generate any IP
- Software encryption
- Concept design
- Clauses in proposals
- Identifying the design with a slogan

Figure 11: Percentage split between types of protection
(in descending order)



The following other methods of intellectual property protection were mentioned:

- "We put it in writing"
- Disclaimers
- Non-disclosure and confidentiality agreements
- "We have an embossing feature that only our company can do"
- "Sell our IP, IP belongs to the client"
- "To buy into the company by setting it up to royalty"
- Proprietary technologies
- Trade secrets

David Blythe, the then chairperson of think, had the following to say about this matter: *"Design management should be looked at within the curriculum. This links with Intellectual Property in that most designers do not have the knowledge when they leave educational institutions on how to protect their intellectual property. There are systems in place but the knowledge in general of these systems are lacking."*

8.6. Design education

8.6.1. Design schools

Table 24: Institutions presenting design training at tertiary level

Type of institution	Number
Number of public institutions	19
Number of private institutions	24
Total	43

Note: Some of these institutions have campuses in more than one location. The numbers mentioned above exclude multiple campuses.

Due to the comprehensiveness of the list, the complete list is attached as Appendix D: List of institutions offering design education.

Table 25: Design programmes presented at tertiary level
(by institutions mentioned in Appendix D)

Discipline	Number of programmes
Communication design (including multimedia and animation)	40
Interior design	13
Industrial design	3
Fashion design	18 (estimated)
Jewellery design	5
Surface design	3

Table 26: Design programmes presented at tertiary level by type of institution

Type	Communication	Interior	Industrial	Fashion	Jewellery	Surface	Total
Public institutions	17	6	3	12	5	3	38
Private institutions	23	7	-	6	-	-	36
Total	40	13	3	18	5	3	74

During the empirical phase some additional questions were, however, put to the education sample (11 responses) of the primary data collection to supplement the data.

8.6.1.1. “What design disciplines are taught at your institution?”

Table 27: Design disciplines taught (number of mentions – sample 11 institutions)

Discipline	Number of mentions
Graphic/communication/visual communication/information design	7
Fine arts with a specialisation in a focussed design field	4
Industrial design (including glass, ceramics, jewellery, surface and materials design)	5
Interior design and interior architecture	5
Motion graphics, animation and new media design	4
Photography	3
Design and media studies	3
Other	3

8.6.1.2. “What levels of education do you provide?”

Table 28: Level of education provided (number of mentions – sample 11 institutions)

DISCIPLINE	Number of mentions
Basic course (Less than one year or at an institution that is not accredited by the Department of Education)	2
Certificate (More than one year but less than three at a Department of Education accredited institution)	0
Diploma (Minimum three years at a Department of Education accredited institution)	2
Degree (Minimum of four years at a Department of Education accredited institution)	5
Postgraduate degree (Honours Masters and Phd studies that follow previous qualifications accredited by the Department of Education.	5

8.6.1.3. “What is the average length of your educational programmes?”

Table 29: Length of course (number of mentions – sample 11 institutions)

Length of programme	Number of mentions	Percentage of mentions
Five years and more	1	9.09%
Four years	3	27.27%
Three years	1	9.09%
Two years	1	9.09%
1 Year or less	2	18.18%
Not indicated	3	27.27%

8.6.1.4. “In your design faculty during the current year, how many staff members are employed?”

Across the 11 institutions respondents reported 173 full-time and 60 part-time employees.

8.6.1.5. “What is the total number of students that enrolled for a design-related course over the past three years?”

Table 30: Enrolment and graduation (number of mentions – sample 11 institutions)

Year	Students enrolled (all years of study)	Students graduated (only final year)
2004	2081	249
2005	2065	400
2006	2103	300
TOTAL	6 249	949

8.6.1.6. "What is the main reason for design students not finishing their studies at your institution?"

The main reasons mentioned for not finishing studies were failing and lack of funds.

8.6.1.7. "What percentage of the students currently enrolled are foreign nationals?" AND "Has this figure of foreign national enrolments in design courses at your institution increased or decreased over the past three years?"

Five of the 11 institutions in the sample had foreign national students. At three institutions the number of foreign national students has increased and in the other two they stayed the same in the past three years.

8.6.1.8. "Which regions are the main sources of the foreign students studying at your institution?"

Regions mentioned were Asia, Africa (outside of SADC), SADC, Europe, Zimbabwe, Taiwan, South Korea and Botswana.

8.6.1.9. "What are the main reasons for foreign students selecting your institution for design studies?"

- "Parents want their children to receive quality education"
- "Our institution has developed relationships with government departments"
- "They don't have anywhere else to go"
- "The good educational standards"
- "International recognition of the degree"
- "Good facilities/teachers"
- "We are able to win competitions and are one of two Gauteng institutions offering BA Design Studies as a programme"

8.6.1.10. "Do you believe that students come out of Grade 12 equipped with the right education to contribute to and help them in their design studies at higher institutions?"

- "Yes – Because they have to go through a screening process"
- "Yes – They are well educated in engineering design to produce the best"
- "No – There is not enough design stimulation at schools"
- "No – I don't believe they have the right skills. There is a big gap in basic communication skills. They don't know yet how to interpret complex texts and content to form sensible ideas. We therefore have to do a basic communication course with them first"
- "No – I don't think they are equipped for anything. There is a decrease in language and writing capability. They can copy and paste and use the Internet but can't spell and don't know the English language well enough." I gave my whole class reading tests because 40 of the 60 students failed their first test. Students are becoming less skilled with language.
- "No – The majority of students have very little design experience and very few have any drawing experience at all"
- "No – They don't study art at school"

A comment received during an in-depth interview supports the above "There is very little emphasis currently placed on design at a secondary school level."

8.7. Open questions

8.7.1. Trends and issues affecting the design sector and a prognosis for the next five years

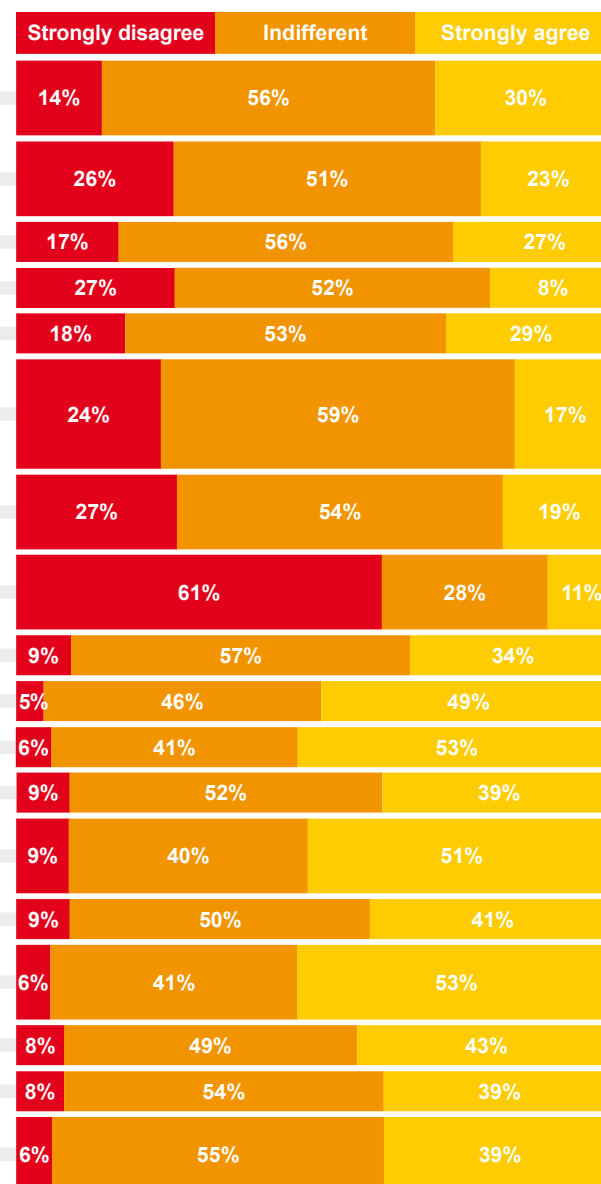
In an attempt to address this issue the respondents were required to provide an evaluation on certain attributes. Respondents were required to evaluate each attribute on a scale from 0 to 10 where 0 = "strongly disagree" and 10 = "strongly agree".

Table 31 provides the index score per each statement and Figure 12 indicates the distribution of scores.

Table 31: Index score per statement

Statement	Index Score
Shareholders and designers in our organisation have a sound knowledge and good understanding of South African Intellectual Property legislation	59.4
Our organisation believes that Intellectual Property protection in SA is sufficient to protect our rights and we don't need to implement other measures to protect our rights	50.8
Local designers in our design sector are ignorant of available Intellectual Property protection	55.6
Local designers in our sector of design do not feel that it is important to protect their Intellectual Property	48.5
Our clients are oblivious to the available Intellectual Property protection	56.4
Design students studying at accredited governmental institutions in South Africa (universities and universities of technology) get the correct training and practical experience to equip them sufficiently when they enter the job market	52.1
Design students studying at accredited private colleges in South Africa get the correct training and practical experience to equip them sufficiently when they enter the job market	54.6
Design students studying at non-accredited private institutions in South Africa get the correct training and practical experience to equip them sufficiently when they enter the job market	42.1
Design in my sector of practice is a profitable in South Africa	61.8
The overall quality of professional design services in South Africa in my organisations sector is of a high standard	71.0
The standard of South Africa's best design practitioners in my sector compare well with that of global best practice	73.0
Design in my sector of practice contributes towards improving the general level of education of South Africans	65.2
The professional practice levels of my design sector in South Africa is fully equipped and strong enough to contribute substantially to the success of the 2010 FIFA World Cup	71.0
People's lives in South Africa are culturally enriched by my professional design sector in South Africa	66.8
Design at its highest level in my professional design sector in South Africa contributes positively to the rest of the world's perception of South Africa	73.2
Design is marginalised in the world of business in South Africa	68.3
Businesses in South Africa are positively influenced by South African design service providers	66.0
The South African design sector in my professional sector positively contributes to making the lives of South Africans more comfortable and increases the general population's quality of life.	67.4
Sample	232

Figure 12: Distribution of scores per statement



It is clear from the above that the respondents view the following four aspects as being the most positive with regard to the design sector in South Africa (index score of higher than 70):

- The positive contribution South African design makes to the image of South Africa internationally – Index score of 73.2
- The international stature and standing of South African designers – Index score of 73.0
- The designers' ability to contribute to the success of an international event such as the 2010 FIFA World Cup and the standard of design in South Africa – Index score of 71.0 for both.

On the negative side the respondents viewed the following as the biggest shortcomings (and thus challenges):

- Effectiveness of non-accredited private design education – Index score of 42.1
- The importance of individuals to protect their intellectual property – Index score of 48.5
- Effectiveness of statutory protection of intellectual property – Index score of 50.8
- Effectiveness of government design education – Index score of 52.1
- Effectiveness of accredited private design education – Index score of 54.6.

Looking at this data, one gets the feeling that the level of design and designers currently working in South Africa is healthy but there are some serious concerns about the future – especially with regard to the educational output and the lack of concern for intellectual property rights. This might be a serious oversight given the comments of David Blythe regarding this aspect:

"For this country to be successful it needs to be a knowledge economy that uses intellectual property industries to be able to incrementally develop the economic wealth of the country through knowledge and one of those practice areas is design."

When looking at the percentage of respondents giving a score of either a 0, 1 or 2 (those strongly disagreeing with the statement, i.e. a strong negative score) and those giving a 8, 9 or 10 (i.e. a strong positive score) one gets a feeling of indifference as between 40% and 59% of the respondents scored in the range between 3 and 7 across all but one statement (the one about the effectiveness of non-accredited private design education) that had an indifference score of 28%. In this instance 61% disagreed that they were effective and only 11% felt that they were effective (See Figure 12 on the previous page.)

Respondents were also asked what they believed to be the largest stumbling blocks in the design industry of South Africa.

Some of the responses that were given were:

- "Proper manufacturers to be willing to get involved in projects"
- Perceptions that industrial designers are expensive
- Lack of understanding of the value of design and branding
- Education
- General assistance from government
- Government rules, the statistics, laws and processes
- "Educating my clients on my process so that they understand the work involved in what they are asking from us"
- "Local clients do not respect professional fees unlike international clients"

- Getting skilled people for the job
- Increase of raw material prices in South Africa
- No legislation for the industry
- Project finance
- Designs get copied even if patented.

The responses were categorised as per Table 32.

Table 32: Categories of stumbling blocks mentioned

Category	Percentage mentions
Financial challenges	46.67%
Lack of awareness and recognition for the design industry	45.00%
Lack of government support for the industry	33.33%
Lack of support in terms of resources	30.00%
Competition in the industry and competing with large companies	28.33%
Promotion/marketing	25.00%
BBBEE	13.33%
Lack of development and growth	10.00%
Public does not want to pay what the designs are worth	10.00%
No policy on design in South Africa	6.67%
Intellectual property protection	5.00%
Employment challenges	3.33%
Technological challenges	1.67%
Beaurocracy and red tape	1.67%
Do more research in the design sector	1.67%

8.7.2. Profile of designers who have gained national or international recognition

A list of names mentioned during the telephonic interviews were copied but the results were not backed up by desk research.

8.7.3. Profile of design businesses who have gained national or international recognition

A list of names mentioned during the telephonic interviews were copied but the results were not backed up by desk research.

8.7.4. Profile of brands or design-led businesses that have gained national or international recognition

A list of names mentioned during the telephonic interviews were copied but the results were not backed up by desk research.

8.7.5. The extent to which design activity forms part of the country's informal economy (AND the contribution of design to the socio-cultural development in South Africa)

No data or research findings could be found regarding the extent to which design activity forms part of the country's informal

economy or its contribution to the socio-cultural development in South Africa. However, extracts from reports published on craft and the creative industries provided the following insight into the matter.

8.7.5.1. Arts and Crafts in South Africa (The Craft Draft Report and Arts and Culture policy review)

Arts and crafts are currently the most represented design sector in South Africa. Craft refers to "the creation and production of a broad range of utilitarian and decorative items produced on a small scale by hand processes being a significant part of the value-added content" *ACTAG Report 1994*.

This would include:

- Home furnishing
- Jewellery, fashion and fashion accessories
- Novelties and gifts including corporate gifts
- Garden and outdoor
- Curios/souvenirs
- Collectibles: One of a kind, high value individually made objects
- Indigenous artefacts: Culturally derived objects

According to the report it is calculated that the South African craft sector contributes approximately R2 billion to GDP (0.14%). Income and employment is contributed to approximately 38 062 people through the economic activity of the sector. Statistics show that there are 7 028 micro and small enterprises operating across the value chain.

South Africa contributes just less than 1% of the global trade in craft said to be US\$35 billion. Over the past five years the sector

has shown an average growth of 8%, which is attributed to growth in tourism and the impact of interventions in the sector.

Some weaknesses that were identified in the craft sub-sector from the craft report. Those that relate to this study were a lack of linkages between government and private sector initiatives, lack of infrastructure and a lack of market information. For artists, income is highly irregular. Many artists depend on grant funding from various agencies to cover their costs while working towards an exhibition or a major opportunity to sell their work.¹

¹ Trade and Investment South Africa, *CSP Craft*, May 2005, p.3.

According to Appendix A of the CIGS report, the provincial departments of Arts and Culture in Mpumalanga estimated 400 crafters active in that province and that there were an estimated 8 000 crafters and 50 craft retailers in the Eastern Cape; Buy-Africa on-line had 400 registered craft enterprises and the Craft Action Body had a database of 5 000 crafters (both the latter are operating nationally).

As was experienced in this report, collecting data in such a diverse and largely informal industry is challenging. Accessing information from the usual data sources such as StatsSA and SARS is complicated. "StatsSA does not disaggregate the hand-craft sector in official sector statistics for employment and revenue. Many craft enterprises are not registered as taxpayers with SARS due to their small size. In addition very few of the enterprises are required to register with the SETA as they fall under the threshold. Customs and Excise export statistics, which are aligned with the Harmonised Standards (HS) coding system,

do not record handcrafted items separately from manufacturing items in almost all products. Lack of coordination in this sector, as well as agreed-upon definitions and baseline indicators have also hampered the central gathering of data.”²

2 Trade and Investment South Africa, *CSP Craft*, May 2005, p.5.

Some of the prominent strengths and opportunities (competitive indicators) in the crafts sub-sector in South Africa are (amongst many stated in the Craft Draft Report):

- The available resources for craft
- The relatively low barrier to entry
- There is a relatively diverse technical skills base in the country
- There is a strong, growing and increasingly sophisticated domestic market
- A strong and diverse retail infrastructure, with some supportive retailers as well as home-based production providing strength to the sector
- Proximity to export infrastructure and flexible production capacity also strengthens the financial viability of the arts and crafts sector to the economy
- Numerous craft producers run on commercial/entrepreneurial principles
- Established experience and knowledge contribute to a strong market, as well as established institutional support mechanisms
- Sustainable livelihoods can be made out of relatively low skills base and minimal capital input
- The current consumer demand for handcrafted, unique, African-inspired products provides opportunity
- Corporate and government procurement demand – e.g.

boutique hotels, new residential developments, boardroom furniture and accessories

- There is scope for increased linkages and collaboration with related sectors, as well as increasing emphasis on design
- There are numerous event-based marketing opportunities and opportunities in the local and international tourism markets
- Developing Proudly South African consumer awareness and purchasing
- Development of coherent policy framework and objectives and African collaboration.

Some of the weaknesses and threats (competitive indicators) in the crafts sub-sector in South Africa are (amongst many stated in the Craft Draft Report) (Although stated with a reference to craft, many of these competitive indicators link closely with challenges faced in the South African design sector as a whole.):

- Inadequate reliable baseline information on the sector
- Inadequate linkages with wider design skills
- Lack of innovation and product development
- Lack of linkages between government and private sector initiatives, exploitation and suspicion
- Lack of infrastructure
- Tendency to be supply- rather than demand-driven in production and interventions
- Lack of reliability in delivering on quality/brief/budget/time
- Inadequate access to raw materials and enterprise finance
- Lack of market information
- Lack of young people interested in craft
- There are limited business skills and market knowledge,

i.e. lack of interest by many craft producers in the business aspects of craft (perceived as being disruptive to the creation process) leading to poor market access, inefficient production methods, inconsistent quality and poor access to finance

- Lack of understanding of the value chain and creation of value-add
- The individualistic mindsets of many crafters, inhibiting co-operation and a creation of sustained negative perceptions because of orders that are not met and unreliable service can cause a threat to the craft sector
- There are potential high failure rates and rapid migration in and out of the sector
- The lack of an integrated approach to implementation of strategies and projects and developmental funding and grants that tend to create “false economics”
- South African arts and crafts cannot compete in export markets with other developing countries on volume, mass production and cost so there is replacement of handcraft by industrialisation and copying. This is also as a result of weak intellectual property protection and extensive copying by competitors, in particular for collective IP
- The role of intermediaries is highly contested due to unequal balance of power and reluctance to share margins
- There is also some historical racial polarisation where white individuals served as intermediaries for black producers.

Craft retail takes place through a variety of outlets:

- Direct selling
- Craft, art and flea markets
- Festivals
- Small retailers/boutiques (generally on consignment)

- Wholesaling (importers/exporters/agents)
- National retailers
- Galleries and museum shops
- E-commerce
- Street vendors.

Predictions for growth

The number of production enterprises over the past five years has increased by an estimated 31% and 48%,³ with an average of 40%. This is an average growth of 8% per year. This is double the national average for economy growth.⁴ This growth can largely be attributed to growth in tourist numbers, which grew by 82% over the past 10 years, and the impact of interventions on the sector.

3 Of the 1 059 enterprises surveyed across various creative industries in CreateSA's National Skills and Resources Audit, November 2003, 45% of respondents were less than 10 years old and of these, 31% of enterprises were started after 2000; 48% of enterprises on CCDI database were established in last 5 years.

4 StatsSA Press Release, 31 May 2005.

Tourism

Shopping is the dominant tourist activity in the Western Cape – 89% of tourists went shopping, while only 38% visited a cultural, historical or heritage site. The V&A Waterfront was visited by 90% of visitors to the Western Cape (followed by Table Mountain (71%), the wine route (60%), the garden route (44%), and smaller percentages visiting Kirstenbosch, Robben Island, ostrich farms, townships, Cape Point and the Cango caves).

A large proportion of craft retail is linked to tourism retail, which means that the craft industry is similarly affected by seasonal

demand. Heritage sites create additional (small-scale) opportunities to link crafts with tourism. The importance of the shopping experience to foreign tourists in the province implies that appropriate alignment of craft production and retail experiences could enhance the tourism perception of the province and potentially even draw additional visitors.

The relatively small, but significant, numbers of the creative industries in South Africa who report export activity is an indication of both the small and micro enterprise base of the sector, and also its largely survivalist nature. It is encouraging to note that the majority of enterprises (23%) that export, report that they have been doing so for over three years.⁵

5 Create SA National Skills & Resources Audit 2003

The main driver of the arts and craft sector development has been the DAC. The dti's role in this process has increased over the past three years as it recognised the potential of the sector and increased its capacity to deal with it. There are numerous other government departments – at local, provincial and national level – as well as many parastatals and non-governmental organisations that are stakeholders in the industry. Increasingly, the private sector is recognising the sector for its business and social investment and social responsibility returns. At a dti workshop in 2003 participants identified in excess of 35 role players in the sector, which included no less than 10 national government departments. This possibly provides a clue to why there is disparity in the sector.

Information obtained from government during in-depth interviews was that government view the creative industries (as they

refer to design related industries) as a priority that is still underestimated in terms of its importance in the modern world.

Although government is of the opinion that 67% of the organisations in the South African creative industries sector are largely self-sustaining, government and international grant funding does play an important role in developing the sector. The low levels of local and foreign investment reflect the difficulties that the sector has in accessing loan finance and government incentives such as SME development packages and investment promotion. During 2005 the DAC spent R490 million on heritage institutions, which accounted for almost 67% of their budget. This expresses the department's mandate as the "custodian of the nation's collective memory". During the 2006/7 financial year, the department earmarked to spend close to R70 million on language programmes and on activities to promote linguistic diversity in South Africa. This includes the financial resources allocated to the work of the Pan South African Language Board (PanSALB) at R39.09 million.

R1 billion has been set aside for the development of libraries over the next three years and a Library Transformation Charter is being developed. R635.22 million has been voted for heritage for the 2006/7 budget.

Arts and culture in peri-urban and rural areas have transformed the lives of many and contributed directly to the fight against poverty. By March 2006 the DAC had created 1 612 new jobs. The overwhelming majority of the beneficiaries (68%) were women; 8.2% were disabled. More than 100 learners have been enrolled in learnerships and skills development programmes directly linked to the arts and culture.

The following amounts are allocated for job creation in these sectors:

- Crafts R10 million
- Music R5 million
- Film incubators R9 million
- Archival conservation R9 million
- Community arts centres R1.5 million
- Heritage R8 million
- Arts education R5 million
- Design and fashion R5 million
- Visual arts R4 million
- Overall, an allocation of R91 million to investing in arts and culture.⁶

6 Minister's Speech for Budget Vote, 2 June 2006.

Current policy intervention in the crafts sector appears to be focused on information sharing, facilitation, projects and grant funding. A comprehensive breakdown of the interventions was set out in the Western Cape MEDS, craft sector intervention recommendations in May 2005.

There is no data on the general sizes of creative industry enterprises or of the kinds of people that they employ. However, national research provides some general indicators. Of the 4 723 levy-paying organisations in the MAPPP SETA, that includes the creative industries, 4 455 (94%) employ less than 50 people.⁷

7 *Baseline Study on SETA Activities in the Western Cape, First Report September 2004* commissioned by the Department of Economic Development and Tourism.

The majority of employees in the creative industries are employed on a full time basis (38%), however, part-time (34%) and contract (18%) work is a significant feature of the labour market, especially in relation to the front-of-house/customer care and production categories. Women (28%) tend to find more contract and part-time employment than men, and also enjoy the majority of full time employment opportunities (32%).

Many of the enterprises are active across a range of sectors, and this pertains to the survivalist nature of the sector. The Arts, Craft, Heritage and Design cluster comprises the visual arts, heritage, fashion, craft and design sub-sectors, and the Entertainment cluster comprises music, film, performing arts and technical services sub-sectors. Enterprises working across both clusters tend to be developmental and not-for-profit, i.e. those oriented towards education and training, self-improvement and job creation.⁸

8 National Skills and Resources Audit: Final Report November 2003.

Employment in the crafts sub-sector is more difficult to determine than in many other sectors. This is related to the informal nature of much of the sector, the high proportion of temporary employment and the low level of organisation and unionisation. Significant skills and creativity are required to succeed in this sector, along with extensive business and marketing skills to sustain an enterprise. Not all individuals are capable of developing the creative ability, manual dexterity and entrepreneurial skills needed. It is rare to find the skills or competencies required to run a successful small business in this sector in one person – and crafters need to either buy those skills into their business (and therefore price their products accordingly) or enter in partnerships with people who will provide some of these services for them, e.g. agents/exporters.

The educational profile of the sector is encouragingly high, with the majority of people in the sector (39%) having completed higher education. This links with the results of this study where the majority of the designers have completed higher education.

8.7.5.2. A qualitative and quantitative analysis of the creative industry of South Africa – arts and crafts (DAC)

In 2004 the South African government, through its Executive Committee or Cabinet decided that all national policies and legislation promulgated and implemented during the period of democracy and freedom had to be reviewed. The decision to review the White Paper on Arts, Culture and Heritage 1996 was taken in April 2005 by a national inter-governmental forum of arts and culture consisting of the minister, deputy minister, and all provincial government departments of Arts and Culture's Members of the Executive Committees (MECs). The inter-governmental forum, referred to as the Arts and Culture MINMEC, was formalised by the Intergovernmental Relations Framework Act, 2005 which empowers Cabinet members to establish national inter-governmental forums to promote and facilitate inter-governmental relations in functional areas for which they are responsible. The Arts and Culture MINMEC acknowledged that the White Paper on Arts, Culture and Heritage, 1996 had to be revisited as there has been, ever since its adoption in 1996, no systematic review of it, including legislation and other equivalent policies of arts, culture and heritage.

The decision to review the White Paper, 1996 encompasses alignment of policies and legislation; identification and resolving of overlapping mandates; providing clear institutional mandates; improving institutional efficiencies and accelerating a process

of transformation of the arts, culture and heritage sector. A policy review process of the current legal framework on arts, culture and heritage⁹ thus gives policy makers, decision makers and cultural actors a direct opportunity to reconsider the broad thrusts of governmental involvement in a particular sector. In other words, it facilitates an understanding of the sum total of the policy initiatives already in place, their relevance, effectiveness and efficiency, as well as the implications of the ways in which decision makers operate.

9 See C. Roodt "A critical look at the legal framework for arts, culture and heritage" vol 47 no 1 2006 *Codicillus* 47.

While the policy review is about broad issues, it cannot afford to gloss over the legislative detail that indicates to what extent the legislative framework is adequate or gives rise to dysfunctional behaviour in practice. The legislative framework is measured against the policy/policies that currently informs action in the area of culture, namely, the White Paper on Arts, Culture and Heritage, 1996, which continues to serve as the national blueprint and definitive guide to policy formulation and implementation until its replacement.

Both the rule occupants and the rules they face are significant in an evaluation of the current legislative framework. A role occupant denotes the class of persons whom a rule addresses, for instance, it may refer to every member of society ("thou shalt not steal"), a defined class of non-officials ("no director shall use insider knowledge to trade") or government officials ("rules for distribution of arts grants must be fair").¹⁰ While the ideals contained in the White Paper are important, it is even more necessary to evaluate whether the laws under consideration

address the realisation of legislative objectives and the goals of reconstruction and development, to which ample reference is made in the White Paper. The guidelines in the form of criteria and procedures need to be clear, otherwise role occupants are likely to exhibit serious dysfunctional behaviours that will delay progress and obstruct institutional and substantive change directed at solving social problems.

10 Seidman & Seidman "Drafting legislation for development: Lessons from a Chinese Project" 1996 (44) *American Journal of Comparative Law* 1, 12 n 58.

A theory of policy formulation with any hope of achieving its aims must comprehend and incorporate the role of the state and law. All laws prescribe repetitive patterns of behaviour on the part of state officials who formulate and implement rules of law. These behaviours constitute the exercise of state power within public institutions. Law must ideally provide relevant planning criteria and procedures in order to guide and shape the patterns of institutions' behaviour. If the (symbiotic) roles of institutions and the legal order are not properly understood, policy will be inoperable; laws will be inadequate, and implementation tasks will not be able to overcome the obstacles standing in the way of development.

To translate policy into law, theory should focus on the causes of repetitive patterns of social behaviour (i.e. institutions) that delay transformation and aggravate poverty.¹¹ Even if a particular policy is sound, backed by effective law of valuable substance, and sufficient goodwill is present for implementation, the quality of a rule is affected also by the likelihood of its effective administration. Because legal frameworks are merely frameworks

for administering policy controls with the capacity to influence patterns of social behaviour, it is not only the technical skill and know-how of legal drafters that are important. In a society in transition, political decisions and law-making form two sides of a single complex, interrelated process.¹² Ignorance concerning the ability of laws to effect appropriate institutional change is not helpful and must be countered.

11 Seidman & Seidman *State and Law in the Development Process: Problem-solving and Institutional Change in the Third World* (1994) 353.

12 Seidman & Seidman (n 4) (1994) 42-43.



9.1. Lead researcher

The South African contribution to the International Design Alliance (IDA) World Design Survey Pilot was a collaborative effort between five of South Africa's most prominent organisations engaged in design promotion and profession management – the SABS Design Institute (DI), Design Education Forum of Southern Africa (DEFSA), Industrial Design Association of South Africa (IdeaSA), Institute of Interior Design Professions (IID), and the South African Communication Design Council (think).

To reach the overall objectives of the study, namely to develop an understanding of the national design economy; design's strengths and contributions to the national economy; and design's socio-cultural contribution to development, a two-tiered approach to data collection was used. Telephonic and in-depth interviews were used to gather descriptive (primary research) data using a somewhat altered baseline questionnaire. Data gathered in this way was enriched with secondary data gathered during an exploratory (secondary research) phase.

Disciplines included in the study were limited to communication design; motion graphics, animation and new media design; industrial design (including glass and ceramics); interior design; and multidisciplinary design (i.e. eventing and architects working as furniture designers).

Some of the challenges and shortcomings which were encountered during the process included:

- Excluding the disciplines of architecture, fashion design, jewellery design, landscape architecture, textile design and urban planning design might have been an oversight as

some of these sectors are prominent in South Africa and play an important role particularly on the economic and labour fronts of design in South Africa.

- The South African focus on crafts and indigenous design, to a lesser degree, implied that this again might have skewed the report by excluding them from the study.
- The lack of availability of respondents due to work pressure – this was especially prevalent in the government sector but occurred throughout all the sectors.
- Respondents' unwillingness to participate.
- The availability of secondary data.
- A general lack of a clear understanding of and knowledge about the design sector among all its stakeholders.
- A lack of structure and organisation within the sector. There is no single definition or classification system.

With regard to the design sector profile the following points are deemed important:

- The private sector generally speaks of design whereas the public sector refers to innovation in all official communication and programmes. Although it is a known fact that design by default implies innovation, it is not necessarily true that innovation involves design. This further complicated the ability to generate data and/or intelligence about, especially, the involvement and focus of government on design.
- Although some of the promotional programmes to stimulate research and development and eventually innovation do utilise some or other evaluation criteria to assess worthy causes no evidence of a defined innovation/creativity index from the side of government (Statistics South Africa or the Department of Trade and Industry (dti)) could be found that applied throughout the industry.
- Research activities and the generation of design sector-

related statistics are few and far between and only occur on an *ad hoc* basis. Normal economic activities are monitored through StatsSA but due to the fact that no design specific Standard Industrial Classification (SIC) code is allocated to design, design statistics from this source were, at best, nothing more than guesswork as it were hidden in the broader economic activities of organisations operating in these sectors.

- There are numerous professional organisations, organisations involved in the promotion of design, quite a number of design-related events and design-orientated media discussed in the report.

The annual revenue (average) of the disciplines included amounted to R 672 250 with the majority of institutions operating in the micro (one to five employees) to small (five to 20 employees) organisational types. It is encouraging to note that the majority of the respondents reported either an increase in their turnover or a turnover that remained static. The majority of the organisations surveyed opted for a formal business structure that implies some statutory requirements, such as Closed Corporations and Private Companies. There was a clear indication of stability in the sector with more than 79% of the respondents having been in business for five or more years and 22,9% being in business for 20 years or longer.

It was obvious that design is still predominantly a male-dominated sector of the economy (as far as ownership is concerned). It was only in the discipline of interior design where female ownership marginally exceeded that of male ownership. Except for multidisciplinary designers who generated more income through production management, the biggest source of income for the other disciplines was derived from professional services and this

income was mainly generated locally (within their immediate vicinity). It was also found that the design sector favoured formal training as the designers employed either qualified at a tertiary institution or were in the process of obtaining their qualifications.

The following four aspects were found to be the most positive with regard to the design sector in South Africa:

- The positive contribution of South African design to the image of South Africa internationally.
- The international stature and standing of South African designers.
- The designers' ability to contribute to the success of an international event such as the 2010 FIFA World Cup.
- The standard of design in South Africa.

On the negative side the respondents viewed the following as the biggest shortcomings (and challenges):

- Effectiveness of non-accredited private design education.
- The importance of individuals to protect their intellectual property.
- Effectiveness of statutory protection of intellectual property.
- Effectiveness of government design education.
- Effectiveness of accredited private design education.

In general the research indicated that the current level of design and designers in South Africa is healthy but there are some serious concerns about the future – especially in terms of educational output, the lack of concern for intellectual property rights, the lack of coordination and the absence of a 'champion' from the side of government.

Pieter van Heerden
Consulta Research

9.2. Project lead – SABS Design Institute

Over the past couple of years the Design Institute and other bodies initiated several well documented attempts to research the impact of the design sector and its value to the South African economy. Attempts were also made to track the opportunities and prerequisites for South Africa becoming a global design player. Various factors obstructed the outcome and the follow-through of these attempts. The IDA's WDS project presented the ideal opportunity to be part of a global project to develop international benchmarks and to form a continuing structure to update and improve data. This project's international partnership with various UN agencies elevated its status, making it possible to motivate the importance of South African and, consequently, Africa participation.

From a South African perspective many issues that were intuitively felt have been verified by the outcomes of the survey. These include:

- The design professions are often accused of fragmentation and not speaking with one voice. It is clear that government similarly lacks cohesion and continuity when it comes to design.
- There is no cross-departmental government body responsible for a holistic overview of design – integrating the different departments' design-related initiatives and involvements. This often leads to duplication and places unnecessary demands on limited human resources.
- Respondents are aware of government programmes but there is a lack of information on the *status quo* of these programmes.

- The results confirm many unanswered questions: No consistent operational definitions of design exist, resulting in confusion about design, the different design sectors and the difference between design, innovation, and research and development. In particular, there is confusion between product design and crafts.
- On the positive side there is clearly huge scope and willingness for design input for socio-economic development in South Africa.
- Despite considerable efforts to strengthen the chain of education and training from primary school to tertiary level, there is still a need to nurture design skills.

From an international perspective the survey's global reach brought many similarities to light. A few important insights are:

- There is an overall lack of reliable data available and a need exists to establish a reliable information infrastructure. In countries where design is well established there is, however, access to reliable information.
- The initial goals in terms of content and timelines were very ambitious and had to be cut back. New goals had to be formulated as the project progressed.
- It is valuable to learn from countries where design has been well established on how they have overcome problems. It is important to compare efforts, strengths and weaknesses with other world players in order to better determine one's own competitive edge.
- Involvement in the survey highlighted the fact that South Africa is inextricably linked to the global design economy and it also emphasised the importance to retain an own identity. This resonates with one of the findings of an OECD *OECD Reviews of Innovation Policy: South Africa* (2007):

"The need to increase the international openness of national innovation systems is well recognised by OECD countries. It is likely to become a matter of much greater significance for South Africa over the next decade. One aspect involves the major shifts that are occurring via the global mobility of skilled people. Increasing numbers of advanced countries, facing growing shortages of the skills they need to sustain their economic development, are implementing stronger measures to attract skills from the global talent pool."

- The survey emphasised the role and responsibility of South Africa as an economic leader and mentor on the African continent.
- The survey results also pointed to the large number of African students studying design at South African tertiary institutions, paving the way towards moulding design thinking and making Africa a leading design continent. On the issue of mentorship, it was decided from the onset of the project that what was done in South Africa should later be rolled out to other African countries.

South Africa's participation in the WDS was due to cooperation between the Design Institute and four professional design associations representing design education, industrial, communication and interior design: DEFSA, IdeaSA, think and IID. The eventual task of compiling the survey was considerably larger than originally anticipated. It was clear that the information was ground-breaking and timely and that the end result should be in a format that would facilitate the quantification of the impact of the design industries on the South African economy. The WDS clearly points towards the huge potential of nurturing South African creativity and design ingenuity.

The Design Institute is indebted to the design associations for their valuable input. Special mention should be made of the huge contribution of Jacques Lange. During his tenure as chairperson of IDA in 2005/7 he was instrumental in formulating this visionary international survey and he was to a large extent responsible for the monumental task of formatting the South African results into a final report. Esme Kruger, who acted as the WDS project leader on behalf of the Design Institute and who was also responsible for the difficult and time-consuming task of verifying information, also deserves special recognition. The survey came about through the financial backing of the South African Bureau of Standards. A word of thanks goes to the SABS Executive for their continued support for South African Design since 1969.

Adrienne Viljoen

Manager SABS Design Institute

Icsid Regional Advisor

9.3. Project partner – Design Education Forum of Southern Africa (DEFSA)

9.3.1. General comments

This project undertook the mammoth task of collating information that maps the characteristics of the South African design sector. The pioneer work that is done through this study will hopefully present the groundwork for further research which could include all design disciplines in South Africa. The outcome could be of enormous value to the disciplines from both the design sectors and tertiary education that formed part of this study. Although the report identified areas of challenges

for tertiary education, which are discussed further on in this report, it also provides strengths and opportunities which could be further enhanced and developed.

While it is acknowledged that this report is intended to represent a baseline survey and that further research will be undertaken in the future, we feel that it is important to stress that a more in-depth study of design education needs to be undertaken to ascertain the following:

- Types of design education institutions (public/private) and their relative status in respect of the following:
 - Structures of undergraduate and graduate programmes
 - Relevance of curricula
 - Industry linkages
 - Access and equity (race, gender, disability)
 - Cost of higher education programmes
 - Links with technology and science programmes
 - Core competencies required of school learners entering design programmes
 - Need for, and provision of continuing professional development programmes
 - Core competencies required of design students exiting higher education and entering industry
 - Status and types of research being undertaken in the design field
- Role of school education in providing appropriately prepared students for tertiary design programmes, in particular:
 - Visual arts, and design curricula in schools
 - Links between design and technology
 - Provision and training of design teachers
 - Quality of implementation
 - Quality of resources
 - Provision and quality of continuing professional development programmes for teachers.

In our view an analysis of this kind would throw into stark contrast the difference between design education, at both school and higher education levels, in developed and developing nations.

Since the *World Design Survey* intends to provide a comparable mapping of the provision of design education in the participating countries, it is important that the data are handled in a systematic and uniform way. Some agreement needs to be reached amongst the participants on the handling of data and, in particular, statistics and performance indicators. Greater detail is provided below.

9.3.2. Areas that require clarification within the report

9.3.2.1 What design disciplines are taught at the responding institutions? Definitions of industrial design

The questionnaire that design education institutions were asked to complete includes a section on the design offerings at each institution. The industrial design rubric reads as follows: 'Industrial design (including glass, jewellery and ceramics that are produced on an industrial scale)'. Any institution that might NOT include industrial design (and there are only three institutions in the country offering this formal programme) would in all probability have included one of the other offerings mentioned in the brackets as industrial design. In particular, Tshwane University of Technology offers jewellery design and glass, Durban Institute of Technology offers jewellery design. In addition, the three institutions offering industrial design both also offer jewellery design (Cape Peninsula University of Technology, Tshwane University of Technology and University of Johannesburg), while

the latter also offers ceramics. Should the industrial design student figures thus include figures for these other disciplines, and have the participating institutions included these figures? Particularly, since earlier in the draft report it is quite clearly stated under 5.3: Changes to the baseline questionnaire, that [particular] 'disciplines were excluded from the study although information that was stumbled upon or sourced (our italics) is ...included for the sake of perspective'. Included in the list was jewellery design and surface design (which includes textile design) which were specifically asked for.

9.3.2.2 Definitions of motion graphics, animation and new media design. Does this particular category include multimedia?

Without a clear definition of these categories, there are going to be discrepancies in the statistics with regard to the numbers of students studying and qualifying in the respective disciplines.

9.3.2.3 Level of education provided

Two headings presented in the Level of Training Table 25: Level of education provided, require clarification. In South African tertiary higher education a distinction is made between undergraduate and postgraduate students. Undergraduate includes diplomas, first degrees, as well as honours degrees, while postgraduate refers to all qualifications above honours. (Refer to the Higher Education Qualification Framework). The heading Graduate used in the table therefore requires clarification. Again, there needs to be a degree of congruence between the participating nations on these level descriptors.

9.3.2.4 Current enrolments per discipline

It would be useful to see what the total current enrolments are for each of the disciplines in the report. A table should be

provided. Linking this to the question dealing with the design disciplines taught in each institution, as expressed in Table 24: Design disciplines taught.

9.3.2.5. Foreign nationals enrolled at South African institutions

Unless students have actually surveyed students in order to ascertain their reasons, the comments offered should be reflected as perceptions rather than fact.

3.9.3. Challenges for tertiary education as presented in the report

This study has identified challenges that need to be addressed by tertiary education in South Africa in order to continue further research, as well as appropriate teaching and learning in preparation for the design sector. These challenges are:

3.9.1. Availability of accurate, relevant statistics

The study indicated that the availability of secondary data, and specifically, recent, accurate statistics were difficult to obtain. Statistics that relate to tertiary education are available from the Department of Education; however, these statistics represent figures that group areas such as art and design in one category. It is, therefore, difficult to extract figures pertaining to one specific discipline from the category. The statistics can, therefore, only be obtained through contacting higher education institutions individually, which would result in a cumbersome, lengthy process. The availability of accurate tertiary statistics will be further discussed by DEFSa in order to find possible solutions.

3.9.2. Perceptions around teaching and learning delivered by accredited tertiary education institutions

The report identified that the formal design sector considers that 54.6% of design students studying at accredited private colleges and 52% who study at accredited public institutions are seen to have received the correct training and practical experience to equip them sufficiently to enter the job market. These percentages are low and urgent attention should be given to these perceptions. DEFSa aims to focus on partnerships and liaison with design professional bodies and industry over the following two years in order to identify areas of concern and shortcomings as experienced within industry.

Report compiled by:

Amanda Breytenbach

Mel Hagen

DEFSa: President

DEFSa: Senate Member

9.4. Project partner – Industrial Designers Association South Africa (IdeaSA)

On behalf of the Industrial Designers Association South Africa (IdeaSA), we welcome and acknowledge the pilot project: *World Design Survey* (WDS) 2007/2008.

IdeaSA also acknowledges the efforts of the International Design Alliance (IDA) and the SABS Design Institute for respectively developing and implementing this important research.

As a young democracy and an emerging economy, it is particularly important that South Africa is included in an international survey of this nature. Design is becoming a strong economic

driver for international competitiveness across the globe and will, therefore, play a major role in current and future economic growth of and job creation in our country.

In giving a brief analysis of the *World Design Survey*, it is important to define the major criteria upon which to judge the accuracy of the results. We define these as follows:

- The WDS 2007/8 is a pilot project.
- There exists no official (e.g. StatsSA; HSRC) prior or current statistics on the generic design sector in South Africa.
- Time and cost constraints for the WDS did not allow for thorough and in-depth research into the economic benefit of the design function through the entire value chain, particularly for industrial design and manufacturing.
- The research methodology was largely telephonic with some additional interviews. This made data collection difficult and erratic, in our view.
- South African design associations are generally young and under-funded compared to overseas counterparts e.g. IdeaSA was founded in 2007.
- Apart from the SABS Design Institute (40-year history), South Africa has a weak institutional support system in government for design.
- South Africa does not have a design policy.

Given the context of the above criteria, the pilot WDS has produced broad brush-strokes of the current economic benefit and statistics of design in South Africa rather than accurate data. E.g. concerning industrial design, figures of turnover for 'companies' was reported at R18 million per annum. All industrial design companies in South Africa are rated as SMMEs (1-8 persons) therefore, these figures seem unrealistic.

Further investigation revealed that these figures came mostly from in-house designers at large manufacturing firms. The real value-add of design was, therefore, mainly guesswork, based on a percentage of turnover of a division and more.

Another flaw in accuracy concerns fees generated by small industrial design firms. These again do not indicate the value-add of design which was one of the objectives of the WDS. For example, an industrial design firm may charge R1 million to design a product. This would be the figure quoted in the WDS. However, this same product may be manufactured and exported, generating say R1 billion in export earnings. This is not reported, therefore, the data are not accurate in terms of value-add or contribution to the economy.

The statistics on education were also not accurate, particularly for industrial design where there are only three tertiary design institutions with a relatively small intake and a high teacher-to-student ratio.

The WDS has generally highlighted the problems facing the design industry, notably:

- There are no official statistics for design.
- The private sector speaks of 'design', yet the public sector speaks 'innovation'.
- Generally, there is not a good national awareness of the value-add of design.
- Design education needs development.

These facts are backed-up by various diagrams and charts. However, due to a poor response by many industry players, these figures, again, do not give an accurate indication of the true value-add of design to the economy.

A few design surveys and industry workshops have been undertaken in South Africa since 1994 (NACI 2002, British Council, DST Baseline study 2005) which, like the WDS, mostly highlight the same problems regarding design in South Africa. The real concern is that since 1994, no real progress has been made.

Whilst IdeaSA welcomes being part of this initiative together with other associations such as think and IID, one must question the relevance of such surveys in the context of what needs to be done 'at home'. To benchmark against other countries may give some indication as the *status quo* of design in South Africa, but it is more important to develop our own capacity for and competency in design. It seems as if we are too often going around in circles or, indeed, taking one step forward and three backwards, in the face of international competition.

Another concern is the alignment and consistency of the research methodology. Taking into consideration that this has been a pilot project, there are glaring inconsistencies and inaccuracies which, if experienced in our own country, makes one wonder how the surveys and criteria link up with other countries. In other words, how accurate is the comparative study if our own national survey is inaccurate?

9.4.1. Recommendations

One of the main outcomes of such a survey should be concise and specific recommendations on the way forward, based on the data collected and aligned to the national economic agenda of the country – alignment to national strategies.

However, we are of the opinion that the recommendations are weak and this again places emphasis on the accuracy of the data collected – much of which (particularly from government departments) are vague comments with no grasp of the importance of design to the economy.

The WDS recommendations centre on how indicators should form the basis of international base to measure the design sector and how frequently these surveys should be done. Whilst these may be relevant, they are not paramount to the pressing issues of design in South Africa.

It is clear that in order to conduct in-depth surveys on design in our country, substantial funding and infrastructure need to be put in place. This leads towards recommendations that we feel would be more appropriate for the development of design in South Africa. These have been recommended previously by official documentation to government through NACI and DST, dti, parliament (January 2008). In certain instances, such as in the NACI report, these recommendations have been formulated into national strategies (such as the AMTS) and developed and implemented through initiatives such as DESIGNation where proposals to government have been made and, in certain instances, accepted.

Our recommendations are:

- A national strategy for industrial design in South Africa should be developed and implemented, together with the national initiative DESIGNation (accepted by government).
- A national design council should be formed that will act as the overarching institution for the development of design in South Africa. This would house international benchmark-

ing and liaison, design promotion and award schemes, education, national design survey data, industry liaison, a product design centre linked to universities and other government institutions (TIA) for, among other, transformation and training of interns for industry.

- The design council should be able to act as an autonomous body in order to run the affairs of the design industry but be accountable as a line-function to one government body (DST, dti).
- The council should house the offices of various design associations, provide funding and mechanisms to protect the interests of the design profession and coordinate the development of design education in South Africa with relevant stakeholders.
- We believe that the national initiative DESIGNation should be used as the lead initiative in achieving these goals. This is based on significant progress, partnerships, funding and accreditation by government of this programme and the strategic alignment to the national development agenda.

On behalf of IdeaSA, we are pleased to have been part of this initiative and to present constructive opinion, advice and recommendations in support of developing the design industry in South Africa.

Bernard George Smith

For and behalf of the board, IdeaSA

9.5. South African Communication Design Council (think)

Design as an industry has a great role to play in the development of South Africa. The inherent ability of designers to innovate, create and implement new ideas means that it should be viewed as a discipline that can be a lead contributor to incremental economic growth rather than just a lag supporter of other sector-based growth.

The above influence is, however, stunted by a many challenges facing the discipline. This report reveals these challenges through its detailed feedback. Taking an aggregate view of the data and complementing this with other data sources a few issues appear to be fundamental in restricting the industry's ability to achieve greater prominence.

9.5.1. Definition and classification

Agreeing on a single definition for design as a practice area is crucial as a lack of clarity negatively affects our ability to communicate our value. This links to a further point about our inability to provide an aggregate view on the size, shape and, therefore, level of influence of our sector due to a poor classification system.

9.5.2. Composition

The data show that the design industry is fragmented and generally populated by small organisations of less than five people. This poses key challenges on a number of fronts:

- Co-ordinating and managing collective agreement and compliance to industry policy (like refusing to pitch for free [speculative work])
- increased competitive rivalry encourages a 'win at all costs' behaviour
- the industry lacks a weighty underbelly of mid-tier influencers
- saliency and visibility is compromised due to uncoordinated individual communication efforts.

9.5.3. Transformation

The South African design industry is far behind other sectors in terms of transformation. This area requires bold new thinking, together with substantial investment by design companies themselves. The difficulty, however, is that the industry is already expressing its hardship – only 34% strongly agree that the industry is profitable and 46.67% claim 'financial challenges' as a barrier. Although the industry has a fairly low barrier to entry and requires minimal capital input to start-up, it remains difficult for smaller organisations to transcend the hourly-rate perception and build a value-based model given that level of competitive rivalry. With time, resource and capital constraints, a focus on transformation in the short-term will never supersede the need to survive day-to-day. It is necessary to address the value equation in the industry simultaneously.

9.5.4. Skills

The design industry needs an integrated view of skills development, not only from secondary to tertiary environments, but into the workplace itself.

9.5.5. Professionalism

The design industry continues to characterise itself with amateur behaviour like free-pitching. Only 39% of respondents claim to have an influence on business but at the same time only 17% strongly disagree that local designers are ignorant of available intellectual property protection. On the flip-side, only 30% of respondents strongly agree that they know IP legislation. Considering that the design industry is IP-based and it sells this knowledge to clients shows lack of maturity and professionalism.

9.5.6. Professional bodies

Professional design bodies are typically inwardly focused and we do not engage actively enough with the clients whose fees we accept. We also tend to talk to our own members and do not share across our design-specific disciplines.

9.5.7. Myopic focus

The data indicate that designers believe that their standards compare well on an international level but besides the industrial designers at 17.3% (Table 13) the other disciplines have relatively low international reach. This could be a function of a lack of collective marketing but could also be related to capitalisation and resourcing to fund travel for business development initiatives.

Another observation is that there are large South African corporations who are awarding their lucrative design contracts to international firms. The danger is that South African organisations fall between two stools and do not manage to secure either international business or large local contracts.

9.5.8. Action recommendations

The industry appears to be growing and looks healthy but to address the above fundamental issues, specific action is required.

- A standard definition and design category classification taxonomy is needed.
- Collaboration and perhaps integration of professional bodies are necessary to aggregate influence on behalf of the overall design industry and improve saliency.
- South African design organisations should work together to form cooperative agreements that better fulfil international or large South African corporate requirements.
- There should be an aggressive focus attention on the value of the industry and its professional behaviour as this will address many of the other issues which are symptomatic of this cause.
- A radical rethink is needed towards the industry's approach to transformation.

David Blyth

On behalf of think

9.6. Lead project advisor's insights

The *IDA World Design Survey* pilot project is possibly the most significant and extensive research study ever undertaken on the South African design sector. This study aimed to map the local design landscape and consolidate diverse data sources into one document – for the first time ever – thereby providing stakeholders with valuable insights into the country's design infrastructure and multidisciplinary industry resources. This critical study is not only important to South Africa, but also to global stakeholders since it sheds new light on the scope of the design economy in a part of the world where there was previously little published data.

From the outset, the international project leader (Icograda) and the IDA partners (Icsid and IFI) acknowledged that there would be many challenges and obstacles in realising the pilot study as it was the first of its kind to gather data from different countries in a comparative manner and according to a common baseline framework. In addition, the international and South African project partners acknowledged that the pilot would test the robustness and applicability of a standardised research methodology and *modus operandi*, as well as the pilot's baseline framework.

The South African study highlights some of these challenges:

- Design cuts across all trade and industry sectors as well as most government departments making it difficult to access data.
- Methodology
 - The heavy reliance on telephonic interviews as a primary data gathering tool proved to be problematic due to the inconvenience of unscheduled interviews. A total of

533 potential respondents could not be interviewed because the system could not accommodate scheduled call-backs.

- The lower than anticipated sample realisation on the side of the CATI was mainly due to the fact that the anticipated sample was based on individual headcounts while the realised sample represented a count of organisations (see 7.3.1 and 7.3.2).
- It is not an ideal methodology to source financial data through telephonic interviews since it leads to estimates and inaccuracies as indicated in sections 8.5.5. and 8.5.12.
- Due to a lack of a common meta-language that clearly describes and defines design and its sub-disciplines, some discrepancies and questionable results occur in the reported data, particularly related to innovation and industrial design.
- Due to a lack of credible secondary data sources, none of the information contained in section 8.5 (Profiles) could be verified for accuracy.
- The fluctuating exchange rate of the South African Rand made it difficult to compare local economic data with those of developed economies (see Appendix A).
- Another important challenge that the research team and project partners faced were their over-ambitious expectations. For various reasons, certain data could not be sourced or verified. All stakeholders should keep in mind that this is a pilot study that should be followed up and expanded upon as a matter of urgency.

The South African study highlights some significant weaknesses:

- Due to financial constraints the study could not accommodate in-depth and telephonic interviews in the fields of

architecture, fashion design, jewellery design, landscape architecture, textile/surface design, urban planning and engineering design. In some instances information regarding these fields was sourced through desk research. This resulted in section 8.5 only reflecting data for a highly selective portion of the design sector.

- There is a lack of comprehensive and accurate databases for the design sector, which makes it difficult to conduct research.
- Some of the project partners were more collaborative and forthcoming than others during the data gathering process, which could have impacted on the final results.
- Throughout this report, the lack of accessible and credible secondary data sources – particularly those related to economic activity – were highlighted. This indicates a weakness in the government's data gathering due to a fragmented statistical classification system as well as the absence of an innovation/creativity index that tracks and manages the design sector's contribution to the national economy.
- The reluctance and/or unavailability of certain key government departments to participate in the study resulted in critical gaps in the results.
- Government's support of the generic design sector is clearly miniscule when compared to other professions and sectors. If we exclude the engineering, built environment and intellectual property protection sectors/areas, there are no legislative support for the design sector and, consequently, no financial support.

The South African study results also highlights some significant strengths:

- The country, in general, has a robust design infrastructure

when considering its socio-economic development status.

- According to the qualitative data, the communication design, motion graphics, advertising, interior and fashion design sectors are performing well compared to international standards and in some instances rank among the top ten in the world. With the exception of fashion design, most of the above-mentioned disciplines receive little support from government, yet they thrive. We can only speculate what the potential growth in exporting these services could be if government would decide to invest in these sectors.
- All but one of the design disciplines have stable professional bodies in place with strong links to international organisations. In this regard, an impressive number of South Africans have during the past ten years served or are currently serving on the executive boards of international design or design-related organisations.
- The country has a well developed recognition system for honouring design excellence with a substantial number of awards schemes serving all the design disciplines.
- The country also has a surprisingly well developed design media infrastructure.

The South African WDS pilot study offers many benefits and opportunities:

- The pilot study facilitated closer collaboration between industry/sector stakeholders, which have previously operated in silos;
- The pilot mapping of the local design landscape provides the required data that government stakeholders need to develop a better understanding of the role of design in the social and economic spheres and, thereby, enhances the status and standing of the design professions;

- The pilot study provides government stakeholders with a resource tool to evaluate and, it is hoped, restructure its sector development assistance programmes and incentive schemes to grow the design economy more effectively;
- The pilot study provides the SABS Design Institute with a resource tool to develop more effective design promotion strategies;
- The pilot study provides for the country's design profession councils/bodies to contextualise their roles and responsibilities to engage in a coordinated effort to develop the national design economy;
- The pilot study provides for the country's design education sector to become more responsive to industry indicators and requirements, and, therefore, adjust curricula to industry trends and requirements. In this regard, the study also highlights the importance of education institutions sharing enrolment and graduation data with key stakeholders such as design profession bodies and the SABS Design Institute to enable them to track and manage supply and demand data;
- The pilot study provides an ideal platform to identify key issues and key stakeholders that should be consulted towards developing a national design strategy that can grow the industry's contribution to national socio-economic development;
- The pilot study results finally highlight the skills and capabilities of South African design, thereby identifying the high-performing contributors to marketing brand South Africa.

Jacques Lange

Icograda Past President 2007-2009

Advisor for the South African *IDA World Design Survey*



Appendix A: IDA World Design Survey Baseline Questionnaire

Introduction

The *IDA World Design Survey* pilot project is a landmark initiative of the International Design Alliance (IDA) to create a clearer understanding of the design sector. Participants will contribute by mapping the characteristics of their national design sectors - its strengths and contributions to the overall economy and its socio-cultural contribution to development.

The goal of the *IDA World Design Survey* pilot project is to address four questions:

- What are the structures/systems that define the design economy and what changes could lead to the recognition and promotion of design's contribution to the overall economy in the long term?
- Who are the participants in the design economy, what are their numbers and what is needed by particular populations, such as professional design associations, design promotional agencies, design management consultancies and design educators to support their successful participation in the long term?
- How can approaches to governance as well as particular programmes, services and initiatives strategically contribute to the enduring growth of capacity within the design sector?
- How does design contribute to socio-cultural development?

The initial mapping of design sector statistics in the participating countries will inform the development of a common set of international indicators. Analysis of data reported, as well as gaps in data available, will provide direction for future development of the survey.

About this questionnaire

The purpose of this questionnaire is to provide a common baseline for each participant in the *IDA World Design Survey* pilot. Each participant is encouraged to develop a country specific questionnaire that will be completed by individual respondents.

1. Participant profile

1.1 Country: Name of the country for which the report is submitted. *If multiple countries are covered by this submission, please complete separate survey reports for each country covered.*

1.2 Report lead: Name of the lead person for the information contained in this report.

Name:

Title/Position:

Institution/Organisation:

Address:

1.3 Report participants: Description of all partners engaged in the development of this report. Include role and contact information.

Name:

Title/Position:

Institution/Organisation:

Address:

1.4 Country description: Please provide the landmass of the country and current population.

2. Design sector profile

2.1 Definition of design sector. Provide the definition of the design sector currently in use in your country. If there is no currently commonly used and agreed definition of the parameters of the design sector in your country, provide the definition that the research partners of this project have agreed to use as the scope for the study.

2.2 Does your country use a defined innovations/creativity index? Describe how design sector activity is considered within the index.

2.3 Describe your country's current activities in the field of design sector statistics. Indicate years for which statistics are available, frequency of data collection, relevant research and presentations on the topic.

2.4 Which government department(s) or agency(cies) has/have the primary responsibility for your statistics related to the design sector? Indicate the level of the department/agency (ie: national, provincial/state, local/municipal).

2.5 Are the design statistics for your country available electronically? Provide relevant website addresses where design statistics for your country may be accessed.

2.6 Does your country use a defined framework and/or classification system to collect and report design sector statistics? Indicate which framework and/or classification systems below is in use and all codes used in the reporting of design sector statistics.

- NAICS: North American Industry Classification System
- NACE 1.1: Classification of Economic Activities in the European Community
- ISIC 3.1: International Standard Industrial Classification of all Economic Activities
- ANZSIC: Australian and New Zealand Standard Industrial Classification
- SOC2000: Standard Occupational Classification 2000
- Other

Include all relevant core design services codes and any other codes which are considered relevant to design sector activities in your country.

3. Representative organisations

- 3.1 Professional organisations:** List national professional organisations that represent designers. *For each listing, provide a brief description of the organisation, including whether it has a single discipline or multidisciplinary mandate and if it has any regulatory authority. Provide contact information.*
- 3.2 Design promotion agencies:** List national design promotion agencies with a primary mandate to promote the benefits of good design in general. *For each listing, provide a brief description of the organisation, including whether it has a single discipline or multidisciplinary mandate. Provide contact information.*
- 3.3 Trade and industry associations:** List national trade and industry associations that include design in their mandate. *For each listing, provide a brief description of the organisation, including whether it has a single discipline or multidisciplinary mandate. Provide contact information.*
- 3.4 Design facilities:** List public or private facilities that directly promote design awareness. *For each listing, provide a brief*

description of the organisation and provide contact information. Include:

- Design centers
- Design museums
- Design galleries
- Design libraries/archives
- Other

4. Design support

- 4.1 Design policy:** Does your country have a national design policy supported or endorsed by the national government? If yes, please provide a summary of the policy's primary objectives. *Provide a copy of the policy as a separate document if the policy is available through the Internet.*
- 4.2 Government spending on design:** Describe the government spending on design initiatives at the national level in local currency.
- Total government budget:
 - Annual government purchase of design services:
 - Annual government investment in design promotion activities:
- 4.3 Government grants available:** List granting programmes that directly support the development of the design sector. Provide a brief description for each distinctive grant programme, including description of eligibility criteria, total amount available on an annual basis and average amount of grants awarded.
- 4.4 Private sector support:** List private sector programmes that directly support the development of the design sector. Provide a brief (250 words) description of eligibility criteria, total amount available on an annual basis and average amount of grants awarded.

4.5 Awards: List national award schemes for design that are offered on a continuing basis. Provide a brief (250 words) description of the objectives, eligibility criteria, frequency of the scheme (annual, biennial, etc) and organiser.

4.6 Events: List trade fairs, conferences and events that have design as their main focus. Indicate frequency (annual, biennial, triennial), profile (regional, national, international), and primary target audience (industry, government, public).

4.7 Media: List media that provide design coverage, including television programs, design publications (i.e. trade journals, books, magazines), design themed columns in newspapers or magazines and web-based design content).

5. Economic profile

This section is intended to create a comprehensive profile of the design sector in your country. Please indicate for what year the data is reported. If multiple years are available, please provide the most recent three years available. If data is estimated from existing information, please provide the rationale for assumptions made to isolate design-related information.

For each category, please provide additional information on activities included in each grouping, ie: industrial design – product design, industrial equipment, homeware and furniture, sports and leisure equipment, ceramics, glass, etc.

Example

- *Motion graphics, animation & new media design* includes interface and electronic game design
- *Industrial Design* should include furniture and decorative object design
- *Multidisciplinary* design firms are those, which engage in two or more of the categories as part of their core services.

5.1 **Overall sector profile:** Provide an overview of the design sector. Include data for the most recent three years available.

	Number of businesses	Total annual revenue	Total employees
Architecture			
Fashion Design			
Graphic Design			
Jewellery Design			
Motion graphics, animation and new media design			
Industrial Design			
Interior Design			
Landscape Architecture			
Textile Design			
Urban Planning/Design			
Multidisciplinary			
TOTAL			

5.3 **Years in operation:** Provide a profile of design businesses by number of years in operation.

	0-5	6-10	11-20	20+
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

6. Business profile

5.2 **Structure:** Provide a summary of the number of design businesses by type of incorporation.

	Sole proprietor	Partnership	Corporation	Other
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

5.4 **Ownership:** Provide a breakdown of design business ownership by gender.

	Male	Female	Total
Architecture			
Fashion Design			
Graphic Design			
Jewellery Design			
Motion graphics, animation and new media design			
Industrial Design			
Interior Design			
Landscape Architecture			
Textile Design			
Urban Planning/Design			
Multidisciplinary			
TOTAL			

5.5 **Annual revenue:** Provide a summary of the number of design businesses by revenue category.

	Less than \$ 500 000	\$ 500 000 – 999 000	\$ 1 million – 5 million	\$ 5 million +
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

5.6 **Revenue source:** Provide a summary of design business revenue by source.

	Fee for service	Licensing/royalty	Other
Architecture			
Fashion Design			
Graphic Design			
Jewellery Design			
Motion graphics, animation and new media design			
Industrial Design			
Interior Design			
Landscape Architecture			
Textile Design			
Urban Planning/Design			
Multidisciplinary			
TOTAL			

5.7 **Revenue by client profile:** Provide a summary of design business revenue by client profile.

	Private corporation	Public service	Government	Other
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

5.8 **Revenue by market:** Provide a summary of design business revenue by market type.

	Local	National	International
Architecture			
Fashion Design			
Graphic Design			
Jewellery Design			
Motion graphics, animation and new media design			
Industrial Design			
Interior Design			
Landscape Architecture			
Textile Design			
Urban Planning/Design			
Multidisciplinary			
TOTAL			

5.9 International markets: List top five international markets by country and revenue. *Example: Architecture – Canada (\$100,000), United States (\$80 000), England (\$50 000), France (\$30 000), Italy (\$20 000)*

	Market 1	Market 2	Market 3	Market 4	Market 5
Architecture					
Fashion Design					
Graphic Design					
Jewellery Design					
Motion graphics, animation and new media design					
Industrial Design					
Interior Design					
Landscape Architecture					
Textile Design					
Urban Planning/Design					
Multidisciplinary					
TOTAL					

Employment profile

5.10 Total employment: Provide a profile of design businesses by total number of employees.

	1-5	6-10	11-20	20+
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

5.11 Designers employed: Provide a profile of design businesses by number of designers employed.

	1-5	6-10	11-20	20+
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

5.12 Average annual income. Provide annual average incomes for designers by number of year's experience.

	1-5	6-9	10-14	15+
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

5.13 **Level of training:** Provide a profile of the education level of designers currently employed by sector.

	Certificate	Under-graduate	Graduate	Post-graduate
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

5.14 **Gender:** Provide a breakdown of designers employed by gender.

	Male	Female	Total
Architecture			
Fashion Design			
Graphic Design			
Jewellery Design			
Motion graphics, animation and new media design			
Industrial Design			
Interior Design			
Landscape Architecture			
Textile Design			
Urban Planning/Design			
Multidisciplinary			
TOTAL			

5.15 **Job creation:** Provide a comparison of number of jobs created by design businesses compared with the national average.

	Number of jobs created	Percentage of national total
Architecture		
Fashion Design		
Graphic Design		
Jewellery Design		
Motion graphics, animation and new media design		
Industrial Design		
Interior Design		
Landscape Architecture		
Textile Design		
Urban Planning/Design		
Multidisciplinary		
TOTAL		

5.16 **Nature of work.** Provide a summary of the type of jobs available to designers by sector.

	Full-time	Project	Freelance	Total
Architecture				
Fashion Design				
Graphic Design				
Jewellery Design				
Motion graphics, animation and new media design				
Industrial Design				
Interior Design				
Landscape Architecture				
Textile Design				
Urban Planning/Design				
Multidisciplinary				
TOTAL				

5.17 **Sector consolidation:** List 10 largest businesses (measured by annual turnover) that have design as their primary activity.

For each business provide:

- Years in operation
- ownership (local or foreign)
- annual turnover
- type of design activity (creation, production, manufacture, distribution)
- number of employees

5.18 **Business starts:** Number of new design business starts annually.

5.19 **Business sustainability:** Average survival rate of a design business.

5.20 **Intellectual property.** Please provide data for the most recent three years available.

- Number of patents registered.
- Number of trademarks registered.
- Number of design rights registered.

6. Design education

6.1 **Design schools:** Lists the schools that offer design education in your country, including contact information. For each listing the following information.

- design discipline taught
- level of programme
- length of programme
- number of design faculty (include breakdown by full-time/part-time status)

- number of design students (include breakdown by discipline)
- number of graduates per year

7. Open questions

7.1 Describe the **trends** and issues affecting the design sector, including a prognosis for the next five years.

7.2 Provide profiles of up to five designers per discipline who have gained national or international **recognition**.

	Profiles				
	1	2	3	4	5
Architecture					
Fashion Design					
Graphic Design					
Jewellery Design					
Motion graphics, animation and new media design					
Industrial Design					
Interior Design					
Landscape Architecture					
Textile Design					
Urban Planning/Design					
Multidisciplinary					

7.3 Provide profiles of up to five design businesses per discipline that have gained national or international **recognition**.

	Profiles				
	1	2	3	4	5
Architecture					
Fashion Design					
Graphic Design					
Jewellery Design					
Motion graphics, animation and new media design					
Industrial Design					
Interior Design					
Landscape Architecture					
Textile Design					
Urban Planning/Design					
Multidisciplinary					

7.4 Provide profiles of up to five brands or design-led businesses that have gained national or international **recognition**.

7.5 Describe the extent to which design activity forms part of your country's **informal economy**.

8. Recommendations

8.1 List the **indicators** that you believe should form the basis of an international base to measure design sector activity.

8.2 With what **frequency** should design sector activity be measured?

Appendix B: South African WDS CATI Questionnaire

Section A: Introduction

Good afternoon Ms/Mrs _____. My name is _____ (state your name). I represent Consulta Research. The IDA has commissioned a study to determine the contribution of the design economy and the level of strategic engagement of design as a socio-economic and cultural developmental in 12 countries. We have been commissioned by the South African working group, i.e. the SABS Design Institute, South African Institute of Interior Design Professions, Design Education Forum of Southern Africa (DEFSA), the South African Communication Design Council (think) and the South African Institute of Industrial Design to conduct the South African portion of the International Design Alliance (IDA) World Design Report and to assess design in South Africa with regard to its characteristics, its strengths and contributions to the South African economy and the contribution of design to socio-cultural development in South Africa.

Please note that this interview will be recorded for quality purposes.

Fraud Issue:

May I assure you that Consulta Research is a registered reputable research company that subscribes to the ethical code of conduct of the South African Marketing Research Association (SAMRA). At no time during this interview will I request any personal details from you. Should you need any further verification of this study, please do not hesitate to contact my manager at Consulta Research: George Kirk on (086) 130-4100 or (082) 578 9402.

Call Back:

Thank you for your willingness to be called at a more convenient time. I would like to advise you that although we may attempt to reach you at the requested time we may be unable to call you back as we may have reached the required number of allocated respondents before it is possible to do the call back.

Section A – General

Question 1 – Sector

Which of the following sectors of design best describes the scope and focus of your business? (If more than one please indicate the most predominant sector) (Single option)

Graphic/Communication design	
Motion graphics, animation and new media design	
Industrial design (including glass, jewellery and ceramics that are produced on an industrial scale)	
Interior design and interior architecture	
Design education	
Design promotion	
Government	
Multidisciplinary (more than one of the above on an equal scale)	
None (Terminate interview)	

Question 2 - Employees

2.1. How many male designers are employed in your organisation ... and female designers?

Number	Male	Female
1-5		
6-10		
11-20		
>20		

2.2. What is the total number of employees that are employed by your organisation? (Single option)

1-5	
6-10	
11-20	
>20	

2.3. Of the designers you employ how many of them are:

Type of employment	Number of employees
Full time employees?	
Employed on a project/contract basis?	
Freelance?	
Apprenticeships (where they do practical as part of their studies)	

2.4. What is the average annual income (salary) earned by designers, by their number of year's experience?

Years Experience	Income
0 to 5 years experience	
Between 5 and 9 years experience	
Between 10 and 14 years experience	
More than 15 years experience	

2.5. How many designers in your organisation have the following qualifications:

Qualification	Number of designers
No formal qualification (self-taught designers)	
A Certificate (less than three-year qualification)	
Undergraduate (BTech and three-year BA degrees)	
Graduate (four-year BA, MTech and Hons-level degrees)	
Postgraduate (MA, DTech and Phd-level degrees)	

Question 3 – Business Profile

3.1 What is the legal form of your business? (Single option)

Sole Proprietor (including freelance)	
Closed Corporations (CC)	
Public Company (Pty Ltd)	
Private Company (Pty)	
Incorporated (Partnership)	
Listed Company (JSE/AltX)	
NGO	
Article 21 (Non profit)	
Public Sector (Government, science councils and public educational institutions)	
Other (Please specify)	

3.2 How many years has your organisation been in operation?

5 years or less	
between 5 and 11 years	
11 to 20 years	
More than 20 years	

3.3 Ownership

We need to clarify the following terms:

Ownership: Ownership of equity interest in an organisation.

Exercisable voting rights: A voting right of a participant that is fully exercisable without any limitation upon that right.

PDI: previously disadvantaged individual.

In each case please provide the percentage shareholding/ownership.

Ownership	Percentage
Total percentage MALE ownership	
Total percentage FEMALE ownership	
Total percentage PDI MALE ownership	
Total percentage PDI FEMALE ownership	

Question 4 – Revenue Profile

4.1 In which of the following annual turnover categories did your organisation fall during the last financial year (2006-2007)?

Less than R1 mil	
Between R1 mil and R2,5 mil	
Between R2,5 mil and R5 mil	
Between R5 mil and R10 mil	
More than R10 mil	
Don't know/Refused	

4.2 What percentage of your turnover is generated from the following sources?

Fees for professional services (Only design and consulting services)	
Income derived from production management on behalf of clients	
Licensing and royalty fees	
Government grants/budget (Only applicable to government related institutions)	

4.3 What percentage of your turnover is derived from each of the following markets?

Local (your city and province)	
National (this includes national government-related institutions)	
International	

4.4 Has your turnover/budget increased, decreased, or remained static during the past two years (2006-2007 and 2007-2008)?

Increased	
Decreased	
Remained static	
Do not know or do not want to divulge	

Section B – additional questions

1. What do you believe are the largest three stumbling blocks for your organisation in the design sector in South Africa?

2. Which of the following do you use for the protection of your intellectual property? (Multiple option)

Trademarks	
Patents	
Design registrations	
Non-registered copyright agreements with clients	
Licensing agreements	
None of these	
Do not generate any IP	

3. Do you use methods other than trademarks, patents and registrations to protect your Intellectual property?

YES	
NO	

4. Please specify the methods of IP protection other than trademarks, patents and design registrations to protect your Intellectual property that you find useful.

Section C – Contribution of design to socio-cultural development in South Africa

On a scale of 0 to 10 where 0 = "Strongly disagree" and 10 = "Strongly agree", to what extent do you agree with the following statements? You may also select any number in between 0 and 10 depending on how strongly you feel.

Statement	Strongly disagree					Strongly agree					Don't know	
Shareholders and designers in our organisation have a sound knowledge and good understanding of SA IP legislation	0	1	2	3	4	5	6	7	8	9	10	DK
Our organisation believes that IP protection in SA is sufficient to protect our rights and we don't need to implement other measures to protect our rights	0	1	2	3	4	5	6	7	8	9	10	DK
Local designers in our design sector are ignorant of available IP protection	0	1	2	3	4	5	6	7	8	9	10	DK

Local designers in our sector of design do not feel that it is important to protect their IP	0	1	2	3	4	5	6	7	8	9	10	DK
Our clients are oblivious to the available IP protection	0	1	2	3	4	5	6	7	8	9	10	DK
Design students studying at accredited governmental institutions in South Africa (universities and universities of technology) get the correct training and practical experience to equip them sufficiently when they enter the job market	0	1	2	3	4	5	6	7	8	9	10	DK
Design students studying at accredited private colleges in South Africa get the correct training and practical experience to equip them sufficiently when they enter the job market	0	1	2	3	4	5	6	7	8	9	10	DK
Design students studying at non-accredited private institutions in South Africa get the correct training and practical experience to equip them sufficiently when they enter the job market	0	1	2	3	4	5	6	7	8	9	10	DK
Design in my sector of practice is a profitable in South Africa	0	1	2	3	4	5	6	7	8	9	10	DK

The overall quality of professional design services in South Africa in my organisation's sector is of a high standard	0	1	2	3	4	5	6	7	8	9	10	DK
The standard of South Africa's best design practitioners in my sector compare well with that of global best practice	0	1	2	3	4	5	6	7	8	9	10	DK
Design in my sector of practice contributes towards improving the general level of education of South Africans	0	1	2	3	4	5	6	7	8	9	10	DK
The professional practice levels of my design sector in South Africa is fully equipped and strong enough to contribute substantially to the success of the 2010 FIFA World Cup	0	1	2	3	4	5	6	7	8	9	10	DK
People's lives in South Africa are culturally enriched by my professional design sector in South Africa	0	1	2	3	4	5	6	7	8	9	10	DK
Design at its highest level in my professional design sector in South Africa contributes positively to the rest of the world's perception of the country	0	1	2	3	4	5	6	7	8	9	10	DK

Design is marginalised in the world of business in South Africa	0	1	2	3	4	5	6	7	8	9	10	DK
Businesses in South Africa are positively influenced by South African design service providers	0	1	2	3	4	5	6	7	8	9	10	DK
The South African design sector in my professional sector positively contributes to making the lives of South Africans more comfortable and increases the general population's quality of life.	0	1	2	3	4	5	6	7	8	9	10	DK

Which individuals in your opinion would be the most capable to present an objective overview of trends and issues affecting **your particular design sector** and provide a prognosis for the next five years?

Name	Discipline	Reason

Which individuals and companies would you recommend to be the top performing in **your respective industry sector** regarding design promotion and creativity during the past two years?

Name	Discipline	Reason

Which five designers in **your design industry sector** have gained national or international recognition during 2007 based on their individual profiles and contributions towards furthering design in South Africa?

Name	Discipline	Reason

Which five design businesses in **your design industry sector** have gained national or international recognition during 2007 based on their contributions towards furthering design in South Africa?

Name	Discipline	Reason

Which five brands or design-led businesses that have gained national or international recognition during the past year?

Name	Discipline	Reason

Section D - Design education

1. What design disciplines are taught at your institution? (Multiple option)

Graphic/communication/visual communication/information design	
Fine arts with a specialisation in a focussed design field	
Industrial design (including glass, ceramics, jewellery, surface and materials design)	
Interior design and interior architecture	
Motion graphics, animation and new media design	
Photography	
Design and media studies (academic courses that focus on qualifying design critics, historians, journalist and design-related popular culture researchers who will not practice design professionally but record or comment on it)	
Other (Please specify)	

2. What levels of education do you provide? (Multiple option)

Basic course (Less than one year or at an institution that is not accredited by the Department of Education)	
Certificate (More than one year but less than three at a Department of Education accredited institution)	
Diploma (Minimum three years at a Department of Education accredited institution)	
Degree (Minimum of four years at a Department of Education accredited institution)	
Postgraduate Degree (Honours Masters and Phd studies that follow previous qualifications accredited by the Department of Education.	

3. What is the average length of your educational programs?

1 Year or less	
Two years	
Three years	
Four years	
Five years and more	

4. In your design faculty during the current year, how many staff members are employed on:

A full time basis	
A part time basis	

5. How many students, by discipline taught, does your institution currently have?

Discipline taught	
Graphic, information, communication, visual design	
Fine Arts	
Industrial Design	
Interior design and interior architecture	
Motion graphics, animation and new media design	
Photography	
Design and media studies	
Other	

6. What is the total number of students that enrolled for a design-related course over the last three years?

Year	Number of students enrolled
Year 1 (2004)	
Year 2 (2005)	
Year 3 (2006)	

7. How many students graduated from your institution in a design related course over the last three years?

Year	Number of students graduated
Year 1 (2004)	
Year 2 (2005)	
Year 3 (2006)	

8. What is the main reason for design students not finishing their studies at your institution? (Single option)

Change of course (lost interest)	
Lack of funds	
Failing	
Change of institution	
Other (Please specify)	

9. What percentage of the students currently enrolled are foreign nationals?

Percentage foreign nationals	
None	

10. Has this figure of foreign national enrolments in design courses at your institution increased or decreased over the last 3 years?

Increased	
Decreased	
Stayed the same	

11. Which regions are the main sources of the foreign students studying at your institution?

Australia/New Zealand	
Asia	
Africa (outside of SADC)	
SADC	
Middle East	
Europe	
North America	
South America	
Other (Please specify)	

12. What are the main reasons for foreign students selecting your institution for design studies?

13. Do you believe that students come out of Grade 12 equipped with the right education to contribute to and help them in their design studies at higher institutions?

YES	
NO	

Please give a brief reason for your answer above.

Closure

I would like to bring it to your attention that it is important for the working group to follow-up on evaluations on an individual basis and we would therefore like to share the evaluations that you have provided in this questionnaire with the working group.

Do you have any objections with the disclosure of the information?

Yes, I have an objection	Please be assured that your individual information will not be disclosed to anybody.
No, I have no objection	Thank you very much!

Thank you very much for your co-operation! End of interview.

Appendix C: List of SETAs

Acronym	Description
AGRISETA	Agriculture Sector Education and Training Authority
BANKSETA	Banking Sector Education and Training Authority
CETA	Construction Education and Training Authority
CHIETA	Chemical Industries Education and Training Authority
CTFL	Clothing, Textiles, Footwear and Leather Sector Education and Training Authority
ESETA	Energy Sector Education and Training Authority
ETDP	Education, Training and Development Practices
FASSET	Financial and Accounting Services Sector Education and Training Authority
FIETA	Forest Industries Education and Training Authority
FOODBEV	Food and Beverages Manufacturing Industry Sector Education and Training Authority
HWSETA	Health and Welfare Sector Education and Training Authority
INSETA	Insurance Sector Education and Training Authority
ISSETT	Information Systems, Electronics and Telecommunication Technologies Sector Education and Training Authority
LGSETA	Local Government Sector Education and Training Authority
MAPPP SETA	Media, Advertising, Publishing, Printing and Packaging Sector Education and Training Authority
MERSETA	Manufacturing, Engineering and Related Services Sector Education and Training Authority
PSETA	Public Service Sector Education and Training Authority
SASSETA	Safety and Security Sector Education & Training Authority
SERVICES SETA	Services Sector Education and Training Authority
TETA	Transport Education and Training Authority
THETA	Tourism Hospitality and Sport Education and Training Authority
W&RSETA	Wholesale and Retail Sector Education and Training Authority

Appendix D: List of institutions offering design education

Institutions offering design education programmes

Please note that the addresses and information provided are intended as a general guideline and must not be regarded as a definitive list.

Universities

Midrand University

Faculty of Arts
PO Box 2986, Halfway House 1685
Tel 011 690 1700
Fax 011 315 2824
midrand@edu.co.za
www.mu.co.za

Nelson Mandela Metropolitan University

Faculty of Arts: School of Creative Arts
(North Campus)
PO Box 77000, Port Elizabeth 6031
Tel 041 504 3256
Fax 041 504 9256 / 3529
liesl.nel@nmmu.ac.za
www.nmmu.ac.za

Nelson Mandela Metropolitan University

Faculty of Arts: School of Architecture
PO Box 77000, Port Elizabeth 6031
Tel 041 504 3517

Fax 041 504 3491
christo.vosloo@nmmu.ac.za
www.nmmu.ac.za

North West University

School of Communication Studies
Private Bag X6001, Potchefstroom 2520
Tel 018 299 4091
Fax 018 299 1651
gfors@puknet.puk.ac.za
www.puk.ac.za

Rhodes University

Department of Fine Arts
PO Box 94, Grahamstown 6140
Tel 046 603 8192/3
Fax 046 622 4349
moira.japp@ru.ac.za
www.ru.ac.za

University of Cape Town

School of Architecture, Planning & Geomatics
Private Bag, Rondebosch 7701
Tel 021 650 2374
Fax 021 650 2383
archiplan@ebe.uct.ac.za
www.arp.uct.ac.za

University of Cape Town

The Michaelis School of Fine Arts
31 Orange Street, Gardens 8001

Tel 021 480 7103
Fax 021 424 2889
czaayman@hiddingh.uct.ac.za
www.michaelis.uct.ac.za

University of the Free State

School of Architecture
PO Box 339, Bloemfontein 9300
Tel 051 401 2332
Fax 051 444 5108
gunterme.sci@mail.uovs.ac.za
www.uovs.ac.za

University of the Free State

Department of Fine Arts
PO Box 339, Bloemfontein 9300
Tel 051 401 2282
Fax 051 401 3557
finearts@mail.uovs.ac.za
www.uovs.ac.za

University of Fort Hare

Department of Fine Art
Private Bag X1314, Alice 5700
Tel 040 602 2011
Fax 040 653 1554
dmc@ufh.ac.za
www.ufh.ac.za

University of KwaZulu-Natal

Department of Architecture

Shepston Level 8, Howard College
Campus, University of KwaZulu-Natal
4000
Tel 031 260 2094 / 3139
winfredn1@ukzn.ac.za
www.ukzn.ac.za

University of KwaZulu-Natal

Centre for Visual Arts
Pietermaritzburg Campus
Private Bag X01, Scottsville 3209
Tel 033 260 5170
Fax 033 260 5240
fowles@ukzn.ac.za
www.ukzn.ac.za

University of Johannesburg

Faculty of Art, Design and Architecture
PO Box 17011, Doornfontein 2028
Tel 011 559 1022
Fax 011 559 1134
marians@uj.ac.za
www.uj.ac.za

University of Pretoria

Department of Visual Arts
Lynnwood Road, Hatfield 0002
Tel 012 420 2353
Fax 012 420 3686
nicole.cunningham@up.ac.za
www.up.ac.za

University of Pretoria

Department of Architecture
Lynnwood Road, Hatfield 0002
Tel 012 420 4600
Fax 012 420 2552
arch@up.ac.za
www.up.ac.za

University of South Africa

Art History & Visual Arts
PO Box 392, Pretoria 0003
Tel 012 429 6798
Fax 012 429 3556
ukun5@unisa.ac.za
www.unisa.ac.za

University of Stellenbosch

Department of Visual Arts
Private X1, Matieland 7602
Tel 021 808 3052
Fax 021 808 3044
mjkaden@sun.ac.za
www.sun.ac.za

University of the Witwatersrand

School of Art
Private Bag X3, Witwatersrand 2050
Tel 011 717 4636
Fax 011 339 7601
andrewd@artworks.wits.ac.za
www.wits.ac.za

University of the Witwatersrand

School of Architecture and Planning
Private Bag X3, Witwatersrand 2050
Tel 011 717 7638
Fax 011 717 7649
mabuyad@archplan.wits.ac.za
www.wits.ac.za

Universities of Technology

Cape Peninsula University of Technology

Faculty of Informatics & Design
P O Box 1906, Bellville 7535
Design & Architectural programmes –
Bellville campus
Tel 021 959 6271
TitusA@cput.ac.za
Design programmes – Cape campus
Tel 021 460 3392
Fax 021 460 3553
Architectural programmes – Cape campus
Tel 021 460 3136
Paull@cput.ac.za
www.cput.ac.za

Central University of Technology

School for Design Technology and Visual Arts
Private Bag X 20539, Bloemfontein 9300
Tel: 051 507 3184
Fax: 051 507 3199
rudi@cut.ac.za
www.cut.ac.za

Durban University of Technology

Arts Faculty
PO Box 1334, Durban 4000
Tel 031 203 6522
Fax 031 203 6518
ReddyP@dut.ac.za
www.dut.ac.za

Tshwane University of Technology

Faculty of the Arts
Private Bag X680, Pretoria 0001
Tel 012 318 6132
Fax 012 318 6178
jacobsv@tut.ac.za
www.tut.ac.za

Tshwane University of Technology

Department of Architecture & Polymer
Technology
Private Bag X680, Pretoria 0001
Tel 012 318 5252
Fax 012 318 5036
pietersep@tut.ac.za
www.architec.co.za

Vaal University of Technology

Department of Visual Arts and Design
Private Bag X012, Vanderbijlpark 1900
Tel 016 950 9312
Fax 016 950 9789
kiren@vut.ac.za
www.vut.ac.za

Walter Sisulu University of Technology

Faculty of Applied Technology
PO Box 1421, East London 5200
Tel 043 708 5200
Fax 043 708 5349
info@wsu.ac.za
www.wsu.ac.za

Independent schools

AAA School of Advertising - Cape Town

Visual Communication
PO Box 3423, Cape Town 8000
Tel 021 422 1800 Fax 021 422 1827
rian@aaaschool.co.za
www.aaaschool.co.za

AAA School of Advertising - Johannesburg

Visual Communication
PO Box 2289, Parklands 2121
Tel 011 781 2772
Fax 011 781 2796
CliveL@aaaschooljhb.co.za
www.aaaschool.co.za

Academy of Advanced Technology - Johannesburg

Architectural Design
P.O. Box 1503, Roosevelt Park, Northcliff
2129
Tel 011 888 7555
Fax 011 888 7222
admin@advancedtech.ac.za
www.advancedtech.ac.za

**Academy of Advanced Technology
- Cape Town**

Tel 021 910 9500
Fax 021 910 0517
cadcraft@mweb.co.za

**Academy of Advanced Technology
- Durban**

Tel 031 201 6523
Fax 031 201 6525
adraught@iafrica.com

Anchorlite College

Fashion Design & Graphic Design
PO Box 3050. Prestondale, Umhlanga
Rocks 4320
Tel 031 306 2680
Fax 031 306 2680
anchorlite@webmail.co.za

BHC School of Design

Interior Design
PO Box 13696, Mowbray 7700
Tel 021 447 7288
Fax 021 447 7288
info@designschool.co.za
www.designschool.co.za

Calder School of Interior Design

Interior Design
PO Box 36, Parklands 2121
Tel 011 447 2364
Fax 011 788 8872
calderschool@telkomsa.net

**Centre for Fine Art, Animation and
Design**

Fine Art, Animation and Graphic design
PO Box 26465, Isipingo Beach 4115
Tel 031 3052480
Fax 031 3076966
contactus@cfad.co.za
www.cfad.co.za

Centurion Akademie (Pty) Ltd

Multimedia
PO Box 10200, Centurion 0046
Tel 012 663-6333
Fax 012 663-6404

City Varsity

Film, TV & Multimedia School
32 Kloof Street, Gardens, Cape Town 8001
Tel 086 222 2489
Fax 021 423 6300
info@cityvarsity.co.za
www.cityvarsity.co.za

College Campus

Graphic Design & Web Development
PO Box 202, Witwatersrand 2050
Tel 011 403 3820 / 012 320 8844 / 011
886 8355
Fax 011 403 7542 / 012 320 8845 / 011
326 1987
parktown@collegecampus.co.za
pretoria@collegecampus.co.za
randburg@collegecampus.co.za
www.collegecampus.co.za

Credo College

Fashion Design
PO Box 11163, Tramshed, Pretoria 0126
Tel 012 322 2892
Fax 012 320 0571
sedibathutocredo@yahoo.com

Damelin

School of Media & Design Technology
Tel 011 718 4000
Call center 086 22 22345
www.damelin.co.za

Greenside Design Center

Graphic, Interior & Multimedia Design
PO Box 84190, Greenside, 2034
Tel 011 646 1984
Fax 011 646 6165
info@designcenter.co.za
emma@designcenter.co.za
www.designcenter.co.za

Inscape Design College - Johannesburg

Graphic, Interior & Multimedia Design
PO Box 87605, Houghton 2041
Tel 011 327 2002
Fax 011 447 7054
study@inscape.co.za
www.inscape.co.za

Inscape Design College - Pretoria

Graphic, Interior & Multimedia Design
Tel 012 365 1208
Fax 012 361 6183
study@inscape.co.za

Inscape Design College - Cape Town

Graphic, Interior & Multimedia Design
Tel 021 425 2211
Fax 021 425 2204
study@inscape.co.za

**Lindiwe Kuzwayo Academy of Fashion
Design**

Fashion Design
PO Box 4076, Durban 4000
Tel 031 301 4690
Fax 031 301 4690
lindiwek@telkomsa.net
www.lindiwekuzwayo.co.za

Linea Fashion Design Academy

Fashion Design
No 16 Charles Strachan Road, Mayville 4091
Tel 031 261 1414
Fax 031 261 8150
linea_academy@telkomsa.net
www.mjvn.co.za/linea

LISOF

Fashion Design
PO Box 1284, Parklands 2121
Tel 011 788 4432
Fax 011 447-4087

Midrand Graduate Institute

Graphic and Fashion Design
PO Box 2986, Halfway House 1685
Tel 011 690 1700
Fax 011 315-2824

Montebello Design Centre

Jewellery & Ceramics
 31 Newlands Ave, Newlands 7700
 Tel 021 685 6445
 Fax 021 686 7403
 montebello@telkomsa.net
 www.montebello.co.za

National College of Photography

Photography
 PO Box 12361, Hatfield 0028
 Tel 012 342 4770
 Fax 012 342 1281
 photo@iafrica.com
 www.photocollege.co.za

Open Window School of Visual Communication

Visual Communication
 PO Box 65273, Erasmusrand 0165
 Tel 012 347 1740
 Fax 012 347 1710
 info@openwindow.co.za
 www.openwindow.co.za

Potchefstroom Akademie

Interior Decorating and Design
 PO Box 20355, Noordbrug 2522
 Tel 018 294 5581
 Fax 018 293 1991

Prestige Academy

Graphic Design and Web Development
 PO Box 2220, Bellville 7595
 Tel 021 949 5036
 Fax 021 948 1859
 info@prestigeacademy.co.za
 www.prestigeacademy.co.za

Red and Yellow

Graphic Design
 PO Box 1442, Cape Town 8000
 Tel 021 462 1946
 Fax 021 448 4393
 hazel@redandyellow.co.za
 www.redandyellow.co.za

Ruth Prowse School of Art

Art, Graphic Design & Photography
 PO Box 89, Woodstock 7915
 info@ruthprose.co.za
 www.ruthprose.co.za

SA School of Motion Picture Medium and Live Performance - Johannesburg

Film & Drama
 PO Box 277, Melville 2109
 Tel 011 428 8345
 Fax 011 482 8347

SA School of Motion Picture Medium and Live Performance - Cape Town

Tel 021 448 7606

Fax 021 448 7610
 info@filmdramaschool.co.za
 www.filmdramaschool.co.za

Stellenbosch Academy of Design and Photography

Graphic Design & Photography
 PO Box 762, Stellenbosch 7599
 Tel 021 880 2623
 Fax 021 880 1233
 paul@stellenboschacademy.co.za
 www.stellenboschacademy.co.za

The Design School of Southern Africa - Johannesburg

Graphic, Interior & Fashion Design
 PO Box 37084, Birnam Park 2015
 Tel 011 786 7501
 Fax 011 786 7503
 info@designschools.co.za
 www.designschools.co.za

The Design School of Southern Africa - Pretoria

Graphic, Interior & Fashion Design
 PO Box 13973, Hatfield 0028
 Tel 012 342 1779
 Fax 012 342 1780
 enquiries@designschools.co.za
 www.designschools.co.za

Vega, The Brand Communications

School - Johannesburg
 Brand Communication
 PO Box 2369, Randburg 2125
 Tel 011 883 0130
 Fax 011 784 6792
 busi@vegaschool.co.za
 www.vegaschool.co.za

Vega, The Brand Communications

School - Cape Town
 Brand Communication
 PO Box 430, Green Point, Cape Town 8051
 Tel 021 425 7591
 Fax 021 425 7592
 gail@vegaschool.com

Vega, The Brand Communications

School - Durban
 Brand Communication
 PO Box 1669, Westville, Durban 3630
 Tel 031 266 2595
 Fax 031 266 2712
 jade@vegaschool.com

Appendix E: Presentation by Brenda Sanderson, Icograda Managing Director



National design policy

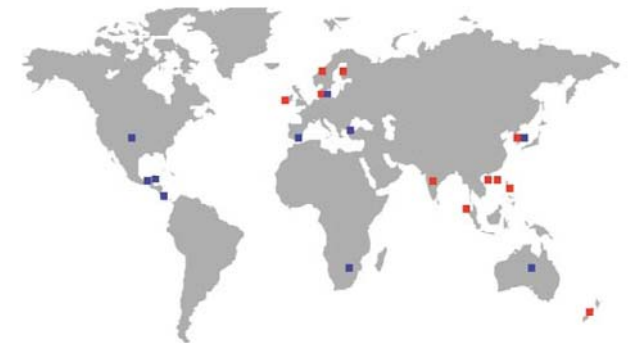
1993: Korea
 1997: Denmark
 1999: Ireland
 2000: Finland
 2001: Norway
 2002: Singapore
 2002: Hong Kong
 2002: Sweden
 2003: New Zealand
 2004: Taiwan
 2004: Thailand
 2006: Indonesia
 2007: India



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The participants

Korea
 Denmark
 Australia
 South Africa
 Spain
 United States
 Qatar
 Honduras
 El Salvador
 Costa Rica



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The contribution of the World Design Report pilot

The WDR pilot will double international design statistics source material.

It will recommend indicators that consider disparate economies to evaluate design as a strategic development tool.

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Indicators

- scale of design activity as a % of per capita GDP
- overall contribution to GDP
- design export figures
- government policy on design
- level of government funding to design
- innovation index score
- most represented design sectors
- no. of patents in previous 12 months
- no. of designers employed
- no. of design schools
- no. of design graduates per year
- national design organisations
- national professional representative body

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The challenges

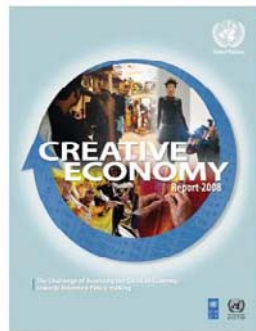
- design
 - no common definition
- interchangeable terminology
 - design, creativity, innovation
- low awareness and engagement of current statistical classifications
- limited consultation between design professional bodies, national statistical agencies, and government policy stakeholders
- design policy is often embedded within disparate government agencies that do not always act in coordination.

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The methodology

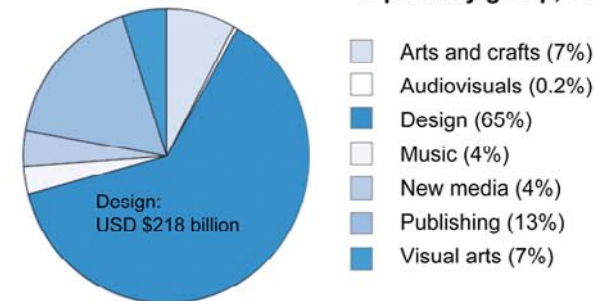
- Baseline questionnaire for all participants
- Individual additional questions for each country to address unique opportunities
- Qualitative report on the state of design and direction
- 'Special case studies' to allow for inclusion of participants where a design culture is just beginning to emerge

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- Released April 2008
- resource for informed policy-making
- collaboration of five UN agencies
- design included within the creative economy

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**Creative industries:
exports by group, 2005**

Overall: USD \$335.5 billion

Source: UNCTAD

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Design: Growth in exports

1996: \$ 119,706
2000: \$ 146,725
2005: \$ 218,173

↑ 182%

(in millions of \$ USD)

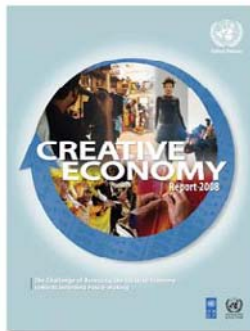
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Key learnings

- lack of a clear framework
- lack of data on which to base development strategies
- need for institutional capacity to protect and enforce IP
- need for country-specific rather than general policies

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Major findings

- need for robust definitions by which to classify data
- policy framework needs to be multi-sectoral

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"It is hoped that governments will...ensure that quality and coverage of data are improved and that an effort will be made to compile accurate statistics allowing for a comparative analysis at the global level."

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UNESCO Institute for Statistics 2008-2013 Strategy

A revised *UNESCO Framework for Cultural Statistics* will be presented to the General Conference in 2009.

Sectors for extra-budgetary evaluation include **design**.

The Institute will **work in close cooperation with the appropriate professional bodies** to determine definitions and indicators.

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Measuring design: the challenges

definitions and classifications:

- how to separate the design input from the final product?

products and services:

- design involves both goods (product) and services (activities)

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The challenge of comparability

CPC Ver.2 (product classification)

ISIC Rev 4 (activity classification)

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ISIC Rev 4

- Section M, Div 74, Group 1

- **Class 7410:**

 - Specialised design activities**

 - fashion design
 - industrial design
 - graphic design
 - interior decorators

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CPC V 2 - draft

Section 8, Div 83, Group 839

- **Class 8391:**
Specialty design services
 - industrial design
 - interior design
 - other specialty design
 - graphic design

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Global perspective
on creative industries



Indicators
Data collection



Classification



Statistics Division

world**design**survey.org

The contribution of the World Design Report

- a methodology for measuring the contribution of design in an international framework:
 - consistent
 - relevant
 - measurable
- a format that allows each country to profile their unique characteristics and contributions

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Desired outcomes

- Resource for national statistics agencies in refining existing definitions
- Recommendations on developing missing definitions
- regrouping of existing statistical codes to support an international framework.
- Advocacy within the design community to encourage the use codes and classifications

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**The evidence shows the importance of design
as a key sector of the our overall economy.**

The challenge ahead of us is to come together
- as a profession working with government and
industry - and facilitate collaboration and manage
our continued contribution to overall economic,
cultural and social well-being of our society.

Thank you.

SABS HEAD OFFICE: Pretoria

Street Address: 1 Dr Lategan Road, Groenkloof
Postal Address: Private Bag X191, Pretoria, 0001
Telephone: +27 (0) 11 428 7911
www.sabs.co.za

SABS Design Institute

Telephone: +27 (0) 12 428 6326
Fax: +27 (0) 12 428 6546
design@sabs.co.za
www.designinstitute.org.za