

Design Policy Mapping in Europe

Deliverable:

D2.7

Type of Report:

Public

Date:

31.10.2025

Grant Number:

101187001

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Acknowledgements

This study was carried out with the support of the Creative Europe programme of the European Union. I would like to warmly thank BEDA member organisations for their guidance and contributions, the MADres project team for their collaboration, and all the experts and interviewees who generously shared their time and insights. Their engagement made this mapping possible.

This is BEDA

Founded in 1969 and based in Brussels, BEDA is a not-for-profit association comprising of 50+ members spanning 28 European countries. Members include publicly funded design organisations plus professional and trade associations, all of whom promote pioneering design nationally or regionally.

This is MADres

MADres is a strategic initiative by BEDA and co-funded by the European Union. MADres advances design as a key enabler of Europe's transformation for sustainable growth and economic value.

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How to cite this report?

Swiatek, P. Hanke, R. (2025) Design Policy Mapping in Europe. MADres project Report. BEDA – Bureau of European Design Associations.

Declaration of Generative AI and AI-assisted technologies in the writing process

The authors have used GenAI tools to support the research and writing process. The tools used were Dovetail and Claude AI. Every GenAI output was counterchecked, evaluated and strongly edited. These tools were selected and used supportively and did not replace core author responsibilities and activities. All authors reviewed, edited and take responsibility for all outputs of the tools used.

Document History:

v1 Raw Text
v2 Refined Text
v3 Final Text
v4 Raw Layout
v5 Proofreading Corrections
v7 Refined Layout
v8 Final Layout

Imprint

Date: 31 October 2025

Authors: Piotr Swiatek & Regina Hanke

Layout: Simon Hermann

Graphics: Regina Hanke & Simon Hermann

Proof Reading: Fleur Fisher

Responsible: Regina Hanke, Mark Illi, Dimitris Kaboukos, Piotr Swiatek

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Organisational Framework

MADres is co-funded by the European Union,

CREA-Cult-Call 24; GA 101187001.

Foreword

A note of consideration

Design Policy in the Context of Contemporary EU Policymaking

Undoubtedly, the environmental, governmental, and political landscapes have shifted profoundly since the European Design Report 2.0 was published in 2018 – conducted by designaustria for BEDA, co-funded by the European Union and supported through Creative Europe.

Almost eight years on, this milestone offers a valuable perspective. While the 2018 report helped strengthen the statistical and institutional visibility of design, we must understand the landscape of Design Policy anew, as the context in which design operates evolves with society's needs. Those have fundamentally transformed. And with it, the context in which the European Union operates today.

Today, European policymaking is shaped by geopolitical uncertainty, the pervasive influence of AI, rapid economic restructuring, and the climate approaching irreversible tipping points. These forces have the power to redefine not only what Europe must address but also how it conceives, designs and delivers policy.

This Design Policy Mapping Report sheds a light on how national entities embed design within their policy systems, to connect to goals like promoting sustainable growth, tackling the green/digital transition, supporting innovation and business or upholding EU values internally and externally. And at the same time strengthening the European Union on external actions, security & defence, migration, human rights and border management.

Those aspects prompt us to ask specific questions:

→ Has the role of design evolved sufficiently within contemporary political frameworks and decision-making processes?

→ How is design embedded in the mechanics of European governance, and how does it contribute to the implementation and communication of complex policy agendas?

At the heart of this reflection lies a simple but powerful truth. Design is, at its core, the interaction between humans and their environment; it is a political – and at its best, supports a democratic act – able to translate strategic intent into tangible experience by balancing the different interests most effectively.

For MADres, these questions are not theoretical. They drill down to the core of how design contributes to innovation, competitiveness, public value, institutional learning and systemic transformation. In today's quickly adapting landscape, design must be recognised as a lever for competitiveness and as an integral part of policymaking – helping to shape resilient, future-ready governance.

Executive Summary

“The results of the study reveal a striking paradox. On the one hand, explicit design policies are rare. On the other hand, design is more visible and influential than ever.“

This study set out to map how design features in national policy frameworks across Europe. The results of the study reveal a striking paradox. On the one hand, explicit [design policies*](#) are rare: in 2025 only two countries – Latvia and Iceland – maintain government-adopted national strategies* dedicated to design. This represents a marked decline from the 2010s, when European Commission initiatives such as the Innovation Union and its Action Plan for Design-driven Innovation inspired more than a dozen national and regional design policies.

On the other hand, design is more visible and influential than ever. Our mapping shows that it now appears in a wide range of policy domains. Beyond its traditional home in Cultural and Creative Industries strategies, design has been taken up in innovation policies, industrial competitiveness strategies, circular economy and sustainability plans, digitalisation agendas, and built environment frameworks. In each case, design is framed differently – as a creative sector, a business capability, a sustainability lever, a public-service tool, or a means of shaping places and infrastructure.

This cross-cutting presence matters. The way design is situated within each policy family shapes both the instruments used and the opportunities that follow. A mention in a cultural strategy may bring visibility and export support, while inclusion in a circular economy roadmap can generate demand for ecodesign and lifecycle innovation. Likewise, design’s role in digitalisation strategies often translates into practical demand for service designers and UX specialists working on public platforms.

Yet while design’s footprint is broad, it is also fragmented. Where countries lack a unifying design policy, responsibility for design is scattered across ministries and agencies, making coordination difficult and leaving gaps in delivery. By contrast, in Latvia and Iceland, explicit national design policies provide a central anchor: they connect the different agendas, create cohesion between cultural, economic and sustainability goals and give legitimacy to intermediary bodies that turn policy into practice.

The lesson from this mapping is clear. [Design thrives across many agendas, but the presence of a dedicated design policy adds value by offering strategic visibility, institutional coordination, and long-term continuity.](#) Without it, design risks being recognised but underused; with it, design becomes a structured contributor to innovation, competitiveness, sustainability, and cultural vitality.

This report therefore argues not for one single “right” model, but for the value of a policy framework that recognises design’s cross-sectoral character while connecting and coordinating the different strands. Dedicated design policies remain the most effective way to achieve this, but even where they are absent, governments can take steps to build coherence across the diverse policy families where design is already at work.

*Read: The terms “policy” and “strategy” are used interchangeably in this report, reflecting the varying terminology adopted in national documents.

Abbreviations

AI	Artificial Intelligence
CCI	Cultural and Creative Industries
CPD	Continuing Professional Development
CREA	Creative Europe (EU funding programme)
DCMS	Department for Digital, Culture, Media and Sport (UK)
DCCoI	Design and Crafts Council of Ireland
ECO	Ecodesign
ESPR	Ecodesign for Sustainable Products Regulation
EU	European Union
Fig	Figure
GA	Grant Agreement
GDP	Gross Domestic Product
ICT	Information and Communications Technology
KPI	Key Performance Indicator
OECD	Organisation for Economic Co-operation and Development
R&D	Research and Development
R&D&I	Research, Development and Innovation
SME	Small and Medium-sized Enterprise
UK	United Kingdom
UNESCO	United Nations Educational, Scientific and Cultural Organization
UX	User Experience
WB	World Bank

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1. Introduction

This study has been commissioned by BEDA – the Bureau of European Design Associations as part of the Creative Europe co-funded project MADres. The study follows the research program defined within MADres. MADres aims to strengthen the European design community and deepen expertise in three focus areas: AI competencies and digital ethics, planetary design and accessibility, and business cases and development. These domains are central to extending the technical skill set of the design sector. For long-term impact, MADres is developing a Living Design Policy Framework – a flexible, adaptive model to help governments and institutions integrate design more effectively into national and EU-level policy agendas.

In this study, design policy is understood as a government strategy to develop national design resources and encourage their effective use (Raulik-Murphy et al., 2010). Such policies take diverse forms: they may be explicit, expressed through official documents such as innovation strategies, smart specialisation agendas, or dedicated design policies; or they may be implicitly embedded in government-supported initiatives and programmes without being formally labelled as design policy. This study focuses primarily on explicit policies, mapping how design is positioned within national policy frameworks across Europe.

The research builds upon earlier BEDA work, notably the European Design Report (2006), which mapped the size and structure of the European design industry, and the European Design Report 2.0 (2018), which explored both the sector's economic performance and the status of design policies across countries. These reports provided a foundation for understanding design's contribution to national economies and this study extends that line of inquiry by mapping and analysing the current state of national design policies across Europe.

BEDA's unique position as a European network of design associations and promotion centres provides privileged access to national ecosystems. Its members offer firsthand knowledge of policy developments, challenges and opportunities, making BEDA a critical platform for consolidating and interpreting evidence on how design is embedded in policy, where gaps remain, and what pathways exist for more coherent and impactful design governance across Europe.

2. Key findings at a glance

Only two dedicated national design policies remain in Europe

Our 2025 mapping identified Latvia and Iceland as the only countries with explicit, government-adopted national design policies in force. This contrasts with the 11 national and 7 regional policies recorded in the BEDA European Design Report 2.0 (2018). While part of this difference is methodological, the decline in formal strategies is significant.

But design is more present than ever

The reduction in standalone policies does not mean design has lost ground. Instead, design has become more deeply embedded across multiple policy families – particularly in Cultural and Creative Industries strategies, innovation and competitiveness policies and circular economy frameworks.

From explicit to embedded

- **2010s:** Design was highly visible in explicit strategies, supported by the European Commission's Innovation Union and Action Plan for Design-driven Innovation.
- **2020s:** Fewer named national strategies, but a growth in cross-cutting design roles – from ecodesign rules in sustainability agendas to service design principles in digital government reforms.

Different policy families = different roles for design

- **CCI policies:** design as a creative sector and cultural export.
- **Innovation policies:** design as a method for user-centred R&D and SME growth.
- **Circular economy strategies:** design as a regulatory lever for durability, repairability, and lifecycle impact.
- **Digitalisation agendas:** design as a driver of user-centred public services.
- **Industrial strategies:** design as a competitiveness and export tool.
- **Built environment policies:** design as spatial quality and inclusion.

A useful anchor where it exists

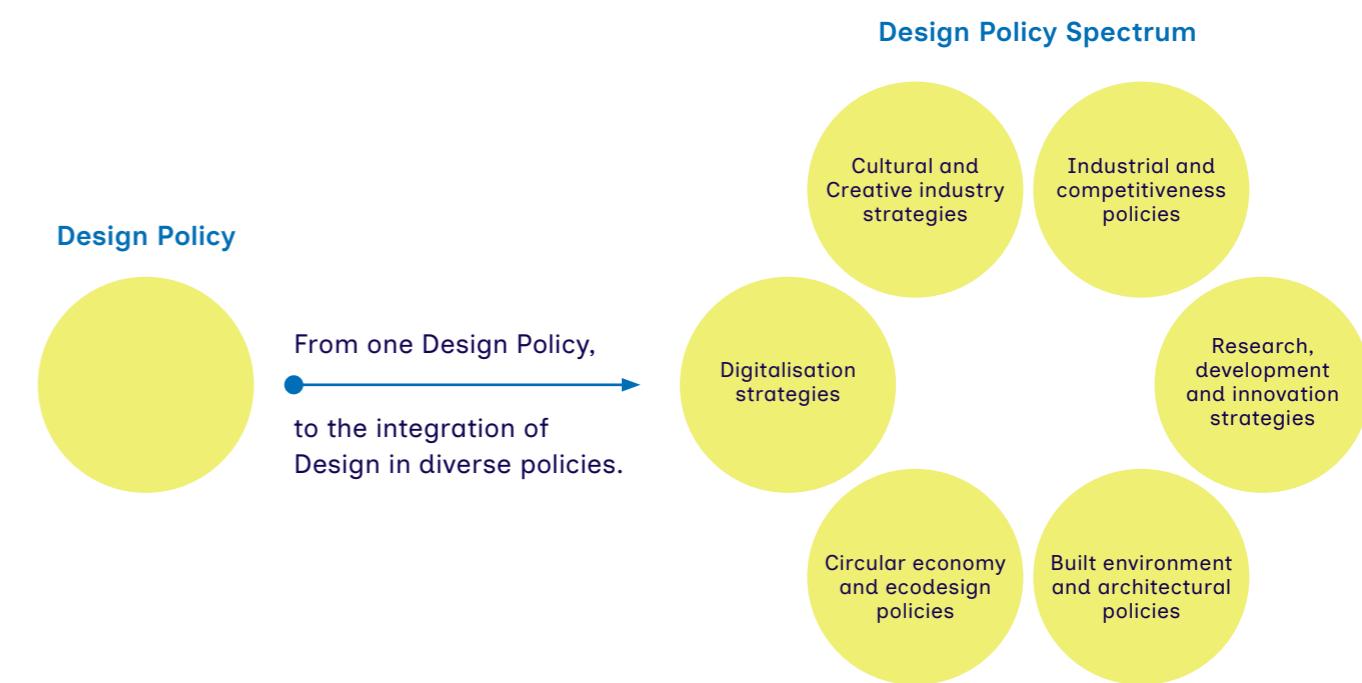
Where a dedicated design policy exists, it serves as a hub that connects agendas, creating coherence and visibility for design across cultural, economic, and sustainability goals. Without it, design's role is more fragmented and reliant on intermediaries (design centres, trade bodies, innovation agencies) to sustain momentum.

3. The Design Policy Spectrum

Design is no longer a niche policy interest: across Europe it now turns up in culture plans, industrial roadmaps, circular economy programmes, digital-government agendas and architecture policies. But while design's presence is widespread, its role is rarely uniform. Our mapping found two clear cases of government-adopted, standalone design strategies in currently in power in Europe – in Iceland and Latvia. Beyond those, countries tend to treat design in one of several, recognisably different ways, from absent to fully institutionalised. That variation matters for what designers and the public can expect from policy.

This variation poses some challenges in mapping design inclusion in policy. In some cases, it is highly visible, framed as a driver of innovation or sustainability with entire programmes and agencies devoted to its delivery. In other countries it is barely mentioned, sitting as a single line in a cultural strategy or in a list of creative sub-sectors. These differences matter. They shape how far design is able to influence economic development, public services or sustainability transitions.

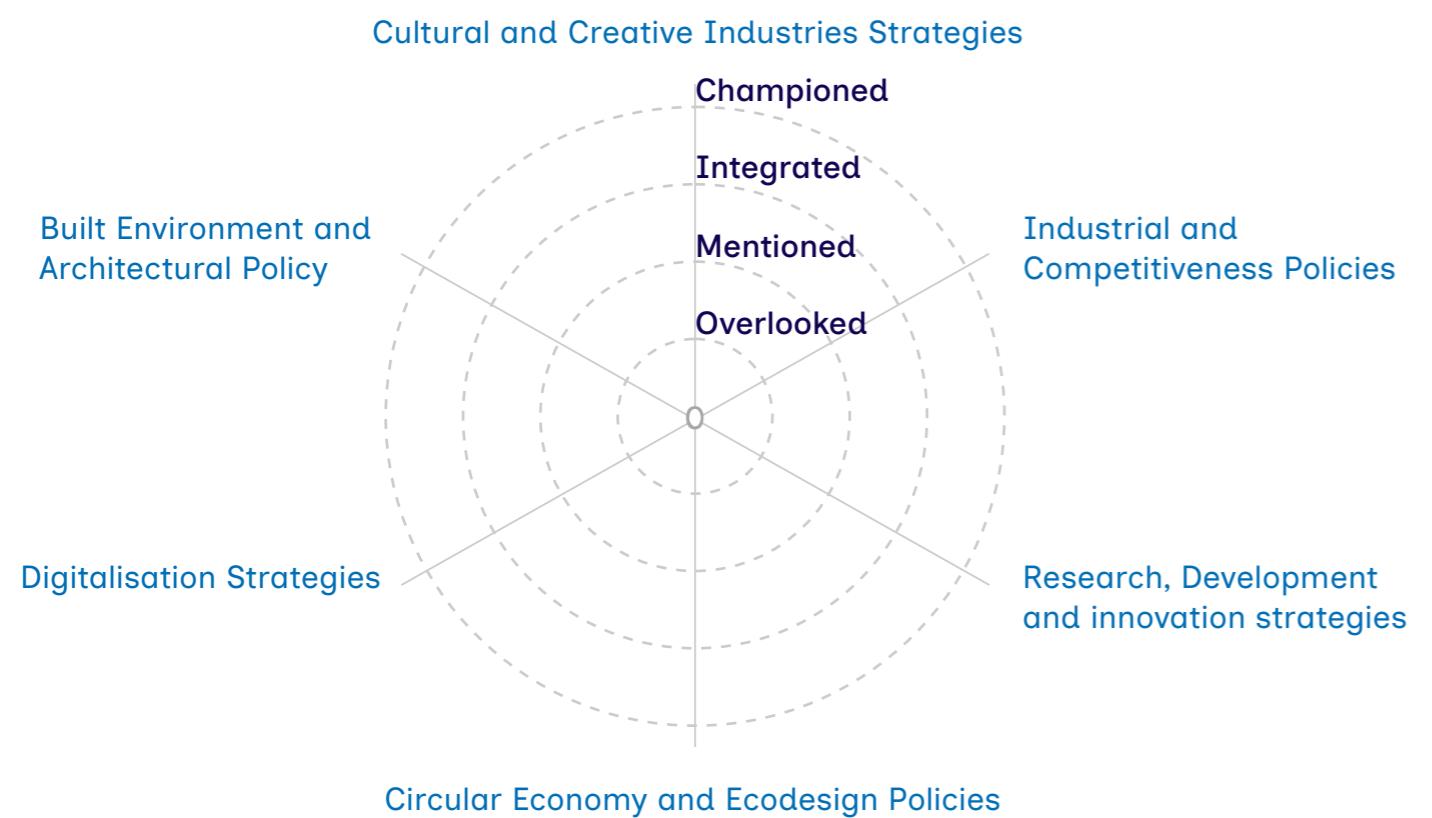
Fig. 2 | From Design Policy to the Design Policy Spectrum
Integration of design in policy | Status: September



To bring clarity to this landscape, this study introduces the [Design Policy Spectrum](#). The framework provides a common language for describing different patterns of policy attention without prescribing a single ‘correct’ approach. It identifies four levels of integration – ranging from absence (Overlooked), through limited Mention, to more substantial Integration and eventually Championing design with comprehensive aims, actions and resources – alongside the case of an explicit, dedicated design policy. Together, these categories reflect how design is positioned and operationalised in national policy landscape.

Fig. 3 | Design Policy Spectrum Evaluation Tool

Status: September



Overlooked: Design is simply overlooked in governmental policies efforts. It does not appear in major policy documents, whether in creative industries, innovation, development, industrial strategies or sustainability agendas. This absence does not necessarily mean design has no role in the economy or culture – many design sectors thrive independently without a dedicated policy. The absence highlights that there is no deliberate effort from government to recognise or support design as a strategic lever.

Mentioned: Governments acknowledge its existence, often by listing it as one of many creative sub-sectors or by including “design applications” as an innovation indicator. This signals awareness, but little more. Mentions rarely come with programmes, budgets or institutions that can turn recognition into practice.

Integrated: Countries make more deliberate use of design, treating it as integrated activities or methods within particular policy contexts. This is where design is connected to specific goals – for example, eco-design principles in circular economy strategies, design vouchers for SMEs in innovation policies or service design principles in digital government reforms. At this level, governments begin to create demand for design in certain sectors, though activity is usually fragmented and tied to single agendas.

Championed: Design is framed as a strategic driver within a major national strategy. Creative industries roadmaps, circular economy action plans or research and innovation strategies sometimes dedicate entire chapters or instruments to design. This is usually accompanied by visible programmes, national centres or agencies, export promotion initiatives and a clear link between strategy and delivery. When design is championed, it gains visibility as a contributor to competitiveness, innovation and social change.

Dedicated: Finally, at the far end of the spectrum, some countries have developed dedicated design policies. These are standalone national strategies, formally adopted by government,

with clear goals, and usually budgets, governance structures and monitoring mechanisms. Dedicated design policies create the most favourable conditions for long-term impact: they signal political will, give institutions legitimacy and allow for coordinated action across ministries and sectors.

What the Spectrum makes visible is the levels of integration are practical differences. The Spectrum highlights the approach of governments and expected impact of design on societal, economic and ecological level. A passing mention will not generate sustained demand for professional design services. By contrast, integrated measures, championed or dedicated programmes usually create new markets, attract investment and embed design in decision-making. And while a fully dedicated national strategy is not the only path, it remains the most comprehensive framework for ensuring design is systematically supported across sectors.

By applying the Design Policy Spectrum in this study, we can see the different routes and the current status in which countries stand today. Some have moved from mentions to integration through pilots and vouchers. Others have used cultural policy as the anchor for a more comprehensive strategy. The Spectrum therefore offers both a diagnostic and a way to trace trajectories of change.

3.1 Design across European countries

Looking across countries, a pattern emerges. The European policy push of the 2010s - the Commission's Innovation Union and design action plan, seeded many dedicated national strategies and regional programmes. In the most recent mapping, however, fewer countries have a single government-labelled design strategy; instead we see design mainstreamed into other policy families.

According to the mapping, Iceland and Latvia provide two examples of how a country can enshrine design in law and strategic planning. Eleven countries - Austria, Czechia, Estonia, Ireland, Malta, Netherlands, Norway, Slovenia, Sweden, Switzerland and the UK; can be classified as championing design in at least one major policy family. Other states integrate design into one or more specific agendas and a group of countries still refer to design only tangentially - a sign of awareness but not of active policymaking.

Fig. 4 | Design Policy Mapping: Dedicated Design Policies vs Design Policy Spectrum

Status: September

Dedicated: 2

Integrated in the Design policy spectrum: 37

Iceland
Latvia
Austria
Belgium
Bosnia Herzogowina
Bulgaria
Croatia
Cyprus
Czechia
Denmark
Estonia
Finland
France
Germany
Greece

Albania
Austria
Belgium
Bosnia Herzogowina
Bulgaria
Croatia
Cyprus
Czechia
Denmark
Estonia
Finland
France
Germany
Greece
Hungary
Ireland
Italy
Lithuania
Luxembourg
Malta
Moldova
Montenegro
Netherlands
North Macedonia
Norway
Poland
Portugal
Romania
Serbia
Slovakia
Slovenia
Spain
Sweden
Switzerland
Turkey
Ukraine
United Kingdom

Two further patterns repeat themselves across dedicated design policies and design policy spectrum.

First, intermediary organisations matter: national design centres, trade promotion bodies and advocacy coalitions are often the brokers that turn strategic nods into pilots and programmes.

Second, monitoring remains thin: most strategies reference design ambitions, but far fewer set measurable KPIs tied to outcomes (firms assisted, procurement projects using design criteria, export growth), which makes it harder to sustain funding or to learn from what works.

For policymakers and funders, the practical implications are straightforward. Lasting impact usually requires both supply-side investment (skills, capability-building, institutional hubs) and demand-side levers (procurement, standards, market-creation). A named convenor, a ministry, a design council or a funded centre helps move activity beyond ad hoc projects and across election cycles. Programme level indicators make it possible to evaluate and defend interventions. Finally, using sectoral entry points strategically (circular economy, digital public services) is often the fastest route to scale designer involvement, but that requires deliberate translation effort: aligning budgets, clarifying responsibilities and building brokerage functions so design can move from a policy line into everyday public and industrial practice.

Design's footprint on the policy landscape is deeper and more complex than a single metric can show.

The policy challenge seems to be less about persuading governments that design matters but rather about building the institutional routines, policy implementation mechanisms and evidence systems that convert recognition into sustained practice.

4.

The Design Policy Spectrum across national policy agendas

A paradox runs through Europe's policy landscape. On the one hand, explicit, standalone design policies remain rare – only Iceland and Latvia currently have government-adopted strategies devoted solely to design. On the other hand, once we widen our lens, design is more present than it first appears. It turns up in cultural roadmaps, industrial competitiveness plans, research and innovation agendas, sustainability frameworks, digital government programmes and built environmental strategies. This "hidden visibility" demonstrates that while few countries brand their work as "design policy" many already mobilise design to advance other priorities.

But presence alone is not enough. To capture the varying ways design features in national and regional strategies, this study introduces the Design Policy Spectrum. The framework distinguishes four levels of design's integration in any policy domain (for detailed explanation see page 18-19), plus an explicit dedicated design policy, reflecting how design is positioned and acted upon in policy documents:

- **Overlooked** – Design is absent from policy strategies, with no explicit references.
- **Mentioned** – Design appears in passing, often listed as a creative sub-sector or as part of innovation indicators. This signals awareness, but usually without dedicated resources or follow-up.
- **Integrated** – Design is included in specific policy contexts such as export promotion, SME competitiveness, skills development, or sustainability. At this level, design may benefit from targeted measures or selective actions, though coverage is still partial rather than systemic.
- **Championed** – Design receives explicit strategic attention, with dedicated sections, instruments, or action plans. Here design is treated as a driver of competitiveness, innovation, and/or societal transitions, effectively forming a de facto design policy within broader frameworks.
- **Dedicated** – A standalone design policy or strategy exists, formally adopted by government, with clear goals, governance structures, and implementation mechanisms.

The spectrum is not a ranking but a descriptive tool. It makes clear that different levels of attention lead to different outcomes: fleeting references rarely build markets for design, while integrated or championed approaches often create demand, institutional capacity and investment. Dedicated policies go further, signalling long-term political will and embedding design across sectors.

Our research, based on 39 countries from across geographic Europe, identified six main policy areas where design plays a significant role, each telling a different story about what design can contribute to national priorities.

The critical insight here is that each family creates different forms of demand for design expertise. A designer can expect promotional visibility from cultural policies, access to new product markets through industrial strategies, research funding via innovation programmes, regulation-driven redesign work from circular economy policies, public service contracts through digitalisation agendas, or long-term infrastructure briefs from built environment strategies.

Cultural and Creative Industries strategies position design as part of the creative economy, emphasising cultural value, creative careers, and creative export promotion. Here, design sits alongside game, film, or music industries, as a cultural asset that can generate visibility and jobs while expressing national identity.

Industrial and competitiveness policies usually treat design as a manufacturing capability that enhances product margin, innovation and export readiness. In this context, design becomes a competitive advantage that helps companies differentiate products in global markets.

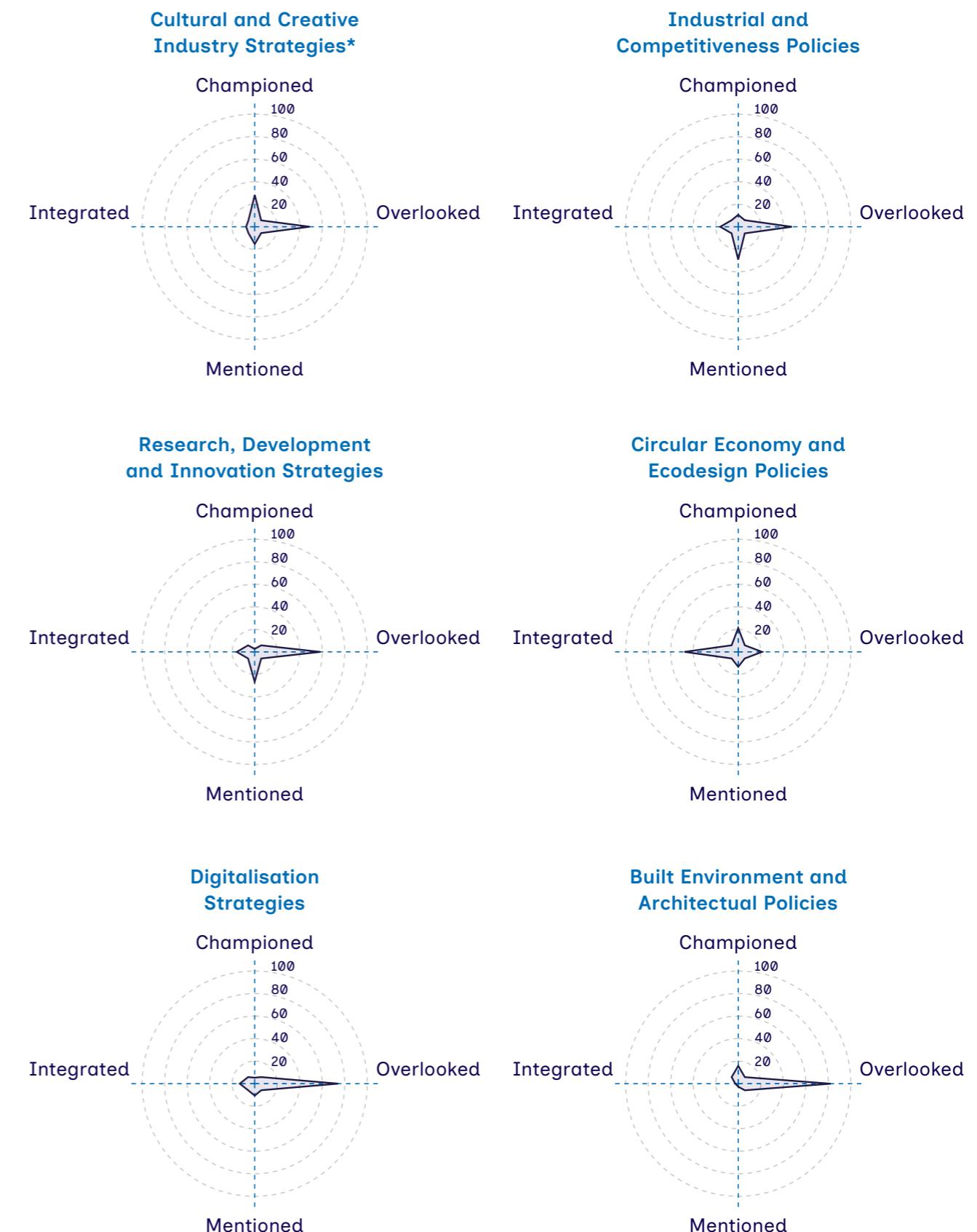
Research, development and innovation strategies approach design primarily as methodology – design thinking, prototyping, and user-centred research become tools for translating academic research into market-ready solutions. Design here serves as a bridge between laboratory and marketplace.

Circular economy and ecodesign policies increasingly cast design as a regulatory lever for sustainability. As governments implement ecodesign directive and product lifecycle rules, designers become key actors in creating repairable, reusable, and ultimately more sustainable products.

Digitalisation strategies aim to improve the digital environment and capability in the country and are an important driver for better, more usable public services (efficiency, accessibility, inclusive UX). As governments digitise services and build platforms, they need designers who can make complex systems human-centred and accessible.

Built environment and architectural policies integrate design into spatial planning and infrastructure development, where quality of place becomes a policy priority alongside accessibility, sustainability and social inclusion.

Fig. 5 | Design Policy Mapping Summary: Integration of Design in the Researched Policy Area in percent | Status: September 2025 | n = 39



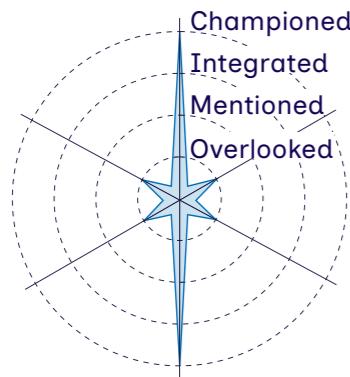
*Read: approx. 25% of the 39 researched nations, championed 'Design' in the Cultural and 'Creative industry Strategies'.

Our mapping found that eleven countries – Austria, Czechia, Estonia, Ireland, Malta, Netherlands, Norway, Slovenia, Sweden, Switzerland, and the UK – demonstrate championing design in at least one major policy family.

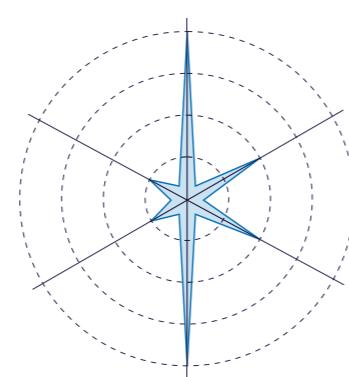
The rest of this report explores these families and country profiles in detail, showing how design has been embedded, what policy instruments support it and how different approaches translate into practice. Together, they show that design is no longer marginal in European policy. Even without widespread dedicated strategies, it has carved out a cross-cutting role though one that varies significantly depending on which policy family takes the lead.

Fig. 6 | Overview of Countries championing design in at least one major policy family
Status: September 2025

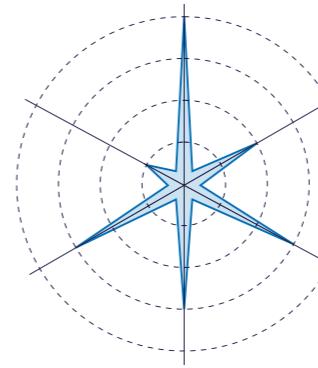
Austria: CCI & Ecodesign



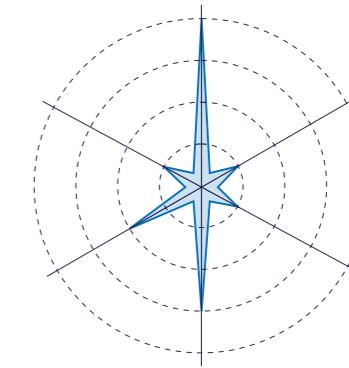
Czechia: CCI & Ecodesign



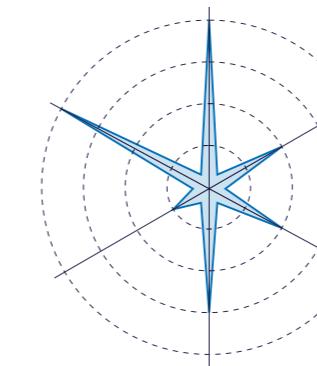
Malta: CCI



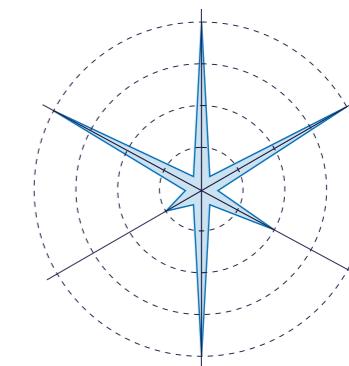
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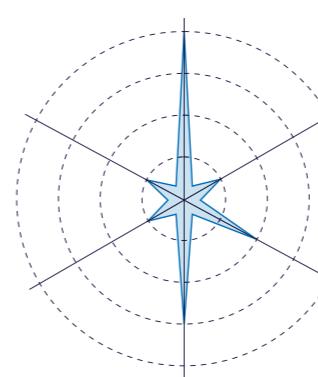
Norway: CCI & Architecture



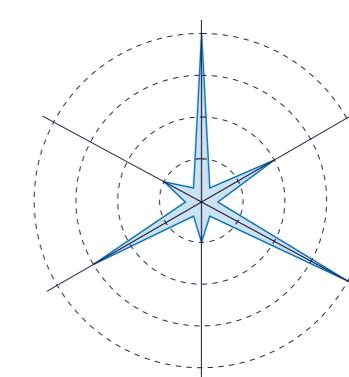
Sweden: CCI, Architecture, Industrial, Ecodesign



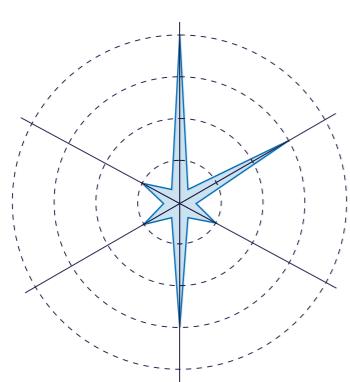
Slovenia: CCI



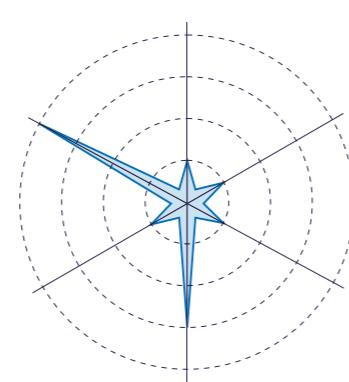
UK: CCI & R&D&I



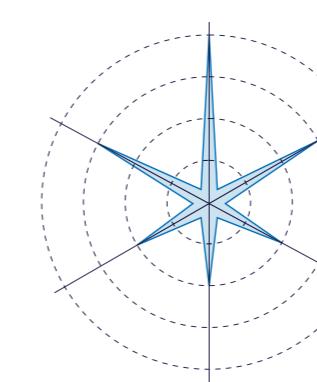
Estonia: CCI



Ireland: Architecture



Switzerland: CCI



4.1 Design in Cultural and Creative Industries strategies

Responsibility for design sector often sits within the remits of ministries of culture, so Cultural and Creative Industries strategies might seem like design's most natural policy environment. Here, design sits alongside film, music, gaming, and the performing arts as part of the broader creative economy. Yet this familiar positioning masks significant variation in how countries actually treat design within their CCI frameworks. Moreover, cultural and creative industries as a catch-all section of the economy and policy is tricky to manage and often receives criticism for trying to cater to sectors as varied as film production, literature and museums and libraries.

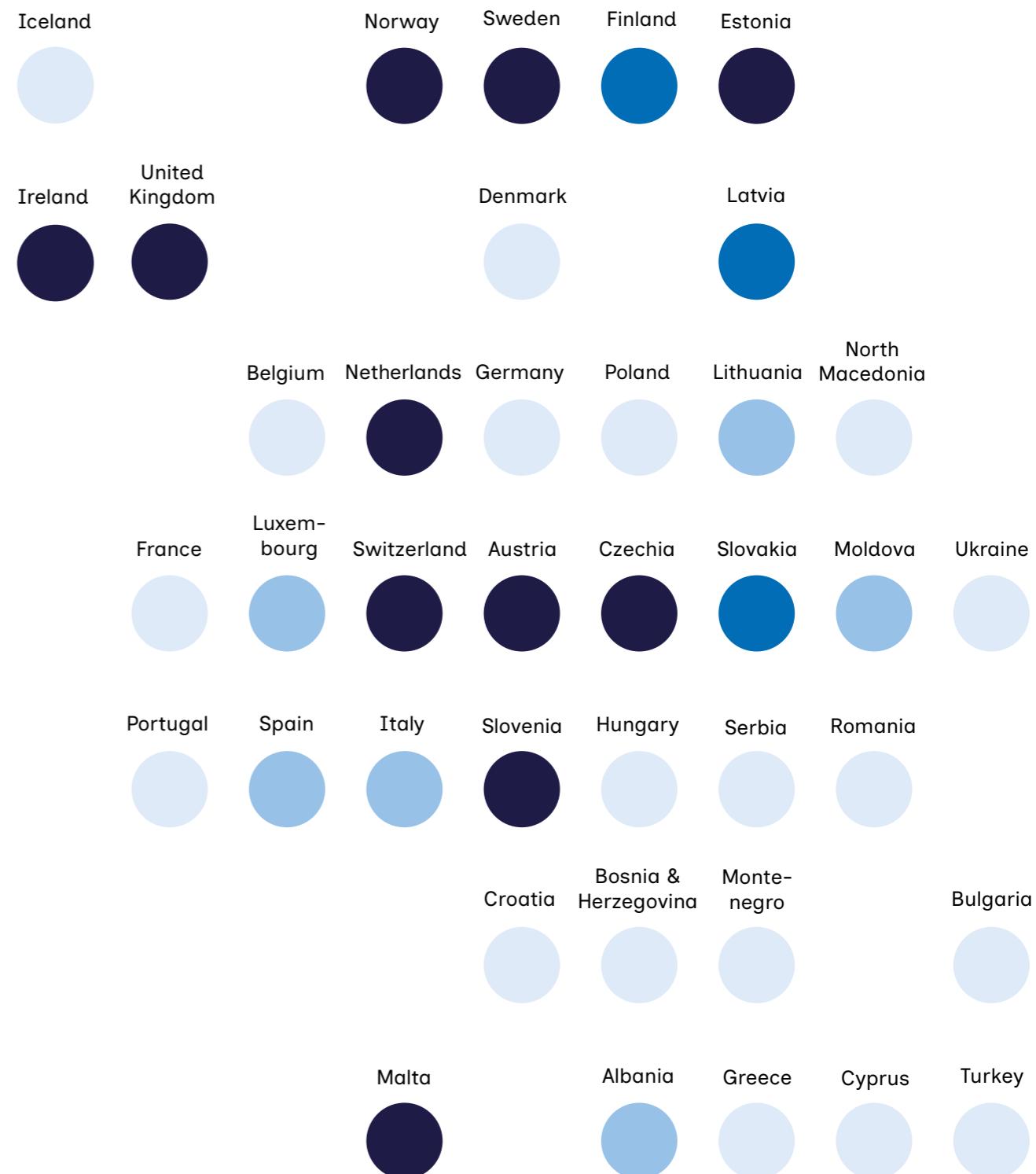
Across Europe, the mapping identified 11 countries that champion design in their CCI or related frameworks, giving it prominent visibility and dedicated measures – for example, Estonia, which devotes a full chapter to design in its Culture Development Plan, or Ireland, which positions design at the heart of innovation and enterprise through the Digital Creative Industries Roadmap 2024–26 and ambition to create a National Design Centre. A smaller group of three countries integrate design more selectively, such as Finland, where it is included in cultural policy in relation to service design and UX, or Latvia, where design is both part of cultural strategy and supported through a dedicated design policy. Six countries mention design in passing, where it appears on CCI sector lists without specific actions. Finally, 19 countries overlook design altogether, omitting it from policy agendas.

Our mapping suggests that design's treatment within CCI strategies often determines its wider positioning across national policy. Countries that only “mention” design in their creative industries frameworks tend to keep it peripheral elsewhere too. But where CCI strategies include dedicated actions, funding streams, and institutional support for design, the discipline typically achieves much greater policy visibility and market support across other policy areas as well.

Fig. 7 | Design in Cultural and Creative Industries Strategies

Status: September 2025

Overlooked Mentioned Integrated Championed



4.2 Design inclusion in R&D & Innovation strategies

Research and innovation policies represent a distinct policy space for design. Unlike cultural or industrial strategies, which often treat design as a sector of economic activity, R&D&I strategies frame design primarily as a method and capability. Terms such as design thinking, user-centred research, and prototyping appear frequently. Here, design is valued not for its outputs, but for its contribution to innovation processes: translating technologies, developing usable products, understanding users, and improving firm competitiveness.

In the previous decade of the XXI century, design featured prominently in the innovation policy agenda. After recognising design as a non-technological innovation and key element of development process by Oslo Manual (2005), publication of the document Design as a driver of user-centred innovation by the European Commission (2009), encouraged adoption of design as one of ten priorities of the 'Innovation Union' (2010) policy, and the subsequent Action Plan for Design-Driven Innovation in Europe (2013) which called upon European countries and regions to adopt such strategic documents.

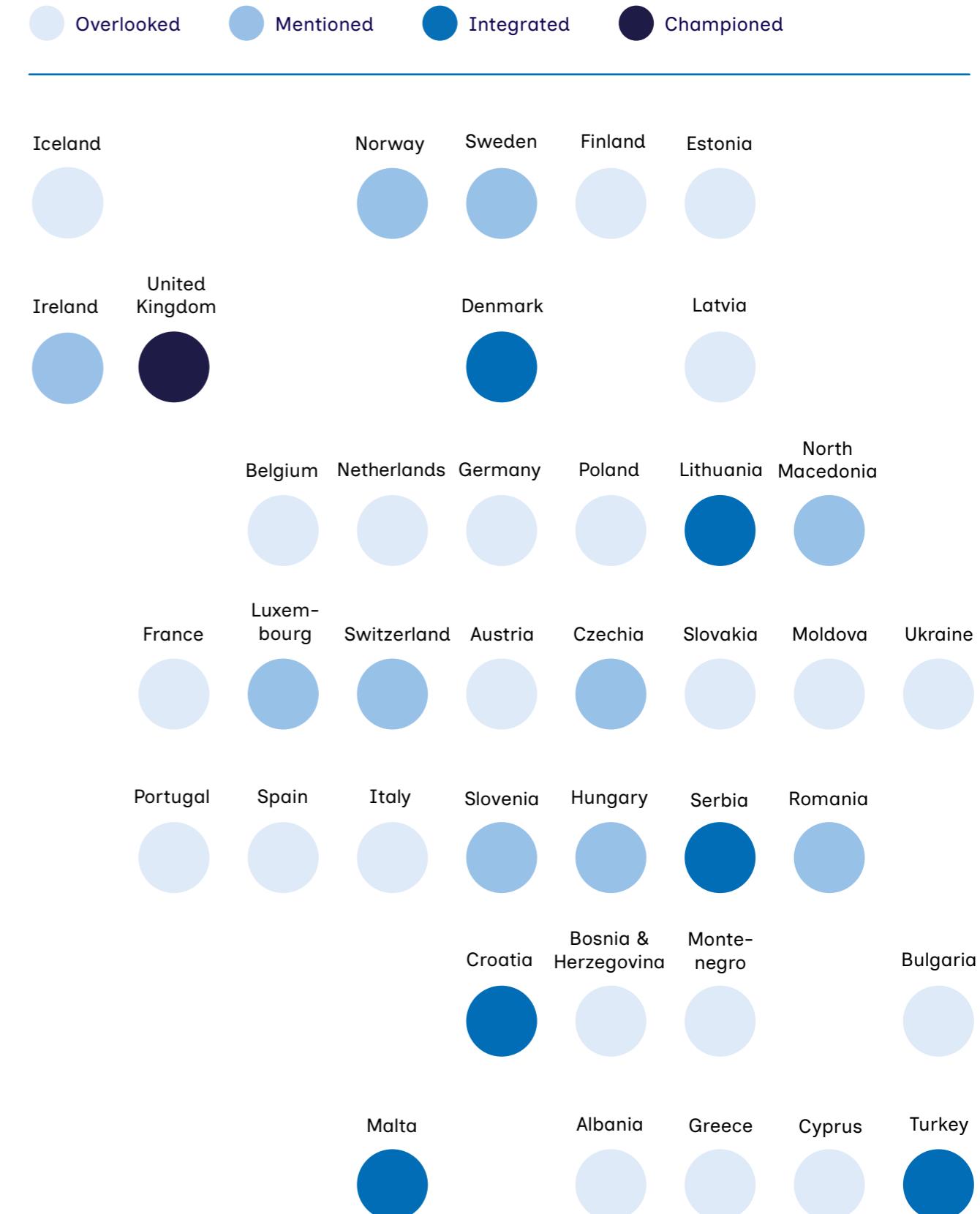
Currently, across innovation and R&D policy, only one country can be classified as championing design: the United Kingdom, where design is embedded as a cross-cutting innovation capability through the UK Innovation Strategy and dedicated programmes such as Innovate UK's Design in Innovation strategy. A further six countries integrate design into their innovation agendas, linking it to specific priorities such as smart specialisation, digitalisation or circular economy – for example, Denmark, which highlights design in research priorities for med-tech and green solutions, or Malta, which explicitly recommends co-design in R&I funding processes. Ten countries that reference design do so only in a limited way, treating it as a peripheral factor in policy documents rather than a structured capability; examples include Sweden, where design is mentioned within the national Research & Innovation Strategy, or Ireland, which links it narrowly to intellectual property awareness. All other European countries in this

mapping exercise overlook design within their innovation and R&D strategies or have not adopted one.

With the exception of the UK, which continues to embed design through dedicated programmes and funding, most recent R&D&I strategies mention design only in passing or in narrowly defined thematic areas such as digitalisation, health technologies, or circular economy. Where included, design is valued primarily as a methodological approach rather than an industry or a sectoral or systemic capability, and concrete instruments or monitoring frameworks are rare. Overall, design's role in R&D&I policy appears to have plateaued, with its early prominence giving way to sporadic mentions rather than sustained policy mainstreaming.

Fig. 8 | Design in Research, Development and Innovation Strategies

Status: September 2025



4.3 Design inclusion in Industrial, Competitiveness & Development strategies

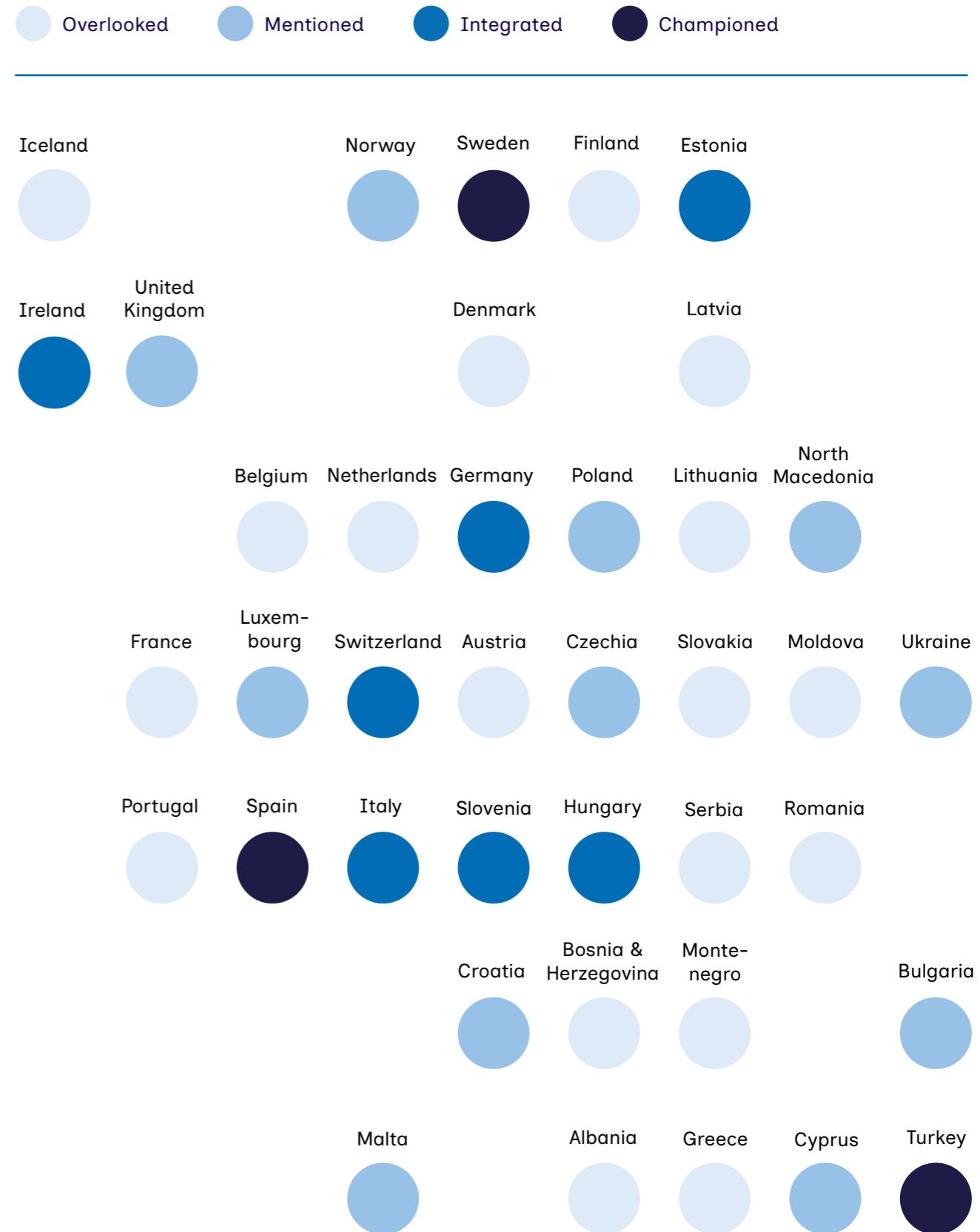
Industrial and competitiveness strategies are a high-stakes policy space for design because they shape market demand, standards, skills and industrial upgrading. When design is treated seriously in this family, it is framed instrumentally – as a lever for product competitiveness, export readiness, eco-innovation, and industrial modernisation. Below we apply the same typology (Championed → Integrated → Mentioned → Overlooked) and highlight recurring instruments and implications.

Across Europe, only a minority of industrial and development strategies explicitly recognise design as part of their policy toolkit. In this mapping, four countries can be classified as championing design, where it is embedded through statutory articles, dedicated institutions, or multi-sectoral action programmes. Examples include Ireland, which committed to establishing a National Design Centre under Project Ireland 2040 as a centrally funded industrial intervention, and Turkey, where the 12th National Development Plan (2024–2028) mainstreams design across R&D centres, circular economy, AI, and public service delivery. Seven countries integrate design into their development agendas in targeted ways, such as Germany's Sustainable Development Strategy (2021), which highlights eco-design and sustainable consumption, or Switzerland's 2030 Sustainable Development Strategy, which frames design as a lever for sustainable production chains. A further nine countries only mention design, often in passing or in relation to sustainability or creative industries, without concrete measures – for example, Bulgaria's National Development Programme 2030, which links design to low-carbon transition, or Luxembourg's transition plan, which briefly references a media and design centre. The remaining countries largely overlook design altogether in their industrial and development policies or have not developed a strategic approach for this domain.

The mapping of industrial, competitiveness and development strategies shows that design is recognised in diverse ways, though often unevenly, but this policy cluster includes different types of policies – from long-term development strategies, through smart specialisation strategies to more operational, cyclical industrial plans. In a few countries, such as Spain, Sweden, Turkey and Ireland, design is explicitly positioned within national development goals, linking it to competitiveness, exports, sustainability, and sectoral modernisation. In many others, references are narrower – most commonly through circular economy and eco-design requirements, or through mentions of public service design as part of broader innovation agendas. These entry points indicate an awareness of design's relevance, even if not always accompanied by clear instruments or programmes. Where design is more embedded, it is typically tied to major transitions – green, digital, and industrial modernisation – and backed by measures such as design centres, roadmaps, and skills initiatives. Taken together, the strategies suggest that design is valued both as an enabler of industrial innovation and as a lever for systemic change, though the level of ambition and institutional follow through varies significantly across contexts.

Fig. 9 | Design in Industrial, Competitiveness & Development Strategies

Status: September 2025



4.4 Design inclusion in Circular Economy Policies

Circular economy strategies are the policy arena where design features most prominently across Europe. This prominence stems largely from the EU Ecodesign Directive (2009), which required member states to integrate product design into sustainability frameworks, and its 2024 upgrade into the Ecodesign for Sustainable Products Regulation (ESPR).

Across national strategies, design is positioned as a lever to “design out waste,” extend product lifecycles, improve repairability, and enable reuse, recycling, and circular business models. In some cases, it is central to transition plans, with actions targeting education, industry incentives, systemic innovation, and consumer awareness. Elsewhere, design appears in sector specific contexts—such as textiles, construction, or packaging—or is mentioned mainly as compliance with EU rules. A smaller group of strategies reference design only once or not at all, indicating superficial alignment. Non-EU countries (e.g., Norway, Switzerland, Turkey, Serbia, UK) often mirror EU trends by embedding ecodesign into waste or resource policies.

Mapping results show significant variation in ambition and depth of integration. Eight countries champion design as a foundational lever of the transition. Austria makes “circular by design” a core principle of its national strategy; Denmark dedicates an entire chapter to circular design and innovation; and Ireland uniquely combines product and policy design as drivers of systemic change. Other leaders—Luxembourg, Portugal, Romania, Sweden, and the UK—embed concrete instruments such as financial incentives, design challenges, and sector-specific roadmaps.

A further 18 countries integrate design into their circular economy strategies, typically linked to specific sectors, materials, or regulatory frameworks. France legislated repair indices and ecodesign planning; and the Netherlands ties its 2050 full circularity goal to ecodesign principles. Others, including Estonia, Finland, Slovenia, Spain, and Turkey, reference design in relation to waste prevention, modularity, or sustainable product standards.

In five countries, design is mentioned only once or narrowly, often without actionable measures—for example, Bulgaria’s CE Strategy, Lithuania’s CE Guidelines, and Slovakia’s Environmental Policy 2030. The remaining countries largely overlook design, missing opportunities to leverage its role in durability, repairability, reuse, and system-wide innovation.

Common policy features include:

- Adoption of “circular by design” as a guiding principle
- Regulatory tools such as repair indices and bonus/malus systems
- Dedicated instruments like design challenges, vouchers, and hubs
- Education and awareness measures, with Austria, Denmark, and Ireland embedding circular design in curricula and professional training

Overall, circular economy policies across Europe consistently acknowledge the role of design, but the degree of integration varies significantly.

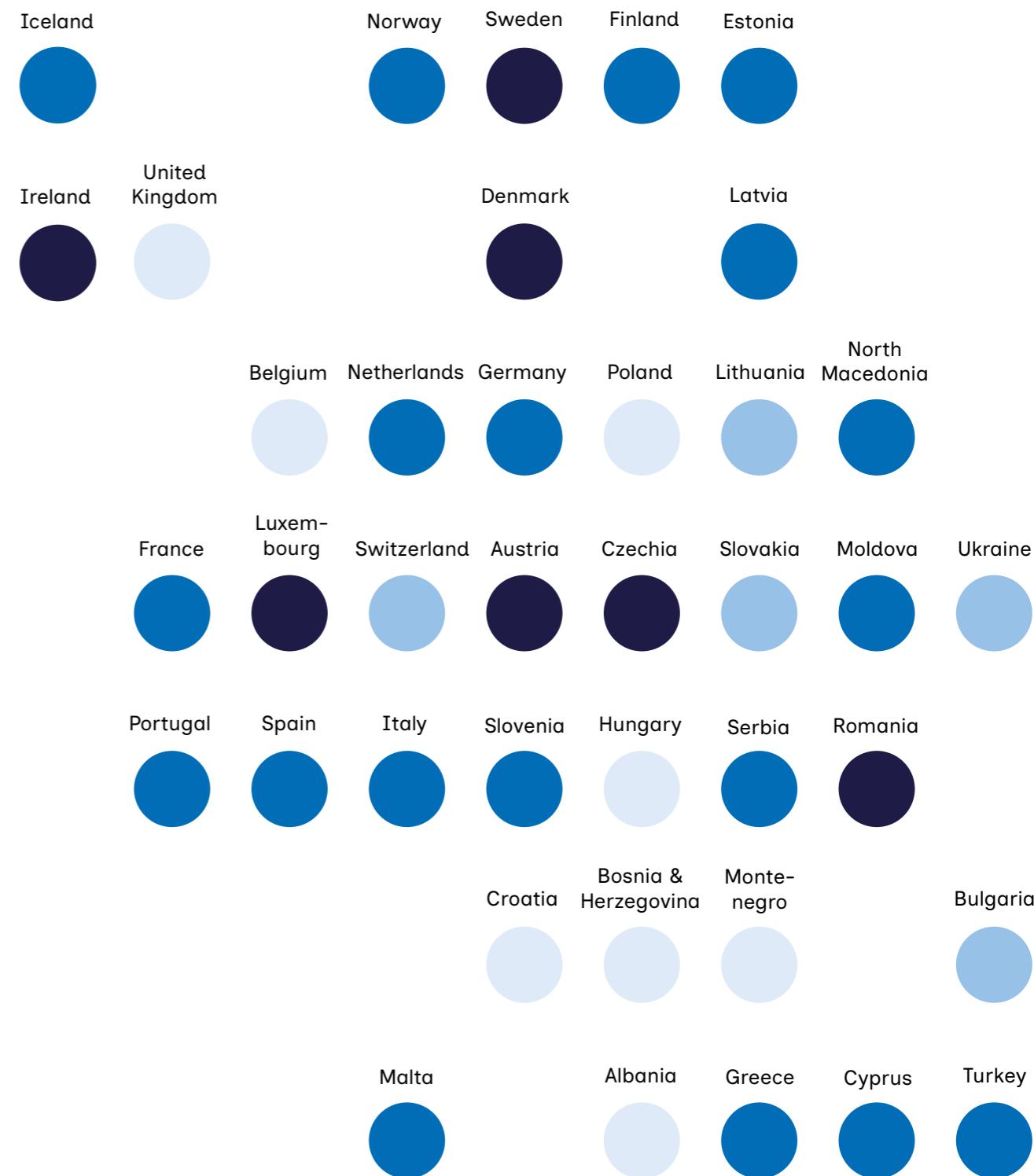
While a small group of countries embed design as a systemic principle supported by regulatory and financial instruments, most adopt a sectoral or compliance-driven approach, and some offer only token references.

This unevenness suggests that policy recognition alone does not guarantee implementation. Future progress will depend on whether governments operationalise design through measurable targets, crosssector coordination, and monitoring mechanisms that link design interventions to circular economy outcomes.

Fig. 10 | Design in Circular Economy Policies

Status: September 2025

Overlooked Mentioned Integrated Championed



4.5 Design in Other Policy Agendas

Beyond industrial strategies, and innovation and circular economy agendas, design frequently surfaces in other national policy frameworks. Our mapping reveals that design has been mobilised through digitalisation programmes, architecture policies, and more occasionally through sectoral innovation roadmaps.

At the same time, a number of countries have experimented with, or are actively developing, dedicated design policy frameworks, often driven by professional associations or ministries of culture and economy.

Digital strategies as an entry point for design

Digital strategies are emerging as a significant entry point for design across Europe, though the level of integration varies. Among the countries reviewed, three stand out as champions: Ireland, Spain and the UK. Spain's Digital Spain 2026 agenda links design with AI ethics, co-creation, participatory labs, and "green-by-design" technologies. While Ireland uses digital transformation to frame design in the public sector through the Action Plan for Designing Better Public Services. The UK embeds design through its Digital Strategy (2022) and Digital Development Strategy (2024-2030), promoting human-centred design for public services, AI processes, and digital democracy, alongside safety-by-design principles. The UK also provides national design principles and a government design system for digital delivery.

Four countries integrate design more broadly into their digital transformation agendas, often through service design, user experience, or education. Greece's Digital Transformation Bible (2020-25) references service design and human-centred methodologies in regulation; Ireland uses digital transformation to frame design in the public sector through its

Action Plan for Designing Better Public Services; Malta's Malta Digitali 2022-27 embeds service design as a guiding principle; the Netherlands' I-Strategy 2021-25 highlights design thinking for government digitalisation; and Hungary incorporates design into e-government and education reforms.

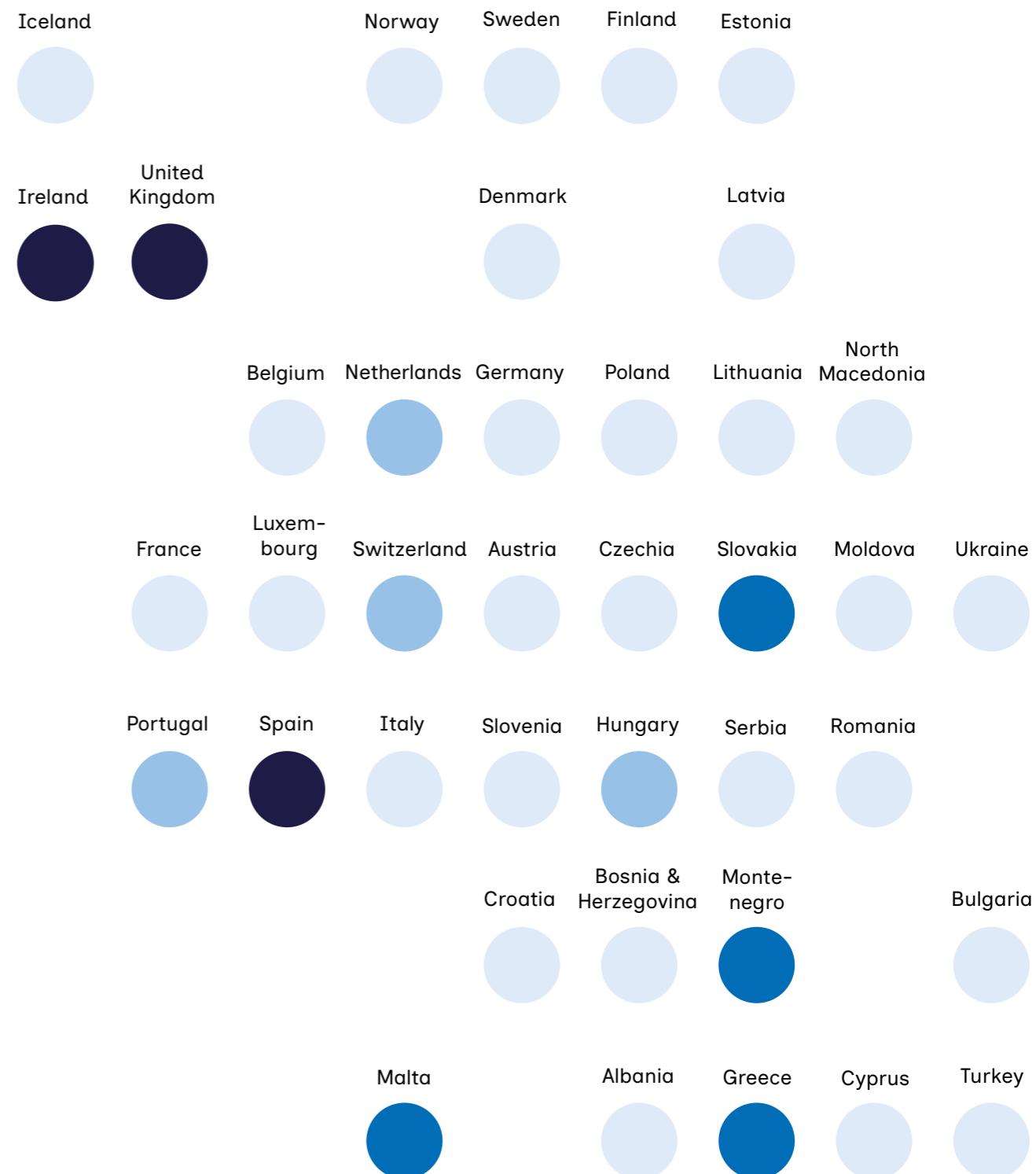
Four others mention design in narrower contexts, such as UX for public services or curricula on sustainable design. Montenegro and Slovakia, for example, include design in education and e-government initiatives, while other references remain limited to compliance or isolated projects.

The remaining countries either lack a dedicated digital strategy or make no reference to design at all, suggesting missed opportunities to leverage design for user-friendly services, ethical AI, and participatory governance. Overall, while digital agendas increasingly recognise design as a tool for improving public services and ensuring responsible technology, the depth of integration, and thus potential impact, remains uneven across Europe.

Fig. 11 | Design in Digital Strategies

Status: September 2025

Overlooked Mentioned Integrated Championed



Architecture and built environment policies as platforms for design policy spillover

Architecture policies across Europe often serve as de facto design policies, embedding design principles under the broader goals of sustainability, inclusivity and quality of the built environment. These frameworks frequently extend beyond architecture to encompass urbanism, cultural heritage and design education, creating strong spillover effects into design policy.

Among the seven strategies identified, several stand out for their comprehensive approach.

Sweden's Policy for a Designed Living Environment (2018) is one of the most integrated examples, linking architecture, design, art, and cultural heritage to shape inclusive, sustainable public spaces. Denmark's National Architecture Policy (2025) sets clear directions for sustainable urban planning, biodiversity, and community-driven design, while Ireland's "Places for People" (2022) positions design as central to building resilient, creative societies. Finland's Architectural Policy Programme (2022) explicitly incorporates "Design for All" and connects architecture with design education and international visibility.

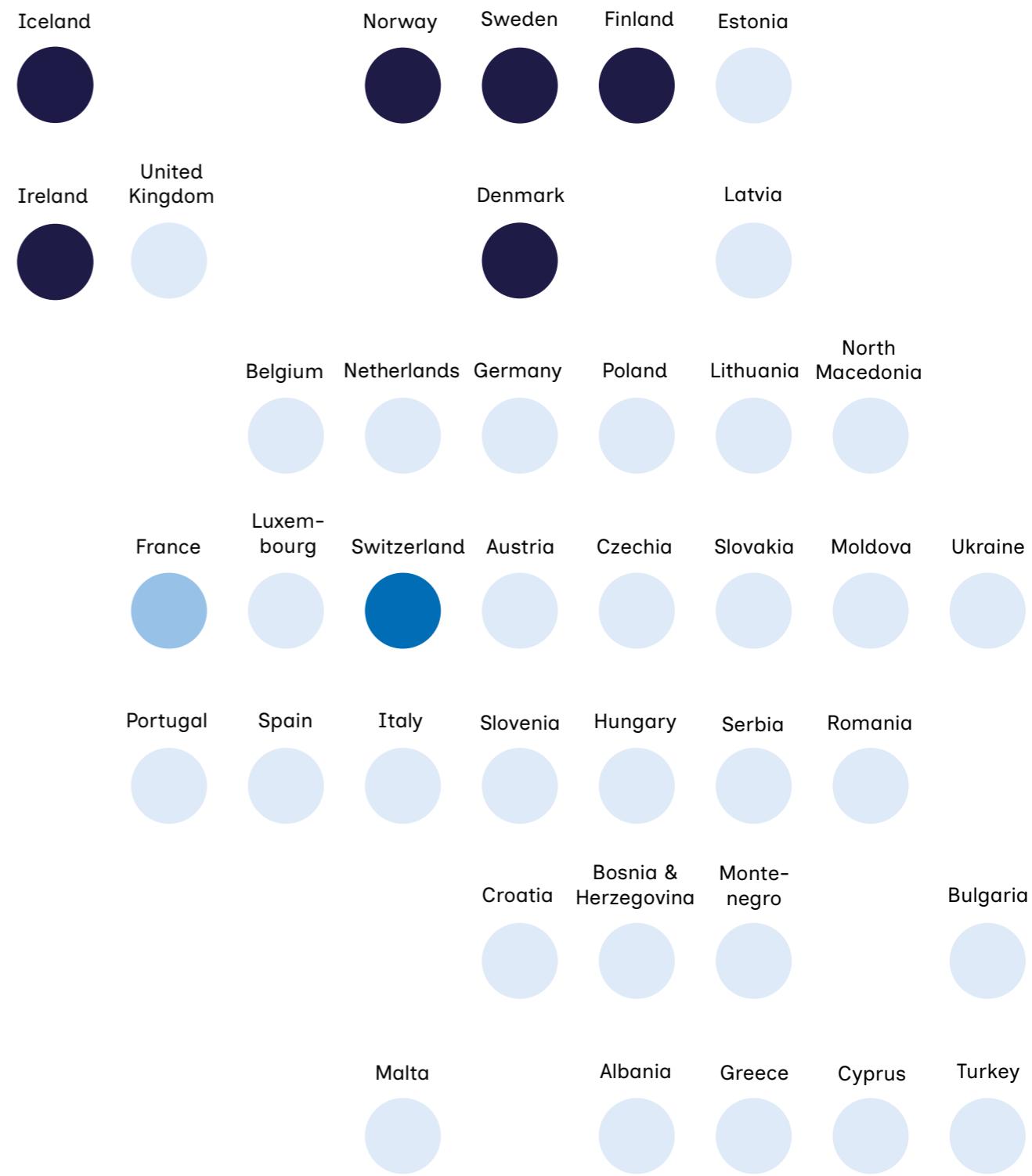
Other countries adopt similar principles with varying emphasis. Switzerland's federal Baukultur policy prioritises the "quality of the designed environment," embedding design within construction, planning, research, and professional standards, while Norway's earlier Action Plan for Universal Design (2009–2013) framed accessibility as a design issue within equality policy. Iceland has a dedicated policy for design and architecture.

Collectively, these policies demonstrate how architecture strategies can act as powerful vehicles for advancing design objectives, particularly when they integrate systemic themes such as sustainability, inclusivity and education.

Fig. 12 | Design in Architecture and Built Environment Policies

Status: September 2025

Overlooked Mentioned Integrated Championed



Identified efforts toward dedicated design policies

Our study identified a series of national and sectoral initiatives aimed at developing dedicated design policies, though few have resulted in comprehensive, binding frameworks. These efforts are often driven by industry advocacy, advisory bodies or collaborative platforms, reflecting a growing but uneven recognition of design as a strategic resource.

Some countries have pursued formal processes without adoption. Croatia, for example, drafted a National Strategy for Design in 2007 and later saw industry-led initiatives, but none were implemented. Others have advanced through consultative or advisory mechanisms. France launched the Assises du Design (2019), leading to the creation of the Conseil National du Design (2021) as a permanent advisory body. Similarly, Germany's Deutscher Designtag formally proposed a national design policy in 2023.

Several initiatives emerged from collaborative platforms. Ireland's Design & Crafts Council published a consultation paper in 2017, influencing subsequent government action plans. Spain's design organisations launched the Pacto por el Diseño (2021), advocating for a national strategy aligned with industrial transformation. Lithuania institutionalised design governance through a Design Council (2019) under the Ministries of Culture and Economy/Innovation, tasked with shaping continuous policy development.

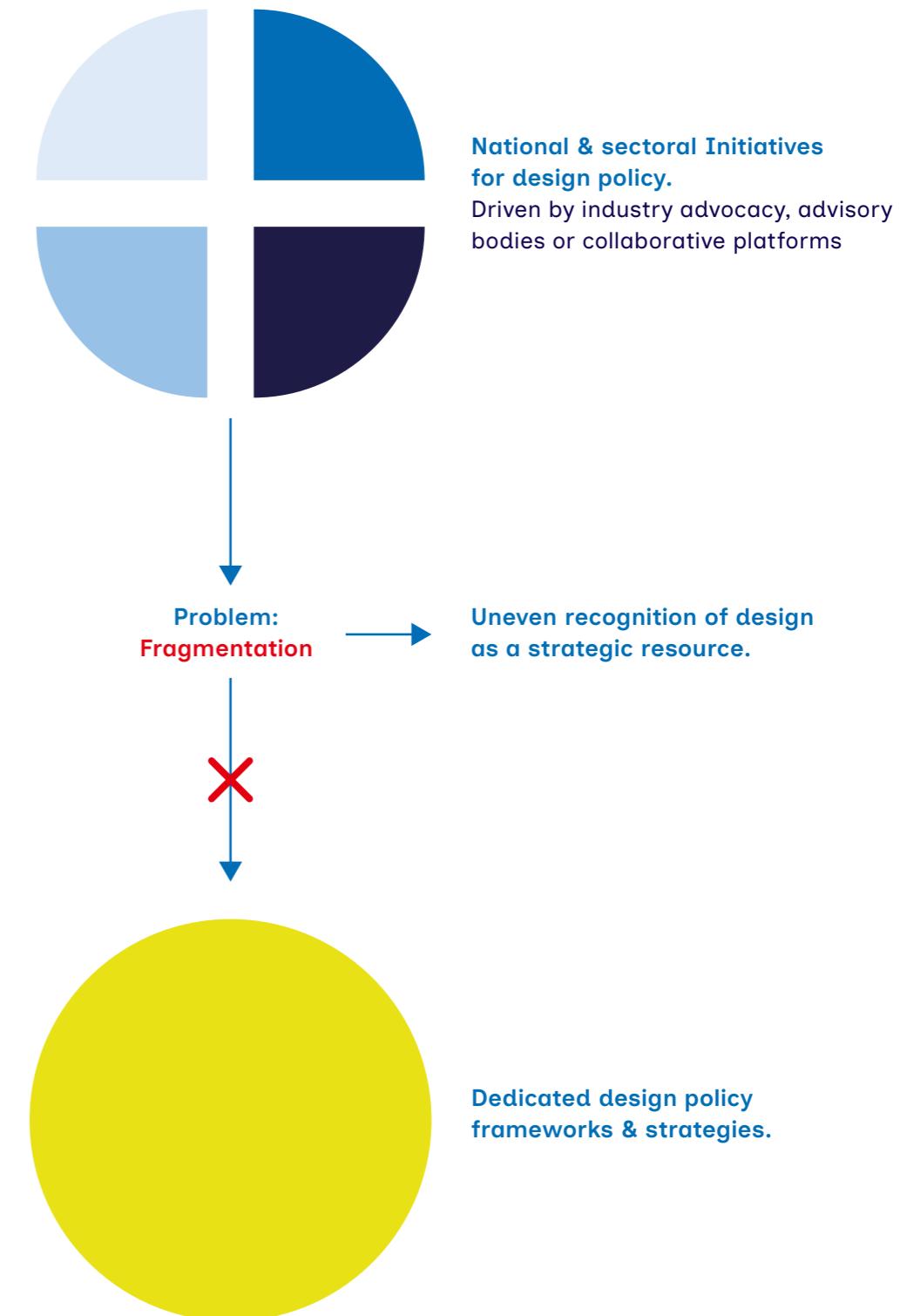
Outside the EU, Turkey adopted a Design Strategies and Action Plans twice (2014-16, 2018-2020), followed by the Türkiye Design Vision 2030 Workshop (2023), though continuity remains uncertain. Ukraine advanced policy recommendations through the Design4Ukraine initiative (2017), while the United Kingdom has maintained continuity via Innovate UK's Design in Innovation strategies (2015-2024) and sectoral roadmaps, despite lacking a whole-of-government policy framework.

Taken together, these "other agendas" show that design often finds its way into varied policy agendas. Architecture policies offer a strong cross-sectoral anchor linking spatial planning with sustainability, inclusivity, and design education, while digital strategies increasingly position design in relation to AI, ethics, citizen-centred service delivery and participatory governance.

The overall picture is one of recognition but fragmentation – design is present in many places, but rarely consolidated into a sustained, cross-government strategy. However, emerging stakeholder-driven initiatives suggest growing momentum toward more institutionalised approaches – more networked, multi-sectoral and cross-ministerial.

Fig. 13 | The Fragmentation of Design Policy Initiatives

Only few dedicated initiatives have resulted in frameworks



5. Conclusions

This mapping confirms that design is firmly present on the European policy map but in many different guises. We found only two formally adopted, standalone national design strategies (Latvia and Iceland). At the same time, design appears repeatedly across other policy families: cultural and creative industries, research and innovation, circular economy, digitalisation and architecture. This combination, few dedicated strategies, many embedded references, defines the current period.

1.

Design is widespread but uneven.

Design features in most policy families, yet the depth of integration and the instruments deployed vary widely. Some countries embed concrete delivery mechanisms – grants, design centres, procurement pilots, while others only mention design in passing. This heterogeneity matters: a passing reference rarely creates sustained demand or capability; instruments and institutional anchors do.

2.

Two dominant modes of policy presence: integration and instrumentalisation.

Where design is taken seriously, it is either (a) integrated as a sectoral or CCI priority with institutional support (education, export promotion, design centres), or (b) instrumentalised as a method (design thinking, UX) within R&D, digital or public-service agendas. Both modes create impact, but they mobilise different delivery tools, metrics and beneficiaries.

3.

Circular economy and digital agendas are powerful entry points.

Ecodesign rules, repairability frameworks, and the EU's sustainable-products agenda have created clear regulatory demand for design skills. Similarly, digitalisation pushes—especially in public services—generate defined commissioning opportunities for service and UX designers. These thematic hooks are often the fastest route to scale designer involvement.

4.

Institutional brokers matter more than labels.

National design centres, funded promotion bodies and intermediary organisations are the most reliable translators of strategic intent into projects and market demand. Countries with active intermediaries convert strategic references into pilots and programmes far more often than those without.

5.

Common barriers persist: politics, fragmentation, and data gaps.

Political cycles and ministerial reshuffles undermine continuity. Cross-ministry fragmentation leaves many cross-cutting design goals without clear owners. Systematic monitoring is rare: few countries define robust KPIs to track designer participation, procurement uptake, or economic and social outcomes—making it hard to defend or scale interventions.

6.

Advocacy coalitions and practitioner ownership are decisive.

The more design actors (associations, councils, research centres) are organised and strategically networked with government, the more likely policy ideas become adopted and sustained. Practitioner-led processes (as in Iceland and Latvia) generate legitimacy and momentum but still require formalised implementation mechanisms to convert ideas into practice.

7.

A shift since the 2010s – not a decline in ambition.

The flurry of named design action plans in the 2010s (driven by EU-level agendas) has given way to a more distributed model: fewer new standalone strategies, but stronger embedding of design into multiple policy domains. This can be an advantage (more routes for impact) or a liability (fragmented accountability), depending on national governance arrangements.

What Successful Integration Looks Like?

Regardless of which policy family embraces design, substantial inclusion tends to follow consistent patterns. Five elements recur across effective strategies:



Clear role definition.

Policies articulate what design contributes to specific objectives: cultural value, competitiveness, sustainability or innovation.



Dedicated instruments.

Grants, innovation vouchers, export schemes, procurement pilots, and regulatory levers (e.g. ecodesign standards) turn recognition into action.



Skills and talent pipelines.

Investment in education, CPD, and cross-disciplinary curricula ensures designers can engage with digital, circular and service design challenges.



Ecosystem connectors.

Design centres, clusters and public-sector design teams broker relationships and aggregate capacity.



Monitoring and evaluation.

Simple, credible metrics tracking supported firms, procurement uptake or programme participation enable accountability and learning.

6. Country Profiles

6.1 Albania

Country Size: 28,748 sq km
Citizens: 2,363,314 (2024) | **Tendency:** falling
GDP per capita: 10,011.6 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Emerging (2025) | 37.9%
BEDA Member Organisation: /

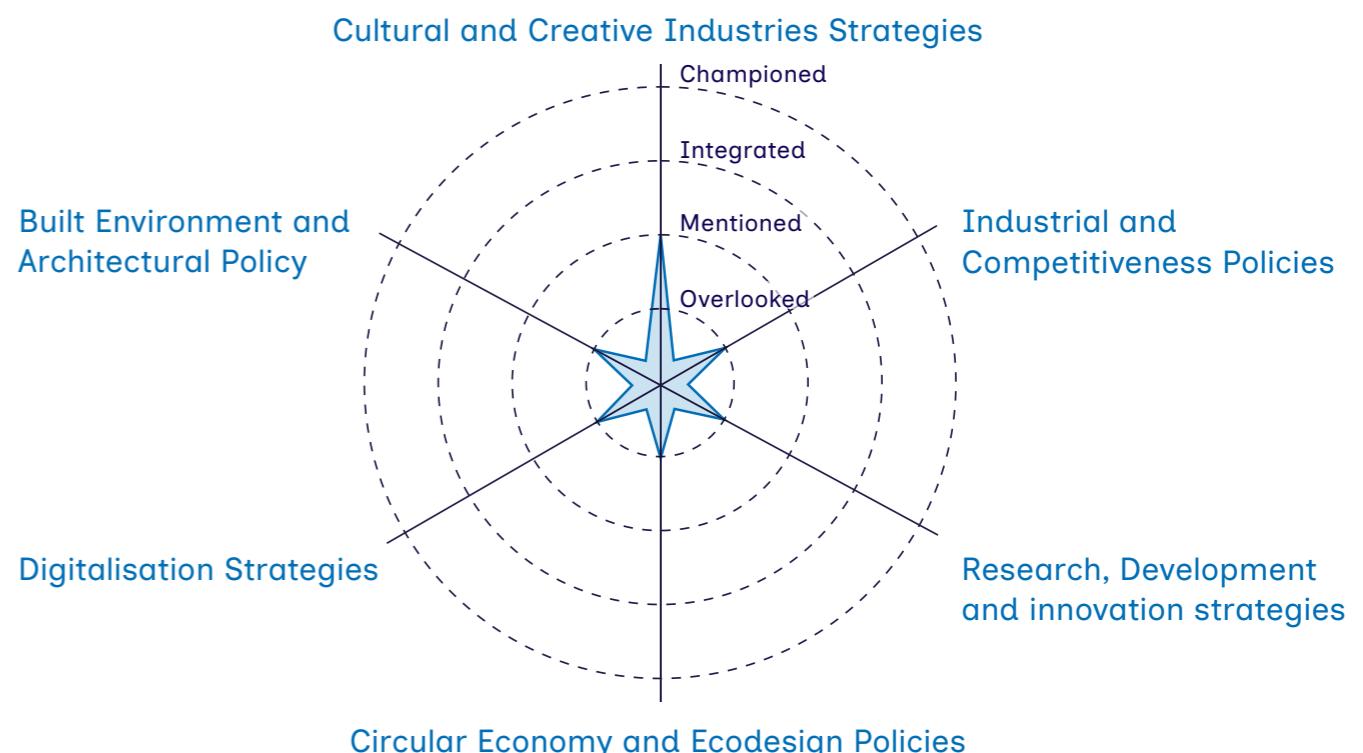
Dedicated design policy status

→ No

Design in other policy agendas

→ CCI strategy: The National Strategy for Culture 2019–2025 makes a brief reference to design within the creative industries, but without dedicated measures. [Mentioned]
→ Innovation, industrial/development, circular economy, digital, and architecture strategies: No strategies or references to design were identified.

Fig. 14 | Country Profile: Albania
Status: September 2025



Observations

At present, design does not feature prominently in Albania's policy landscape. The only entry point is through the strategy for culture, where design is listed but not supported through specific actions or funding. There are no visible plans or advocacy efforts toward developing a dedicated design policy.

6.2 Austria

Country Size: 83,878 sq km
Citizens: 9,158,750 (2024) | Tendency: rising
GDP per capita: 56,833.2 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Strong Innovator (2025) | 128,3 %
BEDA Member Organisation: designaustria

Dedicated design policy status

→ No

Design in other policy agendas

→ CCI strategy: The Creative Industries Strategy for Austria (2016–2025) champions design as a cross-sectoral enabler – linking technology, science and urban competitiveness. It includes measures such as apprenticeships in design, internationalisation of design companies, promotion of design events (e.g. Vienna Design Week), and innovation camps introducing new methods like design thinking. **[Championed]**

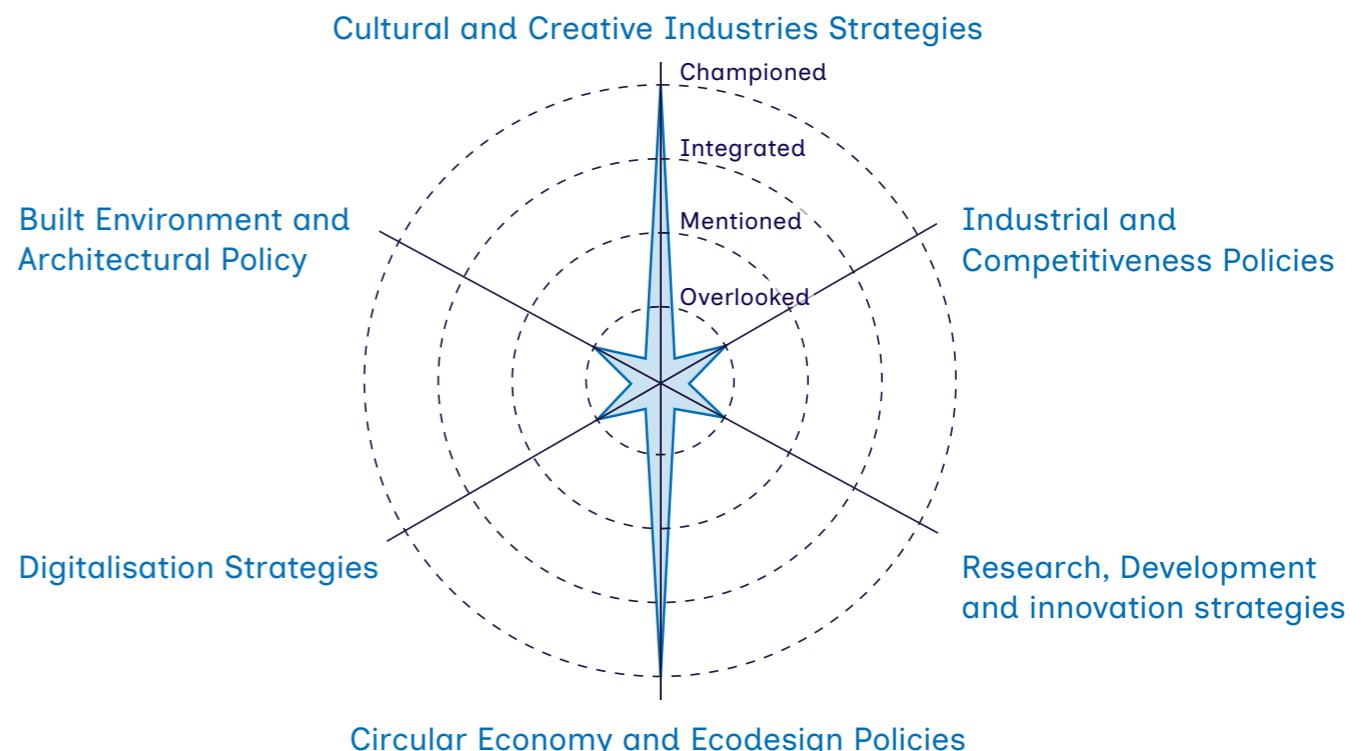
→ Circular economy strategy: This is a strong entry point. The Austrian Circular Economy Strategy embeds design comprehensively: “circular by design” as a principle; ecodesign regulations; incentives for packaging and textiles; design for reuse, repair, recycling, and social innovation; integration of circular design into curricula and vocational training; and consumer awareness measures.

[Championed]

→ Innovation, industrial/development, digital and architecture strategies: No strategies or references to design were identified.

[Overlooked]

Fig. 15 | Country Profile: Austria
Status: September 2025



Observations

Austria shows a strong systemic framings of design within circular economy policy in Europe. While it lacks a standalone design strategy, design is positioned as a central lever for sustainable transitions – spanning business models, education, and consumer behaviour. The CCI strategy adds support for capacity-building and internationalisation, creating a combined emphasis on design's economic and sustainability roles.

6.3 Belgium

Country Size: 30,528 sq km
Citizens: 11,817,096 (2024) | Tendency: rising
GDP per capita: 55,954.6 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Strong Innovator (2025) | 138.0 %
BEDA Member Organisation: Wallonie-Bruxelles Design/Mode (WBDM), Flanders DC, Design Museum Gent, Designregio Kortrijk

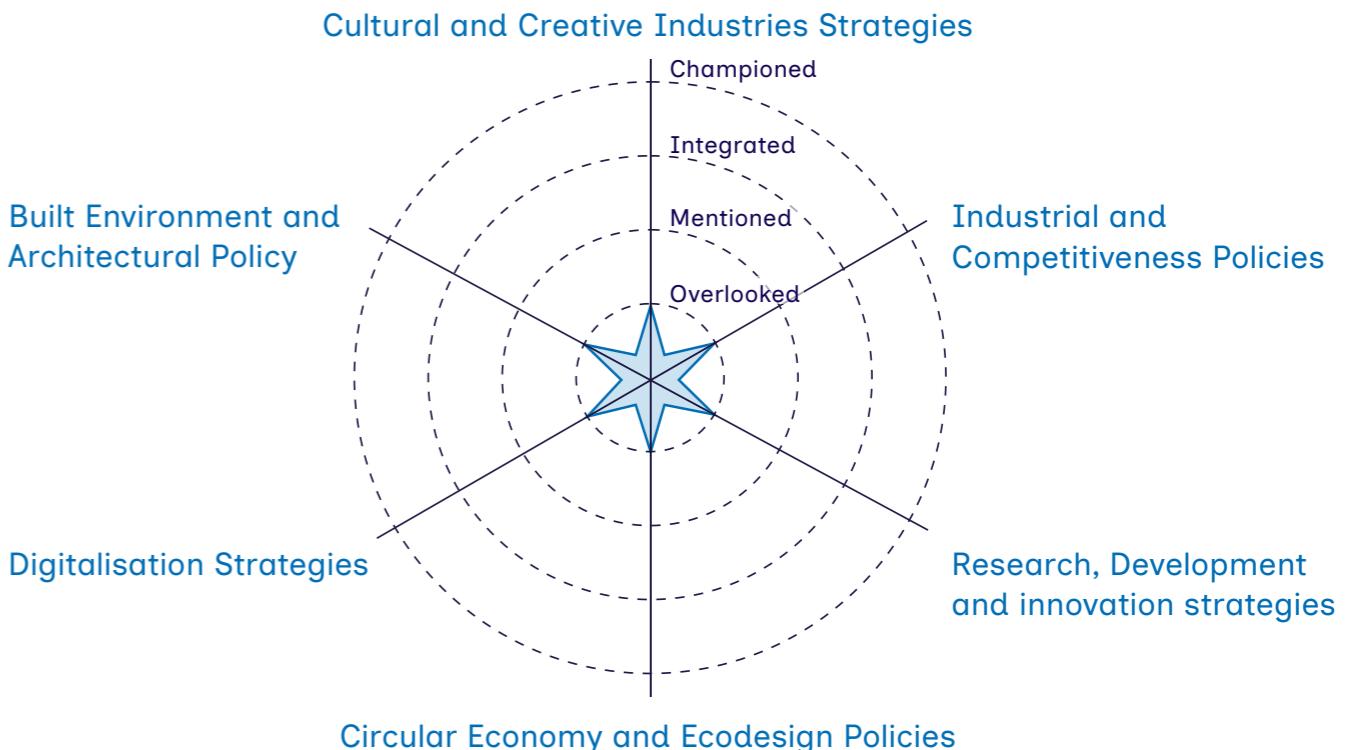
Dedicated design policy status

→ No – responsibilities are devolved to regions (Flanders, Wallonia, Brussels). Belgium is Design (joint initiative of regional actors: Flanders DC, MAD Brussels, Wallonie-Bruxelles Design Mode) promotes Belgian design abroad.

Design in other policy agendas

→ CCI Strategy: No national strategy. Regional actors (Flanders DC, MAD Brussels, Wallonie-Bruxelles Design Mode) support design and CCI.
→ Circular economy Strategy: No national CE plan. Regions lead through Vlaanderen Circulair, Circular Wallonia, and the Brussels CE Programme.
→ Innovation, industrial/development, digital and architecture strategies: No explicit national strategy or inclusion identified; approaches vary by region.

Fig. 16 | Country Profile: Belgium
Status: September 2025



Observations

Belgium's federal system means design policy is fragmented across regions. While there is strong promotional activity, a coherent national design policy is absent.

6.4 Bosnia and Herzegovina

Country Size: 51,209 sq km
Citizens: 3,138,472 (2024) | Tendency: falling
GDP per capita: 8,957.37 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 25.7%
BEDA Member Organisation: /

Dedicated design policy status

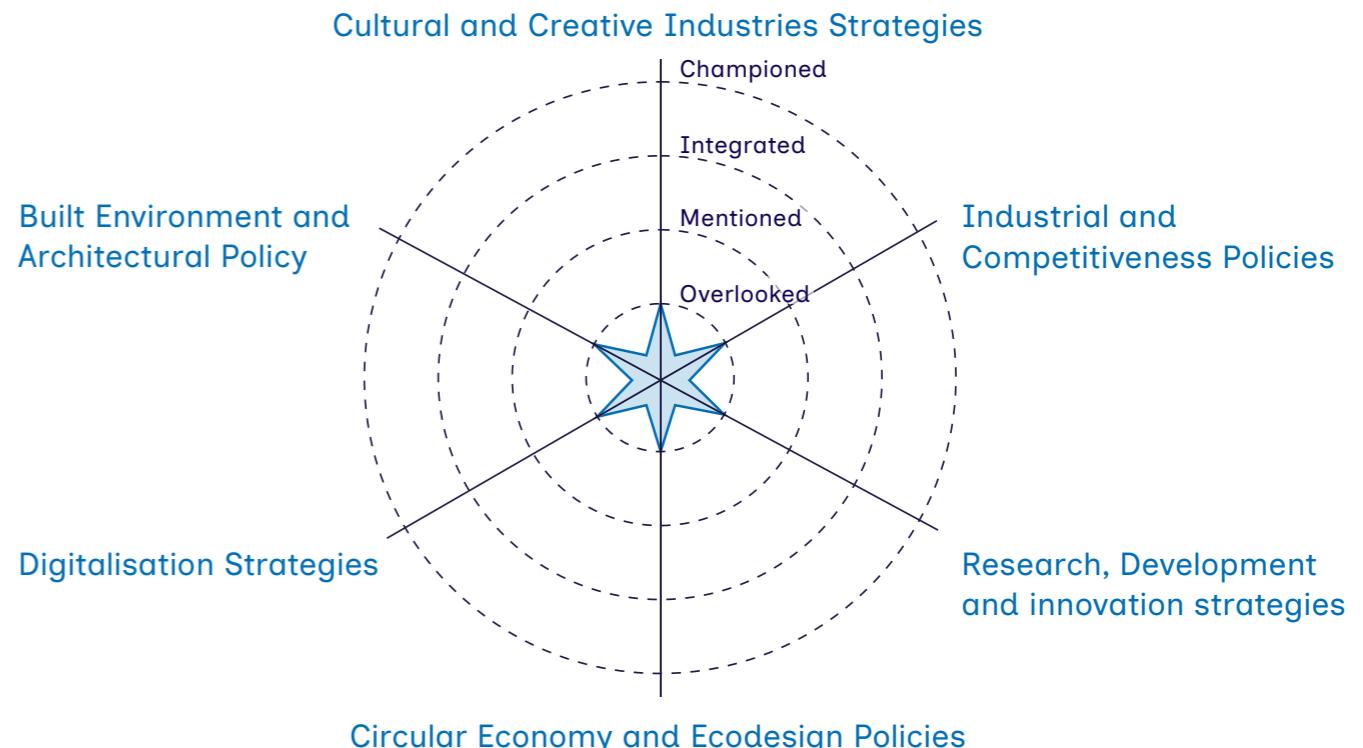
→ No

Design in other policy agendas

→ [Overlooked]

Fig. 17 | Country Profile: Bosnia and Herzegovina

Status: September 2025



Observations

Bosnia and Herzegovina shows one of the weakest baselines in Europe, with no national strategies referencing design across any policy domain. The fragmented governance structure may be a barrier to national-level policy development.

6.5 Bulgaria

Country Size: 110,372 sq km
Citizens: 6,445,481 (2024) | **Tendency:** falling
GDP per capita: 17,412.4 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 51.6%
BEDA Member Organisation: /

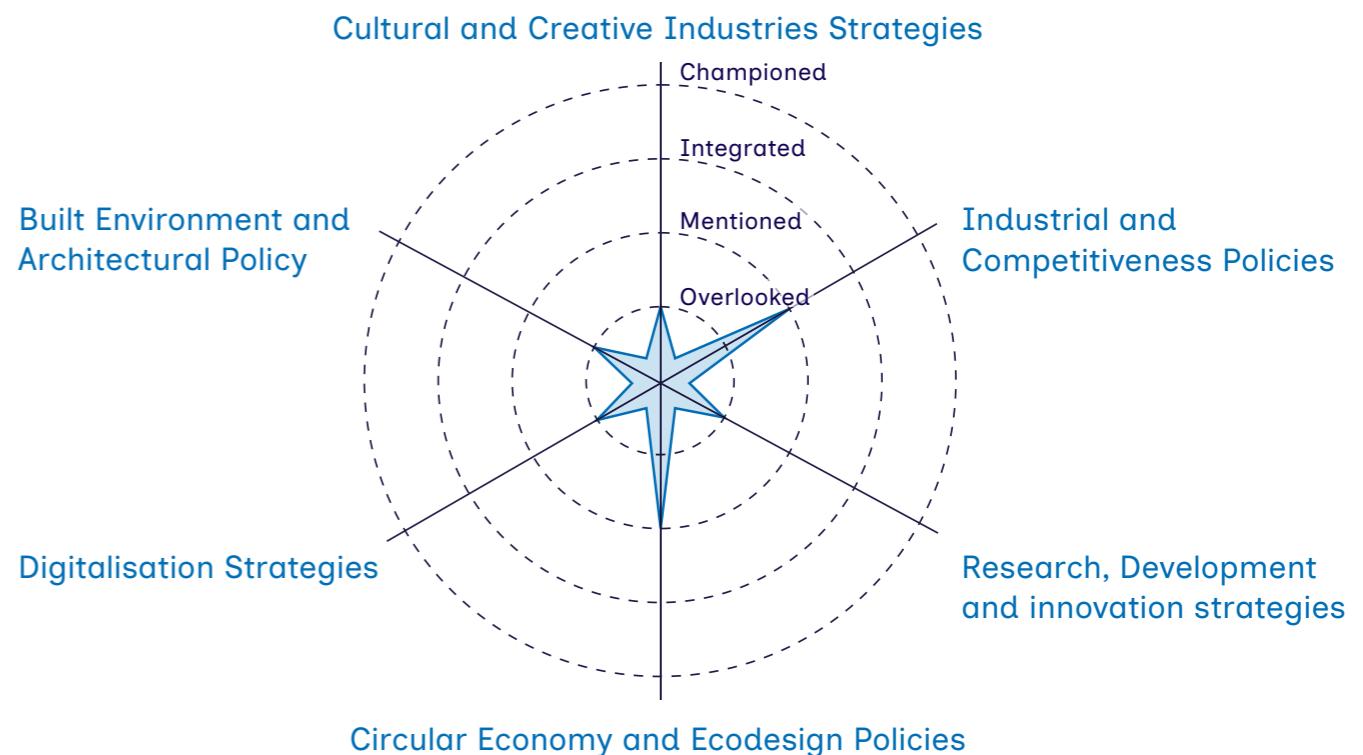
Dedicated design policy status

→ No

Design in other policy agendas

- Industrial / Development strategy – National Development Programme Bulgaria 2030 briefly mentions design in the context of circular and low-carbon economy. [Mentioned]
- Circular economy strategy – Strategy for the Transition to a Circular Economy 2022-2027 refers to “product design” but no related actions included. [Mentioned]
- CCI, innovation, digital, architecture strategies – No strategies or references to design were identified. [Overlooked]

Fig. 18 | Country Profile: Bulgaria
Status: September 2025



Observations

Design presence in Bulgaria's policy landscape is marginal and fragmented. References to design remain baseline, limited to sustainability contexts without clear mechanisms or follow-through in action plans. This positions Bulgaria closer to the Mentioned end of the Design Policy Spectrum, indicating awareness but little evidence of strategic intent or institutional support.

6.6 Croatia

Country Size: 56,594 sq km
Citizens: 3,861,967 (2024) | Tendency: falling
GDP per capita: 23,931.5 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Moderate Innovator (2025) | 80,6%
BEDA Member Organisation: /

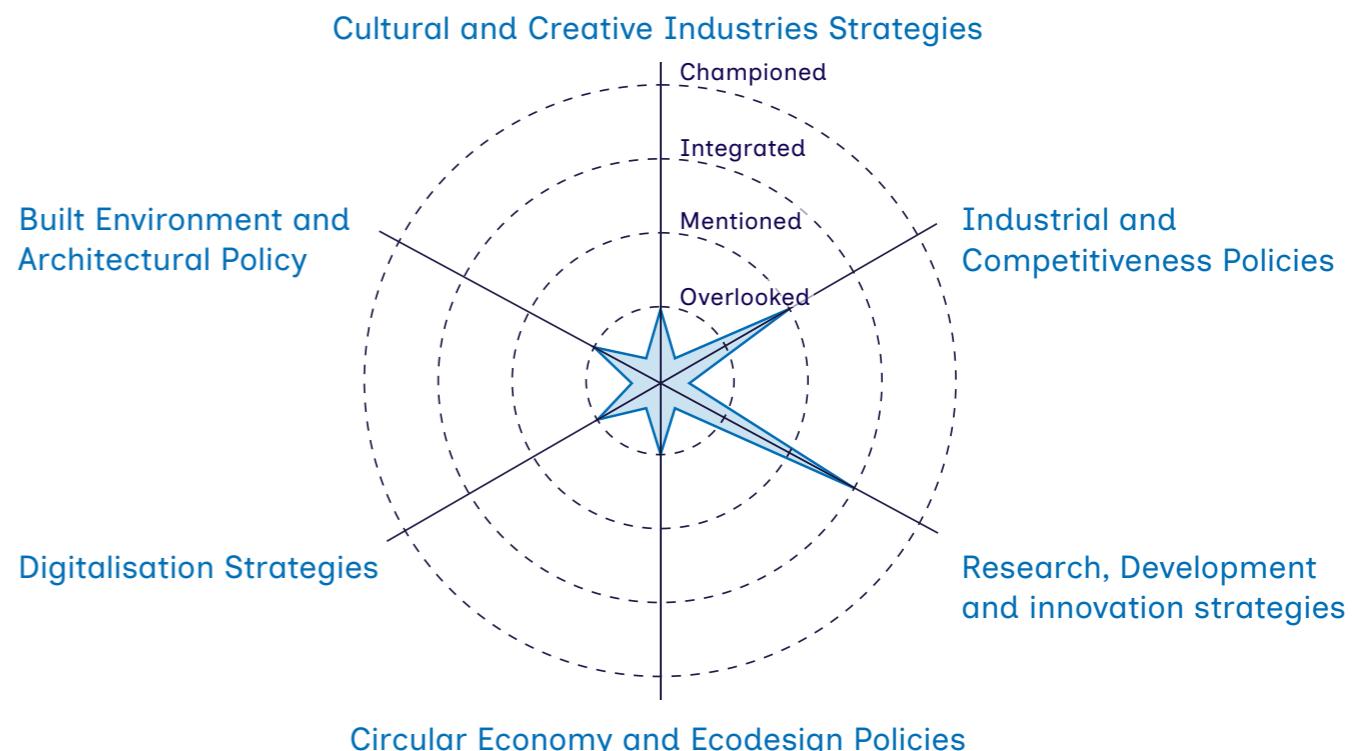
Dedicated design policy status

→ No dedicated design policy. Previous initiatives, including a 2007–2011 draft strategy led by the Croatian Designers Association and a later proposal by the Croatian Cluster of Creative and Cultural Industries, illustrate recurring interest in developing such a policy, though these were not formally adopted.

Design in other policy agendas

→ Industrial / Development strategy – National Development Strategy 2030 contains a reference to design as part of the creative industries. [Mentioned]
→ Innovation strategy – National Innovation Strategy 2014–2020 acknowledged the importance of design for innovation, eco-innovation, and design centres as part of innovation infrastructure. [Integrated]
→ CCI, circular economy, digital, architecture strategies – No strategies or references to design were identified. [Overlooked]

Fig. 19 | Country Profile: Croatia
Status: September 2025



Observations

Croatia demonstrates intermittent recognition of design, particularly in innovation and development strategies, where it is linked to creativity and eco-innovation. Earlier attempts to establish a national design strategy were not adopted, but they point to an ongoing policy interest and consistent stakeholder advocacy. This reflects an awareness of design's potential, with scope for stronger institutional commitment in the future.

6.7 Cyprus

Country Size: 9,251 sq km
Citizens: 966,365 (2024) | Tendency: rising
GDP per capita: 38,654.2 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Moderate Innovator (2025) | 94,7%
BEDA Member Organisation: /

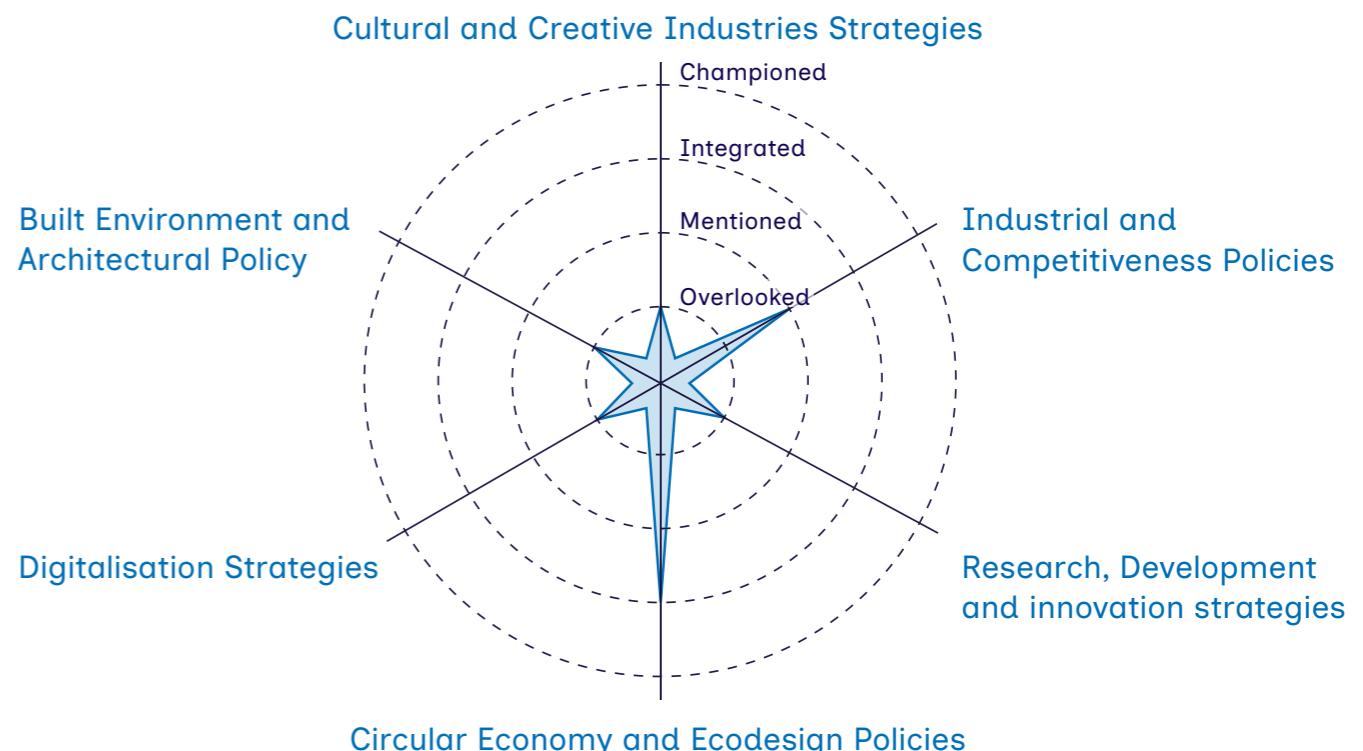
Dedicated design policy status

→ No

Design in other policy agendas

- Industrial / Development Strategy – Cyprus Vision 2035, prepared for government by PwC, references design in multiple contexts: digital public services designed around citizen needs, regulatory co-design, decarbonisation, branding for food produce, and innovation vouchers supporting design in manufacturing. Although not a formal government strategy, it indicates where design could inform future development priorities. [Mentioned/Contextual]
- Circular Economy Strategy – The New Industrial Policy of Cyprus 2019–2030 and the National Circular Economy Plan 2021–2027 promote eco-design principles. [Integrated]
- CCI, innovation, digital, architecture strategies – No official strategies or references to design identified. [Overlooked]

Fig. 20 | Country Profile: Cyprus
Status: September 2025



Observations

Cyprus illustrates how design can surface indirectly in long-term development visions and circular economy priorities, even without a dedicated framework. The emphasis on co-design, eco-design and service design shows an emerging awareness of design as a governance tool and industrial enabler. However, in the absence of adopted policies or concrete programmes, design's role remains largely aspirational and dependent on translation of these ideas into formal government strategies.

6.8 Czech Republic

Country Size: 78,871 sq km
Citizens: 10,900,555 (2024) | Tendency: rising
GDP per capita: 31,706.6 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Moderate Innovator (2025) | 90,8%
BEDA Member Organisation: CzechTrade Design Center, zamek cieszyn

Dedicated design policy status

→ No

Design in other policy agendas

→ CCI Strategy – Action Plan 2021–23 to the CCS Strategy includes concrete measures

Design Credit programmes, strengthening/financing the Design Centre, and company support for design use. Also mentions interdisciplinary studies including design and internationalisation of design.

[Championed]

→ Innovation Strategy – National Research, Development and Innovation Policy 2021+ gives a baseline mention of design as part of CCIs and uses design registrations as an innovation indicator. [Mentioned]

→ Industrial / Development Strategy – Strategic Framework Czech Republic 2030 mentions human-centred design in education.

[Mentioned]

→ Circular Economy Strategy – Circular Czechia 2040 highlights incentives for circular product design and eco-design. [Championed]

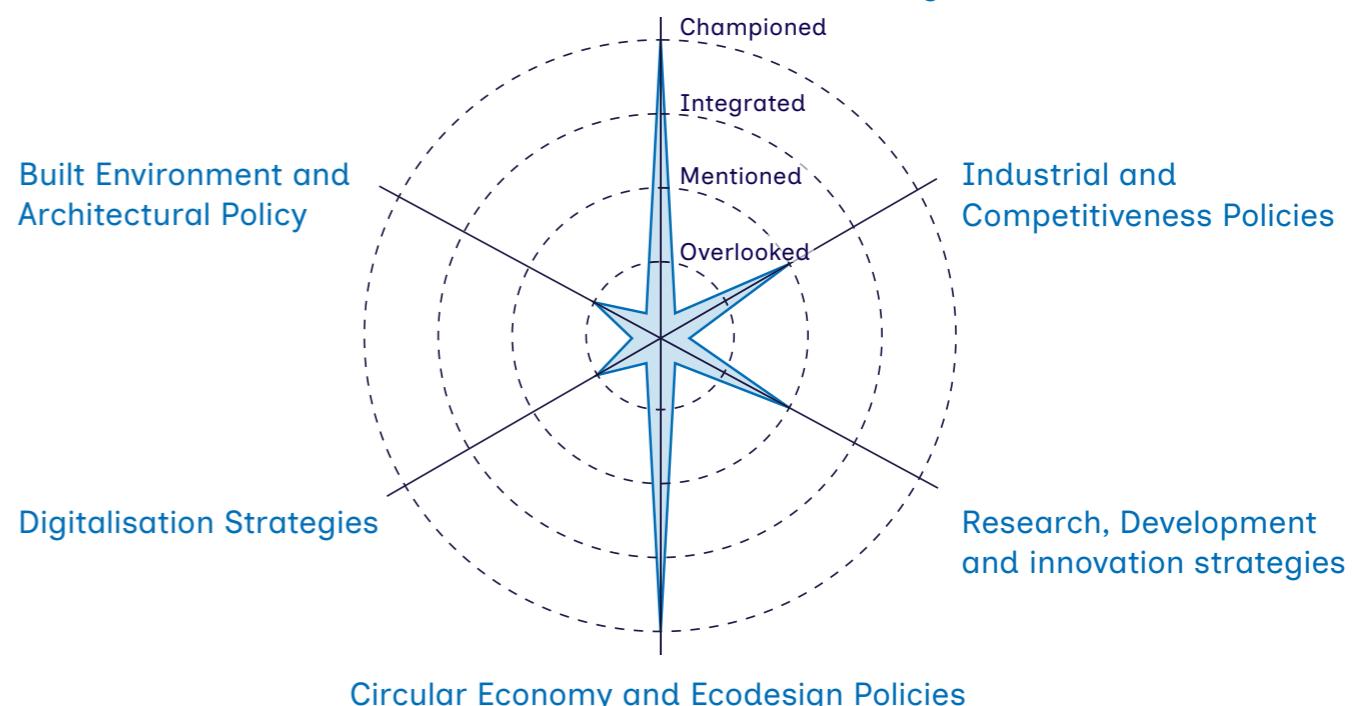
→ Digital, architecture strategies – No strategies or references to design were identified.

[Overlooked]

Fig. 21 | Country Profile: Czech Republic

Status: September 2025

Cultural and Creative Industries Strategies



Observations

The Czech Republic stands out for embedding design in its CCI agenda through concrete instruments such as Design Credits and institutional support for the Design Centre. This represents one of the clearer examples of operational measures rather than symbolic references. Design also appears in innovation, education, and circular economy strategies, though typically in a more generic way. Overall, the picture is one of strong recognition within cultural and circular domains, contrasted with lighter and more fragmented references elsewhere.

6.9 Denmark

Country Size: 42,947 sq km
Citizens: 5,961,249 (2024) | Tendency: rising
GDP per capita: 71,851.8 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Innovation Leader (2025) | 152%
BEDA Member Organisation: Danish Design Center (DDC)

Dedicated design policy status

→ No, previous design policy “Denmark at Work. Plan for Growth in Creative Industries – Design” adopted in 2013.

Design in other policy agendas

→ CCI Strategy – design is mentioned extensively in the 2018 report “An internationally leading growth environment for creative industries – Recommendations from the Growth Team for Creative Industries to the government”, though not a formal government strategy.

→ Innovation Strategy – RESEARCH2025 highlights design in multiple contexts: participatory/user-centred design, additive manufacturing, circular economy, spatial design, digital technologies, med-tech and healthcare, and even in efficient public policy design. [Integrated]

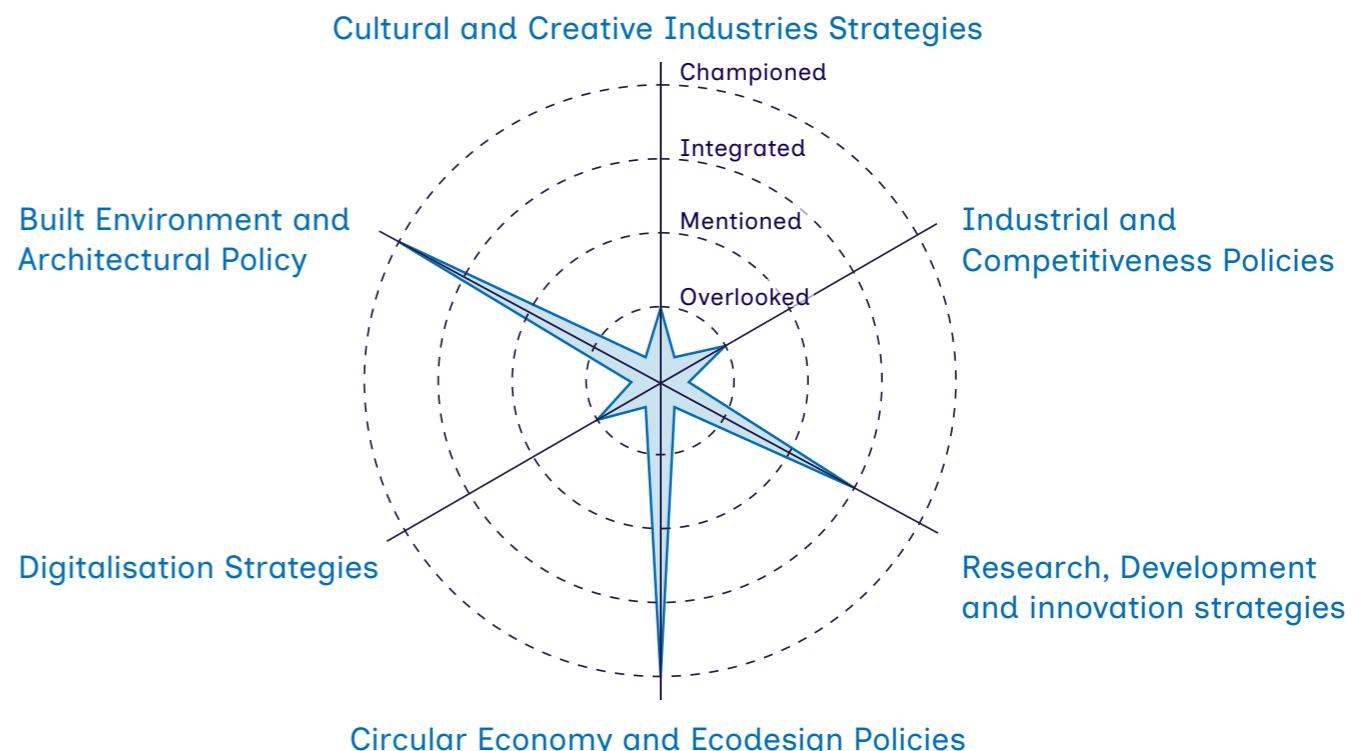
→ Circular Economy – Circular Economy Action Plan 2020–32 includes an entire chapter on circular design, building design, and cross-value chain solutions. Explicitly frames design as a driver of knowledge and innovation in the circular economy. [Championed]

→ Architecture strategy – The National Architecture Policy emphasises sustainable urban planning, biodiversity, and community-driven design.

→ Industrial/development; digital strategies – No strategies or references to design were identified. [Overlooked]

Fig. 22 | Country Profile: Denmark

Status: September 2025



Observations

Denmark continues to leverage its strong international reputation in design across a wide range of policy contexts, even without a dedicated design policy. Design is particularly embedded in research, circular economy, and architecture agendas, where it is framed as a tool for innovation, sustainability and societal value creation. However, the lack of a formal design strategy leaves coordination fragmented, with references dispersed across multiple documents.

6.10 Estonia

Country Size: 45,399 sq km
Citizens: 1,374,687 (2024) | Tendency: falling
GDP per capita: 31,170.1 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Strong Innovator (2025) | 118%
BEDA Member Organisation: Estonian Design Centre (EDC), Estonian Association of Designers (EAD)

Dedicated design policy status

→ No standalone governmental design policy currently, however design is championed within the Culture Development Plan 2021-2030, which contains a full chapter on design. In addition, the Estonian Design Development Plan 2023, prepared by the Estonian Design Centre, provides a sector-driven roadmap that complements the government strategy and strengthens design's position. These build on a consistent policy trajectory dating back to the early 2000s, including the Estonian Design Action Plan 2012-2013. Together, this continuity of government and sectoral initiatives effectively forms a coherent national frame-work for design.

Design in other policy agendas

→ CCI Strategy – Culture Development Plan 2021-2030 contains a full chapter dedicated to design with eight strategic goals, ranging from design's role in the digital/green transition to internationalisation and education. Actions include increasing design capacity in companies and public institutions, boosting export visibility, strengthening design education at all levels, and developing professional qualification systems.

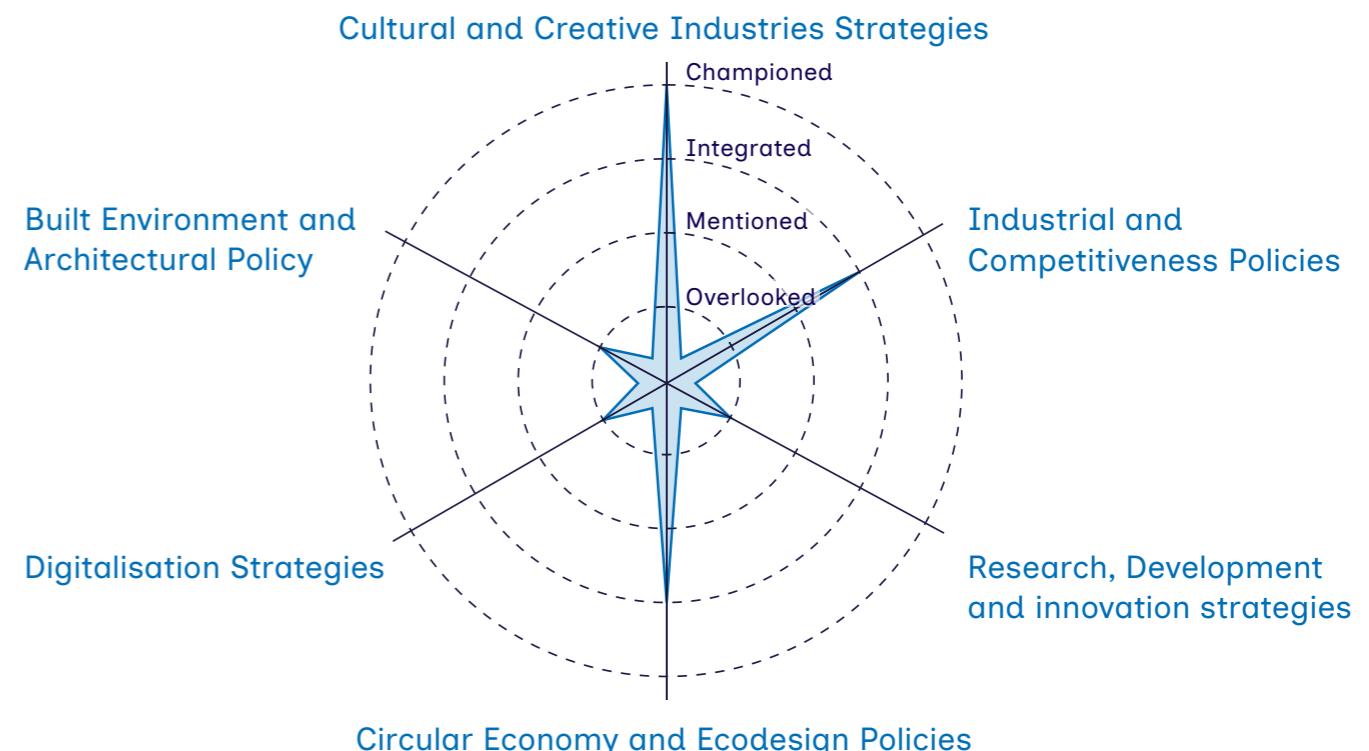
[Championed]

→ Industrial / Development Strategy – Estonia 2035 mentions inclusive, user-centred, and eco-design in mobility, health, and social services. [Integrated]

→ Circular Economy – White Paper references “sustainable-by-design” and circular design principles. [Integrated]

→ Innovation, digital, architecture strategies – No strategies or references to design were identified. [Overlooked]

Fig. 23 | Country Profile: Estonia
Status: September 2025



Built Environment and Architectural Policy

Digitalisation Strategies

Observations

Estonia represents one of the clearest examples of systemic design integration in Europe. The Culture Development Plan embeds design across policy domains, while the Estonian Design Centre's 2023 plan reinforces this with a sector-driven vision. This dual structure provides both governmental and practitioner commitment, ensuring design is recognised as a cultural, economic and innovation enabler. Complementary mentions in development and circular economy agendas broaden its scope.

6.11 Finland

Country Size: 336,884 sq km
Citizens: 5,603,851 (2024) | Tendency: falling
GDP per capita: 53,188.6 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Innovation Leader (2025) | 141,1%
BEDA Member Organisation: Ornamo Art and Design Finland

Dedicated design policy status

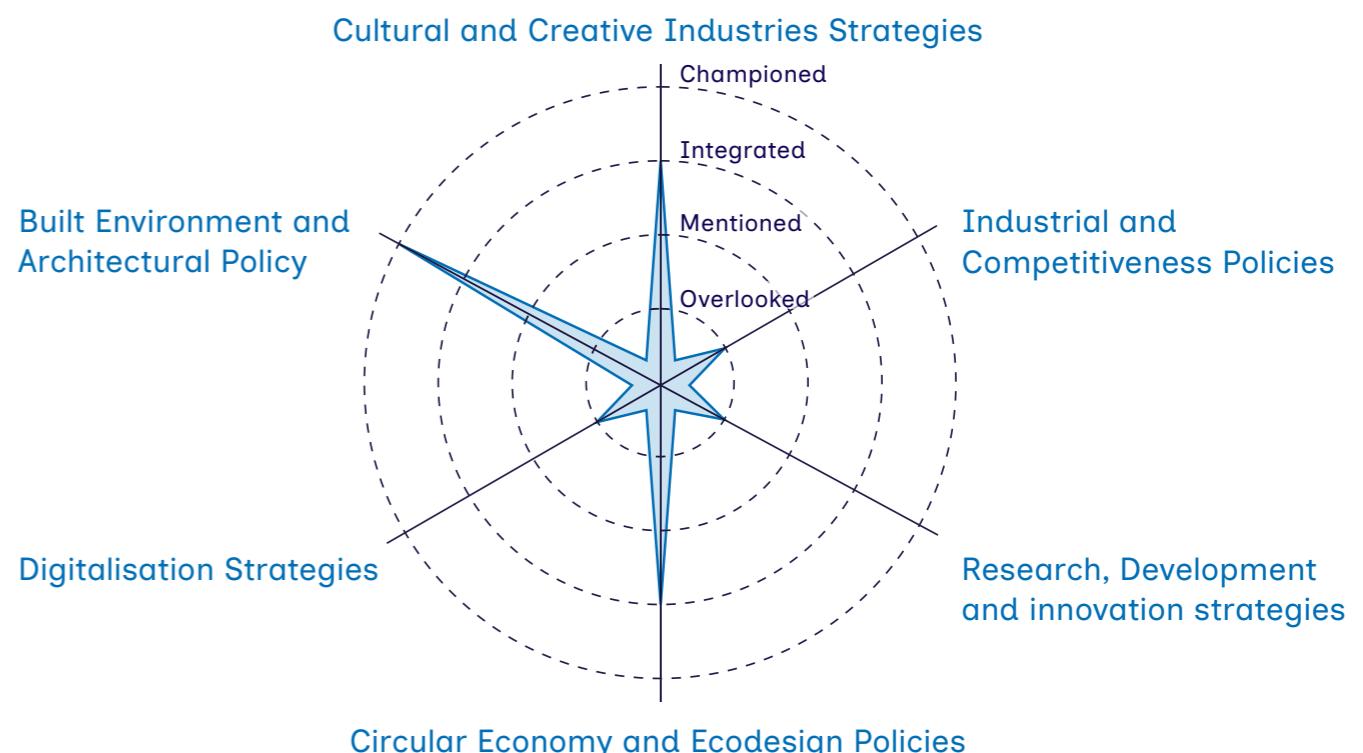
→ No explicit national design policy adopted since Design Finland Programme (2012), prepared by Ministries of Employment, Economy, and Education & Culture, in collaboration with stakeholders.

Design in other policy agendas

- CCI Strategy – Cultural Policy Report (2025) references design as part of the creative economy, highlighting competences in service design, customer insight, UX/UI, and business development opportunities. [Integrated]
- Circular Economy – Strategic Programme for a Circular Economy includes references to circular and eco-design. [Integrated]
- Architecture Strategy – National Architectural Policy Programme (apoli) 2022-2035 integrates design in the built environment, emphasising “Design for All,” education, cultural development and internationalisation.
- Innovation, industrial/development, digital strategies – No strategies or references to design were identified.

Fig. 24 | Country Profile: Finland

Status: September 2025



Observations

Finland lacks a current dedicated design policy but retains a strong legacy through the Design Finland Programme (2012). Design now appears mainly within cultural and architectural frameworks, as well as circular economy policy. The apoli programme, with its emphasis on “Design for All” and education, represents a significant contemporary reference point.

6.12 France

Country Size: 543,941 sq km
Citizens: 68,467,362 (2024) | Tendency: rising
GDP per capita: 46,150.5 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Strong Innovator (2025) | 122,3%
BEDA Member Organisations: Institut Français du Design (IFD), APCI Promotion DU Design, Alliance France Design, Association Valesens, Designers+

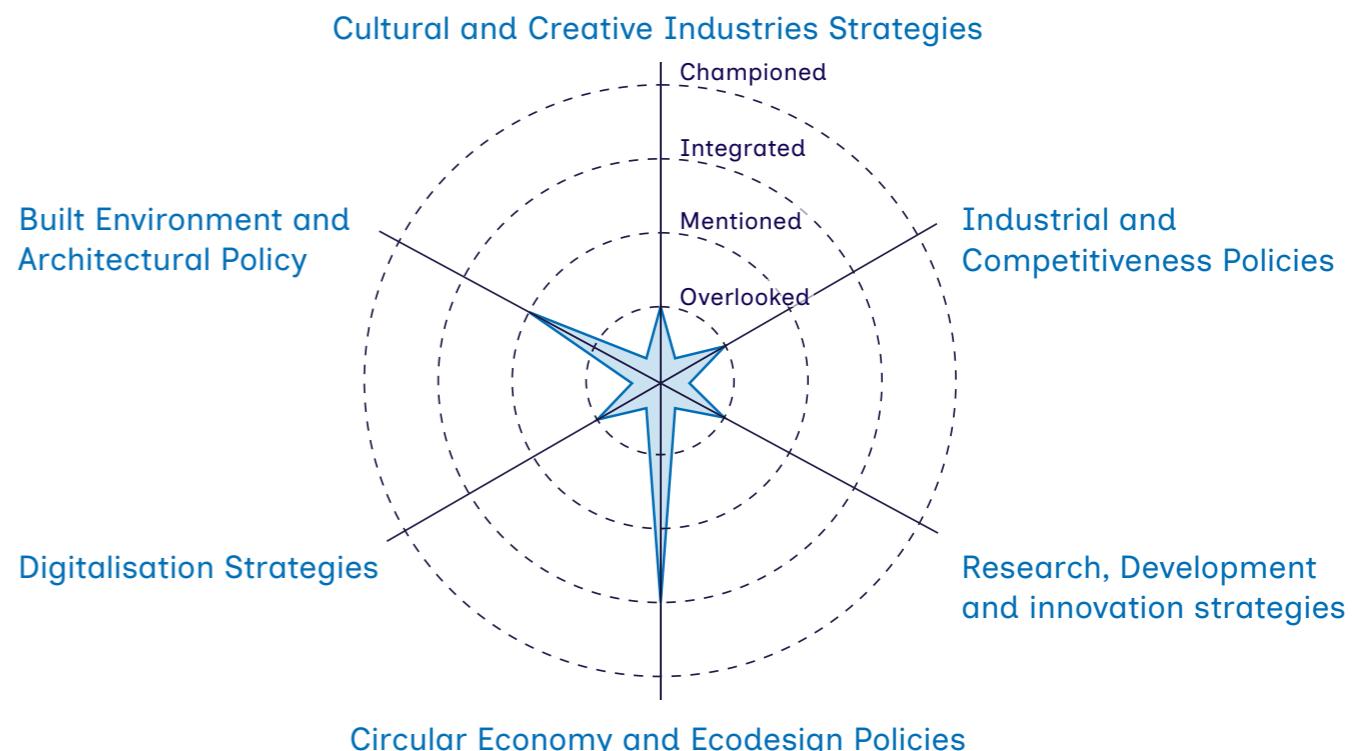
Dedicated design policy status

→ No explicit dedicated design policy. However, Assises du Design (2019) laid important groundwork. It led to the establishment of the Conseil National du Design in 2021, a permanent advisory body tasked with supporting design policy development and providing strategic guidance to national authorities.

Design in other policy agendas

→ Innovation Strategy – No explicit references, though France 2030 (broad investment and development plan) includes potential touchpoints for design.
→ Industrial / Development Strategy – France 2030 and France Relance programmes include sectoral investments where design could play a role, though mentions are not concrete.
→ Circular Economy – Anti-Waste Law includes strong measures for eco-design (repairability index, eco-design plans, bonus/malus incentives, recycled materials, packaging design).
[Integrated]
→ Architecture / Crafts – Crafts Strategy (2023) mentions design.
→ CCI, digital strategies – No strategies or references to design were identified.

Fig. 25 | Country Profile: France
Status: September 2025



Observations

While France lacks a standalone national design policy, the Assises du Design and the creation of the Conseil National du Design (CND) show clear steps toward structured design governance. Strong integration exists in the circular economy agenda through eco-design legislation, and there is some recognition in crafts. However, design's presence in innovation and industrial strategies remains more implicit than explicit. France appears to be moving towards a more institutionalised approach to design policy, with the CND serving as a platform to coordinate and push for stronger design integration across policy domains.

6.13 Germany

Country Size: 357,581 sq km
Citizens: 83,456,045 (2024) | Tendency: falling
GDP per capita: 55,800.2 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Strong Innovator (2025) | 125,1%
BEDA Member Organisations: Deutscher Designtag e.V. (DT), The German Society for Design Theory and Research (DGTF), Service Design Network, Bayern Design, German Design Council

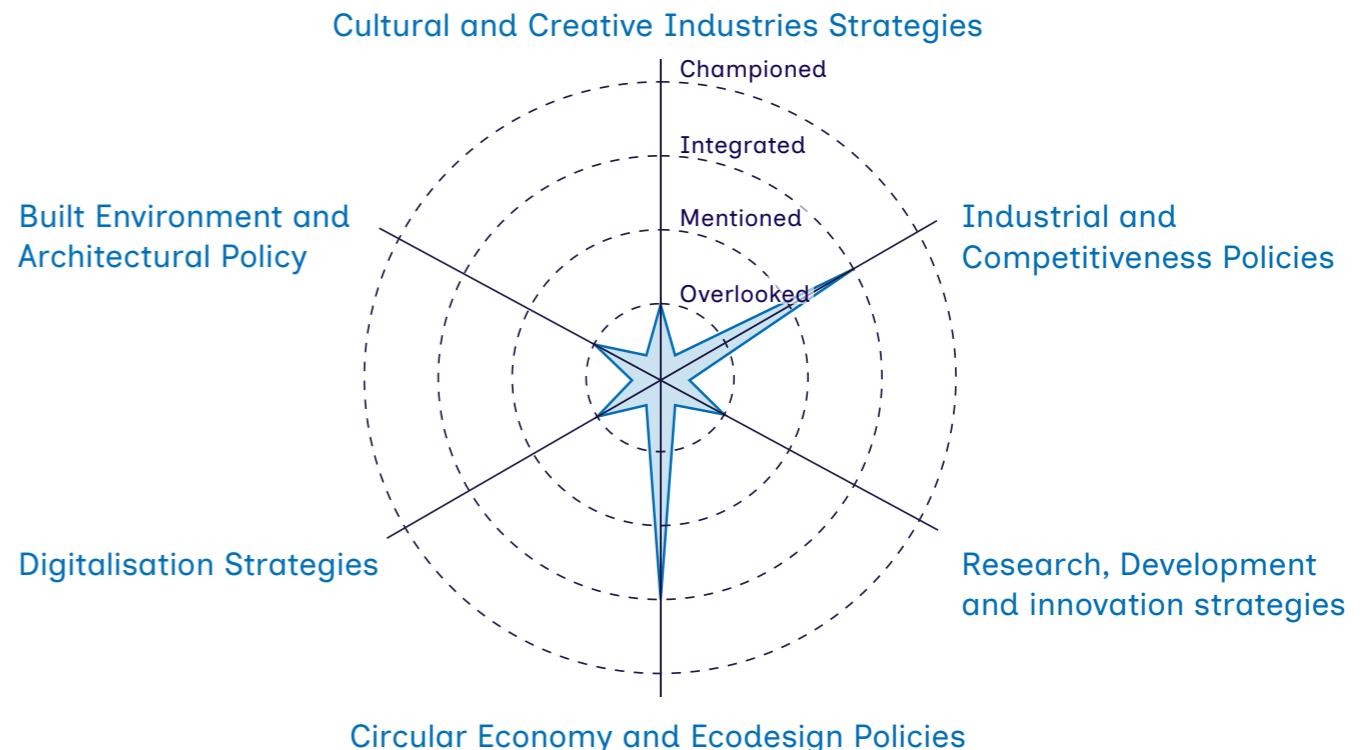
Dedicated design policy status

→ No explicit dedicated national design policy. In 2023, Deutscher Designtag proposed a Design Policy for Germany, aiming to build a collaborative framework between government, business associations, and the design sector. This remains at the proposal stage. As Germany is a federal country, some design-related initiatives may be more appropriately analysed at the Länder (federal state) level.

Design in other policy agendas

→ Industrial / Development Strategy – German Sustainable Development Strategy (2021) mentions eco-design, sustainable product design, and design-driven innovation (particularly in CCI contexts). [Integrated]
→ Circular Economy Strategy – The National Circular Economy Strategy includes multiple mentions of eco-design, sustainable product design, and design for reparability. [Integrated]
→ CCI, innovation, digital, architecture strategies – No strategies or explicit references were identified.

Fig. 26 | Country Profile: Germany
Status: September 2025



Observations

Germany does not yet have a dedicated design policy, but the 2023 proposal by Deutscher Designtag suggests growing advocacy momentum. Stronger references exist in sustainability-oriented agendas, particularly in the Circular Economy Strategy, where eco-design plays a central role. The federal structure may dilute policy visibility at the national level, with Länder playing an important role in cultural and creative industries. This multi-level governance dynamic, combined with active advocacy coalitions, could shape the trajectory toward a more formalised design policy framework.

6.14 Greece

Country Size: 131,957 sq km
Citizens: 10,400,720 (2024) | Tendency: falling
GDP per capita: 24,752.1 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Moderate Innovator (2025) | 85,3%
BEDA Member Organisation: Business and Cultural Development Centre (KEPA)

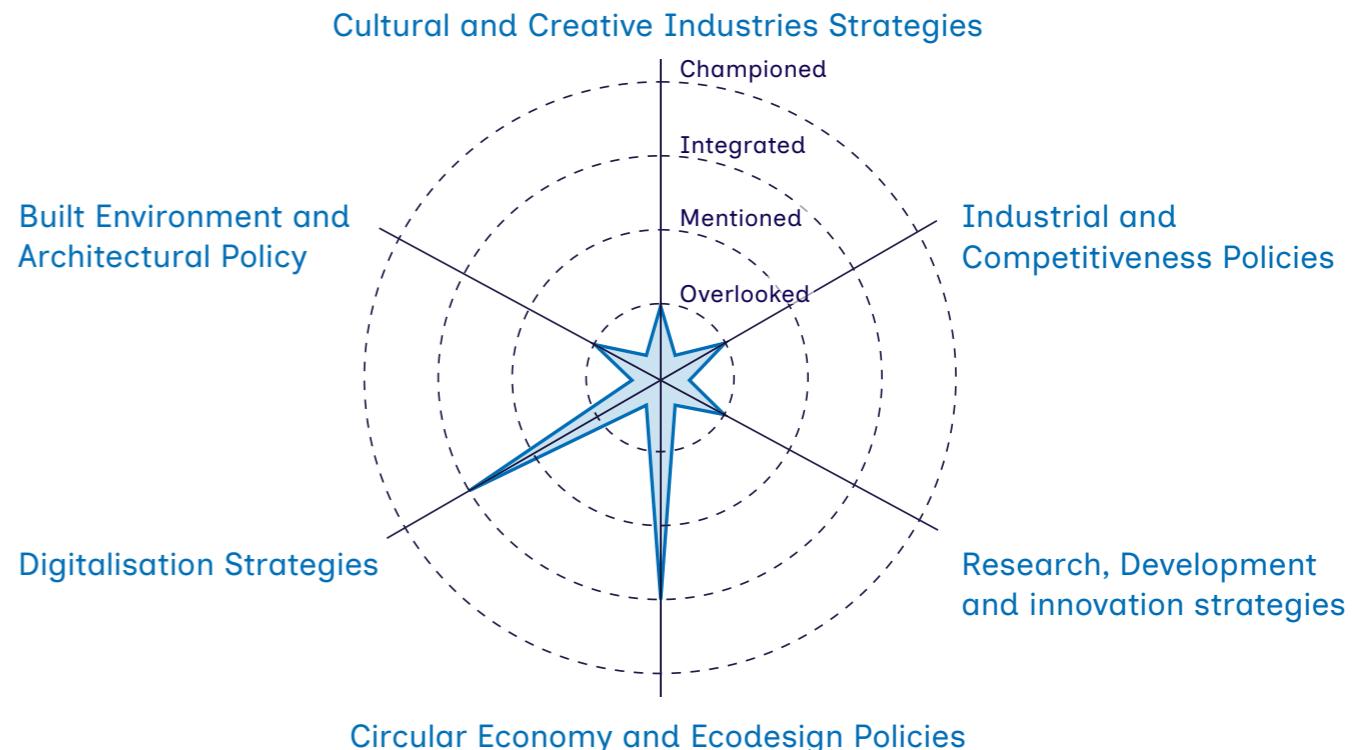
Dedicated design policy status

→ No

Design in other policy agendas

- Circular Economy Strategy – Mentions eco-design and product redesign multiple times. [Integrated]
- Digital Strategy – The Digital Transformation Bible (2020–2025) references the human-centred design, service design and design methodologies. [Integrated]
- CCI, innovation, industrial/development, architecture strategies – No strategies or explicit references were identified.

Fig. 27 | Country Profile: Greece
Status: September 2025



Observations

While Greece lacks a dedicated design policy, design is embedded in both sustainability and digitalisation agendas. The recognition of service design and the human-centred design in the digital strategy suggests institutional entry points, while eco-design provisions anchor design within environmental transitions. Together, these form partial but important foundations for design's integration, though the impact remains fragmented.

6.15 Hungary

Country Size: 93,025 sq km
Citizens: 9,584,627 (2024) | **Tendency:** falling
GDP per capita: 23,310.8 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 78,3%
BEDA Member Organisation: Hungarian Fashion & Design Agency, Hungarian Design Cultural Foundation

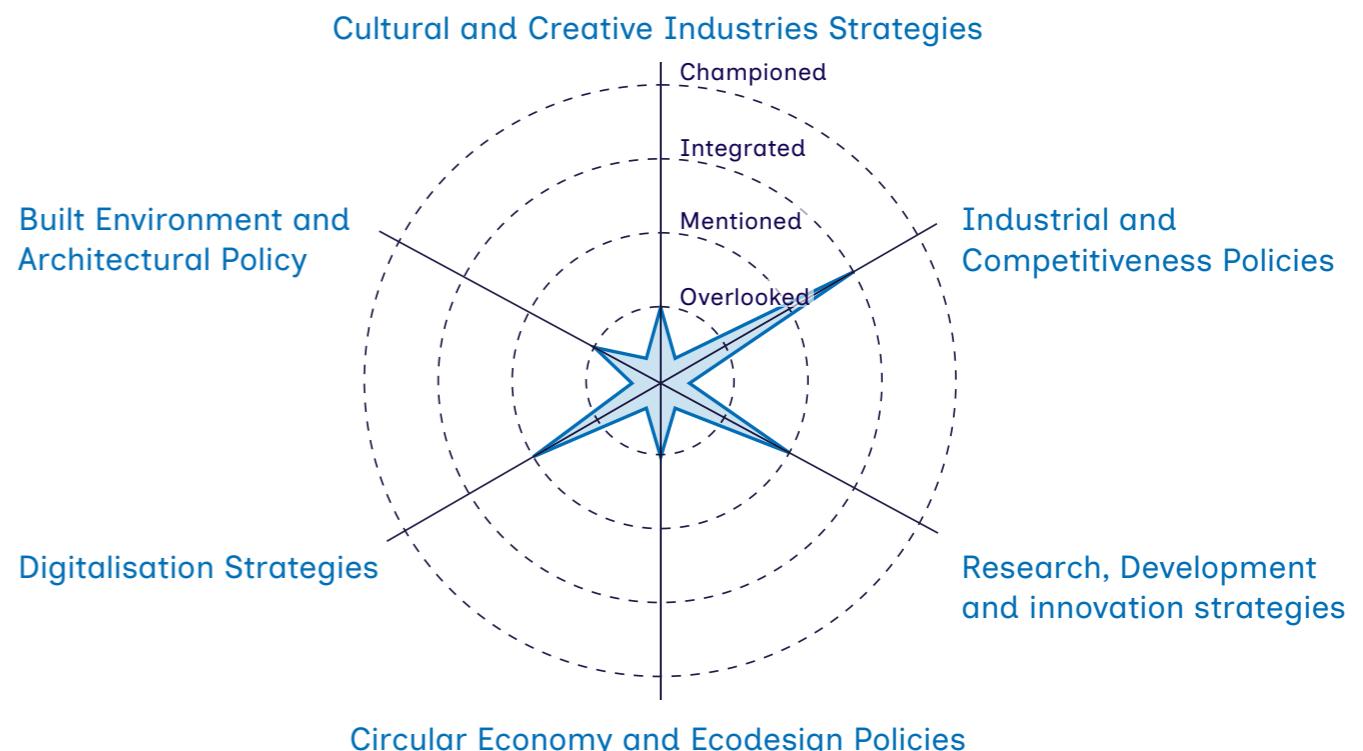
Dedicated design policy status

→ No

Design in other policy agendas

- CCI Strategy – Creative Industries Strategy 2020–2030 was announced but remains inaccessible and with no visible follow-up.
- Innovation Strategy – Baseline mention in the Research, Development and Innovation Strategy 2021–2030, which references design thinking at a societal level. [Mentioned]
- Industrial/Development Strategy – The National Competitiveness Strategy 2024–2030 contains a chapter on creative industries, referencing digital interface design, offline/online game design, brand design and links between design, AI, and cross-sector innovation. [Integrated]
- Digital Strategy – Minimal mentions in the National Digitalisation Strategy 2022–2030, where UX design is noted in relation to improving e-administration. [Mentioned]
- Circular Economy, architecture strategies – No strategies or explicit references were identified.
- It is noteworthy that Hungary has a stand-alone National Fashion Industry Strategy, as it demonstrates how design-related sectors can gain explicit policy visibility when closely tied to cultural heritage, national branding and export potential.

Fig. 28 | Country Profile: Hungary
Status: September 2025



Observations

Hungary embeds design in multiple strategic agendas – particularly competitiveness, digitalisation and innovation, yet in fragmented and inconsistent ways. While design thinking and UX appear in innovation and digital strategies, and creative industries and fashion receive institutional recognition, the absence of a coherent policy or follow-up mechanisms weakens design's role. The stalled Creative Industries Strategy illustrates a gap between agenda-setting and policy implementation, leaving design acknowledged but not strategically championed.

6.16 Iceland

Country Size: 103,000 sq km
Citizens: 383,567 (2024) | Tendency: rising
GDP per capita: 82,703.86 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Strong Innovator (2025) | 112,2%
BEDA Member Organisation: Iceland Design and Architecture

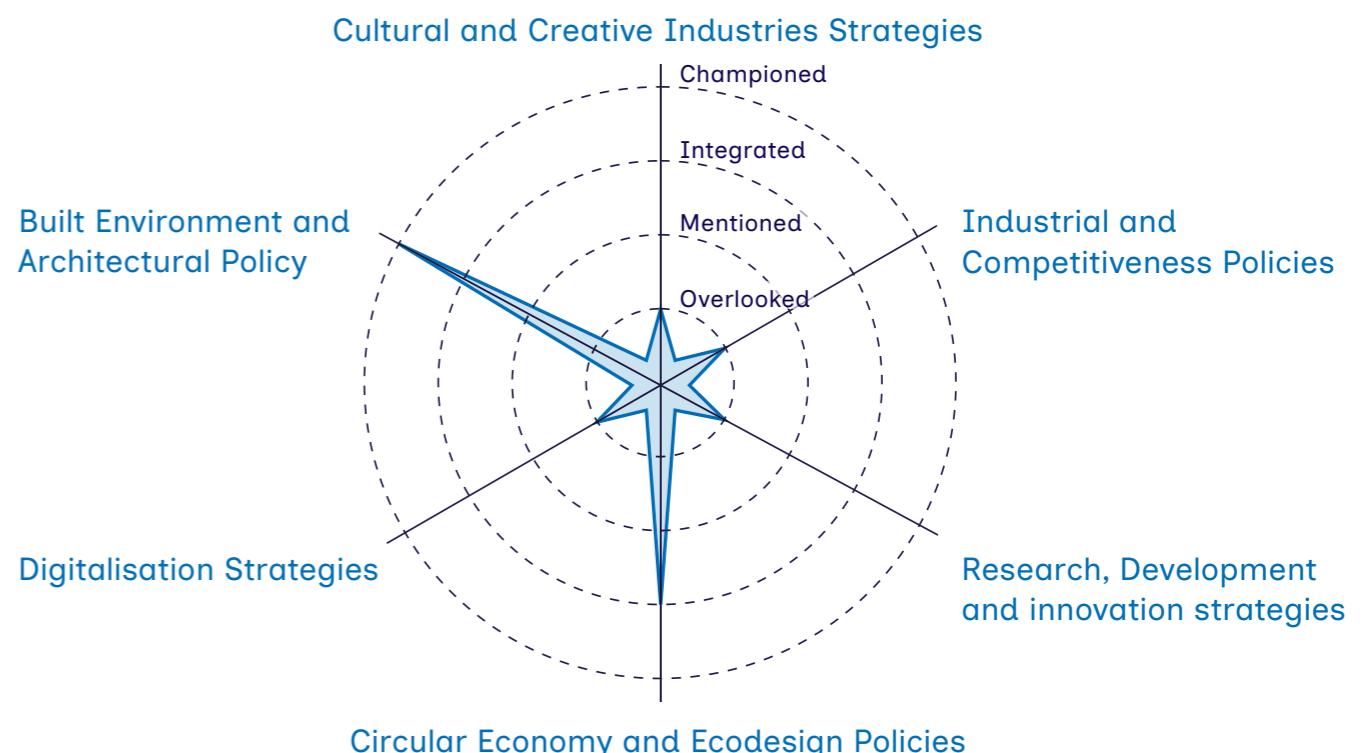
Dedicated design policy status

→ Yes. Iceland stands out in Europe with its Design and Architecture Policy until 2030, adopted in 2023. The policy is ambitious in scope, operating as a comprehensive cross-sectoral framework accompanied by a detailed Action Plan for 2023-2026. It envisions design and architecture as key drivers of societal progress, sustainability, and quality of life. Central aims include embedding design thinking into public decision-making, infrastructure planning, education, and business development, while also positioning design as a method for tackling complex societal challenges and supporting cultural identity, sustainability, and economic growth. The policy builds on earlier efforts, most notably Design as a Driver for the Future 2014-2018, which established the first framework for recognising design as a strategic national resource.

Design in other policy agendas

→ Circular Economy Strategy – Together Against Waste 2016-2027 mentions sustainable product design and ecodesign. [Integrated]
→ CCI, innovation, industrial/development, digital strategies – No strategies or explicit references were identified.

Fig. 29 | Country Profile: Iceland
Status: September 2025



Observations

Iceland offers one of the most comprehensive and future-oriented design policy frameworks in Europe. By combining a long-term vision with a concrete action plan, the policy provides both symbolic and operational weight to design's role in national development. Its cross-cutting integration, spanning governance, business, sustainability and culture illustrates how design can be positioned as a central lever for systemic change. Few countries have managed to create such a cohesive framework, making Iceland an important case for understanding how design policy can evolve from sectoral initiatives into a fully embedded national strategy.

6.16 Iceland

Case Study: Design Policy

Status: September 2025

Design and Architecture Policy until 2030 'Outlining the future'

6.16.1 Policy Overview

Policy Owner: Ministry of Culture, Innovation and Higher Education (until late 2024 Ministry of Culture and Business Affairs)

Start Year: 2023

Policy Period: 2023–2030

Lead Ministry: Ministry of Culture, Innovation and Higher Education (until late 2024 Ministry of Culture and Business Affairs)

Key Implementation Body: Iceland Design and Architecture (1,200+ members across 9 professional associations)

6.16.2 Design definition adopted in the Icelandic policy

“Design is a strategic and critical approach to solving projects or challenges and creating new solutions, methods, or products. Design is an innovative process that takes function, social and cultural factors, aesthetics, and economics into consideration. Good design puts the user’s needs at the forefront, is simple, easy to understand, economically effective, and has artistic value.”

Quote: The Ministry of Culture and Business Affairs (2023). Design and Architecture Policy until 2030 – Outlining the Future.

6.16.3 Main Strategic Actions

1. Value Creation Based on Design and Architecture

- **Funding Enhancement:** Strengthen Icelandic Design Fund and emphasis on design with sustainability focus
- **Access Expansion:** Improve competitive fund access for design projects
- **Tax Incentives:** R&D tax relief for innovative design and architecture projects
- **Profession Support:** Create clear legal framework for design and architecture
- **Economic Measurement:** Define metrics to map economic impact and added value of design

2. Design as Driving Force for Change

- **Decision Integration:** Ensure designer/architect participation in early decision-making stages in various strategic committees and councils
- **Institutional Role:** Expand Iceland Design and Architecture’s leadership in design-driven innovation
- **Digital Transformation:** Apply design thinking to digital government services and regulatory frameworks

3. Sustainable Infrastructure Development

- **Policy Integration:** Revise Cultural Policy of Construction into broader social policy
- **Circular Economy:** Map regulatory changes needed for circular construction practices
- **Procurement Reform:** Increase design emphasis in public procurement and tenders
- **Research Investment:** Allocate infrastructure funding portion to R&D and innovation

4. Progressive Education

- **Educational Diversification:** Support new design disciplines (digital, service, experience design)
- **Interdisciplinary Cooperation:** Create university-industry collaboration incentives
- **Continuing Education:** Ensure professional development access for designers
- **IP Awareness:** Increase copyright and design protection education

5. International Promotion

- **Venice Biennale:** Ensure Iceland’s Architecture Biennale participation
- **Global Partnerships:** Collaborate with Business Iceland and the Icelandic foreign service on international promotion
- **Design Awards:** Strengthen Icelandic Design Awards promotion
- **National Promotion:** Strengthen the core activities of the center of Iceland Design and Architecture and its collaborations
- **Export Support:** Create opportunities for designers in international presentations

6.16.4 Key Performance Indicators

Current Metrics (The Ministry of Culture and Business Affairs (2023)):

- 14 billion ISK operating income (tripled over 10 years)
- 4.5 billion ISK in wages (2020)
- 400+ operators (doubled 2009-2019)
- 1,200 professional association members

Strategic KPIs

- Generally, the policy document does not specify detailed KPIs, monitoring frequencies, or specific evaluation mechanisms beyond the general commitment to define metrics in research
- More emphasis on establishing processes and structures rather than quantitative targets
- Potential metrics: Number of people in design/architecture disciplines, Level of their salaries, Export values from design industries
- Emphasis on quality of life impact indicators and integration with government's six well-being indicators (The Ministry of Culture and Business Affairs (2023):
 - Mental health
 - Housing security
 - Work/education participation
 - Carbon-neutral future
 - Innovation growth
 - Public communication

6.16.5 Policy Context

Implementation Structure

Two-Phase Action Plans:

- Phase 1: 2023-2026
- Phase 2: 2027-2030

Inter-Ministerial Coordination

- Lead: Ministry of Culture, Innovation and Higher Education (until late 2024 Ministry of Culture and Business Affairs)
- Implementation body: Iceland Design and Architecture
- Partners: Ministry for Foreign Affairs, Ministry of Higher Education, Science and Innovation, Ministry of Infrastructure, Ministry of the Environment, Energy and Climate, other Ministries, Business Iceland.

International Alignment – UN SDGs

Iceland's design and architecture policy is explicitly aligned with the UN Sustainable Development Goals, reflecting the integration of economic, social, and environmental dimensions of sustainability. The policy recognises design both as a methodology and as a sector contributing directly and indirectly to the achievement of the SDGs. Specific sub-goals connect to global targets, including expanding vocational training and entrepreneurship opportunities (SDG 4), promoting sustainable consumption and production (SDG 8 & 12), supporting sustainable tourism (SDG 8), investing in resilient infrastructure (SDG 9), advancing sustainable urban and regional development (SDG 11), and strengthening cross-sectoral partnerships (SDG 17). Through these linkages, the policy positions design as a strategic enabler of Iceland's contribution to the international sustainability agenda.

National Policy Connections

- Education Policy 2030
- Science and Technology Policy 2020-2022
- Innovation Strategy „Land of Innovation“
- Cultural Policy
- Intellectual Property Policy 2016-2022

6.16.6 Evidence highlights mentioned in the policy

Economic Growth: Design and architecture sector has tripled operating income over 10 years, demonstrating strong value creation potential

Sustainability Focus: 80% of environmental impact determined in design process, positioning designers as critical leaders for circular economy

STEAM Integration: Policy emphasizes shift from STEM to STEAM education (Science, Technology, Engineering, Arts, Mathematics) for interdisciplinary innovation

The Ministry of Culture and Business Affairs (2023). Design and Architecture Policy until 2030 – Outlining the Future.

6.16.7 Implementation & lessons

learnt from the Icelandic design policy case

Iceland's design policy represents a unique experiment in governance: a policy development and implementation system directly owned and operated by the creative practitioners it aims to support. The current policy, "Design and Architecture Policy until 2030: Outlining the Future", emerged from over 15 years of iterative development through a model that places "power to the people" at its core.

The policy's institutional foundation rests on Iceland Design and Architecture, a centre that operates as a private limited company owned by nine professional associations representing the full spectrum of design disciplines, from architects and landscape architects to ceramicists and textile designers. This ownership structure reflects a deliberate challenge to traditional top-down policy approaches, as one interviewee explained: "If you don't have the power, if you don't have the voice, the strength or the weight, you're not going to get very far."

Strategic Positioning:

Design as Cross-Cutting Force

The 2023-2030 policy positions design as fundamentally cross-sectoral, spanning five strategic domains: value creation, change leadership, sustainable infrastructure, progressive education and international promotion. This horizontal integration reflects hard-won lessons about the limitations of siloed approaches. As the policy development leader noted: "Maybe we should not, in the end have any design policies. Design should be a part of all policies."

The policy's definition of design emphasizes its strategic nature: "a critical approach to solving projects or challenges and creating new solutions, methods, or products" that considers "function, social and cultural factors, aesthetics, and economics." This breadth reflects both opportunity and challenge, the policy must serve disciplines as varied as architecture and fashion design while maintaining coherence and impact.

The strategic emphasis on early integration proves central to the approach. One key insight

from the development process emphasized that "you need to have the design creative element within the highest level of decision making" because "if it comes in too late, we have lost opportunities." This principle underpins several policy actions, including ensuring designer and architect participation in strategic committees and expanding the role of Iceland Design and Architecture in innovation leadership.

Governance Innovation: Navigating Ministerial Boundaries

Iceland's experience reveals the structural challenges that cross-cutting policies face within traditional government systems. The policy's journey through different ministerial configurations, from Ministry of Culture and Business Affairs to the current Ministry of Culture, Innovation and Higher Education sharing previous agenda with Ministry of Industry, illustrates both the problem and potential solutions.

The evolution toward a ministry that bridges culture, innovation and education represents a significant governance innovation, achieved through strategic advocacy by the creative industries sector. As one participant reflected: "We joined forces, the creative industries. And I was a part of leading that to make like a political meeting... we need to have Culture, Innovation and universities." The success of this advocacy demonstrates the potential power of organized creative sector voice in shaping government structures.

However, this structural innovation comes with implementation challenges. The policy leader emphasized the ongoing difficulty: "It's hard because governmental structures don't acknowledge this in a way not because people are like mean or bad or anything but it's sort of like it's a new way of thinking."

The Participatory Process: Building Legitimacy Through Inclusion

The policy development methodology prioritizes extensive stakeholder engagement as both a means of gathering information and building ownership. The process included multiple strategic meetings, study visits to Denmark and Norway, stakeholder workshops, and public consultation phases.

The consultation process proved accessible even to resource-constrained organizations. One stakeholder described receiving direct email communication from the ministry with links to the online policy document: "It was really good, and very easy to give feedback." The digital consultation mechanism enabled participation through written submissions without requiring physical workshop attendance, thereby reducing resource barriers to engagement.

The participatory approach serves multiple functions beyond information gathering. One policy architect explained the political dimension: "You get information—often very good information—and by involving people in that process, you also turn them into stakeholders."

Stakeholder engagement with policy documents appears to follow sector-specific patterns. As one interviewee observed: "I read through it with my organisation in mind. Other people read through it with theirs in mind." This organisational lens through which stakeholders interpret policy suggests they prioritise advocacy for specific institutional interests rather than comprehensive engagement with the full policy scope, a characteristic that policy development teams must recognise and synthesise across multiple inputs.

This extensive consultation revealed surprising commonalities across diverse design disciplines. During early stakeholder meetings, participants discovered that "it was very much the same things they were saying" despite producing different outputs and facing different market conditions. This finding validated the multi-disciplinary approach while highlighting shared challenges around professional recognition, market development, and integration into decision-making processes.

The substantive incorporation of stakeholder feedback appears significant for legitimacy building. When stakeholders provided input, documented instances show integration into final policy rather than symbolic acknowledgement alone. One stakeholder noted that after identifying their institution absence from the initial draft and articulating its institutional role, "we were... taken into the discussion. It was easy to access the files and we were listened

to." The ministerial stakeholder's draft review similarly resulted in explicit incorporation of embassy work into the document with feedback characterized as "very well received." These examples suggest that the perceived responsiveness of the revision process contributed to stakeholder acceptance of the final policy.

Implementation Reality:

The Gap Between Policy and Practice

The 19 strategic actions outlined in the 2023-2030 policy range from funding enhancements and tax incentives to educational reform and international promotion. The implementation structure divides these into two phases (2023-2026 and 2027-2030) with Iceland Design and Architecture serving as the key implementation body alongside multiple government ministries.

However, the implementation track record reveals challenges. Reflecting on previous policy cycles, one implementer noted: "The real challenge with all these policies is implementation by government. Developing them is hard enough, but the bigger problem is that they're simply not implemented well."

Documented policy outcomes include varied implementation results across different action areas. One institutional beneficiary received 30 million Icelandic Kroner allocation through the policy to fund an educational coordinator position for three years, enabling programme expansion described as: "It's been a total change for the institution... every morning it is full of kids." This initiative reached approximately 2,000 children annually through workshop programming and mobile outreach to schools outside Reykjavik, with the director characterizing impacts as exceeding initial expectations.

This implementation case simultaneously illustrates both resource mobilisation and temporal limitations inherent in fixed-term project funding. With one year remaining in the three-year allocation period, the institutional representative expressed concern regarding programme continuation: "We are just worried now, how are we going to continue with this? We've invested a lot in people and develop great programmes." The funding structure enabled programme establishment and proof-of-concept demonstration but did not include mecha-

nisms for transition to sustained operational funding, a pattern observable across pilot-based policy implementation approaches.

Recent implementation successes include expanding the Icelandic Design Fund, increasing designer representation in artist salary allocations and securing continued participation in the Venice Architecture Biennale. Yet concerns remain about systematic monitoring and political continuity. The stakeholder expressed worry about current implementation: "I'm afraid they are not monitoring it well enough right now."

The challenge intensifies during government transitions. Electoral cycles disrupt relationships and priorities, requiring renewed advocacy with new ministers and officials. The current minister, notably an architect by profession, represents both opportunity and uncertainty: "The risk is that if the policy remains tied to the previous minister, the current one won't be interested."

Implementation monitoring practices vary across organisational actors and policy domains. While policy leadership expressed concerns about insufficient systematic tracking, implementing organisations focus monitoring efforts on their specific operational responsibilities. As one implementer noted: "We're not really following how the policy is being implemented, but we're really looking towards results of all cultural events." This organisation maintains event-level metrics including attendance figures, media coverage, stakeholder connections and perceived impact rather than tracking policy-level outcomes. The observed pattern suggests a disjunction between activity-level performance monitoring and comprehensive policy evaluation, a characteristic documented across various policy implementation contexts.

International Promotion: Embedding Design in Diplomatic Infrastructure

Chapter 5 of the policy addresses international promotion through specified collaboration between Iceland Design and Architecture, Business Iceland and the Foreign Ministry. This policy component demonstrates integration between domestic design sector development objectives and cultural diplomacy functions.

Implementation operates through two prima-

ry mechanisms. First, promotional events co-organized with embassies in designated priority markets provide platforms for showcasing Icelandic design to decision-makers, media representatives and design professionals. These activities have concentrated particularly on promoting Design March, Iceland's annual design festival, through Nordic country embassies, with documented plans for potential expansion to France, the UK and the US. As the Foreign Ministry's cultural affairs director explained: "We've been focusing a lot on the Nordic countries... there's really great collaboration going on between the centre and the different embassies."

Second, the Ministry for Foreign Affairs and the Design Centre have developed operational guidelines for integrating Icelandic design within embassy spaces. Developed approximately two years prior to this study, these one-page guidelines specify that embassies and official residences should "feature a light Nordic aesthetic" and "reflect Iceland through references to the nation's culture and nature." Significantly, the guidelines mandate professional consultation: "Professional expertise (such as architects, interior architects, and designers) should be consulted for design projects and major acquisitions."

This professional consultation requirement represents a shift in decision making. Decisions regarding interior design are now made on the basis of professional recommendations. New embassies in Brussels, Oslo, London, Washington and New Delhi have been designed following these guidelines, though implementation proceeds incrementally: "Whenever we re-do an embassy, we look towards this because we can't change everything just in one go, that's going to be too expensive."

The embassy guidelines demonstrate one mechanism through which policy translates into operational practice. Although the guidelines have proven to be a useful tool, it is important to be mindful of the multiple function of embassies and official residences as work spaces, official representation venues and personal residences. While embassies should portray prime examples of Icelandic art and design, design decisions must also be respectful of the wishes of staff members and inhabitants.

Resource allocation structures significantly influence international promotion implementation. The “Creative Iceland” project provides designated funding for priority markets (Nordic countries, USA, Germany, and partially UK and France), enabling sustained promotional programming. However, this geographic prioritisation necessitates declining opportunities in other locations: “*Sometimes a bit of a shame when if, for example, I get a phone call from our embassy in New Delhi about a great exhibition... but we have to say no... because we’re focused on these few priority markets.*”

Economic Evidence and Measurement Challenges

The policy’s economic rationale draws on substantial growth figures: the design and architecture sector has tripled its operating income to 14 billion ISK over the past decade, doubled its operators to 400+, and now employs over 1,200 professional association members. These metrics demonstrate tangible value creation and justify policy investment. However, measurement challenges persist. Statistical offices conduct one-off studies rather than continuous monitoring, limiting the ability to track progress systematically. The policy commits to developing better metrics but provides limited specificity about measurement frameworks or targets.

Implementing organisations acknowledge inherent methodological challenges in measuring cultural and design policy outcomes. The Ministerial stakeholder observed: “*It is really difficult... but it’s really important to do so. But we realise that sometimes you won’t see an impact until after a long time. There are a lot of connections that are made that are so important, but we can’t really register to them, we don’t always know about them, and sometimes they happen in future as well.*” This assessment reflects recognition that certain policy outcomes resist immediate quantification and may materialise through mechanisms not directly observable to implementing organizations.

The emphasis on quality of life indicators alongside economic metrics reflects Iceland’s broader wellbeing approach to governance. The policy connects design outcomes to six national wellbeing indicators including mental health,

housing security and carbon neutrality, though operationalizing these connections remains a work in progress.

Coordination Infrastructure

Iceland’s demographic scale creates distinctive coordination conditions that influence policy implementation patterns. As one Ministerial stakeholder described inter-organisational relationships: “*They are actually in the next floor below me, so everyone is just the phone call away or a cup of coffee away and we’re all friends and we all work closely together.*”

This spatial proximity and interpersonal familiarity facilitates coordination mechanisms. Multiple interview participants identified inter-organisational cooperation as foundational to implementation. One Ministry representative characterised it as “*the key to success... cooperation between the ministries but with Business Iceland and the different centres and the embassies... and everyone understanding what their role is and respecting each other, informing each other.*” Another interviewee described the Design and Architecture Centre’s function primarily as “*a facilitator... they bring us all together*” through convening activities including Design March, grant programme administration and accessible advisory services.

However, these coordination advantages associated with small demographic scale present limitations for policy transfer. The Ministerial representative recognised that coordination approaches may prove “*more difficult maybe to implement in other countries where decision making processes are much more difficult.*” The spatial and social proximity enabling informal coordination mechanisms does not characterize larger governmental systems with more complex organizational structures and decision-making hierarchies.

Institutional Trust

The operational legitimacy of Iceland Design and Architecture as the central coordinating institution appears contingent upon maintained trusted relationships with the broader design community. One stakeholder observed that “*the ministry and the Design Centre, they have a lot of trust from the design circle in Iceland.*”

The Design Centre’s organisational functions extend beyond formal policy implementation to encompass broader sector coordination activities. Interview participants characterised it as a “*connector*” and “*meeting point*” that “*brings us all together.*” Beyond policy-specific work, the Centre administered Design March (an annual event described as requiring substantial organisational capacity “*in such a small place*”), manages design grant allocation processes, coordinates design award programmes, and provides accessible expertise to community members: “*I call them up if I need some advice or help. I think they’re very accessible and there’s a lot of knowledge there.*”

This multifaceted organisational role positions the Centre simultaneously as policy implementation lead and sector service provider. The arrangement creates interdependences wherein the Centre requires community participation and legitimacy for effective policy work, while individual designers and design organisations access resources and coordination infrastructure through the Centre’s convening capacity and governmental connections.

International Context and Learning

Iceland’s approach draws explicitly from international examples, particularly Nordic models and British design policy precedents. Study visits and ongoing collaboration with regional counterparts inform both policy content and process design. As one policy leader reflected: “*I have looked very much on how like Danes process their work... I saw how they do many of their work like this and even I think many of their sort of strategic papers. There are only seven pages.*”

The policy’s international promotion component leverages Iceland’s distinctive position and creative reputation. Continued participation in the Venice Architecture Biennale and collaboration with Business Iceland on export promotion reflect recognition that design serves both domestic development and international competitiveness goals. However, Iceland’s small scale creates both advantages and limitations. Direct access to decision-makers and the ability to mobilize the entire creative community provide advantages that larger countries cannot

replicate. Conversely, limited resources and the need for broad rather than deep expertise create ongoing constraints.

Observations

Iceland’s policy experience yields several observable patterns regarding process design and implementation. The policy development process incorporated stakeholders through differentiated engagement mechanisms, ranging from intensive strategic meetings to accessible online consultation, enabling stakeholders to participate meaningfully within their capacity. The documented incorporation of stakeholder input, appears associated with stakeholder acceptance of final policy outcomes, suggesting that perceived responsiveness to consultation input influences subsequent policy legitimacy among participating actors. Multiple interview participants indicated that policy document creation and discussion itself generates coordinating effects independent of formal implementation structures: “*Just by getting us all together. And just by reading it and writing it... just this fact makes things happen... people come together and they focus on things.*”

Implementation patterns reveal both distributed knowledge requirements and structural constraints. Observed patterns suggest actors do not require comprehensive policy knowledge to implement assigned components effectively, with organisations focusing on domain-specific responsibilities rather than whole-policy understanding. However, time-limited project funding demonstrates both resource mobilisation capacity and temporal sustainability constraints, enabling programme establishment and concept validation while requiring transition mechanisms for sustained operation. Simplified operational tools that embed professional standards while maintaining implementation flexibility appear to facilitate consistent implementation across distributed organisational actors.

6.17 Ireland

Country Size: 69,825 sq km
Citizens: 5,351,681 (2024) | Tendency: rising
GDP per capita: 107,316.34 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Strong Innovator (2025) | 138,6%
BEDA Member Organisation: Design & Crafts Council Ireland (DCCI), Institute Designers Ireland (IDI)

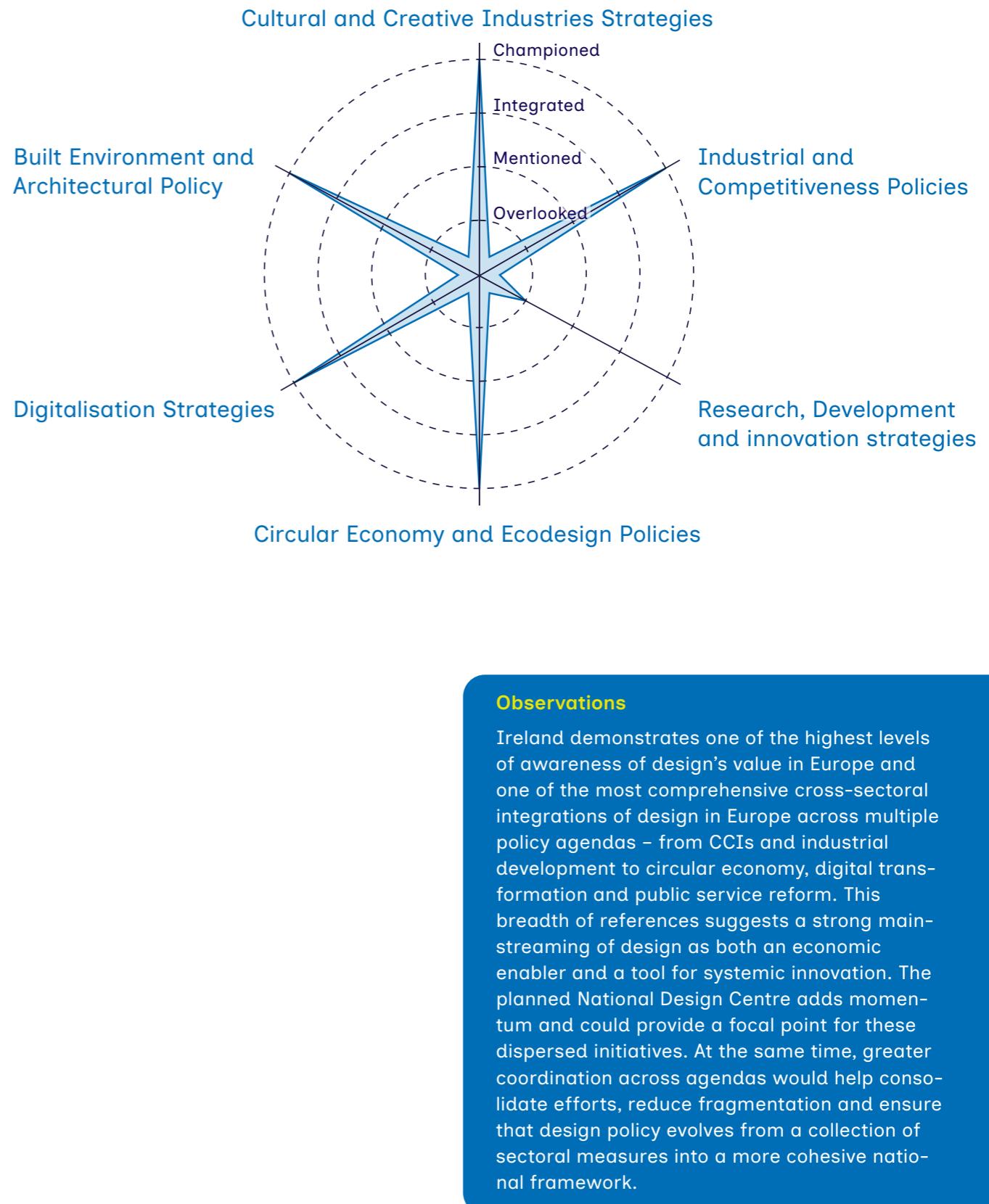
Dedicated design policy status

→ No standalone national design policy. However, multiple initiatives and strategies explicitly acknowledge design, with strong momentum around the planned National Design Centre. Previous initiatives include adoption of the Policy Framework for Design in Enterprise in Ireland (2016) as well as publication of the National Design Strategy for Ireland by The Design and Craft Council in 2016. Specific policy actions for design were being included in the governmental Action Plan for Jobs between 2015 and 2018.

Design in other policy agendas

→ CCI Strategy – Digital Creative Industries Roadmap 2024–26 positions design (industrial, product, service, strategic, UX/UI, visual communication) as a target sector central to innovation spillovers and competitiveness. It lays out actions across industry collaboration (forums), skills & education, direct business support, internationalisation, and research/knowledge creation. It explicitly links design to ISO standards on innovation management and public-sector design principles. The Design & Crafts Council of Ireland strategy (2022–26) also embeds design growth goals. [Championed]
→ Innovation Strategy – Impact 2030 mentions design only in the context of IPRs (baseline presence). [Mentioned]
→ Industrial / Development Strategy – Project Ireland 2040 / National Development Plan 2018–2027 commits to establish a National design centre as a centrally funded industrial/development intervention. The centre is intended as an incubation, training and demonstration facility with regional capacity to support market-led innovation in Irish enterprises and help firms scale internationally. This institutional investment is an industrial lever: it creates sustained demand for designer skills, anchors regional industry-design partnerships, provides training and pilot-demonstration pipelines, and signals government commitment to design as a route to competitiveness. [Championed]
→ Circular Economy Strategy – Whole-of-Government Circular Economy Strategy Living More, Using Less (2022–23) Circular design is a core principle: “good design preserves product value for as long as possible.” The strategy commits to promoting durability, repairability, modular building design, systemic perspectives in material choice, and dedicated instruments (e.g. Climate Action Voucher for ecodesign). It also highlights the Rediscovery Centre as a national circular hub, and uniquely, it treats policy design itself as part of circular governance (“poorly designed policies could have negative outcomes”). [Championed]
→ Digital Strategy – Designing our Public Services initiative applies design principles to government innovation and citizen-centred services. [Championed]
→ Architecture Strategy – Places for People (2022) emphasises architecture and design as drivers of sustainable, resilient societies and cultural identity. [Championed]
→ Culture Policy – Culture 2025 briefly acknowledges design. [Mentioned]

Fig. 30 | Country Profile: Ireland
Status: September 2025



6.18 Italy

Country Size: 301,958 sq km
Citizens: 58,971,230 (2024) | **Tendency:** falling
GDP per capita: 40,226.0 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Moderate Innovator (2025) | 104,7%
BEDA Member Organisation: Italian Association of Visual Communication Design (AIAP),
Associazione per il Disegno Industriale (ADI)

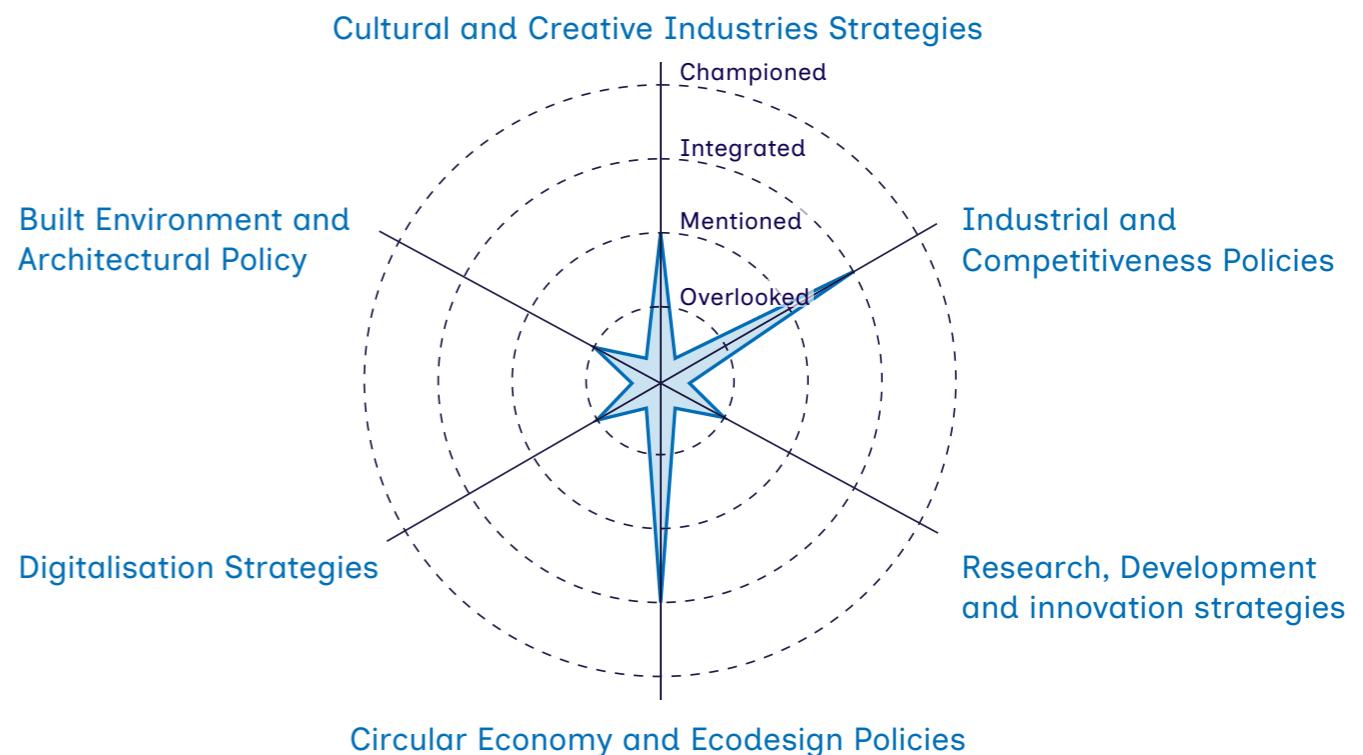
Dedicated design policy status

→ No

Design in other policy agendas

- CCI Strategy – Culture National Programme 2021–2027 references design in the context of the European Green Deal and New European Bauhaus. [Mentioned]
- Industrial / Development Strategy – National Reform Programme (2020) highlights design for public services, sectoral support and tax credits for design and IPRs. [Integrated]
- Circular Economy Strategy – Italian National Strategy for Circular Economy mentions eco-design and design in terms of aesthetics. [Integrated]
- Innovation, digital, architecture strategies
 - No strategies or references to design were identified. [Overlooked]

Fig. 31 | Country Profile: Italy
Status: September 2025



Observations

Italy, as one of Europe's global design leaders, has strong design traditions and sectoral strengths, yet at the national level policy treatment of design remains fragmented. References appear across culture, industrial and circular economy agendas, but without a coordinated strategy or dedicated framework. This raises the question of whether more substantive design policy activity is taking place at the regional level, particularly given the strong design ecosystems in Lombardy, Piedmont and Emilia-Romagna.

6.19 Latvia

Country Size: 64,594 sq km
Citizens: 1,875,316 (2024) | Tendency: falling
GDP per capita: 23,367.6 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 63,9%
BEDA Member Organisation: Latvian Design Centre

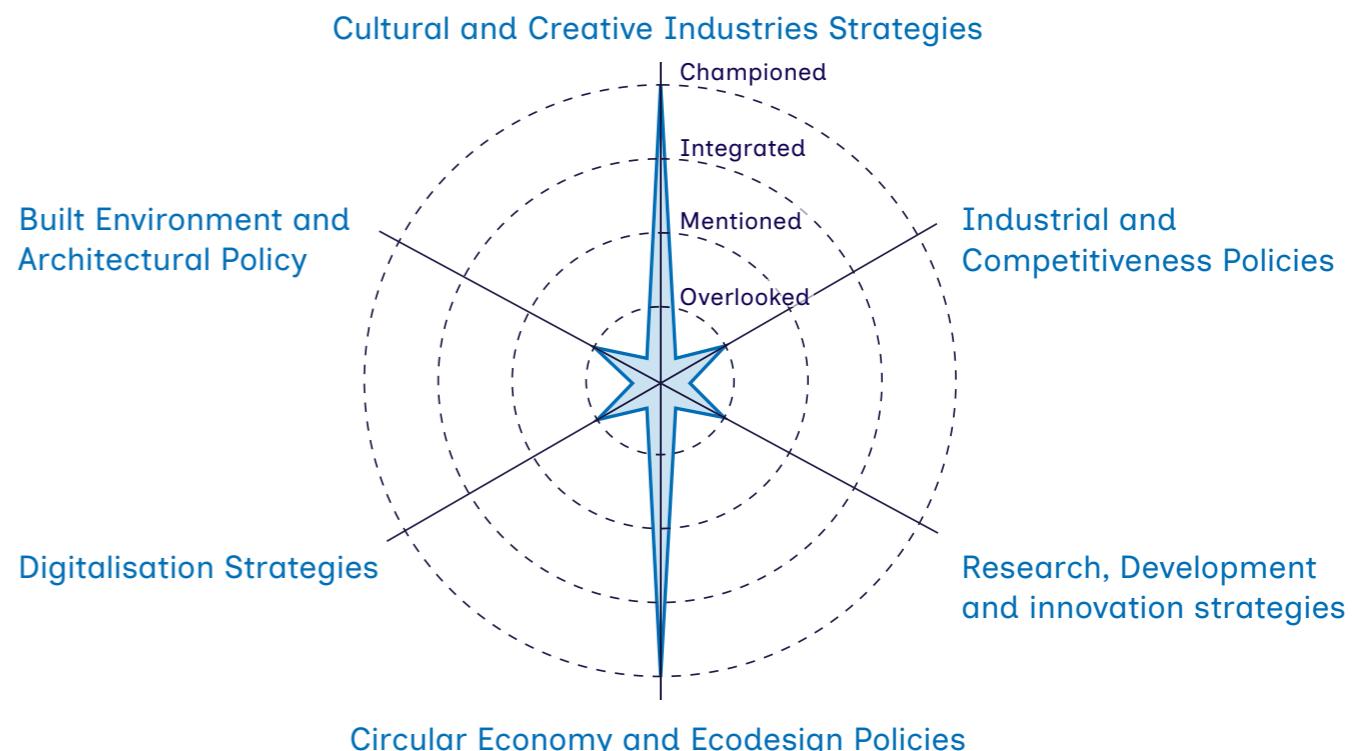
Dedicated design policy status

→ Yes: Latvian Design Strategy 2022-2027, developed as a sector-specific framework, builds on the priorities outlined in the Cultural Policy Guidelines 2022-2027 "Cultural State." It follows an earlier Design Strategy of Latvia 2017-2020 and provides a vision, priorities, and directions of action for strengthening the design sector and embedding design across the economy.

Design in other policy agendas

→ CCI Strategy – Cultural Policy Guidelines 2022-2027 position design both as a creative sector and as a strategic, cross-sectoral tool. Explicit references include design's role in the New European Bauhaus, Green Deal, user-centred solutions, and service design for cultural accessibility. [Integrated]
→ Circular Economy Strategy – Action Plan for the Transition to Circular Economy 2020-2027 mentions eco-design and sustainable product design. [Integrated]
→ Innovation, industrial/development, digital, architecture strategies – No strategies or references to design were identified.

Fig. 32 | Country Profile: Latvia
Status: September 2025



Observations

Latvia is one of the few countries in Europe with a dedicated design strategy, giving the field a clear policy framework. The Latvian Design Strategy 2022-2027 not only strengthens design as a sector but also emphasises its role as a cross-cutting enabler for innovation, sustainability, wellbeing and quality of life for society. Its grounding within the broader Cultural Policy Guidelines ensures institutional anchoring, while earlier strategies (2017-2020) highlight continuity of policy effort. Complementary references in the circular economy agenda reinforce design's relevance for green transitions. Going forward, concrete action plan, effective implementation and coordination across ministries will be key to maximising impact.

6.19 Latvia

Case Study: Design Policy

Status: September 2025

Latvian Design Strategy 2022 - 2027

6.19.1 Policy Overview

Owner: The Ministry of Culture of the Republic of Latvia

Start Year: 2022 (approved May 2022)

Lead Ministry: The Ministry of Culture of the Republic of Latvia

Strategy Period: 2022-2027

Total Actions: 60+ specific measures across 7 strategic areas

and unified design systems

c) Operational Design: Direct implementation by designers in institutions

“By 2024, 30% of employees in direct state administration should be trained in topics such as design thinking, data analytics, technology use, innovation skills”

Design for Digital Future

Focus: Digital transformation and infrastructure

Key Actions: 23 measures covering digital skills, service modernization, and cultural heritage digitization

“The digital environment, like the physical environment, must be trustworthy, inclusive and safe. It must ensure privacy protection, protect society from fake news, fraud and intimidation, and promote a positive culture of exchange of ideas”

“Significantly increase the employment of designers and ICT specialists in the public sector to promote the creation of high-quality digital solutions”

6.19.2 Strategic Goal

“Design is used as a strategic tool to address contemporary challenges in Latvia”

The strategy positions design as a cross-cutting solution for economic competitiveness, social wellbeing, and environmental sustainability, moving beyond traditional cultural policy to embed design thinking across government and improve the country's image.

6.19.3 Seven Strategic Pillars

Design in Society

Focus: Public services and civic engagement

Key Actions: 15 measures including unified digital service architecture, inclusive service design, and civic participation platforms

Quote: Citizens must receive “high-quality, accessible, inclusive, and understandable public services” with user involvement in creation and improvement.

“Society and individuals must understand their right to good design in well-being-related areas and their responsibilities toward other community members, the environment, democratic governance, the economy, health, and safety.”

Design in Education

Focus: Skills development and sector linkage

Key Actions: 12 measures including modular secondary programs, lifelong learning and design research

“All levels of design education must provide high-quality, tradition- and research-based content in line with industry needs and future challenges.”

“Develop a multifaceted lifelong learning offer in the field of design for professionals from other sector and various social groups.”

Design in Entrepreneurship

Focus: Business competitiveness and innovation

Key Actions: 13 measures covering strategic design adoption, circular economy transition, and internationalization

“Using design as a strategic tool in companies to make the planning, development and implementation of products, services and processes more efficient and to increase the potential of companies to create sustainable, circular economy, European Green Deal and the European Commission’s New European Bauhaus initiative.”

Design in Public Sector

Focus: Three-tier implementation model

Key Actions: 9 measures to improve competence, capacity, co-creation, communication and experimentation spanning strategic, tactical, and operational design integration.

Implementation Levels:

a) Strategic Design: Senior-level governance and system-wide integration

b) Tactical Design: Inter-agency collaboration

“Create a unified national image and integrate it into Latvia’s international positioning, also reflecting the values of Latvian design.”
“Involvement of users in the development of new products, services and processes, especially in public sector procurement.”

Design in Environment

Focus: Sustainable development and circular design

Key Actions: 18 measures promoting circular economy, sustainable mobility, and accessible urban spaces

Quote: “The public sector should set an example in implementing sustainable design solutions.”
“Significantly increase the design capacity of local governments by creating positions for chief city designers, architects, and landscape architects to competently represent the interests of the public and environmental sustainability in public design commissions.”

“Design streets and roads so that they are suitable not only for car traffic, but also for safe and convenient public transport, micro-vehicles, bicycles and pedestrians.”

“Create a comfortable outdoor lifestyle throughout the year and around the clock, promoting respectful human contact with nature.”

Design for Designers

Focus: Professional development and prestige

Key Actions: 11 measures to improve designers' qualifications, on design research and documentation, international visibility and update professional ethics code

Quote: “Promote the development of design criticism by encouraging the media to reflect design processes in ways that are relevant and understandable to the public.”

“Updating and improving the Designer’s Code of Ethics and Professional Conduct.”

“Carry out future modelling of social, economic and ecological well-being using design methods”

“Latvian designers must regularly participate in internationally significant industry events”

6.19.4 Key Performance Indicators

Quantitative Targets

- 30% of state administration employees trained in design thinking by 2024
- Design impact measurement methodology adapted by end of 2025
- Modular design education programs introduced by 2025
- Designer database and search tool operational by end of 2022

Qualitative Milestones

- Unified digital service architecture implemented
- Public procurement criteria include design evaluation
- International design event participation strategy established
- Circular economy principles integrated across sectors

6.19.5 Development Process

Co-Creation Approach

The strategy itself was developed through multi-stakeholder collaboration, involving 40+ experts across sectors from March 2020 to May 2022. The process was guided by 7 principles:

- active civic engagement and participation,
- an ecocentric rather than anthropocentric worldview,
- interdisciplinary co-creation,
- digital transformation,
- transition to a circular economy,
- fostering empathy,
- improving communication.

Alignment with Key Policy Frameworks and Design Policy Initiatives

Policy Frameworks:

- The Cultural Policy Guidelines 2022–27 “Cultural Nation” (The Ministry of Culture of the Republic of Latvia)
- European Green Deal
- New European Bauhaus
- UN Sustainable Development Goals

Design Policy Initiatives and Best Practices:

- BEDA Position Paper
- Danish Design Centre
- UK Design Council

6.19.6 Implementation Structure

Governance Model

Key Coordinating Bodies: The Ministry of Culture of the Republic of Latvia (lead), Latvian Design Council (governance), State Chancellery (inter-ministerial coordination)

Partners:

- a) Government & Public Administration**
 - Central Government: State Chancellery, Cabinet of Ministers
 - Lead Ministries: The Ministry of Culture of the Republic of Latvia, The Ministry of Economic of the Republic of Latvia;
 - The Ministry of Smart Administration and Regional Development of the Republic of Latvia, The Ministry of Education and Science of the Republic of Latvia;
 - The Ministry of Transport of the Republic of Latvia; The Ministry of Finance of the Republic of Latvia; Ministry of Health of the Republic of Latvia; The Ministry of Welfare of the Republic of Latvia; The Ministry of Agriculture of the Republic of Latvia; The Ministry of Defence of the Republic of Latvia; The Ministry of the Interior of the Republic of Latvia.
 - Key Agencies: The State Education Development Agency of the Republic of Latvia, Investment and Development Agency of Latvia;
 - Revenue & Statistics: The Central Statistical Bureau; The State Revenue Service

b) Public Service Providers

- Core Services:** The State Social Insurance Agency, The State Employment Agency of Latvia, The State Digital Development Agency.
- The Social Integration State Agency, The Register of Enterprises of the Republic of Latvia
- Joint stock company “Latvenergo”, the state joint-stock company “Latvijas Pasts” (Latvia Post); the state joint-stock company “Latvijas dzelzceļš”, (Latvian Railways), the state joint-stock company “Starptautiskā lidosta “Rīga””(Riga International Airport)
- Security Services: The State Police of Latvia, Municipal Police, The State Fire and Rescue Service, Emergency Medical Service, Centre for Disease Prevention and Control

→ Local Government

→ Municipalities and their subordinate institutions

→ Regional Bodies: Planning region institutions

→ Municipal Services: The Riga City Architect’s Service (The City Development Department of Riga City Council);

c) Funding & Support Organizations

- Public Foundations: State Culture Capital Foundation, The Society Integration Foundation
- Financial Institutions: Banks, ALTUM (state-owned company that ensures access of the enterprises and households to the financial resources);
- Environmental Funds: The Latvian Environmental Protection Fund The Latvian Fund for Nature Design & Creative Sector

d) Design & Creative Sector

- Professional Organizations: Latvian Designers’ Society (LDS), Latvian Design Centre (LDC), FOLD (the communication platform about Latvian and foreign creative industries), SEGD Riga Chapter (SEGD- the Society for Experiential Graphic Design).
- Specialized Bodies: Latvian Design Council (a consultative body of the Ministry of Culture,), National Architecture Council (a consultative body of the Ministry of Culture,.
- Related Associations: The Latvian Association of Landscape; The Latvian Association of Architects; Eco-design Competence Centre
- Tech Communities: UX/UI Riga Meetup, Riga TechGirls, cert.lv

e) Education & Research

- Formal Education: Educational institutions at all levels, competence centers
- Governance: Council for Cultural Education (coordinated by the Latvian National Centre for Culture);
- Research: Research institutions, universities
- Informal Learning: Non-formal education initiatives, libraries, museums

f) Business & Industry

- Business Support: The Latvian Chamber of Commerce and Industry, sectoral and regional business associations
- Professionals: IT, communication, design, advertising professionals
- Development: Real estate developers, land-owners
- Specialized: Urban planning, architecture, landscape architecture, engineering professionals

g) Civil Society

- NGOs: The Civic Alliance – Latvia, Riga Neighborhood Alliance, Green Freedom (“Zaļā brīvība”), Zero Waste, Latvian Green Point (“Latvijas Zaļais punkts”)
- Community Groups: Neighbourhood organizations
- Social Services: Social rehabilitation institutions, crisis centers

h) Media & Communication

- Media Outlets: Public and private media organizations
- Content Creation: Communication and advertising industry professionals

i) Funding Mechanisms

- Existing available funding
- State Culture Capital Foundation programs
- Ministry of Culture direct funding
- EU structural funds integration
- Public-private partnership models

6.19.7 Expected Outcomes

Economic Impact

Enhanced business competitiveness through strategic design adoption, improved export performance, and increased innovation capacity.

Social Impact

Better public services, increased civic participation, and improved quality of life through universal design principles.

Environmental Impact

Circular economy transition, reduced waste, and sustainable urban development through design-led solutions.

6.19.8 Implementation & lessons learnt from the Latvian design policy case

Latvia's ambitions in design policy can be traced back to the early 2000s, when the Design for Latvia report by Per Mollerup first articulated the potential of design as a driver of national development. Over the following two decades, the country made significant progress in turning those ambitions into practice. Major achievements include the systematic strengthening of design education, the introduction of design methods into the public sector through civil service training and the establishment of the State Chancellery's Innovation Laboratory, and the promotion of Latvian design via the creation of the Latvian Design Centre, the National Design Award of Latvia, and increasing international visibility.

Building on this foundation, the Latvian Design Strategy 2022-2027 represents one of Europe's most comprehensive attempts to integrate design thinking across government, with its central goal that “design is used as a strategic tool to address contemporary challenges in Latvia.”

The strategy's scope is remarkable in its ambition, covering seven strategic areas from public sector transformation to environmental sustainability. It includes specific targets such as training “30% of employees in direct state administration” in design thinking by 2024 and establishing unified digital service architectures. Yet this comprehensive approach also created implementation challenges that reveal broader tensions in horizontal policy development.

The Development Process

Unlike many national strategies that emerge from government mandate, the Latvian design strategy originated from the design community itself. The development process was guided by seven core principles including “active civic engagement and participation” and “an ecocentric rather than anthropocentric worldview,” reflecting the community's philosophical evolution.

As one stakeholder noted, the Latvian Design Council (consultative body of the Minis-

try of Culture) operated from “free will, free of charge” with “no guidelines given” from higher authorities. This voluntary foundation enabled genuine innovation but also created fundamental constraints that would later impact implementation. The strategy represented what one participant called moving “from the ecocentric to the anthropocentric principles... we moved from... everything is focused on economic growth to... human-centred approach.”

The strategy development began with an informal evaluation of the previous policy (2017-2020), conducted entirely by Latvian Design Council members using what one participant described as “workshop tools” and Excel-based assessments. While this approach lacked the rigor of formal evaluation, it enabled rapid consensus-building and maintained community ownership of the process. One stakeholder reflected: “We made evaluation in several meetings. It was done by Latvian Design Council... So it was not the complex process where we were asking stakeholders to gather data.”

Innovative Structural Approach

The development process itself applied design thinking principles through iterative collaboration and extensive stakeholder engagement. The strategy emerged from multi-stakeholder collaboration involving over 40 experts from March 2020 to May 2022. The council initially worked collectively before breaking into thematic working groups covering the seven strategic areas: Design in Society, Design in Public Sector, Design for Digital Future, Design in Education, Design in Entrepreneurship, Design in Environment, and Design for Designers.

This structure allowed for specialized expertise while maintaining overall coherence. As one participant explained: “We started as a whole design council with all members involved. And then we broke down by the subjects and continue in smaller groups... we understood it's more productive.”

One particularly innovative aspect was the comprehensive stakeholder consultation phase. The Latvian Design Centre organized approximately ten workshops, with deputy secretary-level participation from relevant ministries, a significant achievement in securing high-level

engagement. As one organizer reflected: “I was positively impressed that actually the level of response was very nice. In almost every case these other policymakers or responsible ministries were represented in our discussions by deputy secretaries of the ministries. So we had really high management level engagement.”

Philosophical and Structural Evolution

The strategy marked a significant evolution from the previous policy, adding new dimensions while maintaining core commitments. Two new chapters emerged during development: Design for Digital Future and Design for Environment, reflecting contemporary challenges. As one stakeholder noted: “We took out Design for Digital Future and Design for Society” as separate strategic areas.

The academic perspective provided crucial insight into this evolution: “We carried out two new topics... Design for digital future and design for environment. And I think it's very clearly show that these environmental problem which are globally very important is also important in design field and as well as digital world.”

The strategy’s alignment with broader policy frameworks was deliberate and extensive, connecting to the European Green Deal, New European Bauhaus, UN Sustainable Development Goals, and national digitalization strategies. One stakeholder emphasized how „we felt it’s very, very crucial... we decided to have separate part for digitalization... we named it Design for digital future.”

Implementation Challenges: The Reality Gap

The fundamental challenge emerged from a structural contradiction: a voluntary advisory body developing policies requiring implementation by executive agencies over which it had no authority. The strategy identifies an extensive network of implementing partners across government, from the State Chancellery and multiple ministries to municipalities, businesses, and civil society organizations. Yet coordination mechanisms remained unclear. One participant captured this dilemma: “The main responsible bodies of implementation are... in other ministries, Ministry of Economics, Education,

Finances... and we don’t have the tools to directly influence these other policies responsible persons.” The strategy’s cross-cutting nature, covering everything from public service design to environmental sustainability exacerbated this authority gap.

This structural constraint created persistent coordination challenges. While the strategy identified responsible bodies across government, actual implementation depended on individual relationships and varying levels of design literacy among civil servants. Success became “personality-dependent rather than systemic,” undermining the strategy’s ambitions for systematic change.

One stakeholder reflected on this challenge: “The design strategy as a policy document depends on the subject or task, which means responsibility falls to different bodies. But those bodies are tied to other policies and sit in other ministries. So, in practice, we lack the tools to coordinate or exchange information quickly.”

The Scope and Prioritization Challenge

The strategy’s comprehensive scope, 60+ specific measures across seven strategic areas, created implementation difficulties. Multiple stakeholders identified this breadth as both strength and weakness. The tendency to include “everything” reflected what one interviewee called “something that is so very typical to basically everything that we do in Latvia in the public sector... we try to do everything simultaneously in every possible field.”

The academic perspective highlighted this challenge: “Everything was important. People did not want to agree to leave anything out, just that it doesn’t get forgotten. Maybe we will not have the time to work on it in the next seven years, but still, please include it because it’s important so that we just don’t lose that idea.”

This comprehensive approach prevented the strategic focus necessary for effective implementation. As one stakeholder reflected: “I think the document just contains too much. There are too many good intentions which kind of stay on the level of being intentions, but not really strategic actions.”

The Missing Action Plan

Despite intentions to develop detailed implementation plans with metrics and accountability mechanisms, this crucial follow-up never materialized. The strategy includes some specific quantitative targets, such as the 30% civil service training goal, but lacks the operational framework to achieve them systematically.

One interviewee described the breakdown: “At that point I felt that everybody was just so tired from this strategy and just couldn’t focus anymore... And also there were then some changes in the Latvian Design Council. Like some people left and new ones came in and at some point it just became, like a bit chaotic and ungovernable.”

This failure left the strategy without operational teeth, functioning more as what one participant called „a well intentioned manifesto“ than actionable policy. The absence of clear metrics, timelines, and responsibility assignments created what multiple stakeholders identified as a critical implementation gap.

One stakeholder captured the frustration: “We never, for a lot of the ideas that are in the strategy, we never really agreed on who would be responsible for the implementation, how the implementation should go, how fast, what should be achieved, and so on.”

Policy success: Civil Service Transformation

Despite systemic challenges, consecutive design strategies in Latvia achieved notable success in transforming civil service culture, particularly through the State Chancellery’s Innovation Laboratory. This success builds on years of groundwork, as one interviewee noted: “The greatest person, the catalyst of the processes is [a key civil servant]. She pulled this design training, the design thinking trainings in State Councillor that was seven, eight, even 10 years ago.” While the establishment of the Innovation Lab was a collective effort, this stakeholder’s impression highlights how design initiatives in government are often spearheaded by committed individuals and can strongly depend on their leadership and persistence.

The Lab grew from a single-person initiative to a recognized centre for government innova-

tion, running design sprint competitions that created what one academic observer called “a movement of new style civil servants who are not satisfied with that what they are doing. They are really curious to make the work better.”

The innovation work connected directly to broader cultural change, with civil servants seeing to “improve service quality” and overcome being “blamed always as a bad state or as a bad civil servant.” This transformation demonstrated design thinking’s potential for addressing not just service delivery but professional identity and organizational culture.

Educational Integration Achievement

Perhaps the strategy’s most systematic success of design policy efforts throughout the years, was integrating design into formal education, fulfilling the strategic goal that “all levels of design education must provide high-quality, tradition- and research-based content in line with industry needs and future challenges.”

The inclusion of design as a subject in secondary education from the fourth year represents a generational investment in design literacy. As one interviewee noted: “Design is now included also in secondary education as a subject of studies with a Reform School 2030 (“Skola 20230” – curriculum reform in secondary education), from 4th year of study at the school.”

This achievement built on existing vocational design education networks while expanding into general education: “That was written also in our first policy that education in all of the levels starting from elementary and finished with the government training. And now this dream is true.”

However, implementation challenges remain, particularly around teacher preparation: “Those teachers who before was a teacher of visual art or the teacher of mathematics or physics, they are not trained in design enough. So it depends from the personalities who are curious.”

Research and Measurement Development

The strategy’s commitment to developing design measurement methodologies is showing progress. One stakeholder reported: “There was now ongoing research through the State Re-

search Programmes / Cultural and creative ecosystem of Latvia as a resource of resilience and sustainability”/CERS. The Latvian Academy of Culture received the grant for the project, so now they are doing the first scale wise big research on design value.“ This research directly addresses the strategy’s goal of adapting “design impact measurement methodology” by 2025, demonstrating how specific, measurable targets can drive implementation even within broader coordination challenges.

Municipal Innovation Examples

At the municipal level, individual leaders have translated strategic concepts into concrete improvements. Riga’s appointment of a Riga City Chief Designer position represents institutional innovation, even if broader municipal awareness of the national strategy remains limited. This approach demonstrates how the strategy’s vision of increasing “design capacity of local governments by creating positions for chief city designers” can work through institutional positions rather than requiring comprehensive organizational transformation. However, the municipal perspective also reveals coordination gaps: “I don’t really think that anyone at the municipalities in Latvia has really knows about the strategy... I think those for instance, that are responsible for like housing policy, I really don’t think that they have read this. They’re probably working in that direction, but independently.”

6.19.9 Lessons Learned from Latvia Design Policy Journey

The Prioritization Challenge

Multiple stakeholders identified the strategy’s comprehensive scope as both strength and weakness. The tendency to include everything reflected broader patterns in Latvian public policy. As one stakeholder observed: “Overall we feel that we are a little bit behind in various fields with other European countries. So we try to catch them and we try to do it simultaneously in every possible field. So we cannot set really clear priorities.”

This “everything is a priority” approach prevented the strategic focus necessary for effective implementation. The strategy’s 60+ measures across seven areas, while comprehensive, may have overwhelmed implementation capacity. Future strategies might benefit from accepting narrower scope in exchange for deeper impact, as one participant suggested: “If I were to do this. This work today, I think I would probably focus more on those really, like, actionable things.”

The academic perspective emphasized this learning: “I think we need to elevate the Latvian Design Council to a higher level, so that its members are not only strong professionals but also include senior representatives from different ministries.”

The Professional Support Gap

The volunteer-based development process, while ensuring community ownership, created significant capacity constraints. The two year-long editing process and difficulty coordinating contributions highlighted needs for professional support. One interviewee reflected: “We had meetings once per month for maybe two hours long. And that is all the time that most people can give. And obviously it is really difficult to create something that is kind of thorough.”

One solution proposed was hybrid approaches: “You cannot exclude all those people from the Latvian Design Council because they are experts, clearly. But maybe all the writing part could be an outside party to be brought in who can do that.” The other stakeholder agreed: “But without a solid understanding of design’s

role, its broad perspective, and its many forms, even a higher-level council will not function effectively.”

The Implementation Integration

The separation between strategy development and implementation planning proved problematic. Future approaches might benefit from developing these elements simultaneously rather than sequentially, ensuring that aspirational content connects directly to operational capabilities.

One stakeholder emphasized: “So if we stick with a strategy, with the strategy that we have, then an action plan is a must. It just, it cannot really be used without the action plan.”

The design policies may need to address administrative infrastructure more directly, moving beyond sectoral applications to tackle the institutional mechanisms that enable or constrain design integration. As one stakeholder noted: “I feel like there’s a lot of distance still between the public sector and the private sector. Those are very different worlds. They speak different languages, and there’s not that many translators in between.”

The Long-term Perspective

The stakeholder’s reflection on temporal expectations provides important context: “I believe in the next strategy because, looking back 20 or 25 years, we’ve already seen a lot of change. The problem is that, for me, the pace feels too slow—perhaps because it’s my lifetime. I wish things could happen faster, but people are people, and change always takes time.” This suggests that design policy effects may be more gradual and cumulative than immediate implementation metrics capture, requiring evaluation frameworks that account for long-term cultural and institutional change.

Theoretical Implications: Design Thinking Meets Government Structure

The Latvian experience reveals fundamental tensions between design thinking approaches and traditional government operations. The strategy’s principles – “active civic engagement,” “interdisciplinary co-creation,” “fostering empathy” reflect design methodology’s empha-

sis on iteration, experimentation, and human-centred problem-solving, while government structures prioritize consistency, accountability and risk management. These tensions manifest in multiple dimensions:

- Temporal: Design thinking’s iterative approach conflicts with policy cycles requiring predetermined outcomes
- Authority: Collaborative decision-making challenges hierarchical responsibility structures
- Scope: Human-centred approaches resist the sectoral boundaries that define governmental organization
- Evaluation: Design’s emphasis on learning and adaptation conflicts with accountability frameworks requiring measurable predetermined outcomes

The Horizontal Policy Challenge

Design policy’s inherently cross-cutting nature creates particular challenges in vertically organized government structures. The Latvian strategy’s seven pillars span multiple ministries and sectors, from education and economics to environment and culture. As one stakeholder noted: “Design should be used in every process... but the main responsible bodies depending on that subject or the task, there are different main responsible bodies... and we don’t have the tools how directly influence these other policies.”

This horizontal-vertical tension appears endemic to design policy, suggesting that successful implementation may require new institutional mechanisms rather than simply applying design thinking to existing structures. The strategy recognizes this challenge by identifying extensive implementing partnerships but lacks the coordination mechanisms to manage this complexity effectively.

Latvia’s Approach and International Alignment

Latvia’s bottom-up, community-led approach enabled authentic stakeholder engagement and maintained professional community ownership, but created implementation challenges that more centralized processes might avoid.

The strategy explicitly references international frameworks and best practices, noting its review of “design strategies of other European countries, the BEDA guidelines for design policy development, the UN Sustainable Development Goals.” This international orientation combined with local participatory development creates a distinctive hybrid model. The 20-year design policy timeline evident in stakeholder accounts, from early 2000s Danish-Baltic cooperation through multiple strategy iterations, demonstrates the incremental nature of design policy institutionalization. The Nordic influence, particularly through early Danish cooperation, appears significant in shaping Latvia’s approach. This external knowledge transfer combined with local adaptation created a distinctive model that may offer lessons for other small European countries developing design policies.

The Promise and Limits of Design Policy

Latvian Design Strategy 2022-2027 represents an ambitious attempt to embed design thinking across government and society. With its comprehensive vision spanning seven strategic areas and over 60 specific measures, it demonstrates both the potential and constraints of horizontal design policy development.

The consecutive design policies in Latvia since early 2000s achieved significant successes in civil service transformation and educational integration while revealing persistent challenges in cross-governmental coordination and operational implementation. The fundamental tension between design thinking’s collaborative, iterative approach and government’s hierarchical, accountability-focused structure appears endemic rather than resolvable through better process design alone.

This suggests that effective design policy may require institutional innovations that accommodate both design methodology and governmental requirements rather than simply applying one to the other. The Latvian case highlights the importance of addressing practical interfaces, like procurement systems, where policy aspirations meet operational reality. The strategy’s development process itself exemplifies design thinking principles through extensive stakeholder engagement and iterative

refinement. Yet the implementation challenges reveal the institutional work required to translate these approaches from project-based initiatives to systematic government operations.

For researchers and practitioners developing design policies elsewhere, Latvia’s experience offers both inspiration and caution. The innovative engagement processes and philosophical sophistication demonstrate design thinking’s potential for enriching policy development. The implementation challenges reveal the institutional work required to translate design strategies from aspiration to operation.

Perhaps most significantly, the Latvian experience suggests that design policy success may depend less on perfect processes than on sustained commitment to iterative improvement, applying design thinking not just to policy content but to the institutional mechanisms that enable design integration within government itself.

The strategy’s vision that “design is used as a strategic tool to address contemporary challenges in Latvia” remains compelling. Achieving this vision may require not just better design policies, but fundamental innovations in how government structures enable horizontal collaboration and iterative improvement, ultimately applying design thinking to the very institutions responsible for implementing design policy.

6.20 Lithuania

Country Size: 65,286 sq km
Citizens: 2,885,891 (2024) | **Tendency:** falling
GDP per capita: 29,386.3 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Moderate Innovator (2025) | 91,2%
BEDA Member Organisation: Design Innovation Center (VAA), Lithuanian Design Forum

Dedicated design policy status

→ No standalone national design policy. However, in 2019 the Ministry of Economy and Innovation and the Ministry of Culture jointly established a Design Council, marking the first formal step toward a continuous, long-term design policy. The Council advises on strategic planning, funding priorities, heritage protection and competitiveness of the design sector.

Design in other policy agendas

→ CCI Strategy – Lithuanian Cultural Policy Strategy (2019) briefly mentions design as an innovative way to promote heritage. **[Mentioned]**

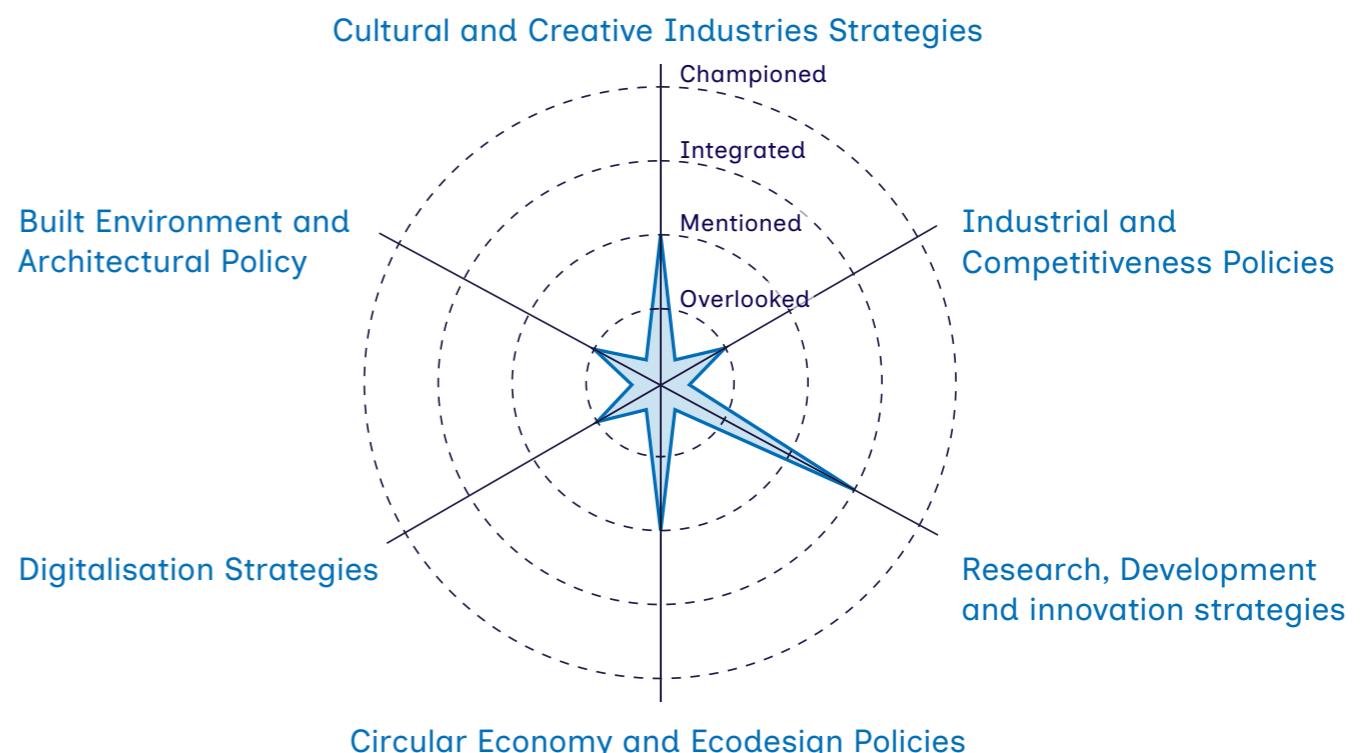
→ Innovation Strategy – The Smart Specialisation Concept 2021–2027 includes “audio-visual media, design technologies and social innovation” as an R&D&I priority area. **[Integrated]**

→ Circular Economy Strategy – Guidelines for the Transition to a Circular Economy by 2035 mention sustainable design briefly. **[Mentioned]**

→ Industrial/development, digital, architecture strategies – No strategies or references to design identified. **[Overlooked]**

Fig. 33 | Country Profile: Lithuania

Status: September 2025



Observations

Lithuania has not yet adopted a dedicated design strategy, but the creation of the Design Council signals government recognition of the sector's potential and lays groundwork for more structured policy in the future. Design is acknowledged in innovation and circular economy agendas, particularly in smart specialisation, which gives it some traction in national R&D priorities. However, coverage in cultural and circular policies remains light. Stronger institutionalisation of the Design Council's recommendations could be key to building momentum toward a comprehensive national design policy.

6.21 Luxembourg

Country Size: 2,586 sq km
Citizens: 672,050 (2024) | Tendency: rising
GDP per capita: 137,516.6 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Strong Innovator (2025) | 128,9%
BEDA Member Organisation: Design Luxembourg

Dedicated design policy status

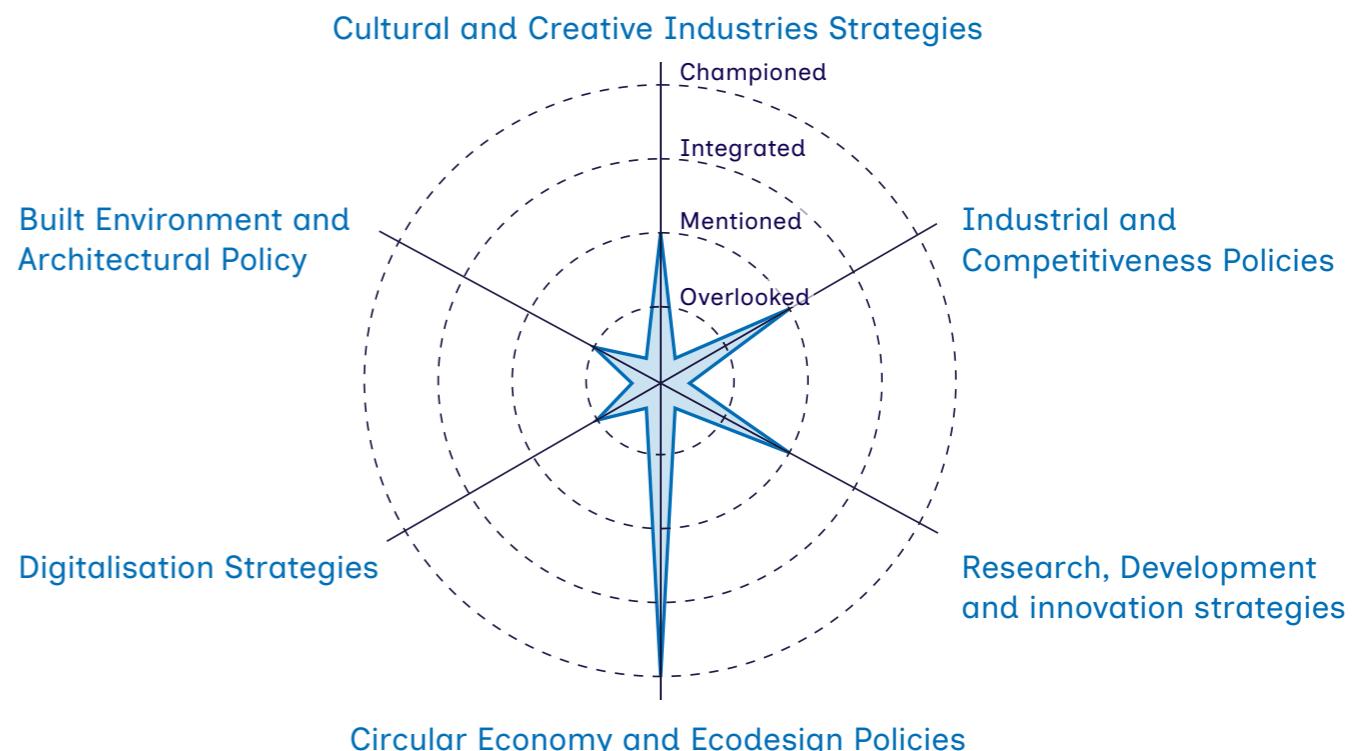
→ No

Design in other policy agendas

- CCI Strategy – National Cultural Development Plan 2018–2028 mentions design as a sector and highlights the “Design for All” initiative. [\[Mentioned\]](#)
- Innovation Strategy – National Research Priorities for Luxembourg (2020 and beyond) includes references to circular design processes and sustainable urban design. [\[Mentioned\]](#)
- Industrial / Development Strategy – National Plan for a Green, Digital and Inclusive Transition (2021) references the creation of the Luxembourg Media and Digital Design Centre as a platform for services and innovation in digital learning. [\[Mentioned\]](#)
- Circular Economy Strategy – Circular Economy Strategy for Luxembourg explicitly includes actions on sustainable, circular, and eco-design, such as the launch of a national “Circular Economy Design Challenge.” [\[Championed\]](#)
- Digital, Architecture strategies – No dedicated strategies or inclusions identified.

Fig. 34 | Country Profile: Luxembourg

Status: September 2025



Observations

Luxembourg demonstrates moderate but consistent recognition of design across cultural, innovation and development strategies, with its most concrete measures appearing in the circular economy domain. Initiatives such as the Circular Economy Design Challenge and the planned Media and Digital Design Centre suggest a growing emphasis on design as both an enabler of sustainability and a tool for digital transformation. However, these initiatives remain fragmented across different policy agendas and no overarching design policy framework currently exists.

6.22 Malta

Country Size: 315 sq km
Citizens: 563,443 (2024) | Tendency: rising
GDP per capita: 42,347.3 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Moderate Innovator (2025) | 107%
BEDA Member Organisation: Valletta Design Cluster (VDC)

Dedicated design policy status

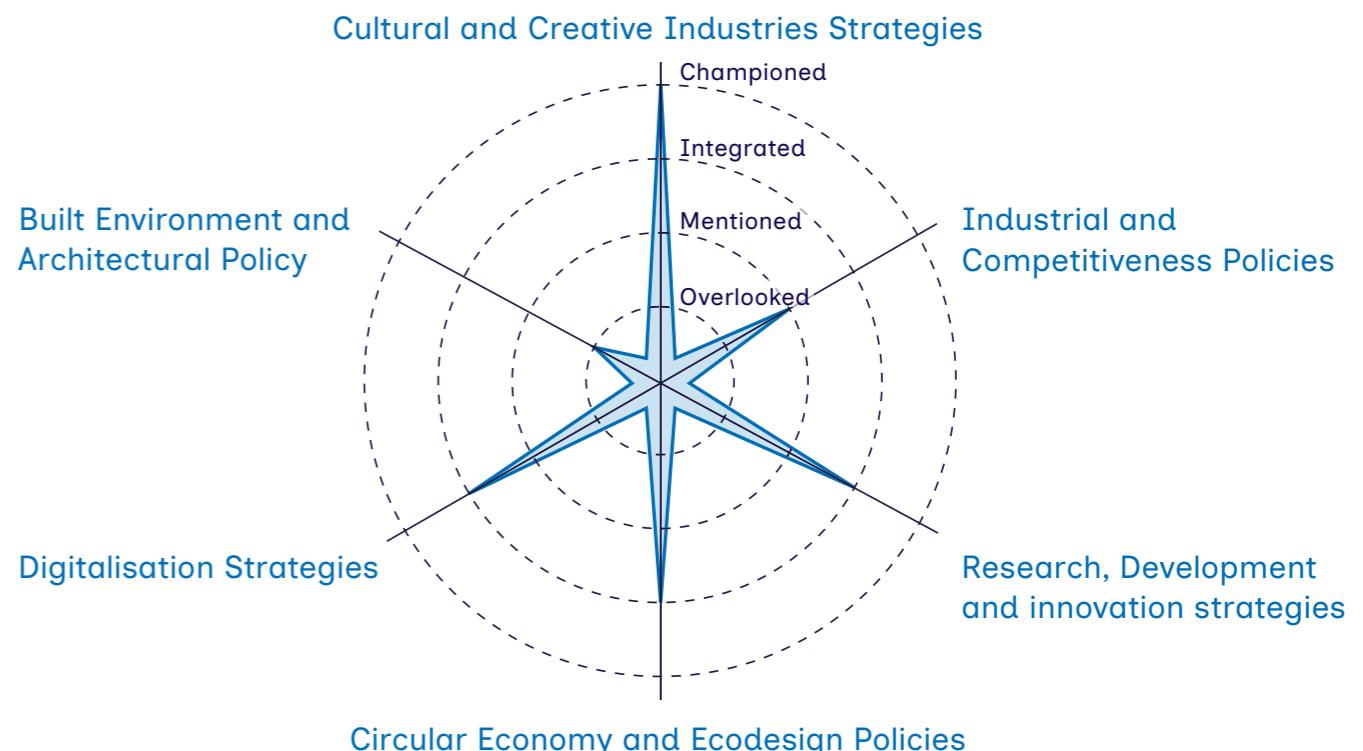
→ No

Design in other policy agendas

- CCI Strategy – National Cultural Policy not only recognises design as a sector, puts emphasis on design education and design as a driver of business innovation; but also includes specific design actions. [Championed]
- Innovation Strategy – National Research and Innovation Strategy 2023–2027 advises strengthening support for non-technological innovation, including design, marketing, and organisational innovation. It highlights iterative co-design of R&I funding measures and suggests exploring a Government Policy Lab. [Integrated]
- Industrial / Development Strategy – Malta's Sustainable Development Vision 2050 references design in relation to circular economy, repairability, product and building design and consumer-facing design solutions. [Mentioned]
- Circular Economy Strategy – Towards a Circular Economy Strategy 2020–2030 calls for material and product design approaches that reduce waste and embed circularity. [Integrated]
- Digital Strategy – Malta Digitali 2022–27 Strategy incorporates service design principles in public digital transformation. [Integrated]
- Architecture Strategy – No dedicated strategy identified.

Fig. 35 | Country Profile: Malta

Status: September 2025



Observations

Malta integrates design in a relatively systematic way across multiple strategies, from cultural policy and R&I frameworks to circular economy and digital agendas. The explicit recognition of design education and its role in innovation and public sector transformation suggests an emerging cross-sectoral vision, even in the absence of a dedicated design policy. While the country has yet to establish a comprehensive national framework, the presence of targeted measures across agendas indicates a clear recognition of design's value for innovation, sustainability and governance.

6.23 Moldova

Country Size: 33,847 sq km
Citizens: 2,401,200 (2024) | **Tendency:** falling
GDP per capita: 7,617.52 \$ | **Tendency:** rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 23,2%
BEDA Member Organisation: /

Dedicated design policy status

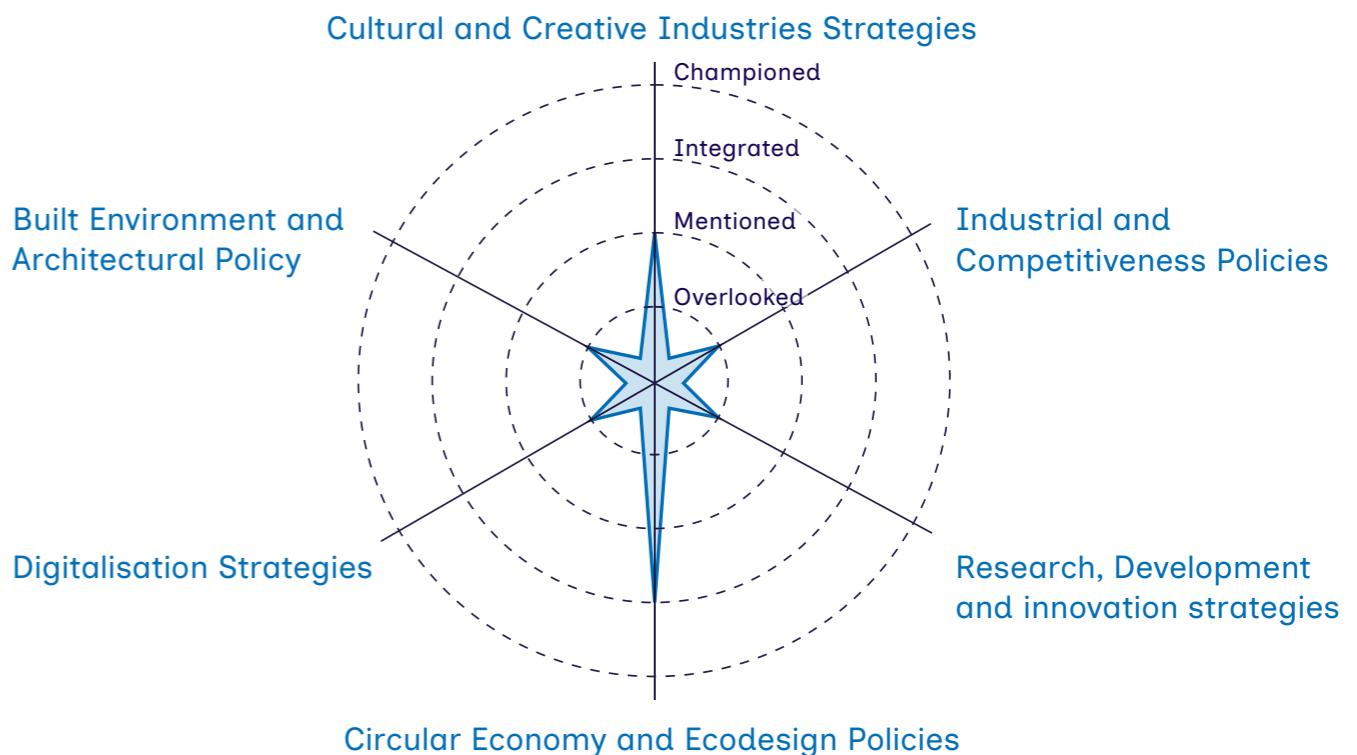
→ No

Design in other policy agendas

- CCI Strategy – National Program for the Development of Creative Industries “Creative Moldova” (2024–2027) mentions design but does not include dedicated actions. **[Mentioned]**
- Circular Economy Strategy – Green and Circular Economy Promotion Program (2024–2028) mentions eco-design and sustainable design. **[Integrated]**
- Innovation, industrial/development, digital, architecture strategies – No dedicated strategies or inclusions identified.

Fig. 36 | Country Profile: Moldova

Status: September 2025



Observations

Moldova's design policy landscape is characterized by a modest recognition of design in national policy agenda. While the Creative Industries Program acknowledges design, the absence of concrete measures limits its impact. The inclusion of eco-design in the circular economy agenda is a positive sign, but overall, design is largely overlooked in innovation, industrial and digital strategies. The upcoming participation in the EU's Creative Europe programme, starting in 2026, may offer new opportunities for design policy development and international collaboration.

6.24 Montenegro

Country Size: 13,888 sq km
Citizens: 633,158 (2024) | Tendency: falling
GDP per capita: 12,935.45 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 45,3%
BEDA Member Organisation: /

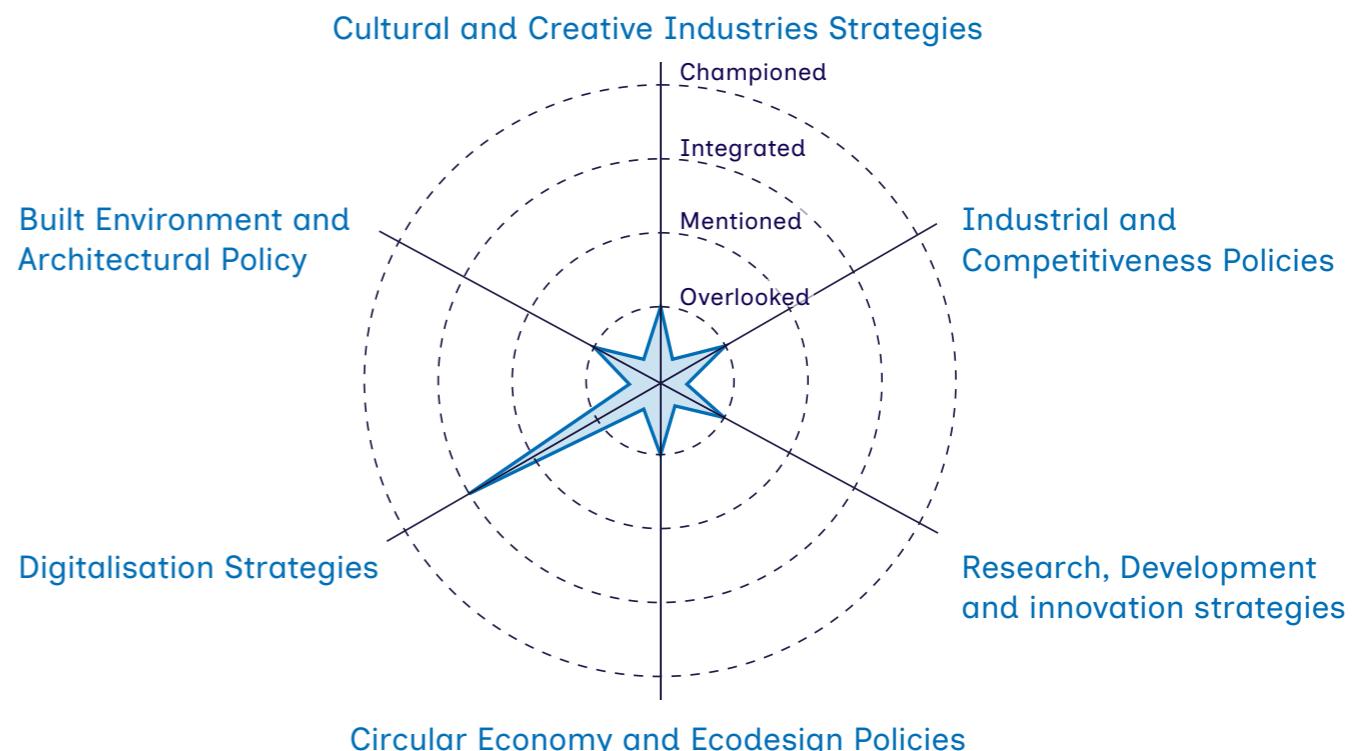
Dedicated design policy status

→ No

Design in other policy agendas

→ CCI, innovation, industrial/development, circular economy, architecture strategies – No dedicated strategies or inclusions identified.
→ Digital Strategy – Digital Transformation Strategy of Montenegro 2022-2026 mentions user-centred design (UCD) and service design principles. [Integrated]

Fig. 37 | Country Profile: Montenegro
Status: September 2025



6.25 Netherlands

Country Size: 41,543 sq km
Citizens: 17,942,942 (2024) | Tendency: rising
GDP per capita: 68,218.7 \$ | Tendency: rising
EU Innovation Scoreboard: Innovation Leader (2025) | 145,3%
BEDA Member Organisations: Dutch Design Foundation (DDF), CLICKNL, Association of Dutch Designers (BNO)

Dedicated design policy status

→ No

Design in other policy agendas

→ CCI Strategy – Creative Industries Fund NL serves as the national cultural fund for design, architecture and digital culture. Its Policy Plan 2025–2028: Changes in Our Work includes actions for design, such as the Spatial Design Action Programme and the Design Sector Internationalisation Programme. Previous plans (2017–2020 and 2021–2024) also featured design prominently.

Design is also featured in the Dutch International Cultural Policy 2021–2024.

[Championed]

→ Circular Economy Strategy – Circular Dutch Economy by 2050 sets the goal for a fully circular economy by 2050. The National Programme on Circular Economy 2023–2030 includes goals for circular economy and design. [Integrated]

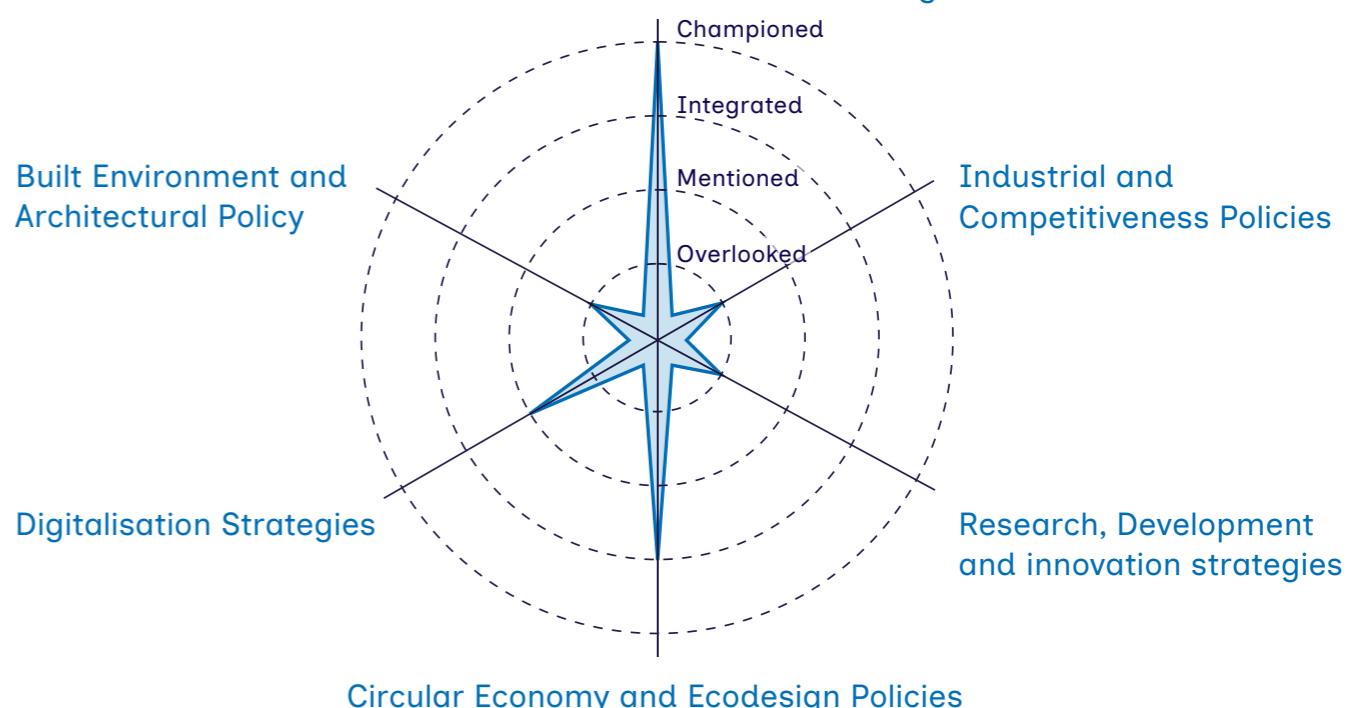
→ Digital Strategy – Central Government's I-Strategy 2021–2025 mentions design thinking as a method to be used.

→ Innovation, industrial/development, architecture strategies – No dedicated strategy or inclusions identified.

Fig. 38 | Country Profile: Netherlands

Status: September 2025

Cultural and Creative Industries Strategies



Built Environment and Architectural Policy

Observations

The Netherlands demonstrates strong institutional support for design through cultural policy and funding mechanisms, particularly via the Creative Industries Fund NL. While there is no dedicated national design policy, design is deeply embedded in cultural strategies and increasingly linked to sustainability through circular economy goals. The inclusion of design thinking in digital governance further signals recognition of design as a strategic tool. However, its absence from innovation and industrial strategies suggests room for broader integration, especially to leverage design for competitiveness and systemic transformation.

6.26 North Macedonia

Country Size: 25,713 sq km
Citizens: 1,811,123 (2024) | Tendency: falling
GDP per capita: 9,310.03 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 40%
BEDA Member Organisation: /

Dedicated design policy status

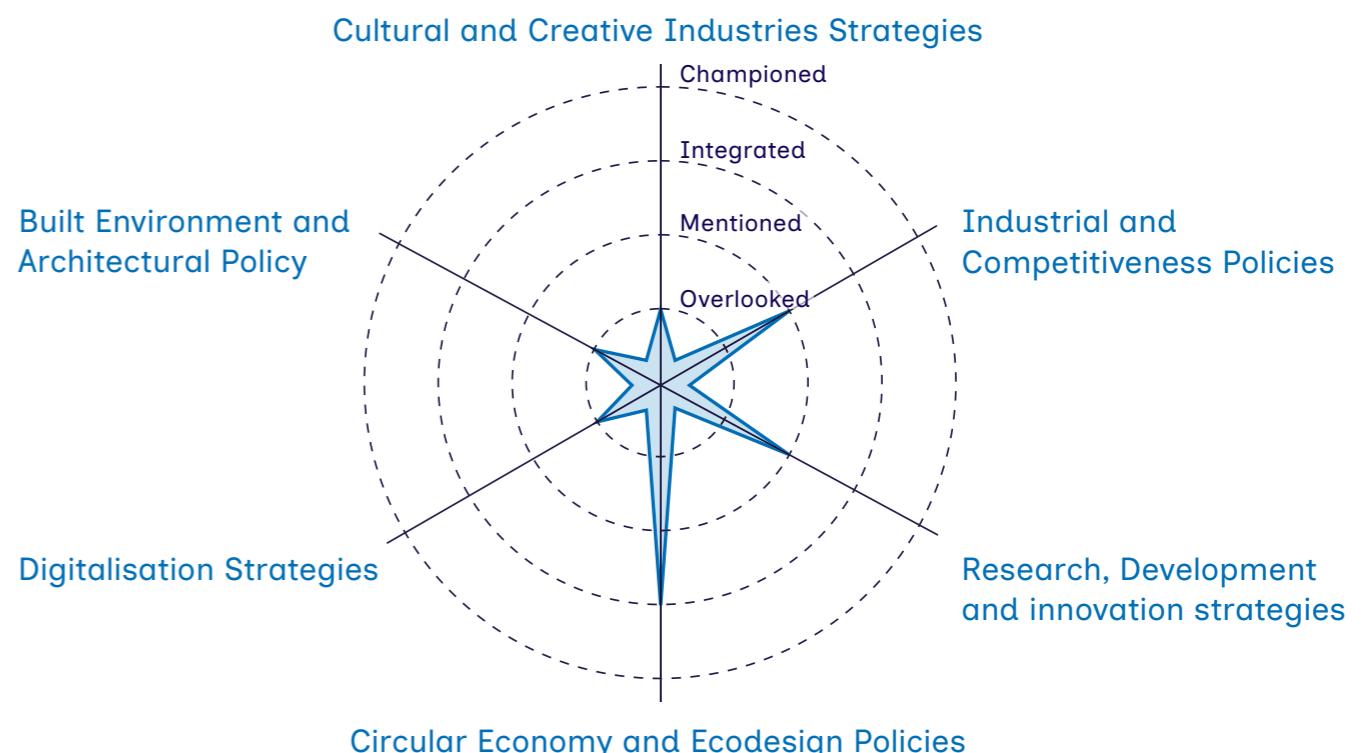
→ No

Design in other policy agendas

- CCI Strategy – A draft strategy (not yet adopted) mentions design in several places.
- Innovation Strategy – Smart Specialisation Strategy of the Republic of North Macedonia 2024–2027 loosely mentions design. [Mentioned]
- Industrial / Development Strategy – National Development Strategy refers to “public services designed according to the needs of beneficiaries” and mentions eco-design of products. [Mentioned]
- Circular Economy Strategy – National Waste Prevention Program (2022–2028) integrates actions for adopting eco-design principles. [Integrated]
- Digital, architecture strategies – No dedicated strategy or references identified.

Fig. 39 | Country Profile: North Macedonia

Status: September 2025



Observations

North Macedonia is in the early stages of integrating design into policy frameworks. While no dedicated design policy exists, references to design appear across several strategic documents, including cultural, innovation and sustainability agendas. The emphasis on eco-design and user-centred public services suggests an emerging awareness of design's role in governance and sustainability. However, the lack of concrete measures and the absence of design in digital strategies indicate that integration remains superficial.

6.27 Norway

Country Size: 323,772 sq km
Citizens: 5,550,217 (2024) | **Tendency:** rising
GDP per capita: 86,809.7 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Strong Innovator (2024) | 81.3%
BEDA Member Organisation: /

Dedicated design policy status

→ No

Design in other policy agendas

→ CCI Strategy – The Roadmap for Creative Industries positions design as the most impactful subsector, highlighting its role in IPRs, placemaking, sustainability and internationalisation. It dedicates chapters to Sami culture and indigenous design, Norwegian design promotion abroad and design's role in the All of Norway Exports reform. It also commits to strengthening DOGA's Design-Driven Innovation Program (DIP) and links design to the green industrial shift.

[Championed]

→ Innovation Strategy – The Long-term Plan for Research and Higher Education 2019–2028 mentions design in relation to university buildings and universal design. [Mentioned]

→ Industrial / Development Strategy – The Industrial Policy Recommendations 2015–17 (outdated) included design for interaction, service, and public sector innovation.

[Mentioned]

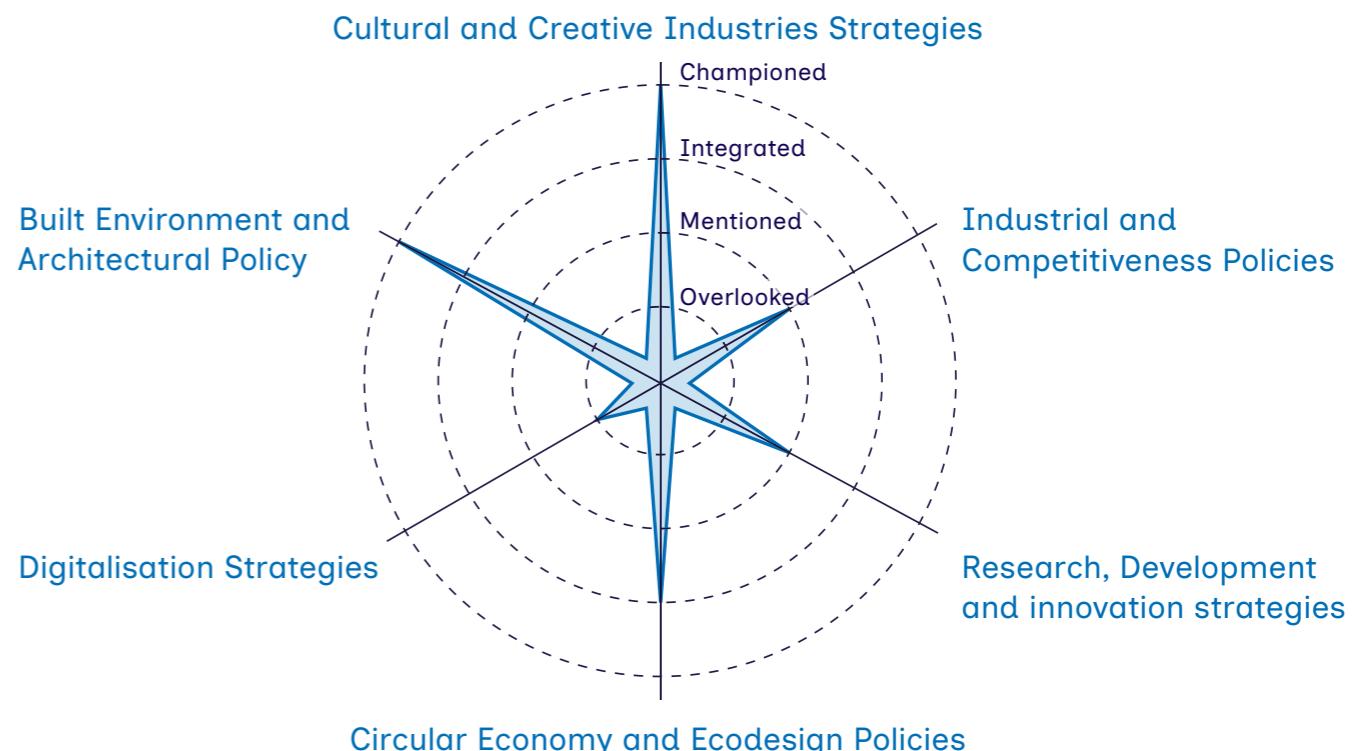
→ Circular Economy Strategy – National strategy mentions sustainable product design and the EU Ecodesign Directive. [Integrated]

→ Digital Strategy – No strategy identified.

→ Architecture Strategy – Earlier framework: Norway Universally Designed by 2025 (2009–2013), focused on accessibility and equality.

[Championed]

Fig. 40 | Country Profile: Norway
Status: September 2025



Observations

Norway stands out for embedding design within its Creative Industries Roadmap, where design is explicitly connected to export promotion, sustainability and innovation capacity. The strong institutional role of DOGA and the reinforcement of the Design-Driven Innovation Program mark notable instruments for policy delivery. However, outside of CCIs and circular economy, references to design in industrial, research and digital strategies remain fragmented and dated. This suggests a need to better integrate design into broader innovation and industrial frameworks, while capitalising on the country's existing international reputation and sectoral strengths.

6.28 Poland

Country Size: 312,679sq km
Citizens: 36,620,970 (2024) | **Tendency:** falling
GDP per capita: 25,022.7 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 74,2%
BEDA Member Organisation: Design Association SPFP, PPNT Gdynia Design Centre

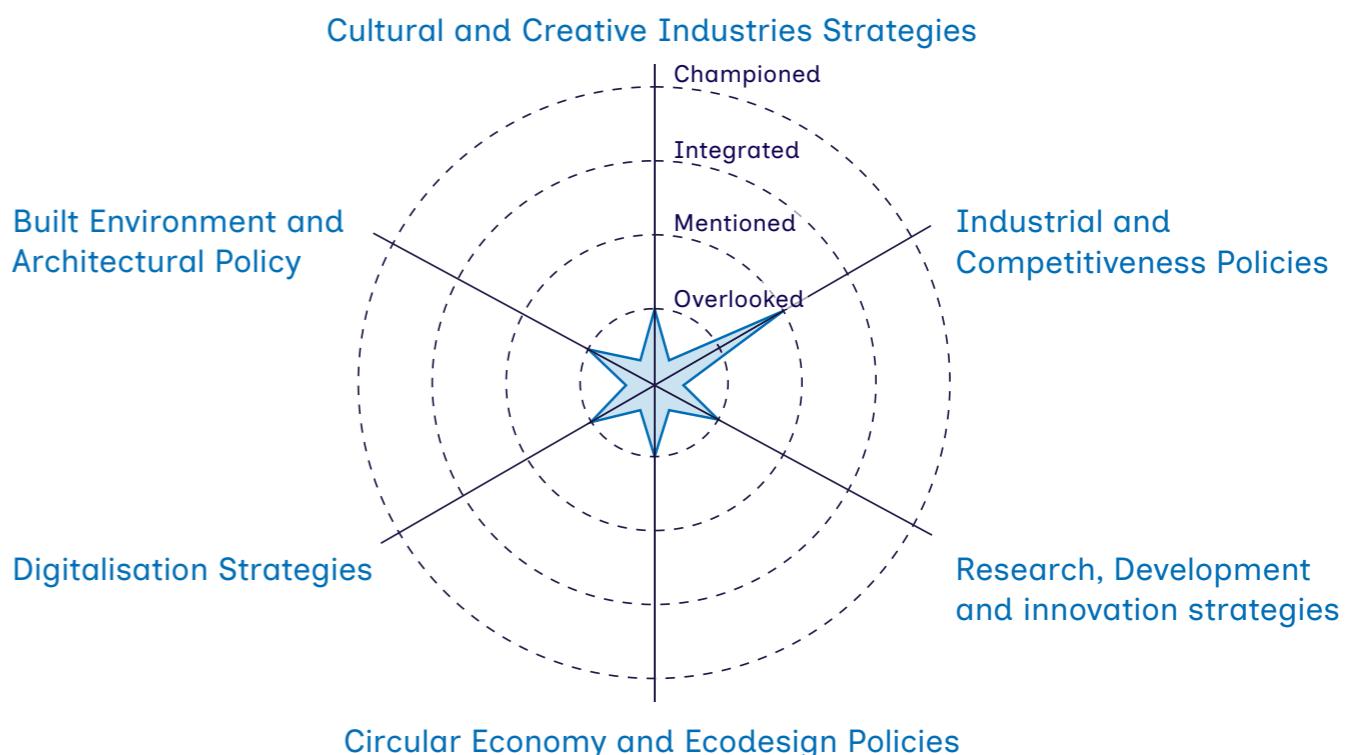
Dedicated design policy status

→ No

Design in other policy agendas

- Industrial / Development Strategy – The Responsible Development Strategy to 2020 (with perspective to 2030), adopted in 2017, includes mentions of design and eco-design in the context of sustainable development. [Mentioned]
- CCI, innovation, circular economy, digital, architecture strategies – No strategies or references to design were identified. [Overlooked]

Fig. 41 | Country Profile: Poland
Status: September 2025



Observations

Design appears only marginally in Poland's main development framework, primarily linked to eco-design and sustainability goals. Beyond this limited mention, there is no evidence of structured policy measures or strategic programmes to support design, leaving the field underdeveloped in national agendas.

6.29 Portugal

Country Size: 91,424 sq km
Citizens: 10,639,726 (2024) | Tendency: rising
GDP per capita: 28,844.5 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Moderate Innovators (2025) | 102,2%
BEDA Member Organisation: esad—idea (R&D unit of ESAD/College of Art and Design)

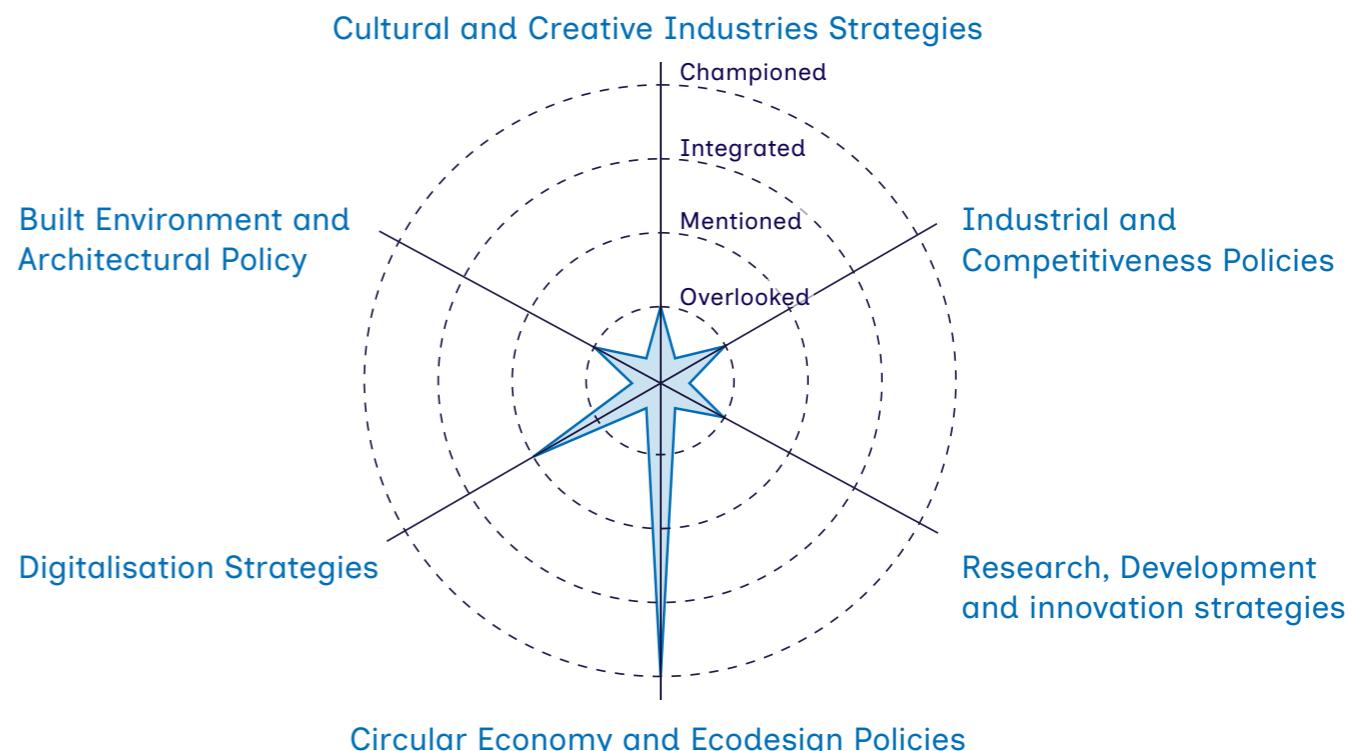
Dedicated design policy status

→ No

Design in other policy agendas

- Circular Economy Strategy – The National Action Plan for the Circular Economy (PAEC) includes strong references to design, particularly eco-design and circular design, with principles and proposed actions for integrating design into product lifecycles. **[Championed]**
- Digital Strategy – The National Digital Strategy briefly highlights design in the context of user-friendly and well-designed public services, but in a limited and generic way.
- CCI, innovation, industrial/development, architecture strategies – No strategies or references to design were identified. **[Overlooked]**

Fig. 42 | Country Profile: Portugal
Status: September 2025



Observations

Portugal's emerging policy attention to design is concentrated in the circular economy domain, where eco-design is explicitly recognised as a driver of sustainable transitions. Other strategies, such as digital transformation, reference design in a superficial manner and there is no evidence of a broader cross-sectoral approach. This indicates potential to build on the strong circular economy framing to position design more strategically across innovation and development agendas.

6.30 Romania

Country Size: 238,298 sq km
Citizens: 19,067,576 (2024) | Tendency: falling
GDP per capita: 20,072.4 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 42,2%
BEDA Member Organisation: /

Dedicated design policy status

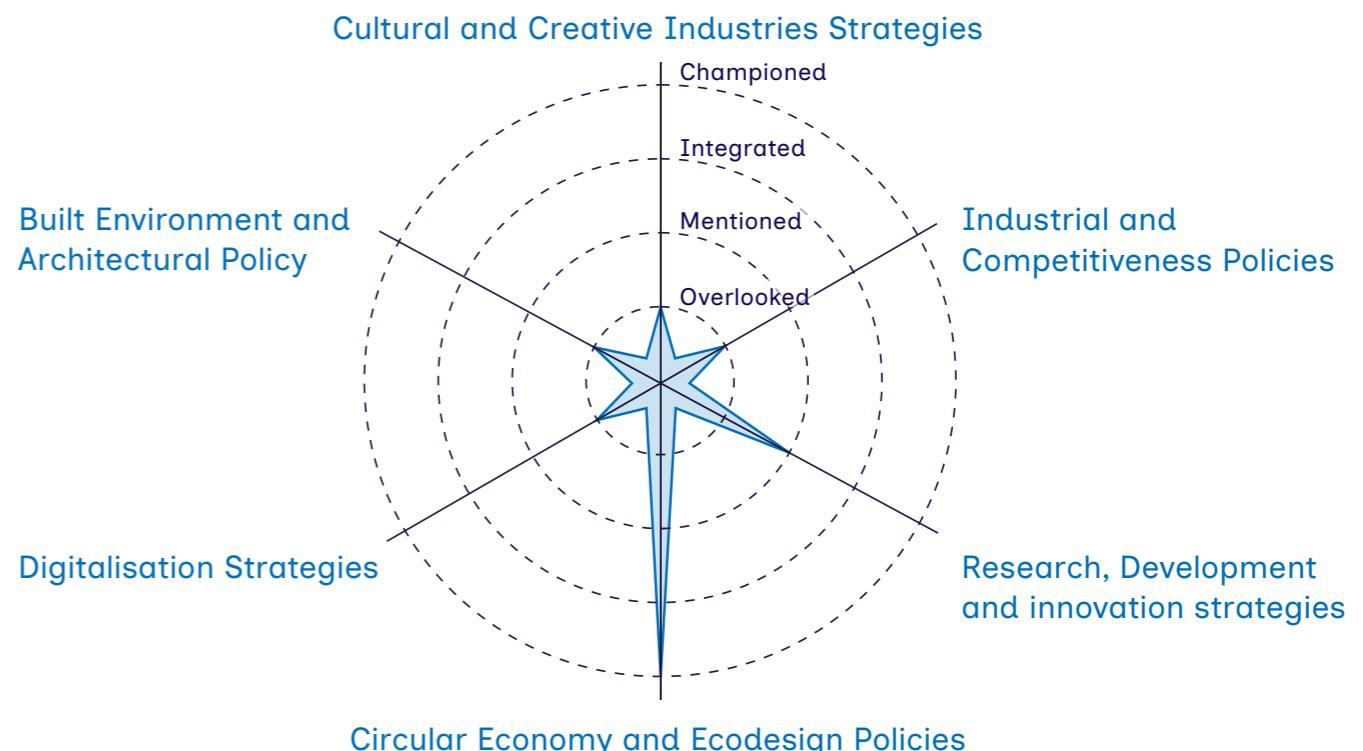
→ No

Design in other policy agendas

- Innovation Strategy – The National Research, Innovation and Smart Specialisation Strategy 2022–2027 includes baseline mentions of design in several forms (systems design, industrial design, artistic design), though without dedicated actions. [Mentioned]
- Circular Economy Strategy – The National Circular Economy Strategy and Action Plan highlights design extensively, particularly product design, sustainable design, and eco-design principles, linking them to waste reduction and resource efficiency. [Championed]
- CCI, industrial/development, digital, architecture strategies – No strategies or references to design were identified. [Overlooked]

Fig. 43 | Country Profile: Romania

Status: September 2025



Observations

Romania's most substantive design references emerge in the circular economy agenda, where eco-design is positioned as central to sustainability goals. While innovation policy includes only baseline recognition, the breadth of references in the Circular Economy Strategy suggests growing potential to mainstream design in addressing systemic challenges. However, beyond this domain, design remains largely absent from broader cultural, industrial, or digital policy frameworks.

6.31 Serbia

Country Size: 77,589 sq km
Citizens: 6,689,039 (2024) | **Tendency:** falling
GDP per capita: 13,523.72 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 51,5%
BEDA Member Organisation: Belgrade Design Week

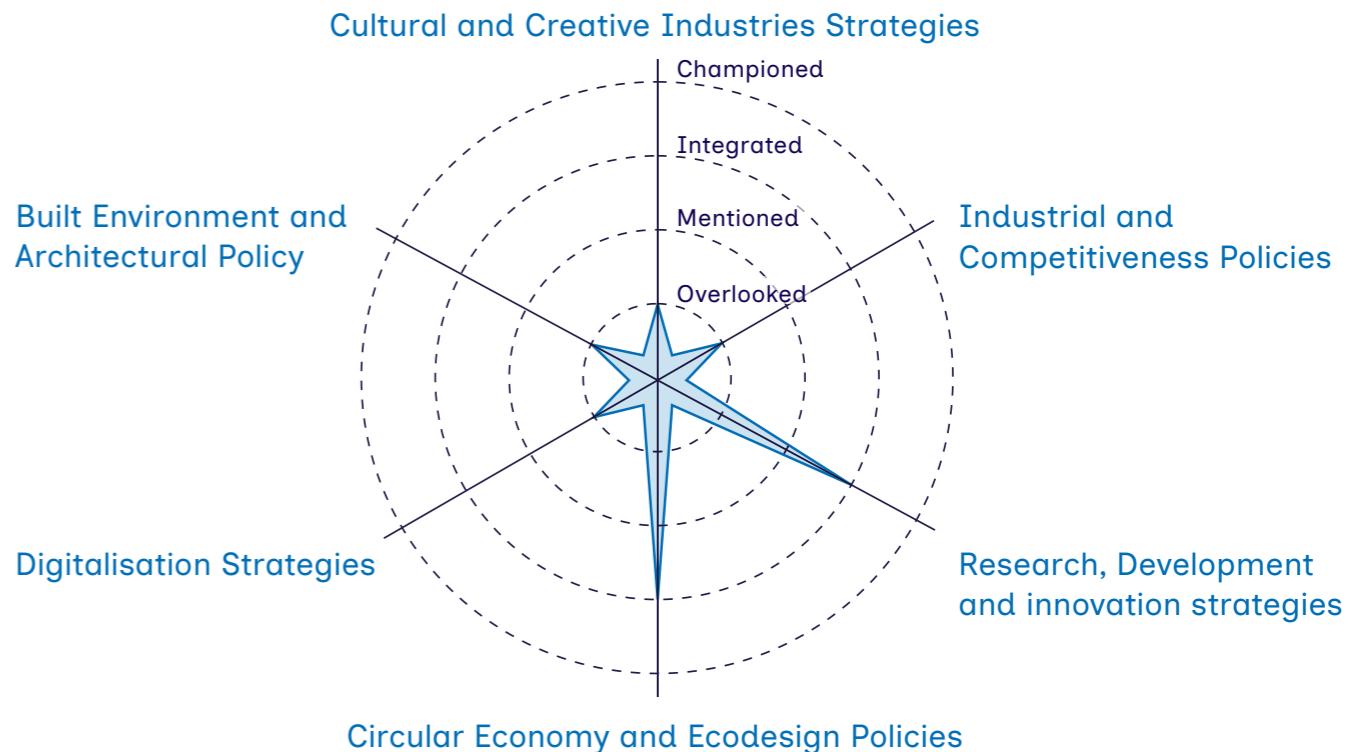
Dedicated design policy status

→ No

Design in other policy agendas

- Innovation Strategy – The Smart Specialisation Strategy of Serbia 2020–2027 mentions design in multiple contexts: as a sector within the creative industries, in product and packaging design, software development, design protection, and funding for art and design schools. It also highlights The Design Hub in Gornji Milanovac as a case of design-business collaboration. [Integrated]
- Circular Economy Strategy – The Roadmap for Circular Economy in Serbia refers extensively to circular design and eco-design principles across sectors. [Integrated]
- CCI, industrial/development, digital, architecture strategies – No strategies or references to design were identified. [Overlooked]

Fig. 44 | Country Profile: Serbia
Status: September 2025



Observations

Design in Serbia is most visible through innovation- and sustainability-oriented strategies, where it is framed as a driver of product development, efficiency, and circular practices. These references, coupled with the establishment of initiatives such as the Design Hub in Gornji Milanovac, indicate a growing ecosystem for design. Translating this momentum into formalised policy structures could strengthen the sector's long-term positioning.

6.32 Slovakia

Country Size: 49,035 sq km
Citizens: 5,424,687 (2024) | **Tendency:** falling
GDP per capita: 26,147.9 \$ | **Tendency:** rising
EU Innovation Scoreboard: Emerging Innovator (2025) | 70,5%
BEDA Member Organisation: Slovak Design Centre

Dedicated design policy status

→ No dedicated national design policy. However, the Strategy for Culture and Creative Industries of the Slovak Republic 2030 acknowledges design as a sector and states that specific goals for the design sector will be developed in 2024-25.

Design in other policy agendas

→ CCI Strategy – Strategy for Culture and Creative Industries 2030 mentions design, primarily as a sector, with a commitment to define targeted goals for design by 2024-25.

[[Integrated](#) → [Championed in intent](#)]

→ Circular Economy Strategy – No standalone CE strategy in place. The Roadmap to Circular Economy (developed with OECD, 2022) has not been formally adopted as strategy.

The Greener Slovakia – Environmental Policy until 2030 includes a mention of “ecological design.” [[Mentioned](#)]

→ Digital Strategy – The Digital Transformation Strategy for Slovakia 2030 contains a concrete action to “create a school curriculum on the principle of sustainable design based on needs.” [[Integrated](#)]

→ Innovation, industrial/development, architecture strategies – No strategies or references to design were identified. [[Overlooked](#)]

Fig. 45 | Country Profile: Slovakia

Status: September 2025

Cultural and Creative Industries Strategies

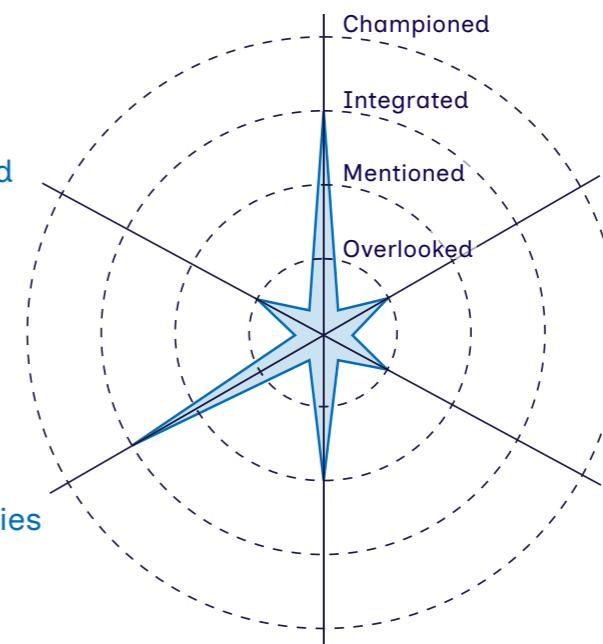
Built Environment and Architectural Policy

Digitalisation Strategies

Circular Economy and Ecodesign Policies

Industrial and Competitiveness Policies

Research, Development and innovation strategies



Observations

Slovakia has begun to signal the importance of design within its cultural and digital strategies, with notable intent to develop specific goals for the design sector by 2024-25. References to ecological and sustainable design in environmental and digital agendas further suggest growing awareness of design as an enabler of green and user-centred transformation. However, design's role remains fragmented and at an early stage of institutionalisation.

6.33 Slovenia

Country Size: 20,273 sq km
Citizens: 2,123,949 (2024) | Tendency: falling
GDP per capita: 34,089.4 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Moderate Innovator (2025) | 106,6%
BEDA Member Organisation: Faculty of Design, Independent Higher Education Institution (HDMI)

Dedicated design policy status

→ No

Design in other policy agendas

→ CCI Strategy – The Resolution on the National Culture Programme 2024–2031 contains a full section on design. It commits to co-financing projects by NGOs and self-employed designers, developing professional foundations, supporting digitalisation and young creators, and promoting the use of design in other sectors. It also stresses export readiness, internationalisation, and raising public awareness of design's societal role. **[Championed]**

→ Innovation Strategy – The Resolution on the Slovenian Scientific Research and Innovation Strategy 2030 mentions design only as an indicator ("design applications"). **[Mentioned]**

→ Industrial / Development Strategy – The Slovenian Industrial Strategy 2021–2030 includes a paragraph on design's relevance to competitiveness and explicitly refers to "circular and digital by design" principles, design management, and co-design approaches. **[Integrated]**

→ Circular Economy Strategy – The national roadmap towards the circular economy highlights circular, eco-, and modular design as key principles. **[Integrated]**

→ Digital, architecture strategies – No strategies or references to design were identified. **[Overlooked]**

Fig. 46 | Country Profile: Slovenia

Status: September 2025

Cultural and Creative Industries Strategies

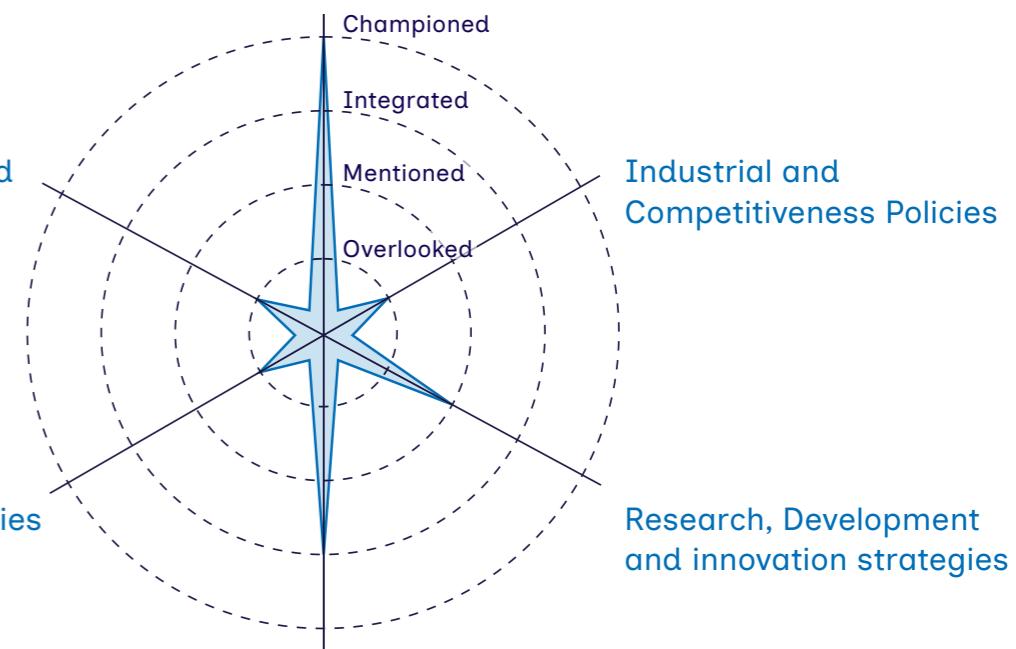
Built Environment and Architectural Policy

Digitalisation Strategies

Circular Economy and Ecodesign Policies

Industrial and Competitiveness Policies

Research, Development and innovation strategies



Observations

Slovenia illustrates how design can be embedded across a range of policy domains, from cultural and industrial strategies to circular economy planning. The cultural programme provides a strong foundation, combining sectoral support with a clear ambition to expand design's role in society, education, and exports. Industrial and circular economy policies further reinforce design as a tool for competitiveness and sustainability. Taken together, these initiatives suggest a policy environment that increasingly values design as both a cultural asset and a cross-sectoral enabler, with momentum building around its internationalisation and systemic impact.

6.34 Spain

Country Size: 498,485 sq km

Citizens: 48,619,695 (2024) | Tendency: rising

GDP per capita: 35,297.0 \$ (2024) | Tendency: rising

EU Innovation Scoreboard: Moderate Innovator (2025) | 104.3%

BEDA Member Organisations: Barcelona Creativity & Design Foundation (BCD), Design Foundation of the Region of Valencia, Spanish Network of Design Associations (READ)

Dedicated design policy status

→ No standalone design policy. However, momentum has been building through sector-led initiatives such as the *Pacto por el Diseño* (2021), a joint call by six major design organisations for a National Design Strategy.

Design in other policy agendas

- CCI Strategy – The most recent Plan for CCI (2018) includes references to design but does not position it centrally. [Mentioned]
- Industrial / Development Strategy – The Spanish Industrial and Strategic Autonomy Strategy includes an explicit article on Industrial design (Article 45). The article frames industrial design as contributing economic, environmental (ecodesign) and social value, supports talent development and profession promotion, and calls for strengthened governance (systematic dialogue with sector associations) and a roadmap for implementation. [Championed]
- Circular Economy Strategy – The *España Circular 2030* Strategy highlights eco-design and circular design as key enablers of the transition. [Integrated]
- Digital Strategy – The Digital Spain 2026 Agenda makes multiple references: design and AI, co-creation in participatory citizen labs, human-centred design in digital regulation, ethical design for AI and digital technologies, and “green by design” approaches. [Championed]
- Innovation, architecture strategies – No strategy or references to design were identified.

Fig. 47 | Country Profile: Spain

Status: September 2025

Cultural and Creative Industries Strategies

Built Environment and Architectural Policy

Digitalisation Strategies

Circular Economy and Ecodesign Policies

Industrial and Competitiveness Policies

Research, Development and innovation strategies

Observations

Spain shows strong, cross-cutting recognition of design, particularly in its industrial, digital, and circular economy agendas, where design is positioned as both an innovation driver and a sustainability enabler. The “*Pacto por el Diseño*” marks an important step by the sector to consolidate these fragmented efforts into a coherent national strategy, signalling growing alignment between government and design actors. While there is not yet a unified policy framework, Spain’s mix of top-down strategies and bottom-up initiatives suggests an environment where design’s role is increasingly institutionalised and visible.

6.35 Sweden

Country Size: 438,574 sq km
Citizens: 10,551,707 (2024) | Tendency: rising
GDP per capita: 57,723.2 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Innovation Leader (2025) | 155,5%
BEDA Member Organisation: Swedish Design Society

Dedicated design policy status

→ Sweden does not have a dedicated design policy, but the Policy for Designed Living Environment (2018) which serves as a comprehensive framework for architecture, design, art, and cultural heritage, aiming to create sustainable, inclusive and high-quality living environments.

Design in other policy agendas

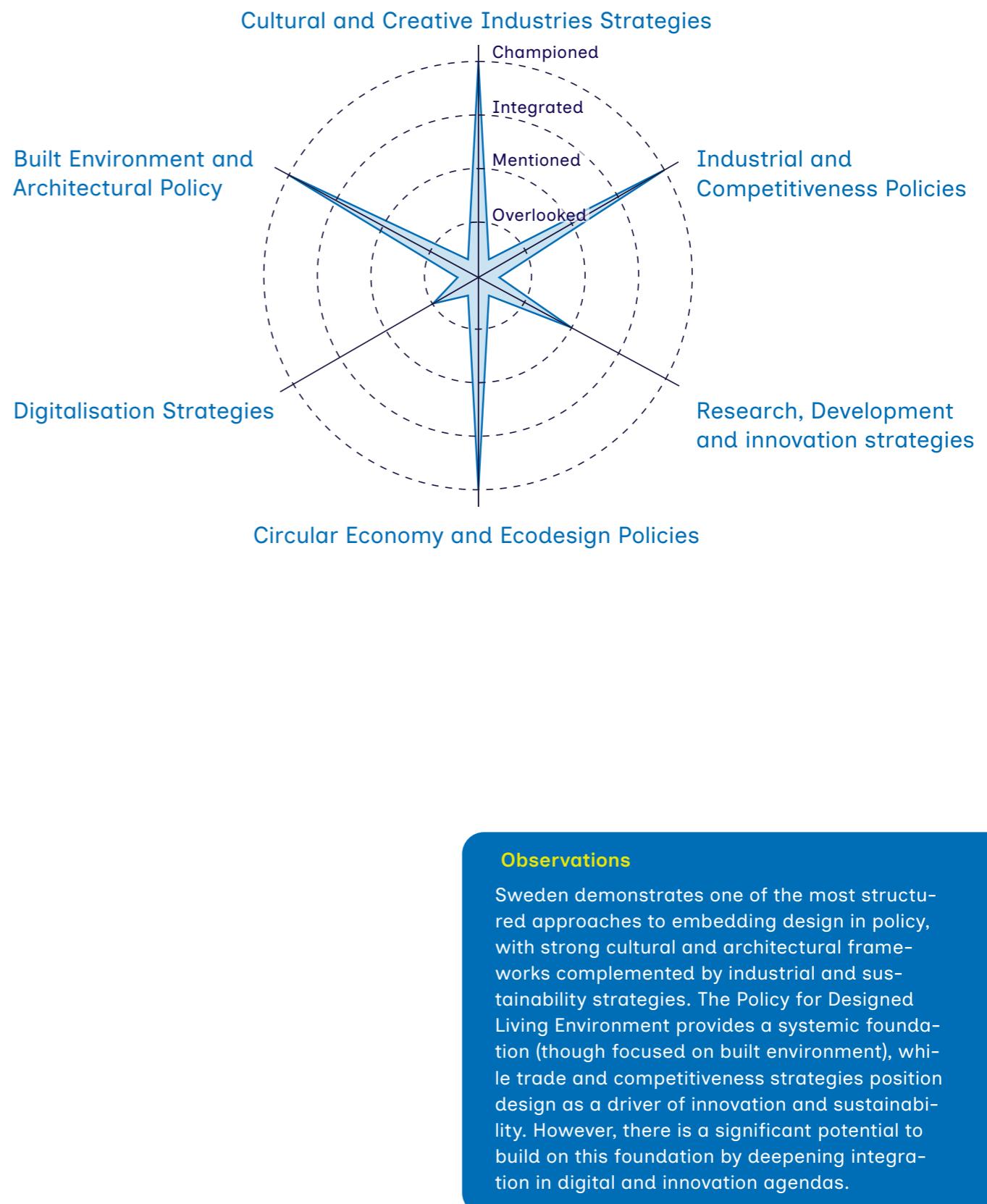
→ CCI Strategy – New Strategy for Businesses in the Cultural and Creative Industries 2024–2033 reiterates the national goal for architecture, form, and design, stating: “Strategically used design processes are an important tool for improving everything from the public sector’s ability to deliver services to the competitiveness of companies and also for reducing the climate impact of products.” **[Championed]**

→ Innovation Strategy – Research and Innovation Strategy (2024) mentions design indirectly by establishing an office to facilitate innovation in/with creative industries. **[Mentioned]**

→ Industrial / development strategy – Strategy for Trade, Investment and Global Competitiveness (2024) highlights “design-driven innovation” as a national strength and signals concrete ambitions: to act as a test market for sustainable, design-driven solutions and to provide high-quality support to businesses within cultural and creative sectors (including design). The strategy links design to export promotion, green transition pilots and targeted sectoral support – putting design into industrial policy levers (markets, pilots, export). **[Championed]**

→ Circular Economy Strategy – Circular Economy Action Plan (2021) mentions better product design and eco-design. **[Championed]**
→ Architecture Strategy – Policy for Designed Living Environment (2018) covers architecture, design, and cultural heritage, promoting sustainable, accessible, and aesthetically considered environments. **[Championed]**
→ Digital Strategy – No strategy or references to design were identified. **[Overlooked]**

Fig. 48 | Country Profile: Sweden
Status: September 2025



6.36 Switzerland

Country Size: 41,291 sq km
Citizens: 8,962,258 (2024) | **Tendency:** rising
GDP per capita: 103,669.87 \$ (2024) | **Tendency:** rising
EU Innovation Scoreboard: Innovation Leader (2024) | 152,2%
BEDA Member Organisation: Swiss Design Association

Dedicated design policy status

→ No

Design in other policy agendas

→ CCI Strategy – Cultural Policy “Cultural Message 2025–2028” includes an entire chapter dedicated to design. It recognizes a broad range of design disciplines – textile, fashion, industrial, product, service, graphic and game design and tasks the Pro Helvetia Foundation with supporting them. The policy emphasizes sustainability and social impact, with a strong focus on the game design sector through project financing, networking, mentoring, and access to international co-production models. [Championed]

→ Innovation Strategy – Federal Education, Research and Innovation Policy 2025–2028 prioritizes digitalization, sustainability, and cooperation, mentioning targeted funding for the Swiss Center for Design and Health. [Mentioned]

→ Industrial / Development Strategy – 2030 Sustainable Development Strategy promotes eco-design and sustainable settlement design, stating: “Businesses are better able to harness their innovative potential when the proper incentives and other framework conditions are present, in particular for resource conservation and the sustainable design of production chains, business models as well as products and services.”

[Integrated]

→ Circular Economy Strategy – Umweltgesetz (2024) refers to “resource-saving design of products and packaging.” [Mentioned]

→ Digital Strategy – Digital Switzerland Strategy 2025 focuses on user-friendly digital services but does not explicitly reference design.

Fig. 49 | Country Profile: Switzerland

Status: September 2025

Cultural and Creative Industries Strategies

Built Environment and Architectural Policy

Digitalisation Strategies

Circular Economy and Ecodesign Policies

Industrial and Competitiveness Policies

Research, Development and innovation strategies

Observations

Switzerland demonstrates a strong cultural commitment to design, particularly through the Cultural Message 2025–2028, which provides targeted measures for multiple design disciplines and emphasizes sustainability and social impact. The inclusion of design in innovation and sustainable development strategies, as well as the Baukultur policy for architecture, reinforces its systemic relevance. While digital strategies remain less explicit, Switzerland’s approach signals a clear recognition of design as a cultural asset and a driver of innovation, health and sustainability, with growing institutional support through Pro Helvetia and sector-specific programs.

6.37 Turkey

Country Size: 23,757 sq km
Citizens: 85,664,944 (2024) | Tendency: rising
GDP per capita: 15,473.30 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Emerging Innovator (2024) | 58%
BEDA Member Organisation: Türkiye Design Council

Dedicated design policy status

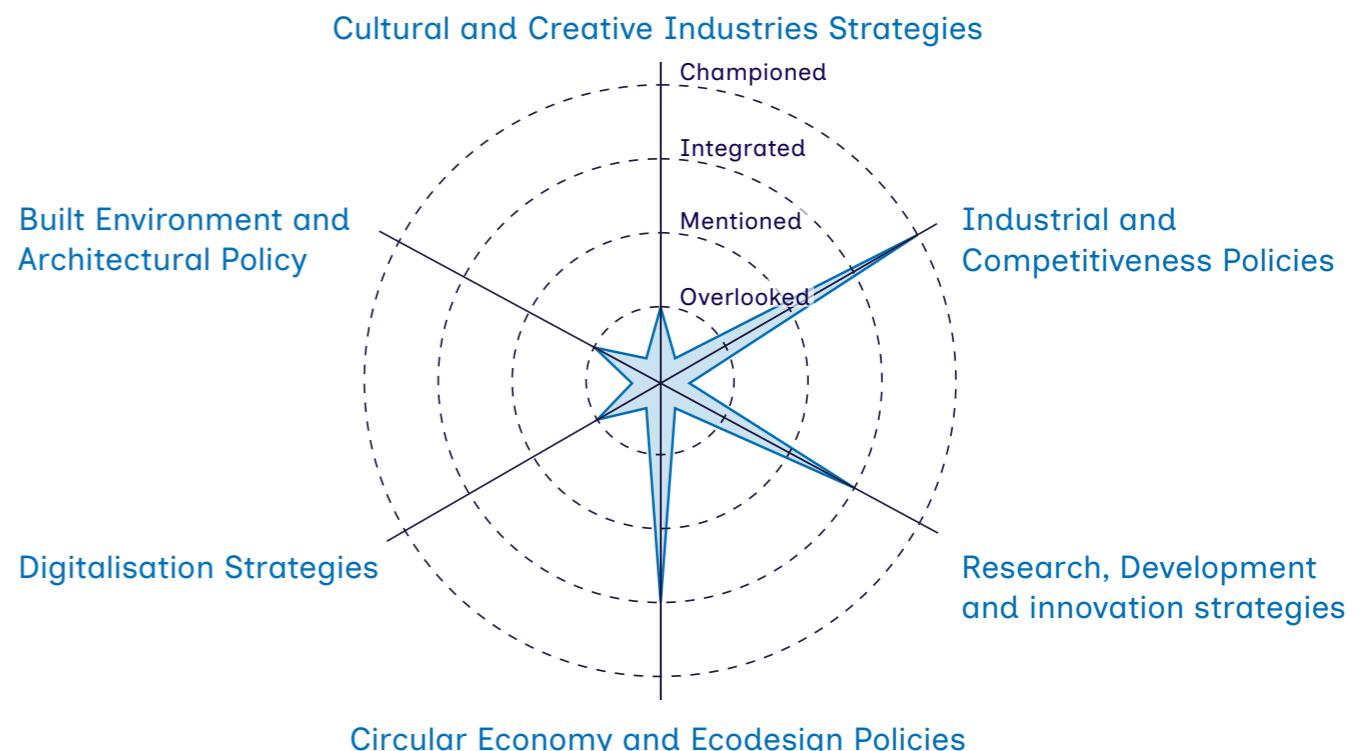
→ No standalone national design policy has been adopted in the last five years. The last official Design Strategy and Action Plan was issued for 2018–2020 by the Turkish Design Advisory Council. In 2023, the Türkiye Design Vision 2030 Workshop was organized by TURKPATENT, Bilişim Vadisi, and WDO, but it has not yet resulted in a formal policy.

Design in other policy agendas

→ CCI Strategy – No dedicated cultural or creative industries strategy referencing design was identified. [Overlooked]
→ Innovation Strategy – Industry and Innovation Strategy 2023 includes measures to increase the competencies of design centres, promote the benefits of industrial design in manufacturing and integrate design and software technologies into education. It also highlights design thinking in educational programs. [Integrated]
→ Industrial / Development Strategy – The 12th National Development Plan (2024–2028) shows an extensive industrial/development-level inclusions of design. Design is mainstreamed across multiple actions and sectors: product design for circular economy, design for AI and microchips, capacity-building for industry-supported R&D and design centres, programmes to train industrial designers and software developers, enhanced functionality of design centres, IP training in design centres, support for innovative furniture design, and explicit measures on smart/sustainable building and urban/spatial design. The plan also includes service-design measures for digital public services (workshops, portals). This is a comprehensive industrial-development

framing where design functions as both capability and delivery mechanism for sectoral modernisation. [Championed]
→ Circular Economy Strategy – National Circular Economy Strategy and Action Plan and the 2053 Long-Term Climate Strategy mention eco-design, environmentally friendly design, product redesign, and design guidelines for sustainable tourism. [Integrated]
→ CCI, digital, architecture strategies – No strategies or explicit references to design identified beyond service design initiatives in the development plan.

Fig. 50 | Country Profile: Turkey
Status: September 2025



Observations

Turkey demonstrates a strong emphasis on design within industrial and development planning, particularly through the 12th National Development Plan, which positions design as an important enabler for innovation, sustainability, and digital transformation. Circular economy and climate strategies further reinforce design's role in achieving long-term sustainability goals. While cultural and creative industries strategies remain underdeveloped and the 2018–2020 Design Strategy has not been renewed, recent initiatives such as the Türkiye Design Vision 2030 Workshop indicate growing momentum toward a more structured national design policy. Building on these efforts could help consolidate fragmented measures into a coherent framework for design-driven innovation and competitiveness.

6.38 Ukraine

Country Size: 603,549 sq km
Citizens: 37,860,221 (2024) | Tendency: falling
GDP per capita: 5,389.47 \$ (2024) | Tendency: rising
EU Innovation Scoreboard: Emerging Innovator (2024) | 32,5%
BEDA Member Organisation: /

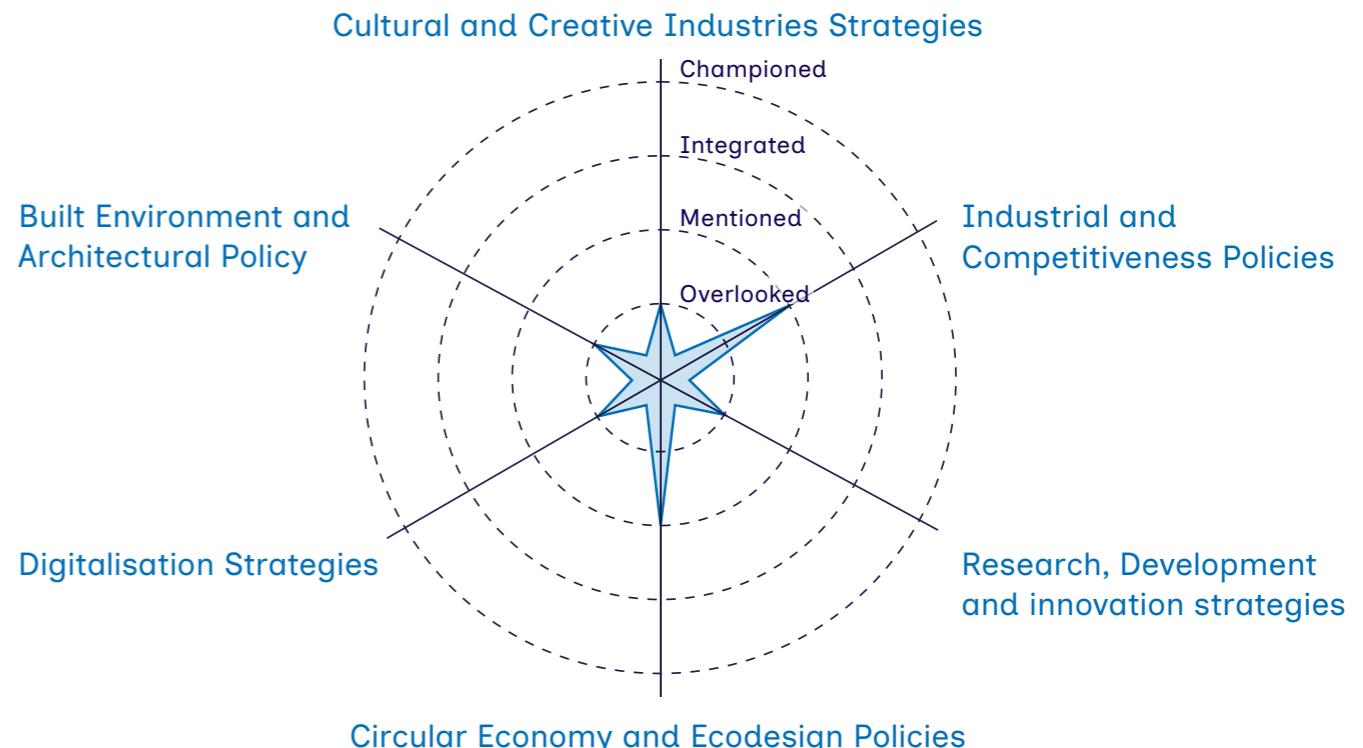
Dedicated design policy status

→ No standalone national design policy has been adopted. In 2017, the Design4Ukraine Association and Prof. Anna Whicher published recommendations for design policy actions, but these have not yet been implemented.

Design in other policy agendas

→ Industrial / Development Strategy – The Green Industrial Recovery Programme for Ukraine 2024–2028 (developed by UNIDO) mentions “green product design” as part of its strategic framework to support post-war recovery and sustainable industrial development. [Mentioned]
→ Circular Economy Strategy – The pre-war Ukraine 2050 Low Emission Development Strategy (2017) featured eco-design, and current efforts to develop a waste reduction and circular economy action plan also recognize eco-design principles. [Mentioned]
→ CCI, innovation, digital, architecture strategies – No strategy or references to design identified.

Fig. 51 | Country Profile: Ukraine
Status: September 2025



Observations

Ukraine's policy landscape shows only limited and fragmented references to design, primarily in sustainability-related frameworks such as the green industrial recovery plan and circular economy initiatives. While these references signal an understanding of design's role in supporting green transition and resilience, there is no systemic integration across cultural, innovation or digital agendas. The 2017 recommendations for a national design policy remain a relevant starting point for future efforts, particularly as Ukraine rebuilds and seeks to align with European innovation and sustainability standards.

6.39 United Kingdom

Country Size: 244,381 sq km

Citizens: 69,281,400 (2024) | Tendency: rising

GDP per capita: 52,636.80 \$ (2024) | Tendency: rising

EU Innovation Scoreboard: Innovation Leader (2025) | 142,1%

BEDA Member Organisation: Design Business Association (DBA), PDR - International Centre for Design & Research, UK Design Council

Dedicated design policy status

→ No standalone national design policy has been adopted. However, the UK has a strong tradition of design-focused initiatives, including the Innovate UK Design in Innovation Strategy (2020–2024) and sectoral programs under the Creative Industries agenda.

Design in other policy agendas

→ CCI Strategy – The Creative Industries Sector Plan (2025) places significant emphasis on design. It includes actions such as reviewing the design curriculum, attracting design talent and investing in initiatives like the British Fashion Council's NEWGEN program and the World Design Congress 2025. The plan highlights design's role in sustainability, the net-zero transition and consumer behaviour change, supported by investments such as UKRI's £15 million the Future Observatory: Design the Green Transition. It also promotes international trade through delegations and business exchanges focused on sustainable design. [Championed]

→ Innovation Strategy – The UK Innovation Strategy: Leading the Future by Creating It (2021) dedicates an entire chapter to the value of design, stating: "Design is core to successful innovation." It recognizes design as integral to the innovation system and includes case studies showcasing its impact. Between 2020–2024, the Innovate UK Design in Innovation Strategy aimed to embed human-centred design in innovation processes, improve SME competitiveness, and maximize value from design investments. [Championed]

→ Industrial / Development Strategy – The UK's industrial policy references design in the context of attracting talent and supporting advanced sectors such as semiconductors and shipbuilding. The Creative Industries Sector Plan, linked to industrial strategy, reinforces design as a growth driver for exports and green innovation. [Mentioned]

→ Circular Economy Strategy – No formal national circular economy policy yet, though sectoral initiatives such as the Design for Life Roadmap for medical technology promote circular design principles.

→ Digital Strategy – The UK Digital Strategy (2022) promotes digital design education and apprenticeships, while the Digital Development Strategy 2024–2030 highlights human-centred design for public services, AI processes, and digital democracy, along-side safety-by-design principles. The Government Digital Service also provides national design principles and a design system for digital delivery. [Championed]

→ Architecture Strategy – No dedicated architecture strategy identified.

→ Design for Scotland – in 2024 V&A Dundee led a programme exploring how to develop a strategic and focussed approach to supporting design nationally, concluded with a recommendations report.

Fig. 52 | Country Profile: United Kingdom

Status: September 2025

Cultural and Creative Industries Strategies

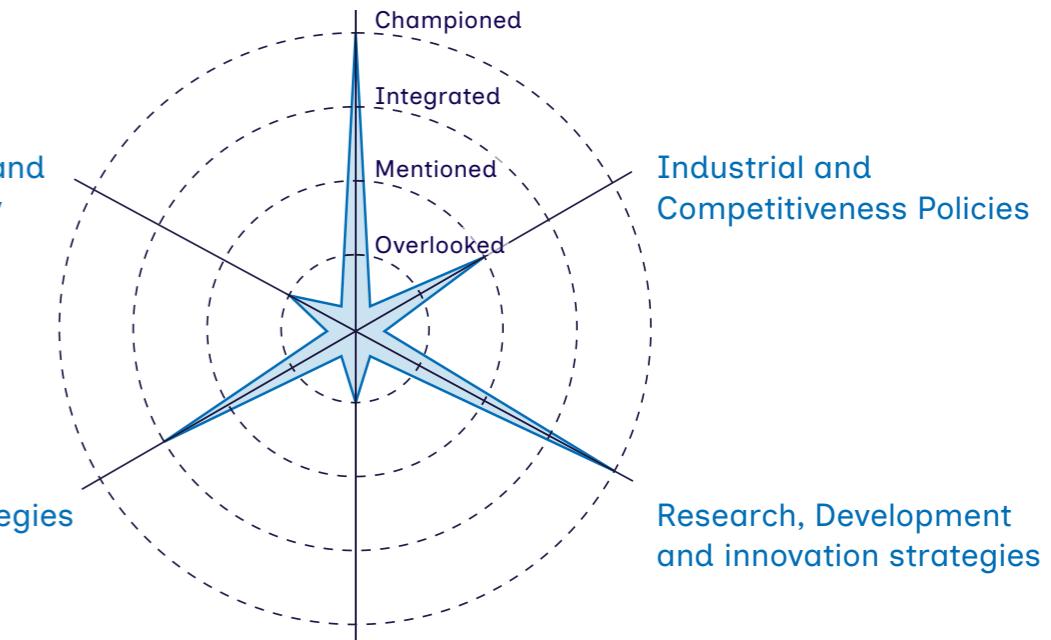
Built Environment and Architectural Policy

Digitalisation Strategies

Circular Economy and Ecodesign Policies

Industrial and Competitiveness Policies

Research, Development and innovation strategies



Observations

The UK demonstrates one of the most advanced and institutionalized approaches to design integration, particularly through its innovation and creative industries strategies. The explicit recognition of design as "core to successful innovation" and substantial investments in design-driven sustainability initiatives underscore its strategic importance. While the absence of a unified design policy leaves efforts somewhat dispersed, the combination of strong sectoral programs, export promotion and green transition measures positions the UK as a global leader in leveraging design for economic growth, innovation and climate goals.

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Appendix

Methodology

This annex documents the research methods used for the Design Policy Mapping study. It provides a transparent account of how the documentary database was compiled, how interviews were selected and conducted, and how qualitative data were analysed. The annex is intended to support reproducibility and to give peer reviewers and project partners sufficient detail without overloading the main body of the report.

A1. Overview of research design

The study used a mixed qualitative approach combining:

1. Systematic desk research / policy mapping to identify national-level design policies and to locate design references in related agendas (culture/CCI, innovation/R&D, industry/development, circular economy, digital government, architecture).
2. Semi-structured interviews with a purposive sample of stakeholders in selected case countries to understand development, implementation and early impacts.
3. Comparative, thematic analysis using an adapted Walt & Gilson policy triangle (context, content, process, actors) as the primary deductive lens, supplemented by inductive coding of emergent themes.

A2. Development of the database

Search approach and iterative development

The database was built iteratively using the following practical search approach:

1. Seed searches (English): structured internet searches of national government portals, ministry websites and institutional repositories using combined keywords such as: design + policy/strategy, creative industries, innovation strategy, circular economy, ecodesign, digital strategy, architecture policy.
2. Cross-policy keyword searches: to capture design mentions embedded in other agendas we combined domain and policy keywords: #culture, #CCI, #innovation, #research&development, #industrial/development, #sustainability, #circularconomy, #architecture, #digital together with policy or strategy.
3. National-language searches: where English versions were not available we translated the keywords into national languages (using online translation as an initial step) and repeated searches on government sites and national repositories.
4. Non-governmental sources: we tracked important non-governmental strategy documents (industry roadmaps, design council plans, academic policy briefs) and noted them as sector-led inputs where relevant.

5. Iterative refinement: the research framework (what counted as an explicit design policy, how to categorise inclusion) was refined as documents were located. In practice this meant that initial document categories and coding labels were adjusted as new forms of policy (e.g., culture documents acting as de facto design strategies) emerged.

Inclusion / exclusion criteria

To ensure consistent selection:

Included if:

- The document was an official government strategy, white paper, action plan, or ministerial programme at national level (or clearly national in scope) published or active since 2020; OR a government-endorsed document adopted prior to 2020 but still explicitly referenced by government as shaping present.
- The document explicitly referred to "design" (or an equivalent national-language term) in a meaningful way (beyond a cursory list entry).
- Documents in which design played a substantive role as judged by actions, instruments or named responsibilities (even if embedded in another policy family).

Excluded if:

- Sub-national / regional documents were excluded from the primary mapping unless they were national in effect or highlighted as national exemplars (regional cases were recorded separately where they represented important policy models).
- Documents that were purely promotional, event-based, or project-level (e.g. single festival programmes) unless they were part of a broader, ongoing governmental programme.
- Non-government opinion pieces, unless they were the only clear public expression of policy intent (noted separately).

Note: non-governmental sector plans (e.g. Design Development Plans by national design centres) were recorded and analysed as important sector inputs but only counted as dedicated national policy if formally adopted by government.

Document capture and metadata

For each included item we recorded standard metadata in a central spreadsheet/database: country, document title, year, responsible ministry/agency, URL, document language, policy family (culture, innovation, industry, CE, digital, architecture), short summary of design references, level of inclusion (see Design Policy Spectrum) and notes on availability/translation.

Document texts were then searched (word search) for design-related terms and relevant passages extracted to a coded repository for thematic analysis.

A3. Interviews – selection, conduct and ethical practice

Objectives

Interviews aimed to:

- Understand how policies were developed (drivers, stakeholders, methods).
- Explore implementation arrangements, early implementation progress and barriers.
- Elicit reflections and lessons for policy design elsewhere.

Sampling and participants

Sampling frame: countries where a dedicated design strategy existed (Latvia, Iceland)

Participant types/Study population: purposive selection across three roles: government representatives (policy leads / civil servants); policy intermediaries (design centres, innovation agencies); sector stakeholders (design associations, academics, municipal implementers).

Inclusion criteria: direct involvement in policy development or implementation, seniority sufficient to speak to process and availability within the interview window.

Numbers: up to 3 interviews per case country was the target; actual numbers reported in the main report (e.g., 4 in Latvia; Iceland interviews ongoing at the time of writing).

Timing and logistics

When: interviews were conducted online (Teams) between August and October 2025.

Format: semi-structured interviews lasting approximately 45 minutes (occasionally up to 60 minutes). Audio and video was recorded with consent; recordings were transcribed for analysis.

Documentation: participants received a Participant Information Sheet and were asked to complete a short consent form prior to participation. Interviewees were told the report would be shared for accuracy-checking and that quotes would be anonymised unless they explicitly consented to attribution.

Topic guide

Interviews followed a flexible guide adapted to participant role; principal themes included:

- Role and involvement in policy development; institutional context and chronology.
- Methods used in design of policy (co-creation, consultations, evidence base).
- Implementation instruments, governance, and funding arrangements.
- Perceived successes and barriers (coordination, procurement, data/monitoring).
- Perceptions of impact and learning for other countries.

(A copy of the full topic guide is available in project files.)

A4. Data analysis – coding and theme development

We combined deductive and inductive coding to analyse both desk research materials and interview transcripts. The Walt & Gilson policy triangle (context, content, process, actors) provided the primary deductive frame, ensuring comparability across national profiles and anchoring the coding in established policy analysis theory. Alongside this, inductive coding allowed new issues to surface—such as procurement bottlenecks, volunteer-led governance, or the emergence of municipal chief designer posts—which were not captured by the initial frame but proved important for understanding practice.

Coding workflow

1. Initial codebook – developed from the policy triangle and literature review, including codes for governance models, policy instruments, funding, KPIs, stakeholder engagement, monitoring, skills/education.
2. Pilot coding – tested the codebook on a subset of profiles and transcripts to refine categories and ensure usability.
3. Full coding – coding was carried out using a hybrid workflow:
 - a. Dovetail software used as a support tool for summarising long transcripts and generating draft theme groupings, which were then reviewed and validated by the research team.
 - b. Claude AI to organise and cluster excerpts across documents.

→ This combination improved efficiency while maintaining researcher oversight of all coding decisions.
4. Team review – coded outputs were peer-reviewed within the research team. Differences in interpretation were discussed and resolved collaboratively, functioning as a qualitative reliability check.
5. Theme development – codes were synthesised into higher-order themes (e.g. ownership/governance, policy context, strategic orientation, barriers/challenges).

A5. Scope

Temporal scope

Policy mapping window: document search and coding focused on policies adopted or active since 2020, with selective reference to earlier documents where they explicitly shaped current practice (e.g. legacy programmes or previously adopted national strategies).

Interview window: stakeholder interviews occurred August–October 2025.

Geographical scope

The study covers European countries (all EU member states and a number of non-EU European countries), excluding microstates and the countries of Belarus and Russia. Sub-national/regional policies were not a primary focus although notable regional initiatives were flagged.

Policy scope

The mapping concentrated on explicit national-level policies and strategies where government actors set direction and accountability. In addition, the study recorded how design appears in six policy families: Cultural & Creative Industries, Industrial & Competitiveness, Research/Innovation, Circular Economy / Waste, Digital, and Built Environment / Architecture.

Non-governmental sector plans (e.g. design centre roadmaps) were documented as inputs and advocacy outputs but counted as government policy only if formally adopted.

A6. Limitations

Document heterogeneity: governments use different terms and formats for strategies (white papers, action plans, roadmaps), complicating direct comparisons. The five-year inclusion rule mitigates this but does not remove the heterogeneity.

Language & translation: where English texts were unavailable we relied on keyword translation and selective excerpt translation; nuances may have been lost. Important documents in non-accessible languages are noted as gaps.

Selection bias: interview participants were purposively sampled for knowledge and availability; this produces depth but is not statistically representative. Availability and willingness to participate affected country coverage.

Reporting and recall bias: interviewees' recollections and assessments are subjective and may emphasise successes or underplay failures. Triangulation with documentary sources mitigates but cannot remove this.

Timebound snapshot: the mapping reflects the policy landscape as found between May–September 2025 (documents) and August–October 2025 (interviews). Policy environments may change rapidly; findings should be read as a time-specific snapshot.

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