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DESIGNING GLOBAL DESIGNERS. NEW TRENDS FOR ITALIAN DESIGN

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ABSTRACT

This paper starts from the first results of a research co-funded by the Italian Ministry of University and Research (MIUR 2005-2007) investigating the relationship between Made in Italy and China. In particular the paper describes an *emerging trend in design research* which is dedicated to the analysis and support of the current transformation of design studios and professions within internationalisation processes and global markets.

The research carried out interviews to companies and design studios of Lombardy Region that have relationship with China and analysed what kind of services institutions are supplying to the Italian System for its internationalisation.

The authors interpret these experiences and put forward some reflections about the necessary future development of design education and research. They interpret Design Universities as important actors of the Italian design system that should cooperate with Institutions to stimulate adequate design policies for internationalisation and to educate the future global designers.

KEYWORDS
Internationalisation strategies, Global Design, Italian Design System

1. PART 1 - CONTEXT

1.1 PREFACE

The new world structure coming out from the globalisation process of world markets is showing a deeply modified economic and production geography. This new scenario activated the renewal of creative, production, trade and consumption processes on a global level, promoting the leadership of some countries, first of all of China, while declassing the competitiveness and visibility of others, like Italy.

This paper aims at underlining the existence and necessity of an *emerging trend in design research* that is dedicated to the analysis and support of the current transformation of design studios and professions within this renewed production geography and at giving a contribution to this debate starting from the specificity of the Italian case study.

The first part of the paper (*the Context*) describes the new scenario brought about by globalisation, stressing the main changes in the world production and design geography, and focusing on the comparison between the development processes of two countries, China and Italy. It shows how design and innovation processes are becoming international and how design demands and capacities are growing in countries like China, originally perceived as solely "world factories". The Italian design and industrial models are presented in their strengths and weaknesses when dealing with international markets and in particular with China.

The central part (*Made in Italy for China*) describes the first results of a national research co-funded by the Ministry of University and Research (MIUR 2005-2007) aiming at identifying critical areas and opportunities for the internationalisation of Made in Italy in particular within the Chinese markets. It describes and analyses the internationalisation strategies, projects and initiatives of a sample of Italian companies, designers and institutions.

The final part (*the new research trends for Italian design*) describes how these e*merging trends in design research* could support the development of the new *global Italian design*, proposing strategies to foster the growth of the competitiveness of the Italian system. In particular the authors, in the conclusions, interpret Design Universities as key actors of the Italian design system that should cooperate with Institutions in order to stimulate adequate design policies and strategies for the internationalisation of Made in Italy, to educate the future global designers and to provide dedicated services for the up-scaling of Italian design and industry.

1.2 DESIGN AND GLOBALISATION

Over the last decades the geography of production, investments, competition and trade has gone through deep changes. The centre of economy is moving toward Asian countries, like China, South Chorea, Vietnam and India; in 2050 China will probably be the biggest world economy, surpassing USA, while the E7 group (the seven developing countries, China, India, Indonesia, Russia, Brazil, Mexico and Turkey) will probably have a

GDP (Gross Domestic Product) 75% higher then the one of G7 countries[1]. This transformation is redrawing the distribution of global political government therefore reorienting the national political choices and the production, trade and investment strategies.

Following this transformation most organisations are becoming international, relying on several countries for their business, forming alliances with foreign companies and deeply modifying their production modes and processes. Together with the need to compete with low cost production capacities of emerging countries, companies have to build their competitive advantage. Innovation and design capabilities are therefore more and more central to branding and differentiating product offering (Borja de Mozota, 2002).

As the production processes also innovation and design ones are starting to become international. Companies try to balance the contrasting needs to manage the company globally, while remaining sensitive to local market needs and connected with national innovative capabilities (James and Howells, 2001).

Even if there is still the tendency to locate innovative activities within home countries, many multinational corporations are restructuring their organisational patterns, dispersing their design and development sites while augmenting the autonomy of overseas subsidiaries. Depending also on the level of adaptation of product design to the market/s to be served, multinationals adopt different strategies in the localisation and management of design activities[2], concentrating them within their home country, positioning in the local markets or in strategic global "hot-spots", relevant for their technical and design resources.

Design activities can in fact vary from limited product adaptations to elaborated product design of complex global products. Yang Cai (2001) talks about adaptive, configurable and interface design, as different design strategies for the development of global products. Clive Grinyer (2001) describes global companies as "value exporters" if they use design to emphasise their uniqueness and local values to differentiate in the global markets, or as "value collectors" if they use design to interpret and answer to local markets specificities. In any case design acts as key mediator and interpreter of globalization processes (Morelli and Sangiorgi, 2006).

Besides designing for global markets, designers are becoming (or should become) global themselves. Apart from the in-house designers employed within global companies, also design industries have to open their market and act as "global payers" (Power et al., 2006). Because of the liberalisation of service industries (OECD, 2005; WTO, 1994) competition among design studios is not anymore limited by national borders. Changes in world markets and production weight and distribution and the growing of international competition within consultancy industries, ask for a deep afterthought on the necessary evolution of design profession and education.

1 PricewaterhouseCooper report, source Shanghai Daily, 21st of May 2006, cited in Orlandi and Prodi, 2007

2 James and Howells (2001) talk about Home-market, Host-market and Global-market orientated companies depending on the strategies and motivations guiding their location choices.

This is particularly true considering the revolutionary effect China's entrance within the global economy and WTO (World Trade Organisation) had on the overall equilibrium of powers among major world economies. Starting from this scenario this paper will debate about the meaning of designing global designers, starting from the specific case of the relationship between China and the Italian design system.

1.3 THE CHINESE PHENOMENON

China has surely been the engine and accelerator of this global economic shakedown. In 2005 China became the fourth world power, surpassing United Kingdom and France, while considering the Ppp (Purchasing Power Parity), it is already the second economy in the world after United States and in front of Japan and India (Prasad, 2004).
The role of China has been therefore the determining factor in the world internationalisation processes, acting both as an attractive low cost production site and producer (*the world factory*) and as growing market in particular for technologies, energy and materials. The opening up of China to global economy, as a consequence of the *Open Door Policy* (1979), aimed to attract foreign capital and knowledge to support its growth and economic, industrial and social development. The successive development policy (1992-2001) that conducted China to the annexation to WTO in 2001, defined new processes of economic reform and market liberalisation, to innovate the industrial system and promote the development of strategic sectors (*the pillars*) as mechanics, electronics, automotive, petrochemical and light industries. A specific attention has been therefore dedicated to high-tech sectors as Aerospatiale, ICT and biotechnologies (Musso et al., 2005). This policy had been successful as, at the moment, China is the country with the highest level of *Foreign Direct Investments* (Prasad, 2004), with an increased amount coming from industrialised nations.

Thanks to the establishment of the Special Economic Zones (SEZ)[3] and the attractiveness of low production costs and huge local market, foreign investments were in fact dramatically increased in the last decades in China. The high level of FDI and related knowledge and technological transfer have supported China manufacturing evolution, moving from the production and exportation of low cost and low-tech goods (like textile, shoes and toys) toward more sophisticated products like mechanics and electronics ones.

The growth of Chinese manufacturers in leading sectors and in international markets are then pressing companies to adopt design as key competence for their competitiveness within domestic and global markets. China's industrial design industry has in fact developed significantly over the past ten years (CGA, 2004) witnessed by the emergence of professional associations (as the CIDA - China Industrial Design Association) and design universities and training institutes (almost 200 in China). Even if still fragmented the overall design

3 Special Economic Zones (SEZ) were Shenzhen, Zhuhai, Shantou and Xiamen chosen because of their geographic proximity to overseas Chinese communities such as Hong Kong, Taiwan and Macau and of their vast overseas connections. Foreign investment was encouraged and new factories were established in these SEZs by offering tax privileges, that were, reduced import tariffs on raw materials, tax exemption for importation of certain capital goods, etc.

policy and trend is to upscale the international recognition of China, shifting from the label "made in China" to the one "designed in China". The majority of China industrial designers work in-house to manufacturers, but independent design studios are growing in number, including the ones opened by returnees.

Within this scenario foreign design studios seem to have a limited portion of Chinese design market, as Chinese manufacturers generally build their own in-house department. Mainly large international studios and highly specialised and renowned design industries manage to collaborate with medium and large-sized Chinese companies answering to their need for cutting-edge design skills and higher reliability of design performance. This is particularly true for leading sectors as automotive and consumer electronics that are gaining international visibility and market share through leading Chinese brands[4]. Multinational companies, as for example Philips present in China as Philips China Group, generally tend to build their local in-house design department, also using their global design teams.

China's strengthening position in global manufacturing makes it therefore an important point of sale for industrial designers around the world (CGA, 2004). But competition, coming from both Chinese and international studios, is growing with the same speed as design market potentialities and acknowledgment. It seems like industrial design industry should be able to strengthen and differentiate their offering and skills as well as specialising in the leading sectors with a higher purchasing capacity, guaranteeing quality and a significant curriculum.

The paper is investigating how, within this scenario, national manufacturing structure and internationalisation policies as well as the organisation of the design system and policies can significantly influence the success or less of design studios in China. The Italian case is used here to reflect on the requirements for the advent and development of the new global designers.

1.4 THE ITALIAN DESIGN SYSTEM IN CHINA

Some recent studies (Orlandi and Prodi, 2007; Musso et al., 2005) have investigated how the Italian industrial system is investing and producing for and within the Chinese territory, evaluating strategies, limitations and successes. A little attention has been instead dedicated to the role of design within this process (Bianchini e Parente, 2006).

The first Italian companies that started to take over in China in the 80's were mainly the large ones. Only after the annexation of China in the WTO in 2001, with a certain delay if compared in particular to Germany and France, there had been a significant increase in the presence of Italian organisations in China. Even if the number of Italian investments is now comparable with the rest of Europe, the entity is still limited. This is

4 Chinese leading automotive manufacturers are First Automotive Works, Shanghai Automotive Industry Corporation and Dongfeng Auto. Chinese leading consumer electronics companies are for example Lenovo (computers), Changhong (TVs) or Ningbo Bird (mobile phones).

maybe due mainly to the average size of companies and the limited presence of capital-intensive production, but it is also related to a diffused attitude toward China and its market.

The main sectors in terms of investment and significance in China are the ones of mechanics, textile/clothing, automotive and electric household appliances and products (Orlandi and Prodi, 2007). In all these sectors, the adoption of advanced technology and design processes had a significant influence on the success of the investments, but the recent growing of China technological and production skills as well as the emergence of the first competitive Chinese brands require a further investment to adapt the Italian system to the new global needs.

In 2005 China in fact surpassed Italy, France and UK in the classification of most industrialised countries. The Italian development and industrial model, widely appreciated in the 90's, is now interpreted as the most exposed and vulnerable one in front of the irruption of *Made in China* in the global market (Business Week, 2005 and 2006).
It has been maybe the celebration of the "industrial districts" model that has brought to a limited far-seeing attitude toward China (Musso et al, 2005). During the decade of the Chinese growth, instead of anticipating and following the global changes, Italy has supported the maintenance of its production and design approach, underestimating the role of innovation and technology protection, and misunderstanding the potentialities of China market (Rampini, 2005: 153-188).

It is in fact evident now that Chinese companies are and will be more and more able in the future to assert a world leadership, not only based on production, but also on R&D and innovation activities. In Italy instead no virtuous process for the growing of R&D activities or for the reconversion toward new post-industrial professions (creative sectors and professions) have still happened.

Furthermore the Italian system is working at two main speeds and dimensions:
_ Medium and large companies that have adopted and developed globalisation processes (delocalisation first and internationalisation after) are successful within global markets and therefore in China (see for example. Natuzzi and Fornarina), interpreting the consuming needs of the growing Chinese middle and high class. *This happens when Italy wears the XL size!*
_ Most SMEs, guided by an individualistic approach and lacking from adequate financial resources and innovation tools, are instead threatened by Chinese competition; Italian design companies, as small as the companies they should work for, are not able to elaborate strategies to project them in the global market while more and more decentralised and *provincialised* institutions disperse their financial and relational capitals to build their showrooms in Eastern countries. *This happens when Italy wears the XS size!*

The difficulty of the "XS" Italian system is worsened by the fact that the well-known values associated with the *Made in Italy* and the *Italian style* not only are not fully exploited, but they are also garrisoned by other countries. We are in fact in front of a colonisation of Asia by a part of the Italian way of life patented by USA, French and Swedish (see for example Starbucks and Pizza Hut), right in the moment when China is living a real "italianisation" of fashion and sport sectors (Rampini, 2005).

This scenario briefly shows the main difficulties and delays of Italy, but also sectors, cases and formula of success to be diffused and empowered. What is still missing is a better understanding of how this internationalisation process is related to the current development of the Italian design: how design is supporting the globalisation of Italian companies and how it is moving in the growing competition among international design industries. As it has been in the past, the growth of the Italian industrial system and of Made in Italy should happen in a synergic way with the growing of Italian design system. The following chapter will therefore summarise the first results of a research investigating the role of design in the internationalisation of Made in Italy proposing possible directions to accelerate the path of growth and change of the Italian industrial and design model as required by the fast and ongoing transformation of global market and production geography.

2. PART II - MADE IN ITALY for CHINA: DESIGN FOR THE INTERNATIONALISATION OF MADE IN ITALY

"*Made in Italy for China. Design of sustainable product design for the internationalisation of Italian companies*" is an ongoing national research co-funded by the Ministry of University and Research (MIUR) investigating the role of Italian design within the internationalisation of Made in Italy in China. The main objective of this research, carried out by 5 Italian Universities[5], is to evaluate what competences, tools and strategies the design culture and system could develop and provide in order to support Made in Italy globalisation, with a particular attention to sustainability issues.

This paper is reporting a research activity carried out by INDACO Department of Politecnico di Milano to identify the internationalisation strategies toward China of a sample of companies and design studios operating in the Lombardy region. This research, still to be compared with the results of the other Universities at a national level, is based on a quantitative-qualitative inquiry, called Audit00, made up of 70 case studies of which:
- *20 companies*: interviews to 13 producers of consumer goods and to 7 producers of intermediate goods to investigate their design strategies to produce and distribute in China;
- *8 design studios:* interviews to 8 design and architecture studios investigating their design experiences and approach when working for and within the Chinese market;
- *22 Institutions and corporations:* mapping of 100 initiatives and projects carried out by Institutions and corporations for the valorisation, support and development of Made in Italy.
This analysis has therefore been compared with the main activities promoted by 18 Design Centres and Agencies at an international level to promote design in China.

The following sections will summarise the main results coming from each category and will therefore outline some first main conclusions, focusing mainly on the relationship with design and comparing the information also with the international scenario.

2.1 AUDIT "00": COMPANIES

The Panel of Companies

The panel of companies is made up mostly of SMEs[6] that are specialised in the typical Made in Italy sectors (furniture, lighting, household appliances and articles, mechanics and metallurgy) and are localised within industrial districts.

[5] Politecnico di Milano, Università degli Studi di Roma, Università degli Studi di Bolzano, Università degli Studi di Camerino, Università degli Studi di Palermo, Università IUAV Venezia.
[6] Turnover classes (2004): micro-enterprise (less then 2 millions of Euros); small enterprise (less then 10 millions of Euros); medium enterprise (less then 50 millions os Euros); large enterprise (more then 50 millions of Euros).
Employees classes (2004): micro-enterprise (less then 10 employees); small enterprise (from 10 to 49 employees); medium enterprise (from 50 to 249 employees); large enterprise (more then 500 employees).

ENTERPRISE TYPOLOGIES	TURNOVER	EMPLOYEES
Small enterprise	7	5
Medium enterprise	12	14
Large enterprise	1	1
Total	20	20

Table 1. Enterprise typologies classified by turnover and number of employees

Relationship with China

Producers of intermediate products have developed their production and distribution strategies in China to take the opportunities of the Chinese market, to follow the delocalisation of their clients and to reduce the losses within their traditional market due to Asian competition. The producers of consumer goods are instead mainly motivated by the growing of the well-to-do social class within Chinese market.

Sale strategy

The majority of producers of consumer goods (household articles, household electric appliances, furniture) tend to sell in China their overall range of products, mainly addressed to the new and young Chinese upper-class that lives Made in Italy as an elite and fashion phenomenon. They generally choose specialised retailers and showrooms (furniture) or Department Store and Shopping Mall (household articles and electric appliances) present in the main metropolises.

The producers of intermediate products position their products in the higher market segments, trying to sell their quality products at competitive prices. They prefer trading corporations and the direct distribution through *JV* or *WFOE*[7].

Main distribution and sale problems are connected to the limited economic and physical dimension of companies (if compared to the wideness of Chinese market) and to inadequate sale tools and strategy. Companies who have invested to build solid relationships with local distributors, co-designing sale and communication formats, have reached best results and are now in the position to widen their sale network; while companies who have acted in a less structured way have now to reorganise their commercial strategies because of negative experiences with Chinese partners.

Obtained results and main problems

Even if the economic results have been mostly positive, there is a general perception that they have been lower then initial expectations, even if they are correlated to the low investments.

The main perceived problems are socio-cultural (language difficulties and lack of design culture) and normative (complexity of bureaucratic procedures) ones. Furthermore the producers of intermediate products are threatened by local competitors, while the producers of consumer goods are worried about the diffusion of counterfeits.

Considering the role of Italian institutions they ask for:

7 The Joint Venture (JV or EJV) is a LTD company model in which the foreign partner (or foreign partners) has a capital quota (more then 25%, but less then 99%). The venture can be built on a single project or on a production, commercial or service activity. They can last from 10 to 20 years.
WFOE - Wholly Foreign Owned Enterprise, are LTD companies for the development of commercial activities entirely owned or managed by one or more foreign investors.

- *Promotion:* more innovation in the promotion and internationalisation initiatives of Made in Italy;
- *Protection:* effective and innovative actions to protect products and brand of Made in Italy in the Chinese market;
- *Information:* more "useful" knowledge on the sectorial dynamics of production, distribution and consumption in China;
- *Education*: create professionals with design, managerial and cultural competences able to operate in China.

The design role

Companies perceive design as a strategic competence for the development of their distribution strategies, but there seems to be a limited use of design to adapt products to the Chinese local market exigencies.
Design is applied to develop sale tools, but the interventions are generally limited and marginal as it happens for the communication materials.
Companies prefer to continue consolidated collaborations with design actors already involved in the design of their products, while it seems no Chinese designers have been involved by now.

2.2 AUDIT "00": DESIGNERS & DESIGN HOUSES

The majority of the interviewed studios work both as architect and designer. Most of them have been founded in the '60/'70 and have kept the same small-medium size structure (from 1 to 5 employees and from 20 to 30 freelances working on a project basis).
Product and interior design predominate over communication, service design and design management, while medium-low technology sectors (typical of Made in Italy) prevail, apart from bigger studios that work in more advanced sectors (like automotive and household electric appliances).

Approach to China

The main motivations driving design studios to open an office in China are the desire to expand their business and the necessity to support their clients (manufacturing companies) that are investing in global market. The recent start up of contacts with the Chinese market (mostly between 2003 to 2006) has been originated by the participation to manufacturing missions and sectorial fairs organised by institutions or by previously established relationships with Chinese designers.
Small and medium sized studios generally preferred to open a Representative Office (RO) or to start up a Joint venture (JV) with Chinese designers, while the bigger ones opted to build a Wholly Owned Foreign Enterprise (WOFE) entirely managed with their own capital. On an average the opened offices host 4/5 Italian and/or Chinese designers.
The favourite cities to invest in are Beijing and Shanghai, while Hong Kong has been selected as a key location to observe the Asian market.

Chinese Projects portfolio

The portfolio composition is not homogeneous and the recent relationships with China don't seem to have originated a trend toward specialisation or maybe the sample is not representative enough. Design studios seem to take any opportunity to test the Chinese market following their own specialisation, occasions and relationships.

Design sector	Developed or on-going projects	Nazionalità cliente
Product design	*Office stapler*	*China*
	Support for audio/video equipment	*China*
	Hair drier	*China*
	Luxury bus	*China*
	Order for the design of a Luxury Bus	*China*
	Order for the design of a Luxury Bus	*China*
Communication design	*Corporate identity of Shanghai Park*	*China*
	Design of signs and corporate identity for a shopping street with Italian high fashion street	*Italy/China*
	Catalogues for Shanghai fair	*China*
Exhibit design	*Dressing of a stand for Shanghai Fair*	*Italy*
	Design of Illy bar format	*Italy/China*
	Multimedia store Concept in Shanghai	*China*
	Assosport Stand (brand collecting Italian manufacturers of sport products) for Shanghai fair	*Italy*
	Adaptation of an Italian design exhibition for the Biennial of Shanghai	*Italy/China*
Service Design	*Education project on the topic of retail design*	*Italy*
	Collaboration with Q-free multinational for the design of a traffic control system in Shanghai	*Norway/Italy/ China/*
Architettura	*Concept of an Italian "skyscraper"*	*China*
	Design of n assembly of villas	*China*
	Design of a Department Store	*China*
	Design for a residential neighbourhood in Shanghai	*China*
	Design of two villages south Shanghai	*China*
	Design of industrial architecture	*China*

Table 2. Design sectors and projects developed for China

The design process

Design processes for the Chinese market don't show particular differences compared to the Italian or European ones; there is a tendency to keep the concept design phase and the overall coordination of the project in Italy, delegating to the Chinese office the development and results verification phases. The small-medium studios have bigger difficulties in the management of the process, in particular in the starting phase, dealing with clients and in the collaboration with Chinese partners. Other operative difficulties emerge from geographical and language distance and from short design timelines and fast rhythms.

Two main kinds of reactions to these conditions emerged: the smaller studios consider this approach in a negative way as they fear to loose quality, while bigger and more integrated studios that adapted their processes to the local conditions and apply the "Chinese" design rhythm also in the Italian and European market, assert to derive a competitiveness advantage.

Critical areas

Professional studios not present in a permanent way in China have bigger difficulties in the relationship with clients and in the organisation and development of the design activities.

There is a wide concern with the actual capacity to control the overall quality of the project, because of a not clearly codified management process and design brief. It is therefore considered to be crucial a correct management of information to reduce the risk of misunderstanding that could alter the project results.

Because of the impulsive market growth and of the explosive development of some sectors (like *hotellerie* and wellness), some studios are in difficulties to organise and orient their service offering and invest in specialised disciplines or areas.

Other critical areas concern the adaptation to the Chinese socio-cultural context. Almost all the interviewed people suffered from a diffuse lack of an adequate "design culture" in the Chinese market. Even if there is a growing interest in the Italian design, the majority of Chinese public has still a conservative taste when choosing some kind of products like the ones Made in Italy is famous for (see furniture for example), while is able to interpret the innovative contents of high-tech products and consumer electronics.

Opportunities for Italian design industries

On a general level, there is a common understanding that the bigger opportunities lie in architecture and less in design, even if in the close future this will change.

Design has bigger opportunities in sectors with a higher technological content and innovation potential, which are actually the sectors China is now investing in: *informatics*, *consumer electronics*, *ICT*, *biomedical*, *automotive*.

Less opportunities and lower profits come instead from low-tech sectors because of Chinese manufacturing competition and because for example multinationals like IKEA has already imposed their design philosophy.

In this scenario it seems that only medium and large studios can compete in the Chinese markets, as the majority of Italian design studios are not equipped to work with multinationals or with high-tech companies.

Product design is at the moment the most favourite area to invest in, as communication and service design, notwithstanding the growing interest of Chinese market, are still too much subject to controls and restrictions.

2.3 AUDIT "00": CORPORATIONS AND INSTITUTIONS

This section aims at identifying initiatives and projects carried out by public and private institutions to support and promote companies and design studios within the Chinese market. The analysed subjects are: territorial governmental institutions, industrial and professional associations, commercial chambers, service agencies, schools and universities, fair organisations and observatories.

The main analysed typologies of initiatives are the following: promotion (24), information (18), Research (7), Education (13) and Support to internationalisation (37) activities.

Role of design within institutional initiatives

Only 11 projects on a total of 100 projects and initiatives are explicitly referring to design and they deal with:

- *Education*: interuniversity projects between Italy and China, professional training aimed to provide design competences useful to approach Chinese market (Politecnico di Milano) and long-distance learning projects (IDOL) on interior design methods and techniques;
- *Research,* investigations of design role within Made in Italy distribution and of intellectual property rights in China (*Design Focus, Osservatorio Asia*);
- *Support to internationalisation*: systemic project for furniture companies, transferring design processes and methods for furniture companies for Chinese market *(CLAC),* collaboration projects between Italian and Chinese creative companies *(CreMiCi: Creative industries Milan to China*), design competitions for young Italian designers;

- *Promotion,* organisation of design events in China: sectorial (*imade@: i modi del produrre; Italian living by Macef*), thematic (*Remade in Italy*) and design exhibitions (*100 oggetti del design italiano; Italian-life in Style; Oggetti esistibili; MilanoMadeinDesign).*

2.4 CONCLUSIONS

Considering the set of activities carried out by the institutional Lombardy system and comparing it with what happens in the other main west countries, no significant differences emerge in terms of themes or kind of developed initiatives and projects. Also in the international context the attention is focused on the development of conferences, courses, seminars, exhibitions that aim at diffusing their own design culture within Chinese market and awakening companies, institutions and designers to the importance of design as key factor for the success on global markets.

The main difference resides instead in the dimension and direction of the initiatives. Lombardy (and in general Italy) suffers from the age-old lack of a design reference agency at a national and/or regional level as the ones represented by the design centres (Design Council, APCI – CDRA, Svensk FORM), subjects entrusted with the elaboration and coordination of national design policy actions.
This means that many initiatives and projects organised by different institutional subjects lacking from design competences, even if innovative and well organised, are less effective both as a single initiative, as they miss the right dimension, and on a general level, as there's no direction and coordination.

Within this dynamic but fragmentary scenario, schools, universities and cultural institutions could have a more central role both in the interpretation of the design system needs and in the elaboration of coordinated proposals that see design as one of the main factors to support the development of companies and professionals in the international markets; this also acting as a link and support to the institutional system for the development of ad hoc design policies.

3. PARTE III - NEW RESEARCH TRENDS FOR ITALIAN DESIGN

Starting from the in progress results of Audit00, that has identified strengths and weaknesses, critical areas and opportunities for the Italian Design System (companies, designers and institutions), we now will propose some potential areas of interest that design research and education could work on to intercept trends related to the internationalisation of Made in Italy and Italian Design.

The research shows a section of the Italian System moving at two speeds and with two dimensions: on one side the medium-large companies that have successfully brought about their growing processes to become global, and on the other side the SMEs as well as small design studios that are attempting to become international, but need new kinds of relationships, competences and tools.
At last the central role of institutions that, even if dynamics in their support and promotion initiatives, often act in a not-coordinated and fragmentary mode, dispersing economic and relational energies and having as a final result valid actions but with a limited effect on the system.

Based on the sum of the manifested necessities, it is therefore possible to draw a scenario of design intervention areas for the development of educational and research activities for companies and professionals and of new services and policies to be supported by institutions. Our hypothesis is that the growing of a global Italian design has to happen in a synergic way with the industrial system and in coordination with institutions and research centres. Intervention strategies have to work therefore contemporarily on different levels:

Companies
There's the need to stimulate research and educational activities in order to develop:
- *Renewal strategies for Made in Italy* (and for the most of its low-tech products) strongly oriented toward the empowerment of technological contents, both within the processes and the products;
- *Alternative distribution models fitting the exigencies of SMEs*, able to elaborate new sale formats (physical or virtual) for global markets;
- *Analysis of success examples of Italian and foreign companies in the global market*, identifying organisational models, tools, methods, creative processes and key factors to be adapted to the peculiarities of SMEs.

Designers
There's the need to stimulate research and educational activities in order to develop:
- *New organisational models for the SMDH* (*Small e Medium Design Houses*), analysing the success experiences of larger Italian or foreign design houses with the aim to identify, adapt and transfer successful approaches to small studios that are willing to become international; this also proposing new aggregation, cooperation and networking modes that could support them to face the global markets;
- *New assist for the design activities*, to empower small design studios willing to become international, with scientific, technological, humanistic, sociological and economic competences (to be used in a singular or

collective way) that are essential today to compete in an innovative way on the global markets: from marketing to finance, from sociology to anthropology, from the ICT to nanotechnologies;
- *Technologies and tools for the design activity*, development of tools (or platforms of tools) for the relationship and design activities (ideation, visualisation, design and communication) able to supply a competitive advantage in terms of speed of the design rhythms and of direct relationships with global companies and markets, reducing distances and augmenting the possibility to manage and control processes.

Institutions

Development of design policy and internationalisation services in the following areas:
- *"From XS to XL" policies*: stimulate the XS system to do a dimensional change considering both companies and design studios, in order to renewal on a global scale the historical alliance between design and industry that contributed to the success of the Italian design;
- *Trust policies:* stimulate the dimensional growth of companies and design studios identifying new relationship and aggregation models as well as design management strategies and tools able to answer to the peculiarities of SMEs (flexibility, personalisation, etc.);
- *Promotion policies:* innovative cultural projects able to stimulate the relationship among design, Made in Italy and the "Italian way of life" and create virtuous processes based on trust and collaboration among companies, designers and institutions[8]; this to propose a systemic and coherent image of Italy abroad and at the same time open design to stimuli and exigencies coming from Chinese and global markets.

Within the Lombardy and Italian context, deprived of local and national reference design organisations, universities seem to be the right actor to undertake the central role to activate virtuous cycles for the development of the "XS model"; strengths of universities are their knowledge of the system, the capacity to act as a promoter and activator of intercultural and interdisciplinary initiatives, the relevant orientation toward innovation and the capacity to build relationship and integrate the industrial, professional and institutional components of Made in Italy. Universities, if put in the right conditions, could therefore elaborate proposals and develop initiatives able to foster the emergence and development of the *new global Italian design*.

8 As example see the results of two researches carried out by INDACO Department and Poli.Design Consortium of Politecnico di Milano:
- Design for trust – Progettare la fiducia, funded by CNR – Consiglio nazionale delle Ricerche (www.sistemadesignitalia.it);
- DAC, Design for Arts&Crafts (www.sistemadesignitalia.it/dac; www.polidesign.net/dactool) a pilot project to support the development of the artisanal production system of the "House System" through the contribution of design.

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