1 CREATIVE IND

Karen

From: James

Sent: 07 October 2004 14:55

To: Karen

Subject: FW: Creative Industries 20 Sep feedback[Scanned]

Submission

167

-----Original Message-----
From: Amanda Cockroft [mailto:response@amandacockroft.co.uk]
Sent: 04 October 2004 00:42
To: James
Subject: Creative Industries 20 Sep feedback[Scanned]

James

I attended your meeting with representatives from the Creative Industries at The Lighthouse on 20 September. Unfortunately, I have been unable to respond to you before now as my schedule has been completely full since our meeting and I am off to Canada tomorrow to attend New Design Cities conference and some leisure time too!

In the meantime, I attach a report I co-wrote with Stuart MacDonald last year. I also commented when I was a member of the recent Ministerial Advisory Group, referred to during the meeting. There was thorough recording of those meetings by Scottish Executive staff (Jane Jeffrey will have access).

I shall write to you more fully on my return in mid-October.

Best regards,

Amanda Cockroft

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THE CREATIVE INDUSTRIES IN SCOTLAND – A NEEDS ANALYSIS

Prepared for The Scottish Executive

Dr Stuart MacDonald
Amanda Cockroft

August 2003

The Lighthouse

1. Executive Summary

The Lighthouse is Scotland's National Centre for Architecture, Design and the City. The aim of this analysis is to inform the future direction of the Lighthouse's Creative Entrepreneurs Club (the Club is described in Annex 1) in the context of the Creative industries in Scotland. As well as focusing on existing, emerging and future needs relative to the latter, the analysis takes the occasion to look at Design's economic impact which, unlike the situation in England and Europe, tends to be underplayed in Scotland. As well as an important industry sector in its own right, this report highlights Design as a key driver within every industrial sector, as well as the connective tissue of the Creative Industries. It is also an important management strategy and problem identifying and solving process.

This report identifies opportunities for the Scottish Creative Industries sector, particularly Design, to further integrate with wider initiatives and groups - including other industry sectors – to improve its abilities to influence policy and provision, and take advantage of opportunity and change, both at a national, UK and international level.

- The Creative Industries, including the Design industry, are important to the economy of Scotland, but not well represented in national economic statistics, leading to difficulties in targeting economic development support. The introduction by the Department of Culture, Media and Sport (DCMS 2002) of national UK guidelines and improved economic data gathering methods should contribute to improved transparency of the inter-dependency and wider economic significance of the various strands within the Creative Industries. However, the full impact of these developments may not be seen for several years. Nonetheless, an emerging awareness of Creative Industries development trends is required to ensure that Scotland does not fall behind other industrial nations.

- A high proportion of Creative Industries practitioners – Design being the highest - are employed in industry sectors, which in Scotland are not necessarily characterised as belonging to the Creative Industries, for example, Manufacturing. Recognising this may create an opportunity to harness the fuller expertise and influence of the Creative Industries and Design sectors, and so lever greater economic impact across the wider industrial spectrum.

- Although there is specialist economic development provision for some Creative Industries sectors, notably the Film and Music industries, economic development strategy for the Creative Industries in Scotland is focused particularly on the Digital Media industry. Support for other Creative Industries occurs largely through the latter. Making interconnections between various disciplines within the Creative Industries, including Design, in order to innovate products and services may be constrained by this strategic focus.

- It can be difficult for creative businesses to negotiate available support. Whilst support hubs exist like websites and advice centers for elements within the Creative Industries, there is no central point bringing together things like business support, skills development opportunities, Continuous Professional Development (CPD) and events. There is a clear need for a central hub. The Lighthouse, which is already recognised as a focus, as the success of its Creative Entrepreneurs Club illustrates, could fill this need - its established communication with the sector could ensure immediate cross-sectoral impact.

- Scotland's Design industry suffers from very low representation by trade bodies. As a result, is not engaged fully with public economic development and skills development strategies. Increasing the Design industry's self-representation would improve its ability to negotiate with national bodies. Again, The Lighthouse, already seen as the Design lead body by the industry and by other agencies within Scotland and Europe, would be a natural choice for this role. The Lighthouse has the potential to intervene in terms of skills, CPD, incubation, research and representation. Additional funding would be required to extend The Lighthouse's role and ability to fulfill these needs.

- UK Industry suffers from a lack of Design and Product Development Management expertise. CPD within the Design industry, across economic cluster boundaries, could stimulate use of Design as an economic development strategy tool. Similarly, it is nationally recognised that there are skills gaps, particularly in management and leadership topics, throughout the Creative Industries.

- Another problem for Design Consultancies is that, whilst they are key economic drivers due to their presence in almost every industrial sector, there is a perceived lack of business incubation space, limiting the sector's ability to develop. In Scotland, business incubation strategy is mainly focused on the Digital Media sector.

- Increased support to the Creative Industries, and recognition and harnessing of Design's impact on the economy, would ensure that Scotland benefits from increased economic productivity and growth in line with our European competitors.

Key Recommendations

- A Design policy for Scotland is needed which underlines the role of design as the connective tissue of the Creative Industries.
- Economic development policy and strategy professionals should be made aware of the Creative Industries' under representation in national economic statistics to ensure that UK economic data gathering developments are relevant to the needs of the Creative Industries in Scotland.
- Economic intervention strategies must recognise convergence between the Creative Industries and their potential impact on other industrial sectors. This cross-sectoral impact is particularly high for the Design Industry.
- A dynamic, Internet enabled, forum/portal for the Creative Industries in Scotland, with representation from all stages of the "culture cycle" (DCMS2002), from education to business growth, accessible by business, education and economic development agencies needs to be established.
- A representative body for the Design industry in Scotland to tackle nationally recognised skills gaps, focusing particularly on management and leadership, and to engage with national economic and skills development bodies needs to be established.
- Provision of CPD for the Design industry in Scotland is needed to ensure that the expertise of Scotland's designers is in line with global standards.
- CPD for the Design industry must include a focus on Design and product development management, which will ensure that Scotland does not lag further behind the rest of Europe in harnessing the economic potential of Design and product development management expertise.
- Ongoing research into the development needs of the Creative Industries and the Design industry is required, and there should be a focus on the industrial application of Design research.
- Scotland should recognise and celebrate the success and cross-sectoral impact of its Design industry.
- A strategic partnership should be established with the Design Council to extend their activities into Scotland; the Lighthouse is the natural partner for this.

1 The Analysis

1.1 Background

The Lighthouse's Creative Entrepeneurs Club, which is the principal driver for this report, was established in 2001 with support from NESTA, SE and Cap Gemini/Ernst and Young. Partnership support funds a full-time temporary administrative post. Funding also covers the cost of staging events and on-costs such as speaker travel and other expenses. Enhanced funding in 2003 has allowed further developments and growth.

The Club has 760 plus members drawn from all areas of the Creative Industries. The emphasis is on providing CPD through up-to-date presentations from key individuals, servicing generic needs like business advice and structured networking. Membership is Scotland wide with speakers drawn from across the UK. Events are held monthly and rotated around Scotland. Recent events have looked, for example at the Creative Industries and the rural economy, the implications of the forthcoming Cities Review for the sector, branding and International trade.

In response to member demand and in addition to the surgery and other advice-related sessions at Club nights, side events have been organised on Intellectual Property and Finance.

Members also participated in an event at Dover House, London in November hosted by the Secretary of State aimed at raising awareness of Scotland's creativity and Creative Industries. The Club's reputation has spread quickly and the Lighthouse has responded to communications from DCMS, British Council, Trade Partners UK and the Design Council as well as communicating with interested agencies in Europe.

1.2 Rationale

This analysis arises from the development of The Lighthouse's Creative Entrepreneurs Club, its enhanced support from the Scottish Executive, NESTA and Scottish Enterprise, and the strategic targets set for 2003 – 2005; these are:

- To develop a nationwide programme of networking events organised on range of relevant topics and issues and which incorporate advice sessions and CPD
- To conduct and industry-led needs analysis; produced by mid financial year 2003
- To extend diversity and reach by making connections made with at least 2 other networks including international connections, yearly
- To initiate 6 x business development case-studies, annually
- To develop 1 x trade international touring exhibition per year
- To create a flexibly delivered digital CPD tool 1 each per years 20003/4 and 2004/5
- To establish Platform a nationally relevant student Creative Entrepreneurs Club (Platform); 3 per year
- To consolidate Lighthouse as lead body for design in Scotland
- To develop an Innovation Fund to help realise and commercialise high risk, creative ideas not covered by existing schemes; to be operable 2005/6

Thus, the analysis seeks to respond to the targets above where they relate to CPD and the creative industries.

1.3 Aims

This analysis has three aims, to:

- Inform the future of The Lighthouse's Creative Entrepreneurs Club, with particular reference to CPD and the Creative Industries
- Synthesise available information on the Creative Industries and CPD as it affects the situation in Scotland and present it in a coherent format
- Highlight the role of design as it is underplayed in Scotland's economic development

2 Methodology

2.1 Approach

Linked to the aims above, several research methods were used in this study. As the overarching intention was not to undertake new research per se, but rather to investigate, extrapolate and synthesise the significant amount of available information on the Creative Industries in Scotland and elsewhere, desk, literature and web searches were carried out alongside telephone interviews with industry practitioners. This was triangulated with the writers' experience of working respectively with Dundee by Design and The Lighthouse's Creative Entrepreneurs Club and illuminative evaluations developed within those contexts. Strenuous efforts were made to analyse the most up to date information pertaining to the Creative Industries and CPD - as well as the Design industry - especially that relating to the recent Sector Skills Councils (SSCs). Overall the approach was to provide a systematic and thoroughgoing analysis of the available data and, instead of merely pointing out limitations, to be sensitive to opportunities.

2.2 Annexes

Thus, as well as the bibliography contained in the report, nine separate annexes quantify matters such as the range of available support, industry initiatives relative to CPD, issues of data gathering and employment, CPD trends as well as the recent development of SCCs. It is hoped that these will usefully provide a comprehensive picture of Creative Industries and CPD as it affects the situation in Scotland.

3 Creative Industries and Design sectors, Economic Overview

3.1 Scope

3.1.1 The Creative Industries are defined by the Department of Culture, Media and Sport (DCMS 2001) as,...those activities which have their origin in individual creativity, skill and talent, and which have their potential for wealth and job creation through the generation and exploitation of intellectual property .

3.1.2 Since the mid-90s, the Creative Industries have been recognised and highlighted as a vibrant and highly significant economic force, contributing substantially to economic growth, employment and exports. The Creative Industries are a vital element of Scotland's economy and, as the impact of national and regional economic development policies and intervention strategies are evaluated, there will be opportunities for additional interventions to meet the current, emerging and future needs of this diverse and exciting sector.

3.1.3 As with any newly defined sector, definitions and language are evolving, reflecting the sector's nascent, diverse and changing nature. The fluidity and ambiguity of the definitions provides an opportunity for interpretation to fit national and regional needs.

3.1.4 DCMS (2001) defines the Creative Industries as Architecture, Advertising, the Art and Antiques market, the Performing Arts, Crafts, Design, Designer Fashion, Film, Interactive Leisure Software, Software, Music, Publishing, and Television and Radio.

3.1.5 Scottish Enterprise (2000) defines the Creative Industries as Architecture, Advertising, Arts and Cultural Industries, Design, Film, Interactive Leisure Software, Music, New Media, Publishing, Radio and Television.

3.1.6 According to DCMS (2002) the UK Creative Industries contribute 7.9 % to GDP, with the Design industry contributing 35 % of this figure. Advertising, Design, and IT and Communications have particularly aggressive employment growth, and convergence throughout the Creative Industries contributes to the particular success of these three inter-dependent sectors.

3.1.7 It is worth noting, nonetheless, that a substantial proportion of creative practitioners are employed in industrial sectors not characterised as Creative Industries, for example, manufacturing. This proportion is highest for the Design industry. This represents an opportunity to use its potential as a lever of economic growth.

3.1.8 The support of the Scottish Executive, Scottish Enterprise and NESTA for The Lighthouse's Creative Entrepreneurs Club with its cross-sectoral membership, is a positive step towards bridging the gap between the Creative Industries cluster and with other sectors of industry not characterised as being within the sector.

3.2 Economic Development Policy

3.2.1 The Minister for the Department of Tourism, Culture and Sport directs Creative Industries policy within the Scottish Executive and has responsibility for Creative Industries in Scotland. In the main, Scottish Enterprise, the Scottish Arts Council and Scottish Screen carry out delivery of intervention strategy.

3.2.2 One consultation mechanism is the Creative Industries Forum of key representatives from the Creative Industries in Scotland, established by former Minister Mike Watson. The Forum has made several observations key amongst which is recognition of the lack of support for some areas of economic activity. Another key theme is the need for a central body representing the Creative Industries at all stages of the education and business cycles to interface with educational and economic development structures.

3.3 Economic Impact

3.3.1 The economic impact of the Creative Industries, and the Design sector in particular, is underestimated by commonly available data sets. The latter sector is based principally upon output defined as the result of an industrial process, whereas the Creative Industries are defined primarily by their market. Also, the economic impact of non-VAT registered businesses (which make up the majority of the freelance community), and the cross-sectoral impact of the Creative Industries, are difficult to quantify, particularly on a regional basis.

3.3.2 In addition, recent research has indicated that the economic importance of the Creative Industries has been exaggerated and that the enthusiasm of policy makers for Creative industries has not been matched by an analysis of their drivers and dynamics (Toruk, 2003). The same research has usefully synthesized parallel studies on creativity, culture and urban regeneration by leading commentators such as Hall, Leadbetter, Landry and others, all of which are relevant to this study.

3.3.3 DCMS is issuing guidelines on economic data gathering, prior to a review of national statistics in 2007, which will consider the definition, quantification and cross-sectoral impact of the Creative Industries. This will improve data comparison and highlight areas of uncertainty, leading to improved economic intervention (see Annexes I and II).

3.3.4 Although national statistical data is of limited use in defining the economic impact of the Creative Industries sector (the same is true for Design, Crafts and the Art and Antique market), DCMS (2002) has generated guides to the scope and impact of the sector. There are different assumptions within each data set, so direct quotation and comparison should be made with some reservation. Additional information is given in Annex III. The main points are summarised thus:

Growth

- In 2000, in the UK, the Creative Industries accounted for 7.9 % of Gross Domestic Product (GDP).
- GDP growth between 1997 and 2000 attributed to the UK Creative Industries was approximately 6 % above that of the whole economy at 9 % p.a.

Employment

- Between 1997 and 2000, UK Creative Industries employment growth was 3.5 % above the total UK average at 5 % p.a.
- In December 2001 41 % of Creative Industries practitioners were employed in sectors outside those characterised as Creative Industries, for example, manufacturing.
- Advertising, Design, and IT and Communications exhibited the most aggressive employment growth for 2000/ 2001, figures were 19 %, 15 % and 2 % respectively (prior to the IT downturn the figure for that industry was 14 %).

Exports

- Exports grew at around 13 % p.a., between 1997 and 2000, compared with total growth in exports of services of 9 % p.a., and goods and services of 5 % p.a. This represents 3.3 % of all goods and services exported.

3.4 Scottish Enterprise Strategy

3.4.1 Scottish Enterprise (SE) is the main body charged with development of the Creative Industries in Scotland. SE is investing up to £ 25 M in Creative Industries development between 2000 and 2005 and has invested £ 4.5 M in the sector during 2001/ 2002, the strategy's first year of implementation. This figure includes projects undertaken by Local Enterprise Companies.

3.4.2 SE places its strategic focus for the Creative Industries on the high growth Digital Media sector. Targeted intervention ensures that this sector takes advantage of global opportunities. The agency's strategy for supporting other Creative Industry sectors, above its generic business support, is largely through the involvement of those sectors with the Digital Media sector.

3.4.3 SE's targeted areas of intervention are the business environment, the talent and skills base, innovation and the enhancement of Scotland's international reputation (SE 2002). Economic development support to the Creative Industries varies according to discipline, business stage and location. Projects relevant to the sector are grouped, according to area within the sector in Annex IV.

3.4.4 The main contact point between the Creative Industries and Scottish Enterprise is through the Business Gateway service, the website and a helpline. The agency also offers a range of generic business services which include:

- Specific start-up advice for businesses up to 6 months old.
- An information service and general business advice
- Specialist advisors for 'high growth' businesses with turnover more than £ 750 000 or over 70 employees.
- Various web-enabled products and training programmes
- Various programmes in partnership with other organisations

3.4.5 Creative Industries, beyond start-up, currently uninvolved in the Digital Media sector and not considered 'high growth', are not specifically targeted by Scottish Enterprise. The Film and Music industries benefit from specialist support (Scottish Screen and NEMIS) and the Cultural Industries have limited support, particularly focused on start-ups (indications are that this may be extended). There is very limited specialist support to the Design industry.

3.4.6 Creative Industries development strategy in Scotland recognises Design as a connective thread throughout the Creative Industries but, whilst it does recognise the industry's impact within industrial sectors not characterised as Creative Industries, there are no obvious intervention strategies in recognition of this fact. The DCMS (2002) guidelines on quantifying the economic impact of the Creative Industries recommend acknowledgement of their cross-sectoral impact, with their definition of the 'culture cycle'.

3.4.7 Current economic development strategies focus on businesses at extremes of the growth spectrum; start-up and 'high growth' businesses with substantial turnover. Establishing the levels of turnover required for specialist support is rare in the majority of Creative Industries companies. This is the case for the Design consultancy industry, which is typified by a few large companies and a very large number of small organisations. In addition, high levels of freelancing and sub-contracting make it difficult for Design companies, beyond start-up to fulfil the criteria for intervention.

3.4.8 Whilst Scotland must recognise the high growth potential of the Digital Media sector, there is opportunity to develop those Creative Industries, particularly Design, which converge with the sector and that fall outside Scottish Enterprise's support criteria.

4 Design Industry, Key Facts

4.1 Scope

Designers are employed in Design Consultancies, in other Creative Industries sectors and in sectors other than the Creative Industries. The following descriptions clarify what Designers do:

- Graphic Designers
  Graphic Designers using illustrative, sound, visual and other multimedia techniques to convey a message for information, advertising, promotion or publicity purposes.

- Product, Clothing and related Designers
  Product, Clothing and related Designers plan, direct and undertake the creation of designs for new industrial and commercial products, clothing and related fashion accessories.

- Design and Development Engineers
  Design and Development Engineers conceive engineering designs from product ideas or requirements in mechanical, electrical and electronic engineering.

4.2 Economic Impact

Design is an important factor in the Scottish economy, within the Creative Industries and within other industrial sectors. The majority of Designers are employed outside the Creative Industries. This, coupled with the nature of national data gathering, creates difficulties in defining the sector. The following information is sourced from DCMS (2002) and Annex V, which provides more detail on the scope of UK Design employment:

- Design contributes 2.8 % of national UK GDP, compared with the total Creative Industries 7.9 % contribution (i.e. Design contributes 35 % of the total Creative Industries contribution to national GDP).

- In the UK, there are 87 000 Graphic Designers, 45 000 Product, Clothing and related Designers, and 74 000 Design and Development Engineers. The total number of Designers is 206 000.

- In Scotland, there are approximately 12 000 Designers, half of whom are Graphic Designers, the rest are split between Product Designers and Design and Development Engineers. When compared with Scottish Enterprise's data, which is focused on the economic contribution of the Digital Media industry, Design constitutes approximately 7 % of Scottish Creative Industries sector employment.

- Between 80 % and 93 % of Designers are employed in sectors other than Design Consultancies, and 76 % of Designers are employed in sectors outside those characterised as Creative Industries (this compares to an average of 41 % for the total Creative Industries). The majority of Design consultancies and in-house Designers are working with the Service and Production industries (7). This proportion is particularly high for Product Designers.

- Employment growth, within the Design sector, was 8 % p.a. between 1997 and 2000, compared with the total Creative Industries 5 % p.a.

- Employment growth, within the Design sector, was 15 % between 2000 and 2001, second to Advertising at 19 %, and compared with total Creative Industries growth of 3 %.

5 Creative Industries Skills Development

5.1 Overview

- The strength of the UK's economy has led to more people benefiting from higher education and an increase in the number of degree qualified employees. UK productivity is lower than other advanced economies and well behind its main competitors. The Government's productivity strategy is built around correcting market failures to strengthen the UK's performance in skills, enterprise, competition, investment and innovation – the five drivers of productivity (8, 9).

- Developing skills is a key factor in bringing UK productivity into line with other competitor nations. The UK has significant skills gaps compared to its competitors, with management and leadership skills having been identified as critical throughout the workforce. There is an identified need for increased mediation between the needs of employers and training providers or colleges.

- The 72 UK-wide National Training Organisations (NTOs) were perceived as not providing an effective liaison between employers and training providers and, thus, approximately 25 new Sector Skills Councils (SSCs) will provide fundamental, wide-ranging change. These partnerships are intended to reduce the deficit in specialist, trade or higher technology skills, linking skills development to wider competitiveness and productivity issues. At least £1M p.a. will be channelled through each SSC (for more information, see Annex VI) and the Scottish Skills Fund exists to provide interim funds for skills development.

- Skillset, already in operation, represents the Audio-Visual industries (Broadcast, Film, Video and Interactive Media). Design and the Cultural Industries are represented by the aspirant Creative and Cultural Industries SSC (not yet in operation). Publishing has its own aspirant SSC, and the position with regard to Advertising and Architecture is unclear. Scottish Enterprise is working in partnership with Skillset on a skills development action plan and has had discussions with the aspirant Creative and Cultural Industries SSC.

- The aspirant Creative and Cultural Industries SSC's definition of Design is...
  "Design is a diverse and broad based sector that plays an important part in the media and cultural industries. Design contributes to many other areas of industry, which involves product innovation, manufacturing and architecture, as well as underpinning the way that organisations present themselves both internally and to the outside world."
  This definition relates to the DCMS view of the 'culture cycle' which relates Design to all industrial sectors, both within and outside the Creative Industries.

- With regard to Design, the aspirant SSC has engaged with the Design Business Association (DBA), the Chartered Society of Designers (CSD) and the Design Council. The DBA has 4 member companies in Scotland out of a total of over 230 members in the UK (117 in London), the CSD is believed to have between 350 and 400 members in Scotland out of a UK total of between 5 000 and 6 000 members. Thus, the aspirant Creative and Cultural Industries SSC represents less than 4 % of Scotland's Design community.

- Design was not previously covered by an NTO and, whilst it is included in the Creative and Cultural Industries SSC, there is no guarantee that it will remain within this SSC.

- Although there have been bids to the Scottish Skills Fund (worth £ 0.5 M p.a.) from the aspirant Creative and Cultural Industries SSC, none has yet focused on development of the Scottish Design industry. This may be explained by a lack of representation.

5.2 Skills Needs within the Design Industry

5.2.1 The Department for Education and Skills has researched the skills needs of the Creative Industries, in order to guide the work of Skillset and the aspirant Creative and Cultural Industries SSC (DFES, 2002). Design employers within both Design Consultancies and Design departments within large employers are considered. One of the main conclusions of the DFES is that the Design industry suffers from a lack of business and management skills, which impacts upon their ability to grow and create a demand for skilled employment. The actions identified lend themselves to being led by the aspirant Creative and Cultural Industries SSC, and are summarised in the following paragraphs:

- The Design industry needs a coherent voice to advise education and training providers on changing skill needs, facilitate greater work experience and lobby for improved training and other support.

- Maintain the profile of the Design industry as attractive to work in, and one that seeks to employ the most highly qualified and skilled in ways that allow them to use their creative skills in a business environment.

- Improve standards in Design education, which may require a greater level of funding for, and quality assurance of, provision. The emphasis has to be on 'better' not simply 'more'.

- Improve the level of 'work-readiness' of new recruits, possibly by including more work-relevant aspects (e.g. studio-based working), visiting lecturers, work experiences and/ or sandwich elements in courses.

- Relevant agencies need to ensure standards are raised to those of the best, which will require adequate funding because good Design courses need small groups, studio workshops and good equipment. You cannot have good and cheap Design courses.

- Offer support to help employers provide more work placements to give young people a start.

- Publicise the benefits of work placements, not least that they are a means of saving on recruitment costs, by identifying potential talent early.

- An initiative is required for improving the management and business skills of those starting or running small Design companies and consultancies.

- The industry needs to consider a programme of work that will encourage small firms to become more involved in workforce development. This should focus particularly on management and business skills development.

- The industry needs to further consider the training needs of freelances.

- Relevant industry bodies need to form (or re-form) relationships with Investors in People UK to further promote the initiative in their sectors.

5.2.2 Sector Skills Councils represent an opportunity to improve the dialogue between employers and training providers and the example of Skillset, the Sector Skills Council for the Audio-Visual industries (Broadcast, Film, Video and Interactive Media), indicates the potential of the aspirant Cultural and Creative Industries SSC. At least £ 1 million p.a., per sector, of government funds will be channeled through each SSC.

5.2.3 The aspirant Creative and Cultural Industries Sector Skills Council has not engaged widely with the Scottish Design industry due to its lack of representation, its cross-sectoral nature, and its previous lack of experience, compared with other sectors, of being represented by a National Training Organisation. Although there have been bids from the Cultural and Creative Industries SSC for the Scottish Skills Fund, there has been no bid focusing on the Design sector.

5.2.4 There is no guarantee that the aspirant Creative and Cultural Industries SSC bid will be successful and, if it is, it could take some time for full effectiveness to be achieved. It is crucial that the Design industry in Scotland does not miss out on skill development due to its lack of representation within, and developing nature of, its representative SSC.

5.2.5 The inability of the aspirant Creative and Cultural Industries SSC to engage with the Design sector in Scotland means that immediate skills development intervention is crucial, if the competitiveness of Scotland's Design industry is to be assured. There is opportunity to fill the current, and nationally recognised, gap in the Design industry's skills development requirements. There is good quality research available to inform the nature of this type of provision.

6 Continuous Professional Development Needs of the Design Industry

6.1 Continuous Professional Development (CPD) ensures that knowledge, and its mode of application, are continuously challenged and improved. London-based Design trade press has been bemoaning the provision of CPD for Designers (Design Week, 2003).

6.2 For the Design industry, a natural focus for Continuous Professional Development (CPD) is trade associations. The Design Business Association, Chartered Society of Designers and British Design and Art Direction run awards and educational programmes, as well as very limited training and skills development events (for more information, see Annexes VII, VIII and IX). Low membership of these organisations in Scotland - they represent 4 % of the Design community, combined with the vast majority of these training events being London-based - contributes to low levels of CPD activity in Scotland.

6.3 Due to the cross-sectoral nature of the Design industry, the low CPD activity in Scotland contributes to other industrial sectors suffering from a lack of up-to-date Design expertise. Effective CPD could raise expertise across all sectors and ensure that Scotland is aware of, and takes a lead in, industrially focused Design research and its implementation.

6.4 The UK's strength in Design is in corporate identity, corporate communications and the retail business, which may explain the strength of the Advertising industry's economic growth. CPD can be a powerful way of stimulating expertise in all areas of Design and ensuring that Designers in Scotland lead the way in modern practice.

6.5 The UK lags behind the rest of the UK in CPD provision for the Design industry. Scotland suffers particularly in this regard due to its low representation in Design trade associations, and their limited provision of CPD. There is opportunity to make an impact upon, not just the Design industry, but all industrial sectors, by stimulating appropriate professional and high quality CPD interventions.

7 Design and Product Development Management Expertise

7.1 It is widely understood that effective Design and Product Development management results in success throughout all industrial sectors, and that UK intervention strategies have concentrated on technology and design of the physical product, rather than Design and Product Management, which is more prevalent in European interventions. Scandinavian countries, in particular, have a Design policies which have resulted in economic interventions throughout all industrial and educational sectors. Product design and technology industries such as IKEA, Nokia and Nokia Ventures are testament to the success of the approach of using Design as a strategic management tool. The success of Scottish companies, which are serious in their approach to Design and Product Development Management, such as Linn Products, indicates the economic benefits good practice can bring.

In recognition of the low levels of Design and Product Development Management adoption in the UK, The Design Council has recently launched two new projects. 'Design Led 24/7' works with established businesses to improve their Design Management strategies, and 'Humanising Technology', works with technology (including biotechnology) oriented companies to look for new applications of their technologies. These initiatives are working with nineteen established and high growth companies (one only in Scotland) and will be used as case studies on the Design Council website. There is no indication of how adoption of this approach, at a business level, is to be encouraged in Scotland.

CPD, which has a strong focus on leading best practice such as Design and Product Development Management, would greatly benefit the Scottish economy. The adoption of leading thinking in Design, and its employment within business and wider society, could bring great benefits to Scotland.

8 Research

Whilst this report goes some way to addressing the needs of the Creative Industries and Design sectors, additional research and its implementation is required in order for the sectors to reach their full potential and take advantage of global opportunities.

Crucial areas for consideration are:

- Ongoing research into the most effective skills development and Continuous Professional Development mechanisms. In particular, the content and context of Continuous Professional Development, and its application in industry,
- A review of Creative Industries economic development systems worldwide, in order to understand best practice and inform Scotland's intervention policies.
- A review of research, current and planned, into the Creative Industries and their development.
- Ongoing research to inform future Creative Industries development policy and its implementation.

9 Conclusion - Needs and Opportunities

9.1 The Creative Industries are a disparate group consisting largely of several small organisations and a significant proportion of freelance workers. Economic development support to the industry varies according to sector, location and stage of business growth, and industry convergence results in there being no clear focus for industry practitioners. A national focus for the entire Creative Industries sector, which engages with business, economic and skills development agencies, education and Scottish and UK government is required.

9.2 Scotland's Design industry needs a coherent representative voice, as this is not provided at present by industry associations. Lack of a credible and widely accepted industry body means that Designers are not engaged with national skills and economic development strategies.

9.3 The success of The Lighthouse's Creative Entrepreneurs Club indicates the desire of both the Creative Industries and the Design industry for focus and intervention. The Club's success in communicating with these sectors, indicates that it is well positioned to deepen dialogue, increase focus and stimulate further intervention with the sector, but it would need additional resources to deepen its role.

9.4 A focused, Internet enabled, hub for Creative Industries support could dovetail with established support mechanisms such as those provided by Scottish Enterprise, Scottish Executive, Scottish Screen, New Music in Scotland, the Arts Council and the Sector Skills Councils.

The service would:

- Involve the Higher Education sector and other representative groups, and balance the social, cultural and economic outputs of any particular project. The service would be attuned to the dynamic and international context in which the Creative Industries sector operates and would ensure that Scotland influences European policy and takes advantage of financial and networking opportunities.

- Be an additional focus of specialist support, integrating with that already provided by the Business Gateway. The service would not duplicate that provided by Scottish Enterprise or other agencies, but could signpost clients to sources of assistance, interpret existing mechanisms for the industry, and fill support gaps, which are specific to the Creative Industries.

- Be nationally inclusive and consider the involvement of the Highlands and Islands region. An Internet focus for any future programmes will be particularly key here, where access to a physical centre can be difficult.

- Integrate with Scottish educational partnerships as well as the Creative Industries Higher Education Forum, established by DCMS, in partnership with Universities UK, in order to ensure that there is a strategic national educational focus on the sector.

- Facilitate a coordinated approach to influencing of policy and provision.

- Enable the cluster to increase dialogue with UK-wide organisations, such as the Trailblazer and aspirant Sector Skills Councils.

- Stimulate networking and cross-fertilisation opportunities.

- Involve the freelance community that is not fully represented in national statistics and which needs to be encouraged and supported to develop.

9.5 The Creative Industries and, in particular, the Design sector have cross-sectoral impact. Skills and professional development of this group will significantly contribute to Scottish Enterprise's targets, beyond those for traditional Creative Industries, as it is recognised that UK manufacturing is weak in Design Management expertise. An increase in support for Design would assist achievement of SE's manufacturing strategies and targets, including '520 new products launched and processes implemented' (SE, 2003/4).

9.6 The Design industry needs effective and targeted Continuous Professional Development in order to ensure that the UK does not lag further behind other nations in Design and Product Development expertise, and to ensure that the Creative Industries sector continues to benefit from convergence with the Design industry.

9.7 Scotland has no Design policy such as exist in other nations and, despite the National Culture Strategy for Scotland raising the issue of a Product Design Network, there is no evidence of this having yet being implemented. There is opportunity develop and blend this existing strategy with a focus on Continuous Professional Development.

9.8 There is a requirement to align the UK Design Council's activities with the needs of the Design industry in Scotland.

9.9 Ongoing research into the industries' current and future needs and development is required to ensure that Scotland takes take advantage of global opportunities.

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Annexes

Annex I
Quantifying the Economic Contribution of theCreative Industries

Introduction

The scope and economic contribution of the Creative Industries is usually quantified using extant data, that is, based mainly on national, government statistics. It is worth developing a broad understanding of the data and its limitations in order to understand the impact that these have on policy development. There is a level of debate, internationally, about the usefulness of traditional Gross Domestic Product measurements, but they are, nonetheless, a useful guide.

Economic Data Sources

There are several routes to mapping of industrial sectors, but data generated through the Office of National Statistics is updated regularly and is an accepted source of Economic Development data.

The Office of National Statistics maintains the Inter-Departmental Business Register (IDBR), which registers details of traders registered for Value Added Tax (VAT) purposes with HM Customs and Excise (note that registering for VAT is voluntary until annual turnover increases to £ 55 000 or above); employers operating a Pay As You Earn (PAYE) scheme, registered with the Inland Revenue; and incorporated businesses registered at Companies House.

The Annual Business Inquiry (ABI), which provides additional detail about companies and employment within those companies, is derived from the IDBR.

Disclosure rules, where data sets below certain thresholds are not reported due to statistical unreliability, mean that there is under-representation in sectors and size bands where there is a low level of companies. Regional disaggregation can be unreliable for this reason.

The Creative Industries have a very high proportion of small, self-employed and freelance businesses. These companies do not show up on the ABI and the IDBR, as very small businesses (self-employed and low turnover) do not, generally, appear.

Thus, quantification of the economic contribution and potential of the Creative Industries, particularly on a regional basis, as is required for Scotland, can be difficult. Careful use of the data can provide a guide to the sector and can identify areas of uncertainty.

Standard Industrial Classifications

The ABI and the IDBR use Standard Industrial Classifications (SIC). The SIC system was first developed in 1948 and offers good visibility for established activities, such as the traditional manufacturing industries, as the system is based principally upon output defined as the result of an industrial process, whereas the cultural and creative industries are defined, primarily, by their market. It is difficult to precisely identify several activities within the service sector as a whole, and it is particularly difficult to identify new or emerging activities. This is because the service sector is sparsely populated with classifications, and is supplemented with a number of generalised 'not elsewhere classified' categories.

The Design industry exhibits particular difficulties in its quantification, due to its cross-sectoral nature. The following paragraphs attempt to explain the scope of the industry in Scotland and, through this explanation, highlight some of the difficulties inherent in current classification methods.

Although the design industry is identified by SIC codes, these cannot be disaggregated due to IDBR and ABI relating to four figure codes and the various design sectors being represented by five-figure subsets of these codes. A similar situation exists, to varying degrees, for the other Creative Industries. The DCMS regularly reviews weightings, specifically for application at the national level, but this artificial disaggregation of the SIC codes is a specialist and time-consuming task and often not statistically robust enough to be used regionally.

Standard Occupational Classifications

Standard Occupational Classifications (SOC) are of more use than SIC codes when identifying skills within the Creative and Design industries.This data is derived from the annual Labour Force Survey (LFS). The key purpose and function of the SOC codes is to identify the competency-defined roles of individuals (thus labelled as 'occupations').

Taking Graphic Designers as an example, the SOC code for Graphic Designers (3421) cannot be used to define the size or economic scope of the Graphic Design sector, as there will be several other occupational skills within that sector. Equally, Graphic Designers in sectors outside design consultancies will be picked up.

The only way to define the Design industry is to carry out specialised 'SIC-SOC mapping' or 'SIC-SOC' matrix'. In practice, this type of analysis produces its own complications and requires a level of sophistication and access to data at such a fundamental level that it is beyond the scope of all but a handful of data specialists in the UK.

Annex II
Developments in data gathering for the Creative Industries sector

Standard Industrial Classifications will be revised in 2007. In the meantime, the difficulty in mapping the Creative and Cultural Industries to commonly recognised economic statistics is tackled by the Department of Culture, Media and Sport (DCMS) in the Regional Cultural Data Framework: A User's Guide for Researchers and Policymakers. This report was guided by the Regional Cultural Data Framework Steering Group, which is chaired by Ian Wood of DCMS, and indicates that work is continuing on development of national UK data gathering in order to more accurately reflect the Creative Industries. There is no representation from the devolved nations in the steering group, although the devolved administrations were involved in research into the framework.

This report focuses on recommendations for representing the Creative Industries using data that is derived from the national Standard Industrial Classifications (SIC) codings.

The DCMS Regional Cultural Data Framework splits the 'cultural sector' into seven 'domains' which can, in some instances, be mapped on to SIC and Standard Occupational Classifications (SOC) codes. Thus, taking our example of Graphic Designers, this group is within the Visual Art domain. The framework defines the model of the 'culture cycle' which is analogous to a production chain or network. This definition brings the UK into line with state of the art thinking and practice at an international level. The following explains the cyclical approach and is taken from the Framework document (DCMS 2002):

Culture has both a 'material' and a non-material dimension. The definition of the cultural sectors must focus upon material culture, and we understand this to be the sum of activities and necessary resources (tools, infrastructure and artifacts) involved in the whole 'cycle' of creation, making, dissemination, exhibition/ reception, archiving/ preservation, and education/understanding relating to cultural products and services.

The following, also taken from the Framework document, illustrates how Design impacts on other industry sectors:

In addition to covering painting and sculpture, the Visual Art domain also encompasses a range of primarily visually-based creative design activities. These design activities are distinct from other forms of cultural production, as they are essentially cultural inputs into other sectors/ industries: architecture (construction), fashion design (clothing), graphic design (publishing and packaging), interior design (construction) and product design (manufacturing).

These definitions recognise the cross-sectoral nature of the Creative Industries and Design sectors. As national data gathering processes develop, policy makers and economic development agencies will have a deeper understanding of the scope and impact of the Creative Industries sector and, in particular, its broader impact on other economic sectors. Guidelines to quantifying the Creative Industries, following this cyclical approach are published by the DCMS. Unfortunately, the DCMS states that there are no appropriate SIC codes to identify the Art and Antique Market, Design (other than Architecture), Interactive Media and Crafts sectors.

Annex III
Economic Contribution of the Creative Industries

The difficulties in quantifying the economic scope of the Creative Industries, the differing data sets used and assumptions made, mean that reservation should be applied when quoting, and making comparisons between, data. The key economic data, most often quoted by policymakers in the UK and Scotland, are summarised below and are taken from the following documents:

- DCMS Creative Industries economic estimates, July 2002 (3)
- Scottish Enterprise Creative Scotland, Shaping the future, August 2000 (2)
- Scottish Enterprise: Creative Industries Baseline Update 2002 (6)

Economic Contribution, UK

Creative industries accounted for 7.9 % of GDP in 2000 (3), with four sectors of the Creative Industries accounting for three-quarters of the economic value of the grouping of sectors:

- Design 2.8 % of the whole economy
- Software 1.6 %
- Publishing 0.9 %
- Advertising 0.7 %

The Creative Industries grew by an average of 9 % p.a. between 1997 and 2000, compared with an average of 2.8 % for the whole economy (3).

Advertising has exhibited the highest growth between 1997 and 2000 (average 20 % p.a.), with the Radio and TV (10 % p.a.) and Software (12 % p.a.) sectors also showing above average growth (DCMS, 2002).

Scotland

In 2000, the Creative Industries in Scotland exhibited an annual turnover of £ 5 billion, amounting to 4 % of the country's GDP. It is estimated that, over the next three to five years, the sector will grow by 30 %, which compares with worldwide growth rates of between 5 % and 20 % p.a. (SE, 2000)

Employment, UK

In December 2001, UK employment in the Creative Industries totaled 1.95 M jobs, comprising of 1.15 M in companies directly regarded as Creative Industries and 800 000 in companies outside the sector (DCMS, 2002).

Between 1997 and 2001, UK employment in the Creative Industries grew at a rate of 5 % p.a. compared with 1.5 % for the whole economy.

The sectors which have shown above average increases in employment for the whole of the Creative Industries, are:

- Design including Fashion, employment growth of 8 % p.a. between 1997 and 2000, growth of 15 % between 2000 and 2001.
- Advertising, employment growth of 10 % p.a. between 1997 and 2000, growth of 15 % between 2000 and 2001.
- IT and Communications, employment growth of 14 % p.a. between 1997 and 2000, growth of 2 % between 2000 and 2001.

Scotland

In 2000, more than 100,000 people were employed in the Creative Industries sector in Scotland and, in the 3 to 5 years following 2000, up to 2000 new jobs are to be created (SE, 2002).

In 2000 (6), employment in the Creative Industries, as a share of the region's total employment, is 7 % (155 615 employees) for Scotland, which relates to the UK figure of 5.3 % (1 886 862 employees) and 10.1 % and 10.9 % in the South East and London respectively. Glasgow and Edinburgh are both slightly higher than the Scottish average at 7.8 %.

Exports, UK

Exports of the creative industries have grown at around 13 % per annum between 1997 and 2000 (DCMS, 2002). This compares with 9 % growth in all services and 5 % growth in all goods and services. The sector contributed £ 8.7 billion to the balance of trade in 2000, equating to around 3.3 % of all goods and services exported.

Scotland

Scottish Enterprise is aiming to increase exports by 15 % during the 3 to 5 years following 2000.

Numbers of businesses, UK

In 2001, there were 135 000 (8 %) businesses in the Creative Industry sectors, as noted on the IBDR. It should be borne in mind that this is an underestimate, due to non-VAT registered small businesses not being included. Nevertheless, the IBDR is estimated to cover over 99 % of economic activity (DCMS, 2002).

Two thirds of these 135,000 businesses are accounted for by Software and Electronic publishing (56,000 businesses) and Music and the Visual and Performing Arts (33,000 businesses).

Scotland

In 2001 Creative Industries business stock, as a share of the regions total employment, was 10 % (18,480 businesses), which relates to the UK figure of 12 % (282,635 businesses) and 18 % for the South East (including London) and 20 % for London. Glasgow and Edinburgh are 11 % and 14 % respectively.

Between 2000 and 2001, the total Scottish business stock increased by 16.6 %, which is almost double the national trend (8.4 %). London and the South East have remained relatively stable (- 0.2 and - 1.9 respectively. Glasgow and Edinburgh exhibited higher levels of growth at 26.5 % and 24.6 % respectively (SE, 2002).

Annex IV
Scottish Enterprise Support to the Creative Industries

The following projects are taken from the 2002 SE Annual Review and have been grouped according to Creative Industry sector to which they apply. This is meant only as a guide to illustrate provision by Scottish Enterprise to the Creative Industries sector:

Design

- The National Design Conference, in partnership with The Lighthouse.

Cultural Industries

- Establishment of the Cultural Enterprise Office in Glasgow, aimed primarily at pre-entry creative businesses.

Film

- The Glasgow Film Office
- Sponsor Scottish Students on Screen, in partnership with Scottish Screen.
- 8 production companies have received support through the Company Development Scheme, in partnership with Scottish Screen.

Publishing

- 6 publishing companies and 6 music-publishing companies have been supported through the Creative Industries Development Scheme, in partnership with the Scottish Arts Council.
- 13 companies assisted to take part in MIDEM, the major European music-publishing exhibition.

Digital Media

- Masterplanning for the Digital Media Quarter at Pacific Quay.
- Inward investors to Pacific Quay targeted through SE's presence at the National Association of Broadcasters exhibition in US.
- A new digital media park will be created in Dundee, masterplanning underway.
- Supports the Dare to be Digital competition for student Computer Games teams, in partnership with the University of Abertay.
- Gathered information relating to the Creative Industries skills base in Scotland, in partnership with Skillset and the Sector Skills Council, and is now developing a skills development action plan.
- Support to IC-CAVE, a Digital Media research centre at the University of Abertay.
- Supported Talent Match recruitment events.
- Interactive Tayside
- Research Centre for Television & interactivity
- Research into digital media being a key component of the Proof of Concept Scheme.
- Support to a virtual reality theatre at the Glasgow Science Centre, aimed at Digital Media developers.
- A joint venture with the Scottish Executive to develop a Scottish Co-Investment scheme to develop new investment models aimed at the Digital Media industries.
- Work with Skillset to deliver a Workforce Development Plan.
- 10 games companies assisted to take part in the international games show, E3.
- Investigation into the development of several Intermediary Technology Institutes, one of these potential institutes is in the communications technology and Digital Media sector.

General Creative Industries

- Two new incubation centres in Dundee for creative businesses developed with the two Dundee universities.
- Support for the Creative Entrepreneurs Club, in partnership with The Lighthouse.
- Support to Channel 4s Ideas Factory
- Direct business support to 200 creative businesses, through the Business Gateway.
- Supported 10 creative companies to attend 5 in-depth workshops on managing intellectual assets.
- Assisted more than 20 managers of creative businesses to take part in management development programmes.
- More than 50 companies have been helped to access international markets.
- 15 companies took part in trade missions.
- Foreign market data generated
- Fellowship project.

Annex V
Definition and Scope of the UK Design Industry

The following Standard Occupational Classifications (SOC) relate directly to Design and include both in-house Designers and those employed in consultancies. A full list of the occupations covered by the codes is at the end of the Annex.

SOC 3421: Graphic Designers

Graphic Designers using illustrative, sound, visual and other multimedia techniques to convey a message for information, advertising, promotion or publicity purposes.

SOC 3422: Product, Clothing and related Designers

Product, Clothing and related Designers plan, direct and undertake the creation of designs for new industrial and commercial products, clothing and related fashion accessories.

SOC 2126: Design and Development Engineers

Design and Development Engineers conceive engineering designs from product ideas or requirements in mechanical, electrical and electronic engineering.

The following data is obtained from the Labour Force Survey, Office for National Statistics. This information is based on the results of the 1991 census and will be subject to revision in Autumn 2003 when the results of the LFS are re-weighted to reflect the results of the 2001 census. The figures include self-employed and employees, government trainees and family workers.

For the UK, as a whole, the total 'in employment' for 2002 for industry sectors covered by SOC 2126, 3421 and 3422 is 206 000.

SOC 3421, Graphic Designers	87,000
SOC 3422, Product Clothing and related Designers	45,000
SOC 2126, Design and Development Engineers	74,000

Employment of Designers in the UK

In order to assess whether these occupations are in consultancies or in-house, it is necessary to cross-reference them with SIC codes (taken from Standard Economic Activities 1992). A general assumption can be made that the number within consultancies indicates the number in-house. This does not allow for self-employed people who are not registered for VAT, as these do not show up in the SIC codes, but the numbers can be used as a guide. The SIC codes are as follows:

- SIC 7484, Speciality Design Consultant
- SIC 7420, Architectural and engineering activities and related technical consultancies

Graphic Designers fall within SIC 7484, Speciality Design Consultant. Within the spectrum of Product Designers, there is a split between these two SIC groups. The 'Speciality Design consultant' group covers Designers of jewellery, furniture, boot and shoe, costume, graphic, lace, interior décor, calico printers, fashion, interior decorator, textile or wallpaper printing. A more industrially oriented Product Designer would be within the group identified by SIC 7420. The cross-referencing results are as follows:

- SOC 3421, Graphic Designers, 87 000 in total, less than 6 000 in SIC 7484 (Speciality Design Consultancies), so number cannot be disclosed with any reliability, but can be assumed that less than 7% of Graphic Designers are in Design consultancies.
- SOC 3421 + 3422 together, 15 000 (11%) in SIC 7484 (Speciality Design Consultancies).
- SOC 3422, Product Designers, 45 000 in total, 9 000 (20%) employed in SIC 7420 (Architectural and engineering activities and related technical consultancies).
- SOC 2126, Design and Development Engineers, 74 000 in total, 15 000 (20%) in SIC 7420 (Architectural and engineering activities and related technical consultancies).

These figures should be strictly used as a rough guide only, due to the difficulties in using SIC codes and SIC/ SOC mapping. A broad conclusion could be brought that the majorities of Designers represented by the three SOC codes are based in-house and are not employed by consultancies. It should be borne in mind that many freelance Designers (those Designers not registered for VAT) are not picked up by the SIC codes and, therefore, the proportions of Designers acting as consultants will be higher than is indicated by the figures above. It can still be asserted that the majority of Designers are employed in-house.

According to the Design Council (18), 39% of businesses employ a dedicated design team, whilst another 9% have Designers on their staff, and these numbers increase with the size of the business. This statistic lends credibility to the conclusions above.

Employment of Designers in Scotland

The total 'in employment', in Scotland, for 2002 for SOC codes 2126, 3421 and 3422 is 12 000 people (5% of UK total of 206 000).

For SOC 3421, Graphic Designers, 6 000 people are in employment (7% of UK total of 87 000).

The numbers employed in the other 2 sectors, 3422 and 2126 (Product, Clothing and related Designers and Design and Development Engineers) are too small to disclose, i.e. less than 6,000.

Cross-referencing of SOC codes with SIC codes is not possible for Scotland, as the figures are too low to be disclosed.

The employment of Designers does not indicate the size of the Design industry as there are other occupations employed in the industry who are, obviously, not identified by the SOC codes for Designers.

Standard Occupational Classifications

3421 Graphic Designers

Graphic Designers using illustrative, sound, visual and other multimedia techniques to convey a message for information, advertising, promotion or publicity purposes.

- Artist, commercial
- Artist, computer
- Artist, graphic
- Artist, layout
- Artist, lettering
- Artist, litho
- Artist, lithographic
- Artist, Mac
- Artist, technical
- Assistant, graphics
- Assistant, publications (desktop publishing)
- Assistant, publishing (desktop publishing)
- Consultant, design, graphic
- Controller, display
- Coordinator, design, graphic
- Copier, design
- Copyist, design
- Copyist, designer's
- Copyist (textile printing)
- Decorator, display
- Designer, exhibition
- Designer, graphic
- Designer, multi-media
- Designer, art
- Designer, web
- Designer, display
- Designer, advertising
- Illuminator
- Illustrator, technical
- Officer, graphics
- Officer, services, creative
- Operator, DTP
- Operator, MAC, Apple
- Operator, MAC
- Operator, publishing, top, desk
- Publisher, top, desk
- Setter-out (technical drawings)
- Visualiser (advertising)

3422 Product, Clothing and related Designers

Product, Clothing and related Designers plan, direct and undertake the creation of designs for new industrial and commercial products, clothing and related fashion accessories.

- Adviser, fashion
- Artist, shoe
- Consultant, design, interior
- Consultant, design
- Consultant, fashion
- Consultant, bridal
- Consultant, packaging
- Couturier
- Decorator, interior
- Designer, dress
- Designer, embroidery
- Designer, fashion
- Designer, furnishing, soft
- Designer, furniture
- Designer, games
- Designer, gem
- Designer, handbag
- Designer, industrial
- Designer, instrument
- Designer, instrumentation
- Designer, interior
- Designer, jewellery
- Designer, kitchen
- Designer, lithographic
- Designer (packaging)
- Designer, pattern (textile printing)
- Designer, pottery
- Designer, printer's
- Designer, product
- Designer, set
- Designer, applications
- Designer, shopfitting
- Designer, stage
- Designer, body (vehicle manufacturer)
- Designer, book
- Designer, textile
- Designer, cloth
- Designer, toy
- Designer, clothing
- Designer, commercial
- Designer, ceramics
- Designer, clothing
- Designer, costume
- Designer, footwear
- Designer, glassware
- Designer, jewellery
- Designer, leather goods
- Designer (motor vehicles)
- Designer (plastic goods)
- Designer (scenery)
- Designer (wallpaper)
- Designer (wood products)
- Designer (broadcasting)
- Designer (fur products manufacturing)
- Designer (millinery mfr)
- Designer (publishing)
- Designer (rubber goods mfr)
- Designer (soft furnishings mfr)
- Designer (soft toy mfr)
- Designer (textile mfr)
- Leader, team (interior design)
- Planner, footwear
- Planner, kitchen
- Stylist, colour (vehicle mfr)
- Stylist (vehicle mfr)
- Technologist, packaging

2126 Design and Development Engineers

Design and Development Engineers conceive engineering designs from product ideas or requirements in mechanical, electrical and electronic engineering.

- Ergonomist
- Consultant, design (engineering)
- Designer, electrical
- Designer, electronics
- Designer, machinery, electrical
- Designer, avionics
- Designer, systems, (railway signalling)
- Designer, circuit (telecommunications)
- Designer (metal trades)
- Engineer, design, hardware (computer)
- Engineer, design
- Engineer, design and test
- Engineer, development
- Engineer, illuminating (professional)
- Engineer, lighting (professional)
- Engineer (research and development)
- Engineer (professional, design)
- Engineer (professional, development)
- Engineer (professional, illuminating)
- Engineer (professional, lighting)

Annex VI
Sector Skills Councils

- Sector Skills Councils will be licensed by the Secretary of State for Education and Skills, in consultation with Ministers in Scotland, Wales and Northern Ireland, to tackle skills and productivity needs within the UK. They are independent, industry and employer-led organisations representing groups of industries that are of economic or strategic significance.

- SSCs bring together employers, trade unions, professional bodies and other stakeholders in their sectors to work with government to develop the skills that UK business needs. The Councils are key to ensuring that employers gain efficient access to support in identifying their skills requirements and accessing provision. Their national nature encourages competition between training providers and sharing of best practice in industry development.

- In order to be licensed, SSCs must take full account of the devolved nature of government in the UK and, within Scotland, the Sector Skills Alliance Scotland (SSAScot) provides a focus for information exchange, development and promotional activities in relation to SSCs. SSCs role will be to (ssda.org):

- Lead the drive to boost skills and workforce development in their sectors and, through this, to improve productivity, business growth, public service improvement and employment.

- Build unrivalled intelligence and analysis about the skills needs of the sector, professionally communicated in a way that leads to real change in the workplace and supply of skills linked to changing and future requirements.

- Directly influence the planning and funding of education and training across the whole United Kingdom, working within the distinctive arrangements in each nation.

- Forge strong links between employers and schools, colleges, training providers and higher education to influence the decisions of young people and adults who are not yet a part of the workforce.

- Develop convincing evidence and share best practice to promote the business case for skills investment and the more effective use of people in the workforce.

Examples of provision include:

- Careers advice (telephone helpline, one-to-one, on-line, booklets)
- Database of a wide range of business and technical skills development (ranging from hostile environment to accountancy to health and safety training)
- Investment into training and skills development schemes
- Setting and monitoring of occupational standards
- Regular assessment of the industry and its needs and skills gaps
- Information on new entrant schemes
- Awards and bursaries

The Sector Skills Development Agency (SSDA) has been established to underpin the SSC network and promote effective working between sectors. The SSDA's role is to:

- Actively assist employers in sectors in bidding to become SSCs.
- Fund, support and monitor the performance of SSCs across the UK.
- Ensure quality and consistent standards across the network.
- Provide the minimum cover for essential functions in sectors without an SSC.
- Ensure skills provision is designed to meet sector needs.
- Ensure generic skills are effectively covered in the work of SSCs.
- Promote best practice sharing and benchmarking between sectors.
- Provide a website portal for public bodies and individuals to access high quality sectoral labour market intelligence across the UK.

Scottish Skills Fund

- Whilst there is ongoing development of Sector Skills Councils, the Scottish Executive Enterprise and Lifelong Learning Department has introduced the Scottish Skills Fund, worth around £ 0.5 M per annum, to improve the demand for high quality in-work training at sector level in Scotland.

Trailblazer Sector Skills Councils

- Although no Sector Skills Councils have been issued with full licenses, five Trailblazer Sector Skills Councils have been issued with two-year licenses. Trailblazers will demonstrate the value of strong and influential employer-led SSCs and help develop effective ways of working for the first fully licensed SSCs that follow them.
The Trailblazer SSCs are:

Skillset Audio-Visual industries (Broadcast, Film, Video and Interactive Media)

Lantra Environmental and Land-based sector

Cogent Oil and Gas Extraction, Chemicals Manufacturing and Petroleum Industries

Skillfast UK Apparel, Footwear and Textiles industries

Skillsmart Retail sector

Skillset - Sector Skills Council for Audio-Visual Industries
(Broadcast, Film, Video and Interactive Media)

- Skillset has been licensed since January 2002, and describes its mission to, 'encourage the delivery of informed training and education provision so that the British broadcast, film, video and interactive media industry's technical, creative and economic achievements are maintained and improved.' (skillset.org)

- Skillset has offices throughout the UK, and has a joint director for Scotland and Northern Ireland and provides a wide range of services to the industry it represents. The organisation describes its services, thus:

  - Help improve the competitiveness of our industry.
  - Undertake research to find out about the training and skills needs of our industry.
  - Support and develop new and existing talent for our industry.
  - Promote training levels which meet industry needs.
  - Encourage and raise investment to pay for training for individuals and organisations.
  - Recognise and certificate the skills and expertise of people working in our industry.
  - Advise on UK wide education and training policy.
  - Encourage and support equality of opportunity.

Aspirant Creative and Cultural Industries Sector Skills Council

- An Expression of Interest is expected to be submitted for the Creative and Cultural Industries in September 2003. This Expression of Interest is led by the NTO for Cultural Heritage. The license could be granted 6 months after the submission. The sectors represented by this Council are:

    - Design
    - Archives
    - Libraries and information services
    - The arts in all their forms (including crafts and music)
    - Cultural heritage

Annex VII
Design Business Association (DBA)

Description of DBA (from dba.org.uk)

'The DBA was founded in 1986 when design first became recognised as a significant business sector in its own right. A non-profit making organisation, it is run by members for members and, as such, is dedicated to representing the interests of design businesses of all disciplines.

Our objectives are simple:

- to promote design as an effective and measurable contributor to the commercial success of a business
- to promote best professional practice in the provision, management and purchasing of design
- to continuously develop relevant services for design businesses to help them succeed in a competitive market'

Continuous Professional Development

Gaps indicate information not available on website, but other prices provide indication (21). All courses run in London.

modules	duration	cost to members/ non-members
Professional Practice – Stage 1	8 half day modules	750/ 930
Professional Practice – Stage 2	10 half day modules	950/ 1290 (150/ 210 for 1 module)
How to find clients 1	1	
How to find clients 2	1	
How to win clients	1	
How to sell to clients	1	
How to keep and develop clients	1	
How to negotiate the client contract	1	
How to market your company internationally	1	
Design Law workshop	1	
Presentation skills	1	410/ 530
Exports workshop	1	

Annex VIII
Chartered Society of Designers (CSD)

Description of CSD (from csd.org.uk)

'The Society for professional designers. The society is the only body in the world able to grant chartered status to designers. Formed in 1930, its objectives are to:

- Promote a concern for design for the benefit of the community
- Further the practice of design
- Define and achieve a recognised profession
- Regulate and control all matters of professional practice and conduct
- Encourage the study of design'

Continuous Professional Development

Gaps indicate information not available on website, but other prices provide indication (22).

modules	duration	location	cost to members/ non-members
Presenting skills, the credentials pitch seminar	1	London	160/250
Psychology of colour seminar	1	London	100/150
New Business: Getting Leads, Getting in the Door, Defining a Brief and Writing a Proposal	1	London	140/199
Creative Thinking	1	Glasgow/London	140/199
Building better relationships with clients	1	Bristol	
Design Project Management	1	London	
Dealing with the Competition	1	London	
Time Management for Designers	1	M/CR	
Going Freelance + Starting your own Design Business	1	London	

Annex IX
British Design and Art Direction (D&AD)

Description of D&AD (from dandad.org)

'D&AD is an educational charity working on behalf of the design and advertising communities. Our purpose is to set creative standards, educate and inspire the next creative generation, and promote the importance of good design, and advertising to the business arena.'

Membership

D&AD has over 2000 members, drawn from the Advertising and Creative Industries, including Design. Forty-four of these members are in Scotland and 12 of these are New Blood members (students and young creatives) who have been through their education programmes.

Continuous Professional Development

Gaps indicate information not available on website (23). All courses run in London.

modules	duration	cost to members
Screenwriting	1	300
Animation – Make him walk, make him talk	1	575
The artist – seeing	1	300
The artist – touching		
The artist – gap the mind	1	575
Writing comedy	1	300 – 500
Film making	2	750
Creative Thinking masterclass	1	500
How to get ahead in advertising	1	280
How to get ahead in design	1	280
Presentation skills	1	280
How they did it - Design	1	200
How they did it – Advertising	1	200
In association with the Institute of Practitioners in Advertising – Powerful communication for Creative Directors	3	3050
The art of the start	1	300
In association with the Institute of Practitioners in Advertising – Management skills for Creative Directors	3	3350
In association with the Institute of Practitioners in Advertising – Excellent Creative Management	3	1700
Art direction – You gotta do more than draw	1	350
Writing for advertising	1	500
Writing for design	1	280
Design craft – touching type	1	400