

European Design Policy Survey 2026

A survey among members organisations of
The Bureau of European Design Associations

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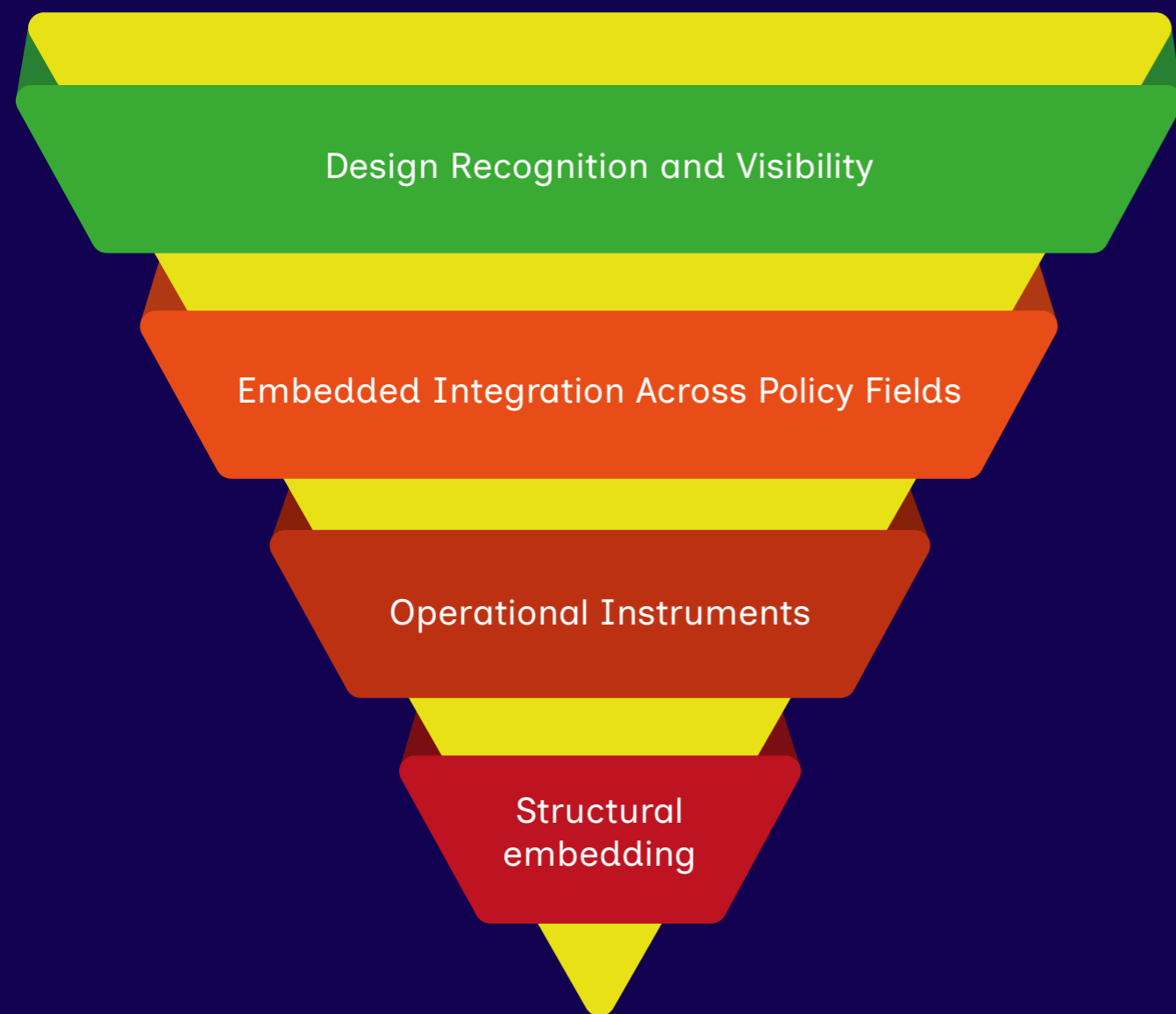
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Fragmentation persists –
a clear policy-to-implementation gap exists.



Executive Summary

Building on the findings of the Design Policy Mapping Report for Europe, this study shifts the perspective from an external, scientific mapping of policy documents to an internal view from national design organisations. It examines how the documented transition—from dedicated national design policies to a more embedded integration of design across diverse policy fields—is experienced and assessed by actors operating within these systems.

The findings confirm that the decline of explicit, standalone design policies is severe. Only a very small number of contexts continue to operate with government-adopted, dedicated design strategies. At the same time, embedded integration of design across multiple policy families is widespread. Design increasingly appears within cultural, innovation, industrial, circular economy, digital, and built environment agendas.

However, **the study reveals that implementation remains the structural weakness.** While design may be mentioned or integrated in policy frameworks, this rarely translates into strong operational instruments. Procurement leverage is limited, funding instruments are scarce, monitoring mechanisms are weak, KPIs are underdeveloped, and dedicated research funding for design remains limited. The presence of design in policy texts does not automatically lead to systematic governmental action.

Fragmentation persists. Integration across policy domains is often cross-sectoral but insufficiently coordinated. Without a unifying framework, responsibilities remain dispersed across ministries and agencies, reducing coherence and long-term continuity.

Taken together, the results provide, based on the respondents, support for the central diagnosis of the Design Policy Mapping Report: **a clear policy-to-implementation gap exists. Design is increasingly recognised across agendas, but structural embedding, governance mechanisms, and accountability tools lag behind.**

Note of Caution

The composition of the sample must be carefully considered when interpreting the findings. While all members operating in contexts with dedicated design policies or strong integration responded, more than 80% of participants stem from countries where design is only weakly integrated or not systematically embedded across diverse policy frameworks.

At the same time, 18 out of 20 respondents (approximately 91%) report that design is at least mentioned or integrated (low, medium, or high) in at least one defined policy area. This indicates that design visibility across policy domains is relatively widespread. However, in most cases this integration remains partial, fragmented, or limited in depth.

The results therefore reflect a European landscape where design is rarely absent from policy discourse, yet only in very few contexts structurally anchored through dedicated strategies or coordinated implementation mechanisms.

Acknowledgements

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This is BEDA

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

This is MADres

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

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Declaration of Generative AI and AI-assisted technologies

The authors have used GenAI tools to support the research and writing process. The tools used was ChatGPT 5.2.. Every GenAI output was counterchecked, evaluated and strongly edited. These tools were selected and used supportively and did not replace core author responsibilities and activities. All authors reviewed, edited and take responsibility for all outputs of the tools used.

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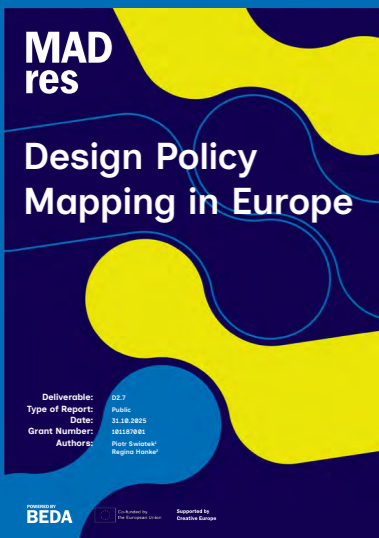
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Organisational Framework

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This Document refers to the “Design Policy Mapping in Europe Report” (Swiatek, P. Hanke, R. 2025).



<https://madres.beda.org/en/publications/design-policy-mapping-in-europe/>

01

Introduction

This study is part of the MADres program – a strategic initiative co-funded by the European Union and led by BEDA – to strengthen the European design community and deepen expertise in three interconnected domains: AI competencies and digital ethics, planetary design and accessibility, and business cases and development. At its core, MADres positions design as a key enabler of Europe’s transformation toward sustainable growth, competitiveness, and societal resilience.

This Study as well as The Design Policy Mapping Report are parts of the development of a Living Design Policy Framework.

The **Design Policy Mapping Report in Europe**¹ provided a comprehensive, research-based overview whether design is embedded within national policy systems. It identified a structural shift over the past decade: from an explicit, standalone national design strategy to a more distributed model in which design is embedded across multiple policy families: **The Design Policy Spectrum**. While dedicated design policies have become rare, design now appears more frequently within innovation agendas, industrial competitiveness strategies, circular economy frameworks, digitalisation strategies, and cultural policies. This shift has increased visibility but also introduced fragmentation.

The present study builds on that foundation by complementing the external, document-based mapping with an internal, self-reported perspective. It explores how national design organisations experience this transition in practice. Does the integration of design into diverse policy areas lead to measurable governmental action? Where does recognition translate into structural support, and where does it remain largely symbolic? How do procurement, funding instruments, monitoring systems, and governance arrangements reflect – or fail to reflect – the growing rhetorical prominence of design?

Note of caution

The findings must be interpreted within the context of the sample composition. While all organisations operating in countries with dedicated design policies or far-reaching integration responded, the majority of participants stem from contexts where design integration remains limited in depth and coordination. At the same time, most respondents report that design is at least mentioned or integrated in one policy area, indicating that complete absence is rare, but structural anchoring is uneven. This reflects a European landscape in which design is broadly present in policy discourse, yet only selectively institutionalised.

Understanding this landscape is essential for MADres’ long-term objective: the development of a Living Design Policy Framework capable of supporting governments and institutions in embedding design more coherently and effectively. **By combining systemic mapping with practitioner insight, this study contributes to a deeper understanding of Europe’s design policy environment and identifies where strategic intervention is required to bridge the policy-to-implementation gap and unlock design’s full economic, societal, and environmental potential.**

¹ Swiatek, P. Hanke, R. (2025) Design Policy Mapping in Europe. MADres project Report. BEDA – Bureau of European Design Associations.



Key Findings at a Glance

#1 Policy Recognition Does Not Ensure Action

The mention or integration of design in policy documents does not automatically lead to consistent or substantial governmental measures.

#2 Impact Remains Limited

While half of respondents observe some governmental response, 41% perceive little to no tangible action, indicating moderate but weak overall impact.

#3 Recognition Is Often Symbolic

Design is frequently positively valued for promotion and visibility and acknowledged as a stakeholder. Yet, only rarely this leads to acknowledgment as structural driver of economic or societal transformation.

#4 Monitoring Is Rare and Informal

Where evaluation exists, it is typically informal or part of broader assessments. Dedicated monitoring or revision of the integration of Design in diverse policies is exceptional. This includes KPIs* as well as KBIs* for a deeper understanding of the impact of design.

#5 Lack of Evaluation Sustains the Implementation Gap

Without structured monitoring and revision mechanisms, accountability and long-term policy learning remain limited.

#6 Methodological Integration Is Selective

Design methods are mainly deployed in digital and innovation agendas, often in project-based contexts rather than as part of a coherent cross-governmental framework.

#7 Access Does Not Equal Influence

Although many organisations maintain contact with governmental bodies, these relationships are largely consultative. Institutional access rarely translates into binding policy integration or structural implementation power.

*KPI: Key Performance Indicators. Those Indicators are quantifiable Data points (cold data) – reporting a status.
KBI: Key Behaviour Indicators. Those Indicators tap into narratives, behaviour and spill over effects (warm data) – rather explaining the impact.

M3

Detailing the Outcome

1. Design policy

Out of 20 responding members (see Fig. 1), four reported the existence of a Design Policy framework in their context. Two operate with dedicated Design Policies, while two report a strong integration of design across broader policy fields rather than through standalone instruments.

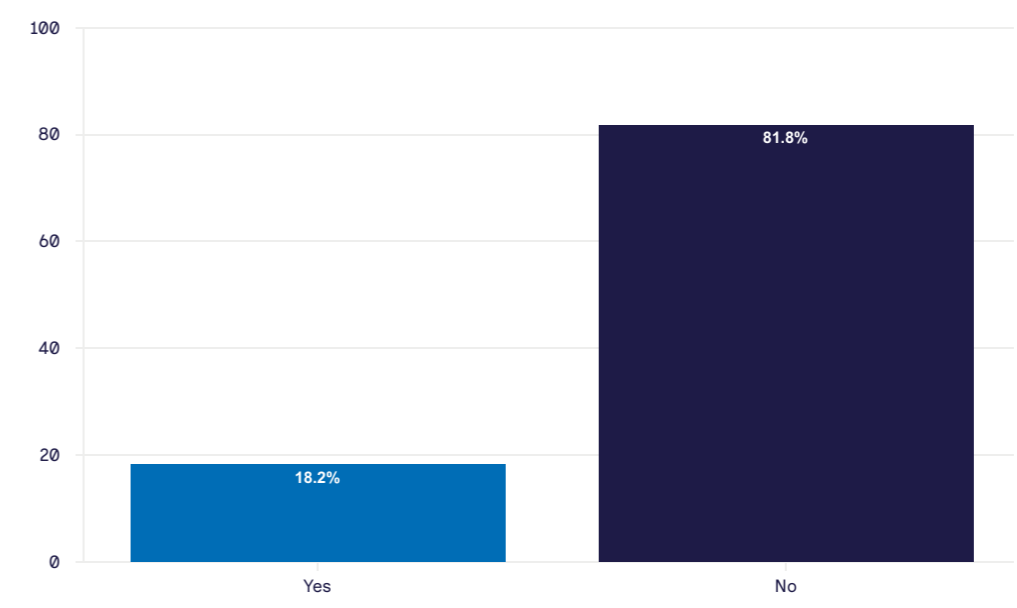


Fig. 1: Does your country/region have an explicit design policy or strategy?

n=20 | February 2026

Those respondents which reported the existence of a Design Policy framework in their context indicated that they have are aware of design being integrated into other policy areas (see Fig. 2).

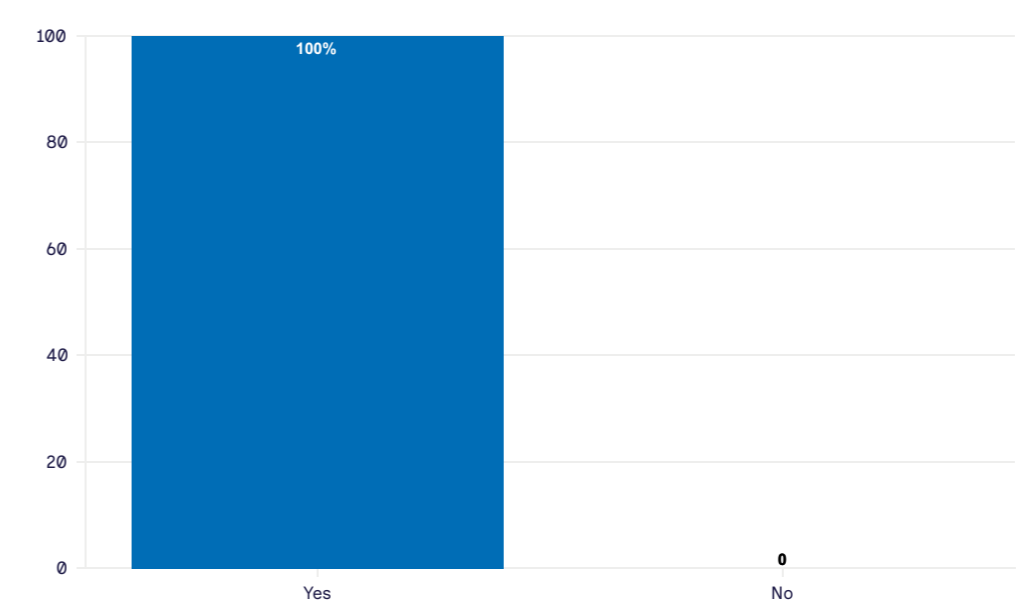


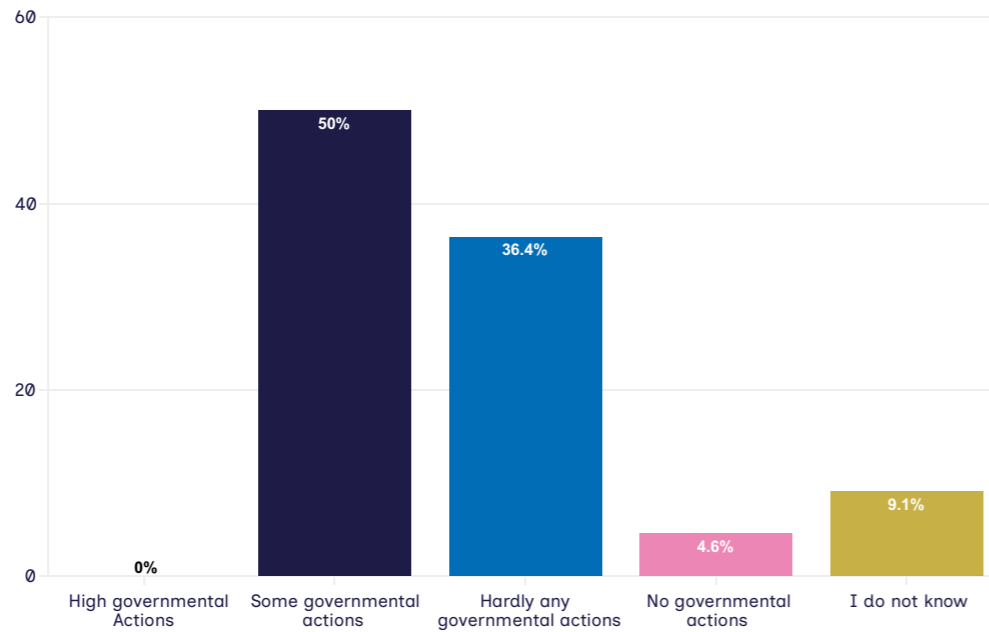
Fig. 2: Are you familiar with the integration of Design in one or more policies?

n=4 | February 2026

The respondents reported, based on their experience and knowledge, that the observable impact on governmental action remains limited. 50% of respondents report some level of governmental activity linked to design. However, 36% perceive hardly any action, approximately 5% report no action at all, and 9% indicate that they are not in a position to assess this (see Fig. 3).

Fig. 3: Based on your experience and knowledge: Where design is mentioned, integrated, or championed in policies in your country, to what extent does this lead to government action in your country?

n=20 | in % | February 2026



This distribution highlights a moderate but clearly limited impact. While half of the respondents observe some level of governmental response, this does not indicate systemic or far-reaching implementation. A combined 41% (hardly any + none) perceive little to no tangible governmental action resulting from design integration.

Conclusion

The results complement the Design Policy Mapping Report: the integration or mention of design in policy documents does not automatically translate into consistent or substantial governmental measures. Hence, not surprisingly, the study population self-reports a low effect of design when it is mentioned, integrated, or championed across various policies (see Fig. 4).

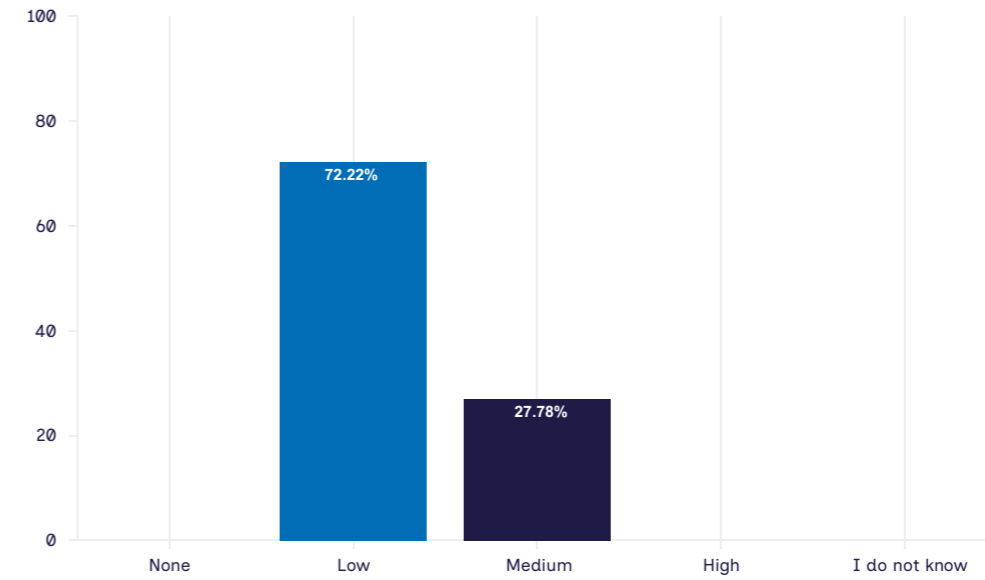


Fig. 4: To your knowledge, please rate the impact of design integration into policies in your country/region.

n=20 | February 2026

1.1 Design deployment in policy areas, where it is mentioned, integrated or championed

A total of 18 respondents answered the question. The results provide a nuanced picture of how design is operationalised where it is mentioned, integrated, or championed in policy frameworks.

The most visible forms of deployment are promotional in nature. **A majority report “specific governmental actions”, such as national awards or proactive support of design promotion (12 out of 17 responses).** Similarly, invitations to participate in roundtables and stakeholder discussions’ are relatively common (12 out of 18).

Government-funded studies on design impact present a more balanced distribution (8 out of 18 reporting such initiatives). While not dominant, this suggests that in some contexts governments seek to build an evidence base for design’s economic or societal contribution.

However, structural and regulatory embedding remains limited. Only 2 out of 17 respondents report that design is integrated as a “must-have” feature in public tenders. Likewise, only 2 out of 17 indicate that “design is included as a required partner in calls”, and only 3 out of 18 report “design science calls, grants, or research funding”.

Reporting obligations for designers—such as integration into risk assessments, product life cycles, or delivery chains—are equally rare (2 out of 17).

Conclusion

Overall, the results suggest that design integration in policy often leads to recognition through national awards or proactive design promotion, rather than to systemic transformation. **Design is valued with promotional and image-enhancing tools and acknowledged as a stakeholder. Still, Design isn’t acknowledged as a scientific field, nor as a feature in the areas where Design is part of policies.**

This mixed picture points to a significant “**policy-to-implementation gap**”. Addressing this gap will be essential if Design is to unfold its full potential as an economic, methodological, and societal force across Europe.

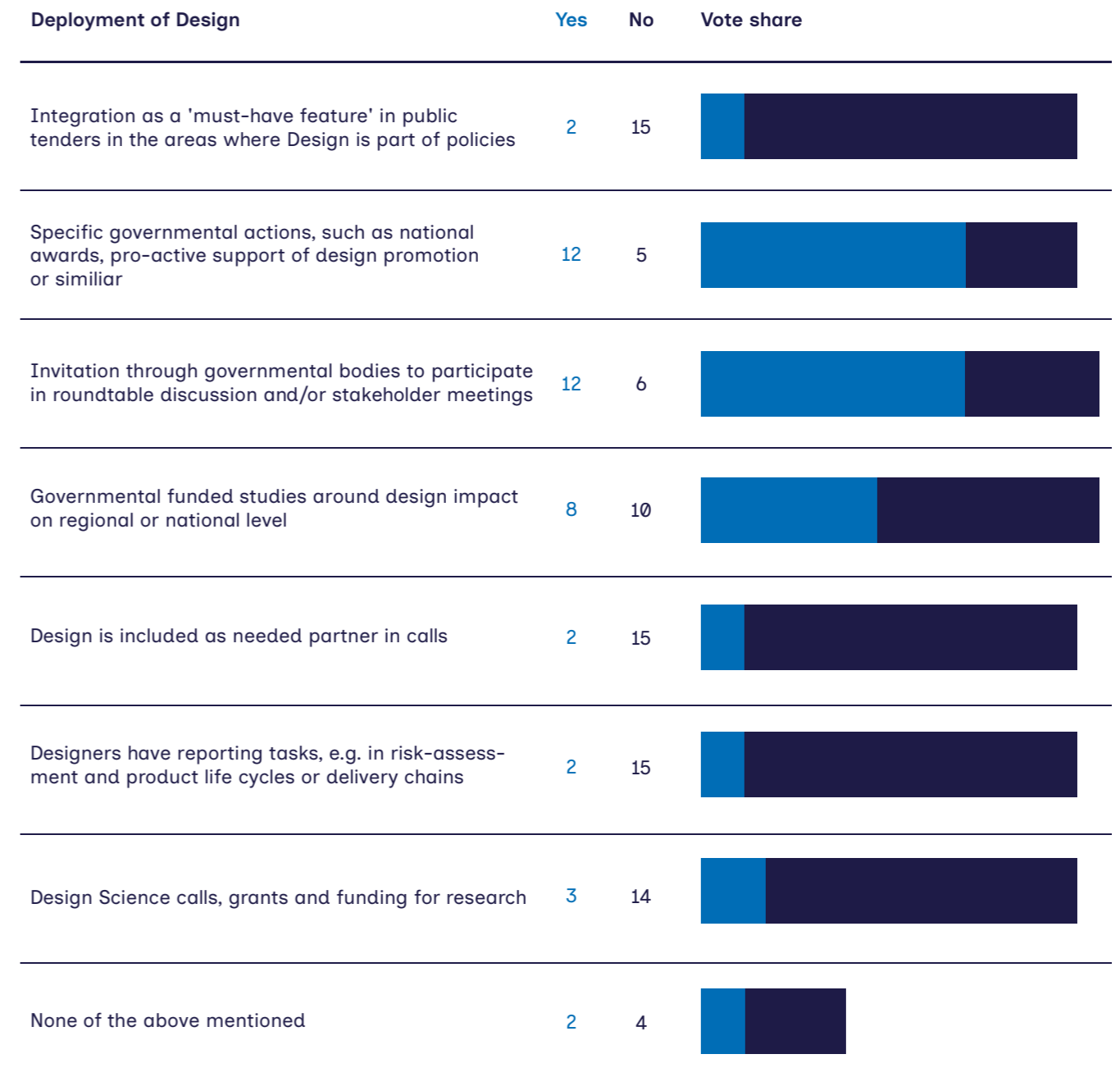


Fig. 5: Please indicate how Design is deployed in the policy areas where it is mentioned, integrated or championed.

n=18 | February 2026

1.2 Revision and monitoring of Design Policies

The answers of those BEDA Members Organisations where Design is integrated in various policies, indicate that this is only rarely subject to regular revision or systematic monitoring (see Fig 6 & 7). A minority of the BEDA Members Organisations report the existence of structured review mechanisms. At the same time, the majority either indicate that monitoring does not take place or are unaware of any formal evaluation processes.

Where monitoring exists, it is often informal or embedded in broader policy assessments rather than linked to dedicated design indicators. Clear KPIs or measurable benchmarks specifically tracking the impact of design integration are the exception rather than the rule.

Conclusion

This lack of regular revision and structured monitoring reinforces the broader finding of a policy-to-implementation gap. Without defined evaluation mechanisms, the effectiveness of design integration remains difficult to assess, limiting accountability, learning, and long-term strategic development.

Fig. 6: Is the integration of design in policies regularly revised?

n=12 | February 2026

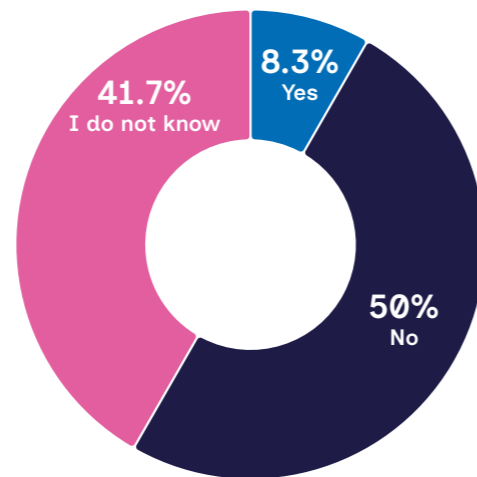
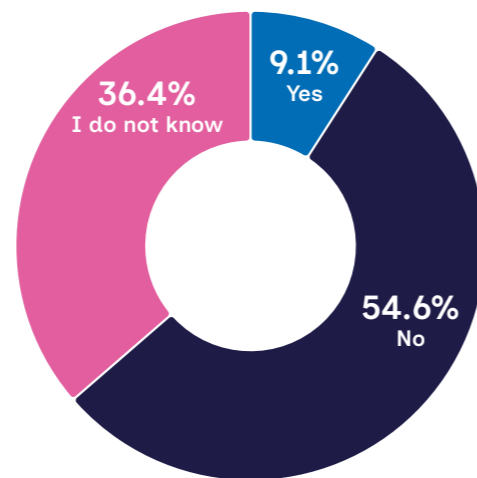


Fig. 7: Is the integration of design in policies regularly monitored?

n=11 | February 2026



2. Design in Governmental Proceedings

The question of the extent to which design methods are deployed across different governmental areas was posed only after respondents had confirmed that service design or other design methodologies are used within governmental actions. This sequencing is significant: the responses reflect contexts in which design methods are already acknowledged to play some role, rather than situations of complete absence. (see Fig. 8)

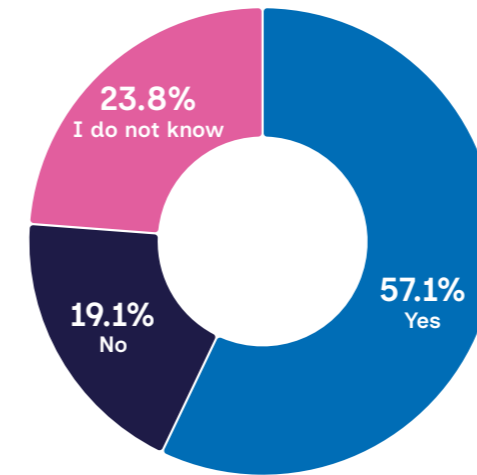


Fig. 8: Are design methods used, or is design deployed within governmental administration or services?

n=20 | February 2026

The results (see Fig. 9) indicate that the deployment of design methods is uneven and strongly context-dependent. **Where design methods are present, they are most frequently associated with “governmental digital strategies and innovation strategies”.** In these domains, design thinking, user-centred approaches, and service design methodologies are increasingly recognised as practical tools for improving public services, digital platforms, and citizen interaction. Those findings correspond with the broader findings of the “Design Policy Mapping Report in Europe”, which documents whether design is part of digitalisation agendas. **The report highlights that digital strategies often frame design as a public service tool, particularly in digital transformation processes and administrative reform.**

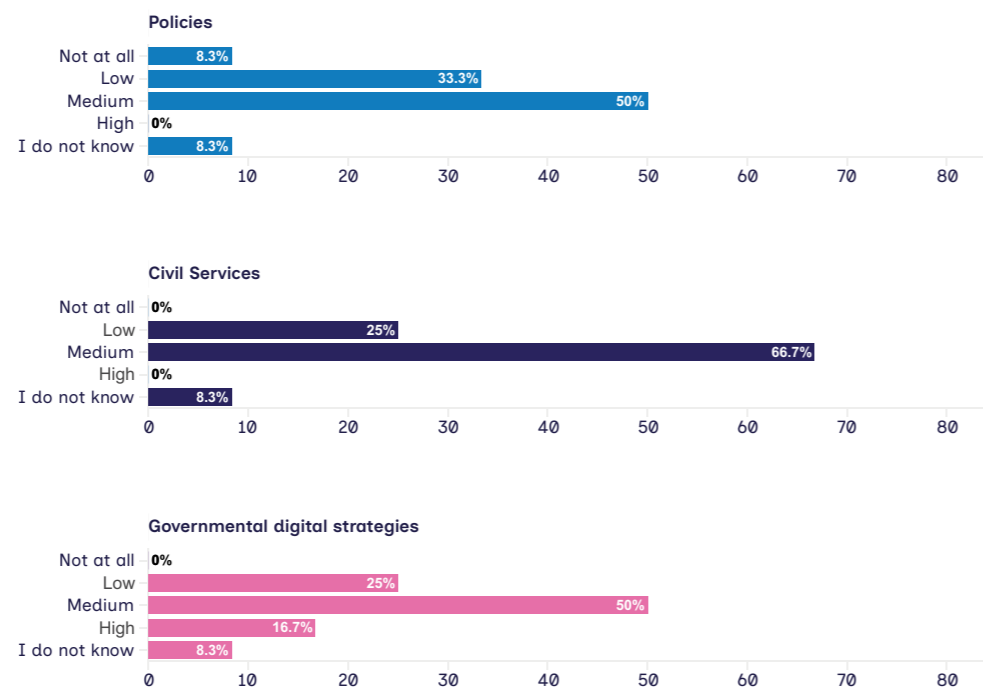
Additionally, design methods are reported—though less consistently—within “civil service contexts”, suggesting that training initiatives, innovation labs, or reform programmes introduce design approaches into administrative processes. These findings align with patterns observed in the national case studies in the Mapping Report, where public-sector innovation labs and chief design roles serve as institutional connectors for embedding design thinking into governance structures. However, such integration remains selective and often project-based rather than systemic.

By contrast, the deployment of design methods within “governmental procurement strategies and industrial strategies” remains limited. **Despite the Mapping Report’s identification of industrial competitiveness strategies as key policy families, design methodologies are not yet widely institutionalised** as mandatory or structural components within these frameworks. This highlights a structural disconnect: while design may be recognised in strategic documents, it is less frequently embedded in regulatory or economic instruments capable of generating large-scale impact.

In the area of “governmental PR and branding strategies”, design methods appear more naturally integrated, reflecting design’s traditional association with communication, identity, and visibility. This reinforces a broader structural pattern identified in both the survey and the Mapping Report: design is more readily deployed where it aligns with user experience, communication, and digital service delivery, and less so where it would influence economic structuring, procurement leverage, or binding regulatory mechanisms.

Fig. 9: To what extent are design methods deployed in the development of the following areas in your country/region?

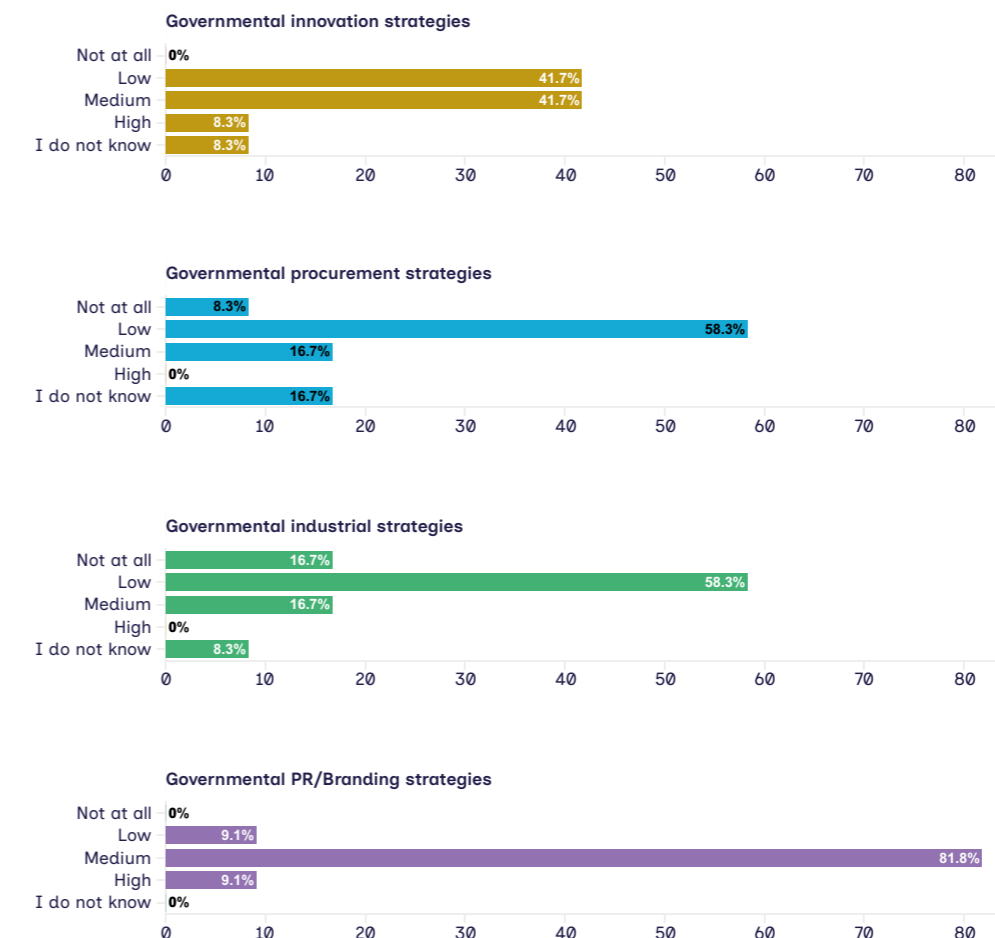
n=12 | February 2026



Conclusion

Overall, the findings suggest that design methods are primarily embedded in innovation-driven and digitally oriented reform agendas. **Their deployment is often situational and linked to transformation projects rather than forming part of a coherent, cross-governmental framework.**

This complements the broader structural diagnosis of the study and the Mapping Report: recognition of design as a methodology is growing, particularly in digital and public-service contexts, but its institutionalisation across governance systems remains partial and uneven. The result is a continued policy-to-implementation gap, where design methods are acknowledged as valuable, yet not consistently embedded across the full spectrum of governmental activity.

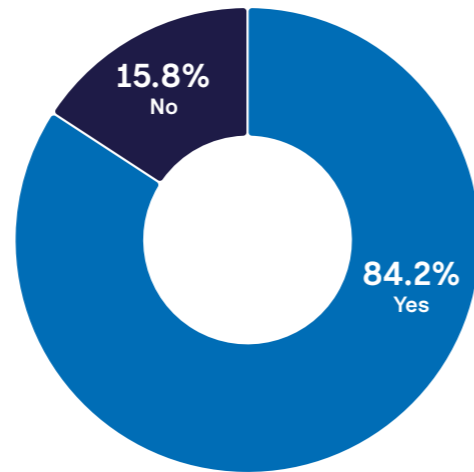


3. Design and National Advocacy

The question “Is your organisation in contact with national or regional ministerial or governmental bodies?” functioned as a fork question (Fig. 10). Only respondents who answered “yes” were subsequently asked to specify with whom they are in contact. This structure allows for a clearer distinction between the existence of institutional relationships and their scope.

Fig. 10: Is your organisation in contact with national or regional ministerial or governmental bodies?

n=19 | February 2026



The majority of respondents report that their organisation is in contact with governmental actors at the national or regional level (see Fig. 10). Among those who answered “yes,” (see Fig. 11) the follow-up responses indicate that contact most frequently occurs at the ‘national (federal) level’, particularly with:

- National (federal) ministers
- National policy officers
- Government decision-making bodies
- Ministries responsible for culture, innovation, economy, or related portfolios

In fewer cases, contact extends to regional or state-level authorities, depending on the country’s governance structure. The emphasis on national-level engagement suggests that design organisations primarily position themselves within central policy arenas rather than exclusively at local or municipal levels.

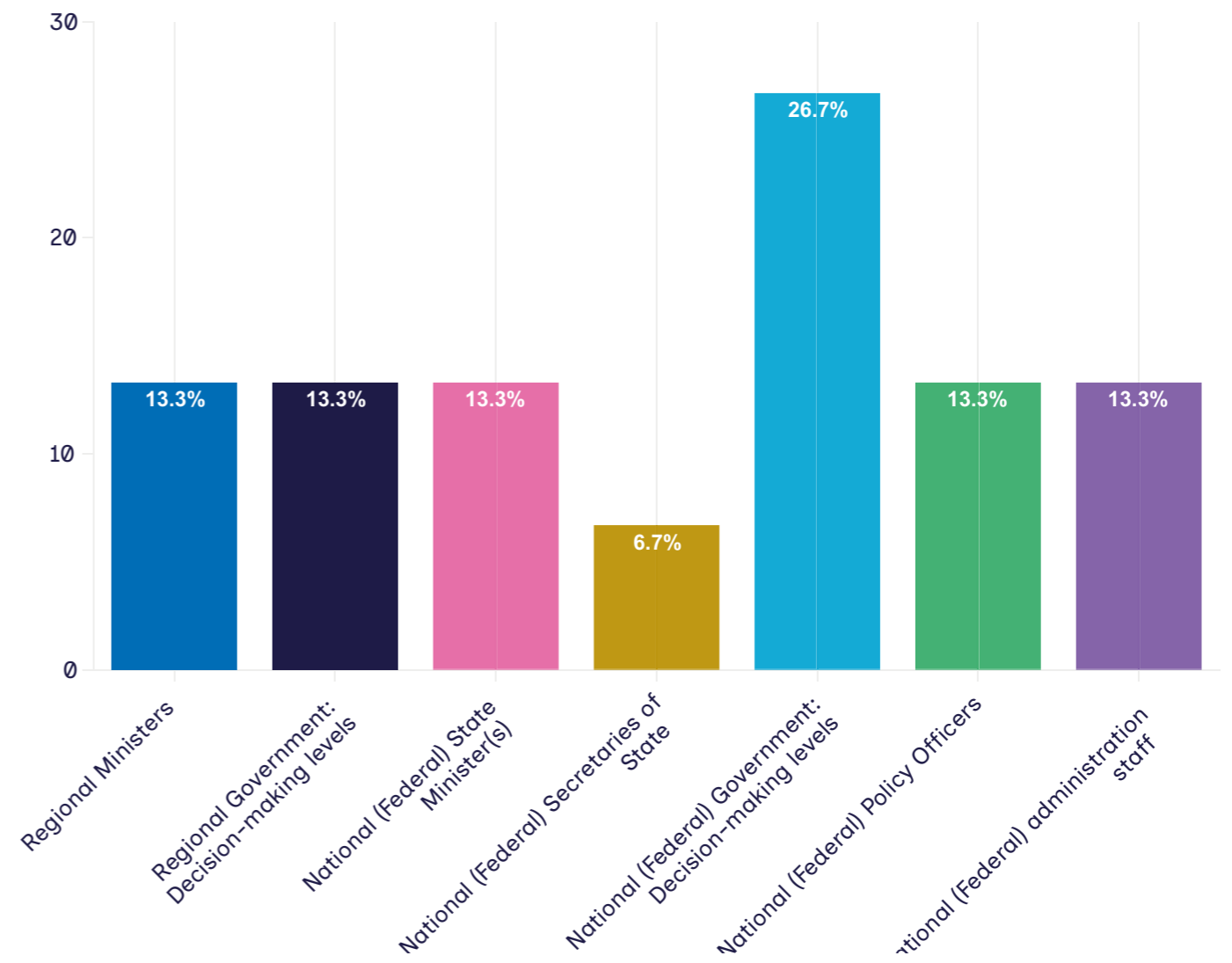
However, the existence of contact does not necessarily imply structural influence. When considered alongside other survey results—particularly those concerning limited procurement leverage, weak monitoring systems, and scarce funding instruments—it becomes clear that institutional access does not automatically translate into binding policy integration or implementation power.

Conclusion

The findings, therefore, point to an important distinction: design organisations are frequently recognised as relevant interlocutors within governmental systems and maintain formal channels of communication. These relationships remain consultative rather than regulatory or structural. That supports the broader conclusion of the study: while design is present in policy dialogues, its institutional embedding in governance frameworks remains uneven and often lacks enforceable mechanisms.

Fig. 11: We are in contact with...

n=15 | February 2026



4. Method

The survey was conducted as an online questionnaire, programmed using a paid version of Typeform. The survey was sent out on 10. January 2026, and closed on 31. January 2026.

4.1 Questionnaire Design

The questionnaire replicated the core data set from 2024 (section 1) and added questions dedicated to the topic of Design Policy and their implementation (section 2).

→ **Section 1:** The core data questions consisted of inquiries about the study population, their membership structure, the financial situation combined with a prospective outlook for the upcoming budget year, and the income structures. This core data set is a an ongoing questionnaire, used to create a long-term perspective on the development and situation of design associations and the design industry.

→ **Section 2:** The questions in section 2 were dedicated to the awareness of the ‚Design Policy Mapping Report‘ (Swiatek P., Hanke R.,2025) published November 2025, the impact of policy integration and design in governmental proceedings.

4.2 Studypopulation

The questionnaire was sent to n = 49 member associations, of which n = 20 answered the questionnaire completely (defined as answering over 90% of the questions). The study population covers, to a large extent, the European Union.

Additionally, all types of design-related associations (Design Centres, Design Promotional Organisations, Professional Design Associations, Umbrella Organisations, and Educational Institutions) were represented. (Fig.1).

4.3 Analysis, Evaluation and Synthesis

Numerical data was descriptively analysed using the dataset provided by Typeform. Answers to open questions were inductively analysed with a content analysis approach according to Mayring (2014). In case an Organisation answered twice the latest answer is part of the analysis.

4.4 Ethics

The study was conducted in adherence to the WMA Declaration of Helsinki, 2013. The study survey policy followed GDPR Article 13 of Germany. Each participant gave their individual and informed consent before the start of the questionnaire and agreed to the anonymous publication of the provided data.

The Design Policy Mapping Report

The report analysed over 200 national policies. The outcome highlighted, that only two dedicated Design Policies remain in Europe in 2025, yet the integration of Design in different policies became visible. Based on the content analysis a new framework for the integration of Design in policy was developed.

Mayring, Philipp. "Qualitative Inhaltsanalyse – Abgrenzungen, Spielarten, Weiterentwicklungen." Forum Qualitative Sozialforschung / Forum: Qualitative Social Research 20, no. 3 (2019): 3. <https://doi.org/10.17169/fqs-20.3.3343>.

Fig. 12 | BEDA Member Participation

n=20 | February 2026



- Austria**
designaustria ●
 - Belgium**
Designregio Kortrijk ●
Wallonie-Bruxelles Design/Mode (WBDM) ●
Design Museum of Ghent – Expertise Centre ●
Flanders District of Creativity (Flanders DC) ●
 - Estonia**
Estonian Design Centre ●
 - France**
Alliance Française des Designers ●
APCI – Promotion du Design ●
 - Germany**
bayern design ●
Deutscher Designtag ●
 - Iceland**
Iceland Design and Architecture ●
 - Ireland**
Design & Crafts Council Ireland (DCCI) ●
Institute of Designers in Ireland (IDI) ●
 - Italy**
AIAP – Associazione Italiana Design della Comunicazione Visiva ●
 - Latvia**
Latvian Design Centre ●
 - Netherlands**
CLICKNL ●
 - Poland**
PPNT Gdynia | Design Centre ●
 - Spain**
READ – Spanish Network of Design Associations ●
 - Switzerland**
Swiss Design Association (SDA) ●
 - United Kingdom**
Design Business Association (DBA) ●
-
- Design Centre ●
 - Professional Design Association ●
 - Design Promotion Institution ●
 - Government Agency ●
 - National Design Umbrella Association ●

MADres is a strategic initiative by BEDA and co-funded by the European Union.

MADres advances design as a key enabler of Europe's transformation for sustainable growth and economic value.

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