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# USAID KOSOVO PRIVATE ENTERPRISE PROGRAM

## An Assessment of the Design Requirements of the Furniture Industry in Kosovo

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Implemented by  
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# AN ASSESSMENT OF THE DESIGN REQUIREMENTS OF THE FURNITURE INDUSTRY IN KOSOVO

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Kosovo Private Enterprise Program project "An Assessment of the Design Requirements of the Furniture Industry in Kosovo"  
Contract No. No. EEM-I-07-00007-00, TO #2

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# CONTENTS

1. PROGRAME OBJECTIVES.....	4
2. ASSIGNMENT OBJECTIVES .....	5
3. ASSIGNMENT NOTE.....	6
4. REPORT ON DELIVERABLES-PHASE ONE .....	7
5. ASSESSMENT OF INDUSTRY DESIGN TRAINING REQUIREMENTS ...	12
6. ASSESSMENT OF DESIGN TRAINING IN KOSOVO.....	16
7. LOCAL PARTNER/CONSULTANT.....	20
8. DEBRIEFING WITH KPEP AND AWPK-PHASE 1 .....	21
9. SUMMARY OF FINDINGS AND RECOMMENDATIONS.....	22
10. DELIVERABLES-HOME BASE STAGE .....	28
11. WORK PROGRAMME-PHASE TWO .....	29
ANNEXES.....	30

## 1. PROGRAMME OBJECTIVES

KPEP's strategy for the wood processing sector is to improve industry's ability to meet recognised international standards and designs. The goal is to ensure that future designs of wood products will be compatible with market needs. Overall goals are to increase sales with a focus on exports, while at the same time increasing employment in the industry.

- Improving local industrial/furniture design capability to meet market needs
- Establishing local training capabilities to upgrade the skills of designers in furniture manufacturing/wood processing industry.

*(Please refer to Appendix A for complete terms of reference)*

## 2.ASSIGNMENT OBJECTIVES

- An understanding of the current state of furniture design in Kosovo
- An understanding of the training needs of current and future industrial/furniture designers in Kosovo
- Recommend an action plan to address the identified training needs based on best practices in design training.
- Formulate and prepare a pilot training programme to meet the most urgent needs of the industry.

*(Please refer to Appendix A for complete terms of reference)*

### 3.ASSIGNMENT NOTE

It should be noted that the programme objectives as stated by KPEP refers to the wood processing sector that includes processed timber, wood construction products (i.e. windows, doors and flooring) and wooden furniture. However, the assignment objectives of this project refer only to furniture products and furniture design. The focus of this report, therefore, concentrates on the design and manufacture of furniture for export and not on wood processing in general.

As the time allocated to this initial assessment was limited, this analysis of the industry design requirements can only be of a general nature. Only the most export ready companies were visited and this report is based on their abilities and needs.

## 4. REPORT ON DELIVERABLES-PHASE ONE

### 4.1. Product Design Critique Form/Design Audit Form

The 'Statement of Work' requested a 'Design Critique Form' prior to the visiting the Natyra Furniture Fair. This was not possible due to the late decision and approval to travel to Kosovo. However a brief assessment of the exhibition, the standard of the exhibits and the quality of furniture designs are contained later in this report.

The concept of a design critique form remains an issue, as design can quite often be a subjective discipline which is difficult to mark in a scoring format (as requested by the Statement of Work). The furniture industry in Kosovo relies on copying and adapting existing designs and, therefore, a critique form using a scoring system may not be so productive and would be of little benefit to the project.

However, an information gathering exercise would be beneficial as there is no complete database available on the furniture manufacturing companies in Kosovo. AWPK and KPEP have limited knowledge on the capabilities of individual manufactures or the industry as a whole. A full design audit would cover these areas and more, giving valuable information to assist the design process. Once complete this information could be made available to development agencies and potential buyers.

The furniture design process cannot exist in a vacuum; it relies on the balance of knowledge between manufacturing processing abilities and intended market information. The audit form would cover all areas of the manufacturing and marketing process and would be broken down into the following sections:

- Background Information
- Product Policy
- Manufacture and Distribution
- Processing Equipment
- Marketing and PR
- Design and Development

It is proposed that a specific design audit form be developed for the furniture sector in Kosovo and be submitted prior to the phase two visit of this project. It is hoped that this form is completed by furniture sector companies prior to the completion of this project.

### 4.2. Design Competition

The 'Statement of Work' requested recommendation to AWPK on how a furniture design competition could be organised, this has been considered by the consultant during the visit and it is the consultants opinion that it is too premature for this type of proposition. To have a design competition for furniture you must have designers working in the industry, at present there are not sufficient numbers employed either part time or full time in the industry to run such a competition.

It is proposed that a furniture design competition is organised at the end of the initial design training programme and this proposal is outlined later in this document.

A student design/art competition could also be possible for the future, in order to develop interest in the furniture industry and this suggestion has been mentioned to AWPK and will be discussed further and formulated prior to the completion of this programme.

### **4.3. Report on Natyra Furniture Fair 2009**

The show was well presented with most exhibitors making huge efforts to present their products in a design and market orientated manner. An exhibition brochure held all relevant information regarding the exhibitors and the event in total seemed professional and well organised.

Excluding the exhibitors in wood construction products and exhibitors of wood machinery there were less than ten exhibitors dealing primarily with wooden furniture. There were some other wood product companies such as children's playground equipment and a company producing wooden toys.

A number of the companies dealing with kitchen and interior design schemes showed great design ability and quality designed products. Although many of the furniture companies displayed quality furniture products, there was little innovation and most designs were adaptations of existing designs.

A selection of carved furniture products designed for the local markets were not of any great design sensibility or quality. Most of the traditional designed products, with the exception of the traditional hand painted chests, would be unsuitable for any international export market.

### **4.4. Individual Furniture Company Reports**

The product ranges of a number of companies were assessed, both at the show and with some subsequent factory visits. Brief individual reports follow:

#### **Fabrika e Mobiljeve Ahikos**

This company was viewed at the trade show with a subsequent factory visit.

Part of this company has a working relationship with an Italian partner producing upholstered furniture. Ahikos, remains a separate company with a totally underutilised wood production facility. The potential for design development with this company is very strong, as management already have the mind set to link-up and expand into international markets.

#### **Elnor**

This company was viewed at the trade show with a subsequent factory visit.

Presently employ an architect to cover a number of in-house design requirements, from brochure design to one off commissioned pieces of furniture. There is not much evidence that this design influence has filtered down into their main product lines.

The facility and equipment that this company has is perfect for the design development of commercial ranges of wooden tables and chairs. A marketing and design programme would greatly assist this company. Design direction should be given in conjunction with their existing designer.

#### **Tre Yje Design**

This company was viewed at the trade show only.

This is a small company with an owner with an understanding of the importance of design and product development. This company is making efforts to produce something different and unique but perhaps the company is trying too hard and some of the effort is somewhat misplaced. Their design could be refined and simplified to make them more commercial and economical to produce. However, this company shows great promise and management are very responsive and keen to develop.

#### Tefik Çanga Design

This company was viewed at the trade show with a subsequent factory visit.

This company has tentative links with a German Company with whom they are developing a range of upholstered leather chairs. These chairs were the best products viewed during this assessment period. Generally this company displayed the best range of quality products of any company visited and shows great potential for international market development.

However they do not have an in-house designer and most of their designs are derivatives of existing designs. But it would take little effort to set this company in the right direction if they would only invest in a design development programme.

#### Kosovawood

This company did not exhibit at Natyra and was viewed by a factory visit.

This company has all the components for success in an international market, not only does it have a very good facility that is well equipped it also uses the indigenous wood, beech. Its also has a very keen and capable young manager/owner who has the ability to make this company develop and deliver into international markets.

Their showroom is very poor and the products on display do not do justice to the companies' capabilities. The biggest drawback with this company is that it has no design direction or design policy and does not have access to design expertise. The product lines are very limited and of low design standard. This company should be capitalising on its strengths and producing a much broader range of products, especially in the area of occasional furniture.

#### Lesna

This company was viewed at the trade show with a subsequent factory visit.

This company is in the process of moving to a purpose built facility, so it would be unfair to make an assessment on the premises that was visited. This company is well financed and have invested heavily in facilities and equipment, yet their investment in design development is poor. This is a kitchen cabinet manufacturing company, supplying the local market. They maintain a large scale retail space, selling mostly imported furniture and products, with some of their own products mixed in.

Because of its furniture import business this company should be more design aware and more involved in design development. They do employ designers for interior design layouts and space planning rather than furniture design and product development. They also employ a production engineer to manage and monitor production output.

A company design audit is required to assess component and carcass construction and this should be followed up with a design development programme for the introduction of a new ranges of kitchen styles and designs. This company, using existing fabrication and construction techniques, has the potential to expand beyond the kitchen market and should consider product development for the bedroom and office furniture markets.

Berto

This company did not exhibit at Natyra and was viewed by a factory visit.

Although this company has some very up to date equipment and a comprehensive facility, they remain held back by their reluctance to expand outside the home market. This company is also a big local retailer and seems to focus on this side of the business.

Until the mindset of this company changes and possible the younger generation gets more actively involved this company will remain supplying the local market.

Gacaferi

This company did not exhibit at Natyra and was viewed by a factory visit.

This is a very professional operation with modern equipment, excellent facility and well structured production line. With the exception of the front section, the retail show room is well designed and beautifully finished. Also their backup interior design team offer a very professional service to local clients.

The owner of this company has invested heavily in raw materials and hardware from Italy and producing Italian styled contemporary kitchens. This has given this company an edge over most other kitchen companies in Kosovo. The only negative downside to this is that he has primarily become an assembly plant for bespoke and made-to-order kitchens.

This company is quite confident in what they are doing, and should be given every encouragement to achieve their aims.

#### **4.5. Schedule of Meetings and Visits with Manufacturers, Designers, Associations and Educational Establishments**

Wednesday 6

Arrival

Review of Natyra Furniture Trade Show

Meeting with KPEP – Burim Meqa

Meeting with  
Marketing Consultant – William Vernon

Thursday 7

Meeting with KPEP - Burim Meqa

John MacKillop

Vjosa Mullatahiri

Factory Visit to - Tefik Çanga Design

Fabrika e Mobiljeve Ahikos

Educational Visit - University of Prishtina

Faculty of Technical Applied Science – Ferizaj/Uroševac

Visit to Natyra Furniture Trade Show

Visit Meeting with AWPK - Secretary - Arieta

Ukai

Elnor

Tre Yje Design

Friday 8

Meeting with Kosovo Association of Architects

Meeting with KPEP - Vjosa Mullatahiri

Visit to Natyra Furniture Trade Show

Meeting with-  
Educational Visit to- Tefik Çanga Design  
University of Prishtina – Public- Faculty of Architecture  
AAB University – Private - Faculty of Architecture

Saturday 9  
Factory Visit to - Gacaferi  
Kosovawood  
Visit to Natyra Furniture Trade Show

Sunday 10  
Meeting with Marketing Consultant – William Vernon

Monday 11  
Factory Visit to - Berto  
Elnor

Tuesday 13  
Meeting with KPEP - John MacKillop  
Educational Visit - V.T.C - Pristina  
V.T.C – Gjilan/Gnjilane  
Don Bosco – Pristina

Wednesday 14  
Meeting with KPEP - John MacKillop  
Meeting with interested Architect  
Educational Visit V.E.T – Pejë/Peć

Thursday 15  
Educational Visit - University of Prishtina  
Faculty of Art  
Meeting with Dept of Labour  
Head of V.T.Cs

Friday 16  
Meeting with KPEP - David Cowles  
Meeting with AWPk - Secretary – Arieta  
Burim Meqa  
William Vernon  
Factory Visit - Lesna  
Meeting with Dept of Education  
Head of V.E.Ts

Saturday 17  
Debriefing Report  
Departure

## 5. ASSESSMENT OF INDUSTRY DESIGN TRAINING REQUIREMENTS

### 5.1. Industry Overview

It is the considered opinion of this assessment and other international consultants, that this sector has manufacturing facilities of a standard capable to produce export quality furniture at a competitive price. Many companies have invested heavily in modern state of the art processing equipment, capable of mass producing quality furniture. Generally the factories are well laid out and production processes well organised. The workforce seems well trained in traditional and modern techniques and supervisors are well informed and capable.

The management/owners stand out as a very progressive and determined group of people keen to learn and develop the industry.

The only problem seems to be the supply of timber and raw materials. Few of the companies visited used native timbers i.e. beech, which is disappointing considering the positive reported information on natural timber resources. If Kosovo could develop its supply of certified timber it would greatly help in the marketing of its manufacturing capabilities. Furniture produced from certified timber not only carried a higher premium but it is also a valuable unique selling point and provides opportunities for branding and marketing campaigns.

With so much imported raw material and fittings there is little economic reason, apart from the low labour costs, for buying furniture made in Kosovo. This may be sustainable in the short term but labour costs may rise and this could have a negative effect across the industry in the future.

It is evident that many of the furniture industry issues have already been addressed by other programmes and other development agencies. Additional concerns over timber drying and product efficiency are already been identified. The two main areas remaining to be resolved are product design/development and market promotion/sales.

These two areas are closely linked as they rely on each other for success; in the absence of specifically designed products new markets can be difficult to penetrate and, equally so, exposure to and an understanding of these new markets is critical for the product development process. Good design, in this situation of economical development, requires market led design best suited to the materials, skills, scale and capabilities of individual companies. To succeed in international markets product development strategies will need to consider not only the purchasing and aesthetic preferences of individual target markets but should consider issues such as quality control, conforming to standards and cost effective production.

### 5.2. Industry Design Requirements

At present most if not all furniture products produced by the sector are adaptations/copies of existing designs. This may be acceptable for the local and regional market but if companies would consider developing into other international markets design development would need to advance to an original level of creativity. Companies need to develop and capture market sectors by creatively using design and innovation to develop new market led designs.

Likewise, if manufacturers within this sector consider working with international buyers/partners then their in-house design/development capabilities would have to be

improved to meet these challenges. There is a need for the establishment of design development sections in furniture companies with personnel capable of interpretation client/buyer requirements and producing prototypes for assessment and market testing.

At present there are only a few companies employing architects and engineering/wood technicians in the area of product design/development. This group would be 'untrained specific' in the area of furniture design and would have little or no knowledge of designing furniture for export markets. However it is positive that management are now seeing the benefits of employing a designer to work on commissioned projects and products for production. There remains a strong need to develop personnel at different levels of the design production process, from the creative designer, to the technical draftsman and to the prototyping specialist with manufacturing processing knowledge.

The need for design skills should not be taken in isolation to the training needs of the industry as a whole. Except for one V.E.T school in Pejë/Peć all factory floor workforce training happens onsite, this type of training may be adequate for some factory jobs but is restrictive if a higher level of workmanship and leadership is required. There is a need for an up-skilling programme for all the workforce, which if implemented, would also allow for the introduction of technical design development skills.

### 5.3. Recommendations

The following recommendations for design training for the furniture sector are broken down into three main areas:

Short Term	Workshops/Seminars
Medium Term	Skills Development Programme
Long Term	National Design Educational Programme

Please note that within the remit and time constraints of this assignment only the short term proposal will be dealt at this time. The medium term and the long term proposals are dependant on further discussions with interested parties.

#### 5.3.1. Short Term - Specialised Training Workshops

To address the situation that exists at present the short term answer is to run a series of workshops and seminars which would, firstly help inform industry management of the need to invest in the area of design development. Secondly it would address the main issues lacking in the existing staff and encourage suitable interested parties into working with the wood/furniture sector.

Proposed Workshops/Seminars in Design for the Export Market

- Manufacturing Process
- Design/Creativity Process
- Design for International Markets

(Please refer to summary of findings and recommendations for additional information)

#### 5.3.2. Medium Term - Skills Development Programme

Short specialised courses of study aimed at addressing technical/production needs of industry personnel. These courses would have prerequisite requirements for entry and would be primarily aimed at improving the skills of existing staff in the sector.

Courses would be considered in conjunction with other consultants and the AWPK members, a suggested list would be:

- Quality Control
- Pattern Cutting
- Advance Upholstery Techniques
- Auto CAD
- CNC Processing
- International Standards
- Finishing
- Health & Safety
- Design Basics
- Design Technology
- Timber Processing
- Tooling
- Material Technology

This group of subjects or similar could be combined into a programme of study that would be accredited into a national technical qualification for the industry.

### **5.3.3. Long Term – National Design Education Programme**

The educational levels referred to in this section are based on the Bologna Agreement (refer to Appendix B)

#### **Semi Skilled - Wood Processing Operatives**

A similar course is presently being offered by V.E.T. Pejë/Peć with facilities sponsored by GTZ. Three year study programme, with industry placement.

Grade – Certificate – Level 4-6

#### **Skilled -**

Wood Processing Technicians  
Wood Technology Technicians  
Wood Design Technicians

These courses could be offered by V.E.T. Pejë/Peć with improved facilities or similar school/college with suitable facilities. It is proposed that this would be a four year programme of study with industry placement.

Grade – Diploma – Level 6

#### **Specialised - Product/Furniture Designer**

International Marketing Studies  
Production Engineer in Wood Technologies

It is envisaged that these programmes of study would be offered at university level.

Grade – Bachelors Degree – Level 7-8

## 6. ASSESSMENT OF DESIGN TRAINING IN KOSOVO

The time allocated to this section of the assignment was limited and, therefore, the consultant can only provide a briefest overview of design training in Kosovo. The consultant wishes to note that with just brief meetings at each education centre it is impossible to provide an informed and definitive overview on such an important subject as education and training.

### 6.1. University Education

#### 6.1.1. University of Prishtina, Faculty of Technical Applied Science – Ferizaj / Uroševac

This university is the only education centre that runs wood science technology courses and therefore this might suggest that it holds the greatest potential for the development of further courses for the wood processing sector. The situation on the ground, however, provided a totally different picture, as the facilities are, presently, very limited and teaching of wood science technology is purely academic. There are no facilities for wood processing and no expressions of interest to provide additional courses catering for the more practical requirements of the wood processing industry.

Management did, however, express an interest in design as a possible component subject on existing or future course syllabi. The consultant is of the opinion that the university may not be the best environment for a creative design programme and that the courses offered may be too demanding academically for the technical training needs of the industry.

It is recommended that this university should be revisited and further discussions held with management to further investigate possible avenues for course development.

#### 6.1.2. University of Prishtina, Faculty of Architecture

This is a very well established programme of study with well an acknowledged record of student achievement. Due to the specialised nature of the course and, indeed, of the profession of architecture itself the consultant has some reservations as to whether the subject of furniture design could be successfully amalgamated into the existing programme or developed into a new programme. There is also some concern regarding the timeframes necessary for new course development and approval at this faculty.

The staff member interviewed was not particularly well informed of the capabilities of the furniture industry in Kosovo. There was no obvious interest in the development of a furniture/product design programme.

This development programme should continue to develop links and encourage the interest of architectural students possibly through a student furniture design competition.

#### 6.1.3. AAB University – Private, Faculty of Architecture

This college showed great potential and were positively receptive to the concept of furniture/product design. They would have both architectural and interior design students interested in the area of furniture design. There are no wood workshop facilities, but the general facilities are very good. The benefit of working with a private university is that the timeframe to deliver of a new course could be relatively short.

This is a fee paying university and, with the best students being selected by the public universities, the standard here is perceived to be lower than in public universities. The main problem with the private universities would be that they are presently unaccredited and are unable to take in new students. Until circumstances change within this sector it would be best to hold back from working with the private universities. This situation should be revisited as soon as accreditation issues are resolved.

#### **6.1.4. University of Prishtina, Faculty of Art**

The Department of Design is comparatively small within the Faculty of Art and the main focus is on graphic design with students studying to MA level. The sculpture section display great potential despite having limited facilities. The most positive aspect of this university was the enthusiasm of design staff and management. They have been planning the concept of expanding the design programme to include furniture/product design and would be very receptive to any assistance that could be given on curriculum development. They also indicated that space could be made available for such a programme but that they would need some assistance in staffing and equipment.

The consultant would recommend that this location be considered for the development of a creative furniture/design design programme. To ensure a successful programme it would be imperative that links between this college and industry are established at an early stage so that designer students establish a working relationship with industry and graduate with a production bias approach to furniture design.

#### **6.2. Vocational Training Centres – V.T.C**

VTCs offer valuable basic skills programmes to unemployed persons in order to assist them into the workplace. Programmes are short and focused on persons who require a defined specific skill. The schools visited offered programmes in office skills, business administration skills, cookery skills, graphic design computer programmes, and carpentry skills.

A programme of study could be developed in basic skill development to assist and encourage unemployed persons into the wood sector industry.

The following are some issues that would need to be resolved before skill developments programmes for the wood sector could be based within the VTC centres.

##### **Entry Requirements**

To enter into a training programme the applicant must be registered as unemployed therefore the decision regarding the suitability of applicants rest with the Department of Labour and not the individual training centres.

No prerequisite educational entry requirement is required.

##### **Entry Points**

Access to courses is at the discretion of the Dept. of Labour. Students can join courses at any time.

##### **Duration**

Courses are normally of three month duration; however this can be reduced to as little as a month if students wish to reduce the number of subjects studied. The three month period can be increased to six months in certain circumstances, depending on the capability of individual students.

Three hours of study are provided each day and there is no requirement for out of school work.

There is no set time frame for students to complete a programme of study.

#### Staffing

Staffing is limited to full time teachers employed by the Department of Labour. At present special skilled part time teachers from industry are excluded. The present level of teaching and the lack of special skills training present limitations for development.

#### Programme of Study

Existing programmes of study are broken down into modules and students are permitted to select modules within the programme. Modules are rarely sequential.

#### Educational Standard

A number of factors, such as short course duration, unregulated student entry requirements and poor teaching staff levels, are reflected in educational standards that may be considered to be below average. There are no defined assessment standards and assessment is primarily done on a theory rather than a practical basis.

Also, because entry points remain undefined the teaching is spread over a group of students at varying levels of skill and ability. There seems to be no supervision of assessments or recognised accreditation procedures. Courses are directed to teach skills and therefore an understanding of the role for creativity and the importance of the design process is somewhat limited.

#### Facilities

Facilities at VTCs are very limited, however, some schools have computer facilities. The VTC in Gjilan/Gnjilane, providing courses in wood working studies, has a very limited and out-dated range of equipment. Supplies of instructional and construction materials are very limited on the practical courses.

### **6.3. Vocational Education Training – V.E.T**

The school at Pejë/Peć, set up with funding from GTZ, has a good workshop space and is fully equipped with wood processing machines. The staff members are capable and expressed an interest in developing additional programmes. A particular strength of this facility is an existing programme that encourages industrial links between the school and local furniture companies. This facility is very suitable for the development of training programmes for technical students interested in a career in wood processing.

It transpires that Pejë/Peć is to receive a Department of Education Centre of Excellence accreditation, specific to the wood sector, within the next two years. Therefore, it is important that this project encourages and recommends that one of the programmes delivered at the new centre will be a design technician course. The course content has been acquired for review by the consultant and recommendations will be provided for additional modules specifically designed for providing training for design technicians. Additional curriculum development work will be undertaken, in conjunction with KPEP and the Department of Education, as part of this assignment. It is recommended that this course be offered outboard of normal class hours to provide better access to interested individuals already working in industry.

### **6.4. Missing Sector of Education - Technical Skills Programme**

There is a sector of education, normally termed Higher Education, that is missing at present and, therefore, a void exists between the school and technical school sector and university

sector. Students who are unsuccessful in gaining entry to university level, or those who are unable to commit to a further four years of study have no viable or alternative route for self improvement or further study. This situation leads to a workforce that is either under-trained or over-trained for many of the posts available within the wood processing sector.

In the long term it is of great important that this situation be addressed by Government. However, in the short term and in absence of any viable alternative, an interim solution is required. Following discussions with AWPK it is proposed that their organisation prepare and deliver formal and structured training workshops and seminars for the employees of their members. The workshops and training seminars could be held in the space provided by GTZ, however, assistance and support in preparing training curriculum and staff training would be necessary and funding for some additional equipment, such as computers would be required. This proposal would not only increase the profile and influence of AWPK but it would also enable the industry to grow and develop a more integrated and capable workforce.

The consultant acknowledges that this proposed programme is a considerable undertaking and would require further discussions and planning with interested parties.

## 7. LOCAL PARTNER/CONSULTANT

The 'Statement of Work' for this assignment referred to a local training partner who would be identified during the first phase of the project. No single individual or organisation was identified as a suitable or interested training partner. KPEP may wish to employ a local consultant with a design background to provide this supporting role. Alternatively, it is suggested that KPEP delay the appointment of a training partner until the workshops and seminars are completed as one of the seminar delegates may be identified as a worthy candidate for the local training partner position.

## 8. DEBRIEFING WITH KPEP AND AWPK—PHASE 1

An initial report on the finding and recommendations on the design training needs of the furniture industry were presented to the secretary of the association AWPK. Also present at the meeting were Burim Meqa, KPEP – wood processing specialist and William Vernon, furniture marketing consultant. The focus of the report was on the immediate training needs of the industry as set out in this assignments 'Statement of Work'.

The concept of dividing the workshop into three sections was well received as was the decision to open the participation in the programme to interested designers. It was confirmed that a fee would be charged for the workshops to participating manufactures and that interested designers would be sponsored.

It was concluded that it was important that all participants of the programme were members of a design development team and that they could fully participate and develop designs and prototypes for the competition.

It was concluded that the seminars could be held at the AWPK premises and that lunch should be provided in order to contain the focus of the group.

For the factory visits it was suggested that a mini bus would be desirable to transport the participants, as a group, to the venues.

In regard to the schedule the secretary of the association felt that the seminar programme would be better attended if it was held outside the manufacturers busy period, i.e. summer months. This is because many Kosovo people return home and order furniture for homes that they are building. It was also suggested that outside of the summer months would be a cooler period to hold such a programme.

The idea of developing a half day talk to senior managers and company owners in order to encourage them to establish a design development team and to participate actively in this programme, was consider to be a positive one. This presentation would also give an overview of the content of the main programme, which should remain flexible in order for this senior group to have an input into its content. It was also suggested that this short programme would be an avenue to attract members from government departments responsible for educational training into the programme.

The idea of introducing a competition into the programme was welcomed and it was suggested if the winners from this competition could be entered into an international design competition. It was also suggested that an exhibition could be held to display the wining entries.

The proposal to introduce an organised design study tour was also greatly supported and the possibility of linking the study tour with a marketing campaign for Kosovo furniture producers was also suggested.

## 9. SUMMARY OF FINDINGS AND RECOMMENDATIONS

To summarise, the main objectives of this project, as set out in the 'Statement of Work', were to assess the state of the design industry in Kosovo, and to assess the education and training system for designers in Kosovo, in relation to the furniture manufacturers potential to develop into export markets.

### 9.1. Findings

#### **The State of the Design Industry in Kosovo**

At present there no design-led manufacturers in the furniture sector, developing new or innovative designs suitable for international markets. However, there are many capable manufacturers, producing adaptations/copies of furniture products with strong export potential. Furniture companies, in general, are well equipped with modern technology, and workforce capable of developing new market-led designs given the right opportunities.

Many furniture company owners and key management staff are conscious and market aware regarding new furniture design, products and accessories, either from having travelled abroad or from viewing magazines and international furniture company brochures. There are also a number of high end furniture showrooms in Kosovo selling international and contemporary designs, so market awareness is quite high. From the products on view during the Natyra 2009 show it is was evident that there was an appreciation and awareness of modern and international design and that companies were capable of product design adaptation.

This strong sense of design and manufacturing capability will enable the furniture companies develop local and regional markets, however if international markets are to be targeted investment must be made into design development and marketing strategies. Any design development programme of furniture products must work hand in hand with an export marketing strategy. Design development must be market-led if companies are to break into international markets with own design products.

Only a very small number of companies employ a full-time designer. None of the designers employed by companies are qualified with the specific skills required for designing furniture. Most design adaptations are carried out by management, technical supervisors or, in a few rare situations, architects/interior designers.

Two of the companies visited had developed joint venture agreements, one with an Italian company and the other with a German company. Both were developing new designs of upholstered products for their respective target markets. Designs were being supplied by the venture companies along with a furniture design consultants based at the factory either full-time or part-time. The design and quality of both ranges were of a high standard.

Generally design is more evident in companies producing kitchen cabinets/products; here architects/interior designs are employed mostly to service local client space planning and design layout requirements. This design process is limited to using existing components with little design or innovation into new ranges or styles of kitchen cabinet.

The role of design is also evident in other areas aside from product development. Many of the companies have contracted skilled digital modellers to produce simulated interiors, for interior design projects and publicity materials. However furniture design in this area is limited to existing adapted products and existing kitchen components.

## **9.2. Recommendations**

### **9.2.1. Joint Ventures**

The most time efficient and effective way to create an international export ready furniture industry is for companies to establish market/sales partners in either a permanent joint venture or on a project by project base. These partners would provide valuable international marketing contacts and direct sales. An international partner would also provide quality and standard procedures for production, costing and delivery of specific products. Designs for the specific market would be supplied by the joint venture partner and produced to their standards and specifications.

This would solve the lack of specific furniture design expertise that exists in the country at present. However product design development, even with joint venture companies would still need in-house capabilities to interpret and execute the design specifications provided. Management and production engineers can provide some of the backup required, but specific staff should be identified and trained to provide long term support and, eventually, to take over design development responsibility.

### **9.2.2. Self Directed Design Development**

For furniture companies interested in developing into international markets without the aid and assistance of a joint venture partner they would need support and assistance in three main areas.

- **Marketing – International Market Exposure/Sales Initiates**  
A marketing strategy aimed at targeting potential buyers would need to be identified and a marketing campaign developed and prepared to actively target such markets. From the marketing strategy a design development programme could be established for individuals or for groups within in the furniture sector. This would be followed by exposure of the newly developed products, either by participation at international trade shows or providing previews in Kosovo to invited international buyers. Online marketing could enable companies to expose their products to international markets from within Kosovo.
- **Design – Market led Design and Development**  
Market led designs, as identified by the marketing initiative and matched to manufacturer's capabilities, would be developed and prototypes produced to test and attract new markets.
- **Production – Export Quality and Standards**  
The design development team would ensure quality and standards of products suitable to specific market requirements and be constantly aware of economy of scale, production costs, profit margins, etc

### 9.2.3. Proposed Workshop and Seminars

The breakdown of the programme is proposed as follows:

- Introduction Overview of Programme
- Workshop One - Furniture Construction Technology
- Workshop Two - Furniture Design Process
- Workshop Three - Designing Furniture for the Export Market

It is the remit of this project to develop and deliver a design programme that would address the more pertinent issues of the industry. At present there are only a very small number of designers employed in the industry with owner/managers taking the lead roles in any design development initiatives.

If you were to aim a seminar at owner/managers it is unlikely that they can devote the time and concentration required of a workshop/seminar of this type and duration. If you aim it at the design profession who are not actively involved the furniture production process, they will have limited foundation knowledge to productively implement any new knowledge.

It is therefore proposed to run a series of workshops/seminars to address the main issues lacking in the existing staff and encourage design led interested parties into working with the wood/furniture sector. It is suggested that in order to be as productive as possible, during these seminars, that participants are actively members of a design development team. If a design development team is not presently identified within companies, it is suggested, that it should be a prerequisite requirement for participation in this design programme. It is also proposed to make an open call for qualified interested parties in the design and engineering fields presently not involved in the furniture sector, to participate in this workshop/seminar.

Participation would be open to the following persons

- Nominated personnel from AWPK companies with responsibility for product design development.
- Nominated personnel from AWPK companies with suitable design or technical ability in the furniture industry.
- Nominated staff members from Architectural Universities, private and public.
- Nominated staff members from VTC programmes teaching in the area of design and technology related to the furniture industry.
- Interested members of the Association of Architects.
- KPEP staff responsible for training and development in the furniture industry.

Introduction- Overview of Programme (1/2 Day)

This would take the form of a presentation to AWPK members, invited education partners and interested stakeholders in the wood/furniture sector and educational development.

Content

- The importance of design development

- The role of management in design process.
- Design and marketing for export.

#### Workshop One - Furniture Construction Technology (4 Days)

In order to achieve a base level of knowledge it is suggested that a manufacturing process workshop/seminar precede the design workshop/seminars. This would allow those not familiar with the industry to gain an overview of the processes presently in use by manufacturers and allow those persons presently involved in the industry also have an overview of capabilities of others within the industry.

This workshop would be located in four different furniture factories with facilities that can demonstrate a range of materials used, construction techniques employed, and technologically advanced processing equipment in use. Furniture categories to be covered are tables, chairs, case goods and upholstery.

It is proposed that each day would start with a seminar followed by a relevant factory visit and demonstration.

#### Content

- Material Technology
- Construction Technology
- Production Processes
- Digital Processing
- Finishing
- Upholstery
- Hardware Selection
- Quality and Standards

#### Workshop Two - Furniture Design Process (4 Days)

Lecture based seminar with practical workshops on design concept ideas and the writing and implementation of a furniture design brief.

#### Content

- History of Furniture Design
- Design and Creativity
- Design Process
- Models and Prototyping
- Evaluation and Revision Procedures
- Sample Design Brief Presentation

#### Workshop Three - Designing Furniture for the Export Market (4 Days)

Lecture based workshop with practical exercises in designing furniture for identified target markets.

#### Content

- Life Styles and Markets
- Markets & Styles
- Trends & Influences

- Trend Forecasting
- Designing for a Market
- Presentation and Marketing
- International Quality and Standards

#### **9.2.4. Competition and Study Tour**

As part of the development of home grown designers and innovative design, it is proposed to develop a furniture design competition. This would be open to participants of the workshops/seminars to put into practice issues learned during the programme. Designers, in conjunction with manufacturers, would develop a piece of furniture to a specific design brief and enter it for a judged competition. It is proposed, depending on funding, that the winners would be awarded a travel scholarship to attend the proposed furniture trade study tour.

This type of activity would not only ensure healthy participation in the programme, but it would also create a collection of innovative designs manufactured in Kosovo for promotional marketing activities. The award of a travel scholarship would further improve the capabilities of designers by exposure to international markets and trends.

#### **9.2.5. Proposed Trade Show Study Tour (3-5Days)**

To compliment and to enforce the learning outcomes of the workshops/seminars it is proposed to provide a study tour to international furniture trade show/s. This activity could be run in conjunction with a marketing initiative to connect with potential buyers. The shows in Paris and Cologne during the early part of 2010 are proposed. Details on the feasibility of such a proposal would have to be discussed further with KPEP and AWPK.

#### **9.2.6. Programme of Workshop/Seminars**

In discussion with AWPK, they expressed a preference to hold these workshops/seminars outside of the manufacturers busy period, which is June, July and August. It was also deemed preferable to hold the seminars over a two to three month period, the months of September, October and November were suggested. As this falls outside the time period of this assignment it is not possible to agree to this suggestion without further discussions with KPEP and USAID contractor.

### **9.3. Findings**

#### **The State of Design Education in Kosovo**

At present there are no design education programmes producing furniture designers in Kosovo. There are architectural universities, both public and private producing architects with some capabilities suited to designing furniture for local manufacturers. However, these graduates do not have the specific knowledge required for considering certain aspects of furniture construction, manufacturing processes and production. The architecture graduates also lack a knowledge and understanding of the design requirements and standards required for international markets.

Aside from the architectural programmes, private universities run interior design courses which do have some components of furniture design, these courses should complementary with the requirements of furniture industry; however it was not possible to confirm this during this initial trip. There are also courses, at university level, in graphic design which would not

be so complementary with issues relating to product development but whose graduates could impact on the design and production of promotional materials, corporate identity issues, and packaging and technical documentation requirements within the furniture sector.

At the middle level of the education system there are no courses to facilitate design requirements for the local furniture industry. This, perhaps, is the area that needs most attention in order to provide a skilled labour workforce for the development of the furniture sector industry.

At lower school level there is only one programme of study related to the furniture industry and that is located at Pejë/Peć V.E.T. This course delivers a technical understanding of wood and processing techniques, facilities are adequate but funding for materials is very limited.

#### **9.4. Recommendations**

##### University Level

It is recommended that further discussions take place with the University of Prishtina - Faculty of Art to develop a furniture/product design programme within their department. This is the one centre visited that displayed the most interest and capability in developing such a programme. The only drawback is that it is a public university and the timeframe for the establishment of a new programme may be somewhat protracted.

##### Technical Skills Upgrade Level

It is suggested that, in the absence of a suitable training centre, that AWPK take on the task of developing a range of skills development programmes which would include technical design.

##### Technical Training School Level

It is recommended that all possible assistance is given to V.E.T – Pejë/Peć in order to develop training programmes to include technical design for wood production. It is also recommended that this facility is encouraged to open up training programmes to local wood industry employees.

## 10. DELIVERABLES-HOME BASE STAGE

Design Audit Form

Curriculum for a Design Technicians Course

Digital Presentation Material for Design Workshop/ Seminar (original criteria until otherwise revised)

Competition Brief, Criteria and Assessment Procedures

## 11. WORK PROGRAMME-PHASE TWO

Due to the uncertainty surrounding the scheduling of the second phase of this programme it is the consultant's intention to continue with the deliverables as outlines in this report and to concentrate the remainder of the time on the preparation of the workshop/seminar material. When this material is to be presented remains an issue to be resolved.

# ANNEXES

## Appendix A

### **DRAFT STATEMENT OF WORK Short-Term Technical Assistance Furniture Design Consultant/Trainer**

**Kosovo Private Enterprise Program  
Contract Number: EEM-I-00-07-00007-00 Task Order Number 02**

#### **I. Background**

In September 2008, USAID awarded the Kosovo Private Enterprise Program (KPEP) to Booz Allen Hamilton, an international strategic management and technology consulting firm headquartered in McLean, Virginia. Designed to stimulate private sector competitiveness in Kosovo, KPEP consists of four components: 1) private sector support in targeted sectors; 2) demand-driven business support services; 3) improved business enabling environment; and 4) workforce development. KPEP also addresses cross-cutting areas including gender, youth, and minority development. The program manages a Strategic Activities Fund (SAF) valued at \$3,760,000.

#### **II. Objectives – Wood Processing Sector**

KPEP's strategy for the wood processing sector is to improve industry's ability to meet recognised international standards and designs. The goal is to ensure that future designs of wood products will be compatible with market needs. Overall our goals are to increase sales (with a focus on exports), while at the same time increasing employment in the industry.

Proposed KPEP activities for the wood processing sector include:

1. Improving local industrial/furniture design capability to meet market needs
2. Establishing local training capabilities to upgrade the skills of designers in furniture manufacturing/wood processing industry

Presently, a critical need exists in Kosovo for skilled furniture designers (furniture design studios) that work in wood processing industry. As such, KPEP is supporting the Association of Wood Processors of Kosovo to assess the training needs of furniture designers and recommend how to best meet unmet needs.

This assignment supports the broad KPEP activity to establish training programs and facilities to upgrade the skills of designers in the furniture and wood processing industry. The focus will be on designers who are already working in their profession, rather than on students. However, KPEP wants to explore how both can benefit from the recommended activities.

To undertake this assignment, KPEP would like to identify an industrial/furniture design consultant who has both practical experience as a designer working in the private sector and background in work force development/training programs. This assessment will be the basis for additional activities to build the design capacity of Kosovo's furniture designers.

### **III. Assignment Objective**

The overarching objective of this assignment is to better understand state of design industry in Kosovo and the education/training system for designers in Kosovo, including:

- An understanding of the current state of furniture design in Kosovo
- An understanding of the training needs of current and future industrial/furniture designers in Kosovo (those working for manufacturers and those working in independent “studio”)
- A recommended action plan to address the identified training needs based on best practices in design training
- Pilot of initial training to meet most urgent need(s)

### **IV. Tasks**

The Consultant’s scope of work will include, but not be limited to, the following tasks:

#### **First trip to Kosovo**

1. Prepare criteria and scoring system on which designs of furniture presented at 2009 NATYRA trade show will be critiqued and advice for improvements based
  - a. Develop format(s) for recording Consultant’s comments and for sharing comments with companies
  - b. Give recommendations to AWPK on how a design competition could be organized for the future
2. Attend NATYRA fair on May 6-9, 2009, and conduct critiques
3. Meet with manufacturers and furniture designers – both company employed and those in private studios – to provide feedback and advice for improving their design and to further clarify their design training needs
4. Identify and visit schools (university-level, Vocational Education Centers, technical/vocational schools, etc.) that offer “design” training in the broadest sense – art classes, commercial design, CAD-CAM classes etc.
  - a. Provide overview of existing courses/curricula
  - b. Evaluate interest and/or ability of school to incorporate commercial furniture design into offerings
  - c. Recommend one or more as potential local partner to ensure sustainability of training
5. Prepare and present debriefing of findings and recommendations to meeting of selected external stakeholders (for example, manufacturers, designers, AWPK, USAID)
  - a. Feedback from internal stakeholders should be considered in this debriefing
6. Submit written report of findings and recommendations from assignment to date, including:
  - a. Summary of critiques (copies of forms to be included as appendix) and recommendations
  - b. Recommended action plan for meeting training needs of furniture designers, including one pilot course that addresses most immediate need and longer term plan
  - c. General overview of pilot course that includes need being addressed, objective of training, topics to be covered, length of course, equipment needed and recommended local partner(s)

**Interim Work**

7. Based on previously noted report of findings, recommendations and feedback from the debriefing, design a training course for furniture designers that addresses immediate needs. Design should identify:
  - a. Course outline and schedule
  - b. Presentations, exercises, discussions
  - c. Handouts and other materials to support training
8. Electronically submit training design per #7 above along with partner recommendation to KPEP for approval before finalizing
9. Finalize training course and necessary presentations, materials etc.

**Second Trip to Kosovo**

10. Conduct one pilot of the training in conjunction with a local training partner
  - a. Provide training advice and support (TOT) to local training partner who will be expected to continue offering the training
11. Provide one-on-one consultation to designers and/or manufacturers as time allows
12. Submit final report of assignment using KPEP format and submit with invoice within 15 days of completion of assignment

**V. Deliverables**

The Consultant will be responsible for the following deliverables:

1. Form on which furniture design critique will be recorded, clearly identifying criteria and scoring system
2. Recommendations to AWPK on organizing design competition event in future
3. Schedule of meetings with manufacturers and designers
4. Debriefing with internal stakeholders prior to concluding first trip
5. Written report of findings and recommendations from first trip, as per Tasks above, to be submitted within 5 days of close of first trip to Kosovo
6. Design and materials for training course for furniture designers and recommendation for local partner
7. Pilot of training course identified in #5 above
8. Schedule of one-on-one consultations to designers and/or manufacturers
9. Internal debriefing with internal stakeholders prior to finalizing external debriefing (#9 below)
10. Debriefing presentation of findings and recommendations encompassing entire assignment to be given to selected external stakeholders (for example, manufacturers, designers, AWPK, GTZ, USAID)
11. Final assignment report encompassing entire assignment and prepared in KPEP format to be submitted with invoice due within 15 days of completion of assignment

**VI. Period of Performance and Level of Effort**

KPEP expects that this scope of work will include two trips to Kosovo and require 32 days of effort (LOE). The assignment is expected to begin on/about May 4, 2009, and be completed by June 15, 2009. A six-day work week is allowed.

Activity/Location	Level of Effort Days
NATYRA & training needs identification (tasks 1-9)/ Kosovo	12
Design & prepare for training (tasks 10-12)/ STTA home base	10
Pilot & 1on 1 consulting/Kosovo	10
<b>TOTAL</b>	<b>32</b>

### VII. Reporting

The Consultant will collaborate with and report to the KPEP Wood Processing Specialist and Workforce Development Specialist. The Consultant will also coordinate work activities with the Director of the Wood Processing Association of Kosovo.

### VIII. Qualifications and Requirements

- BA or BS in industrial/furniture design; advanced degree preferred, certified industrial designer preferred
- 10 years of working experience as commercial furniture designer in private sector in the EU; experience as furniture designer in Italy a plus
- 5 years of professional experience in designing and conducting private sector-led work force training programs for designers
- Graduate Diploma in Training and Development will be an advantage
- Training experience in transitional economies preferable; experience in the Balkans a plus
- Good knowledge of CAD-CAM applications

## **Appendix B**

### Educational Levels – Bologna Agreement

As a guide, the learning outcomes related to each of the 10 levels can be summarised as:

**Level 1:**

Ability to learn basic facts and repetitive skills as well as to sequence learning tasks

**Level 2:**

Ability to learn new skills and knowledge in a supervised environment and to carry out routine work under direction, with basic literacy and numeracy

**Level 3:**

Ability to perform relatively simple work related tasks. Confirming a minimum level of employability, while incorporating practical capabilities and understanding of theory

**Level 4:**

Independent learning associated with what may be required for first time entry to many occupational sectors

**Level 5:**

A broad range of understanding and/or skills which may lead to specific occupations; working independently while subject to general direction

**Level 6: Certificate Degree**

A comprehensive range of understanding and/or skills which may be vocationally specific and/or of a general supervisory nature. Also includes detailed theoretical understanding

**Level 7: Ordinary Bachelor Degree**

Appropriate to the upper end of many technical occupations e.g. higher technicians as well as junior management

**Level 8: Honours Bachelor Degree**

Being at the forefront of a field of learning in terms of knowledge and understanding

**Level 9: Masters Degree**

Demonstration of knowledge and understanding which is at the forefront of a field of learning

**Level 10: Doctoral Degree**

Discovery and development of new knowledge and skills