Mapping the Design Industry in Northern Ireland

A report for the
Northern Ireland Design Alliance

Supported by: **The Creative Industries Innovation Fund**

Contents

Executive Summary

The design industry in Northern Ireland is increasingly important to growing a successful Northern Ireland economy. Mapping the Design Industry in Northern Ireland (NI) presents a first attempt by Creative & Cultural Skills to examine the characteristics of the design sector in NI. This research has been conducted to provide a foundation for the Northern Ireland Design Alliance (NIDA) and other organisations to coordinate and harness the strength of the sector as a whole.

Mapping the Northern Ireland Design Sector was aimed at canvassing the views of as many design businesses in Northern Ireland as possible through an online survey of their business characteristics and habits. In total, this approach helped gather 144 responses. In addition, 66% of these respondents chose to participate in NIDA's online design directory.

Demographics of design businesses in Northern Ireland

Respondents were asked a range of questions about their business characteristics and make-up:

- 55.6% of respondents to the survey where business owners in their own right, 28.5% of respondents were employed within a design business (not as the owner), and 16% were members of an in-house design team in a non-design business.
- Over half of the businesses who responded were either sole traders or businesses that employed five people or fewer.
- 44% of all businesses had been operating for over ten years, and a further 18% had been in operation for over five years. However, these figures were lower for respondents who were business owners in their own right (design only businesses).
- The majority of respondents worked in communications/graphic design and/or web/interactive design.

Survey Findings

Beyond demographic data about businesses, the survey particularly focused on information about; Business confidence, characteristics and key challenges; Design industry approaches to exporting goods and services; and support mechanisms to foster growth in the design industry.

- Design businesses in Northern Ireland are positive about growth. 70% of those surveyed stated that they believed the turnover of their business would grow in the next three years. 11% felt that their turnover would remain static, and only 2% felt it would fall.
- Design businesses most frequently work with other types of business within the wider creative sector. 44% of respondents claimed to conduct work for other organisations in the creative industries, and 36% claimed to work for the media and digital media sector.
- 73% of design businesses collaborate with other designers in order to offer a wider range of services to clients.
- In terms of key challenges faced by the industry, respondents most frequently cited managing their workflow, the current economic climate and finding opportunities to penetrate and exploit new markets.

- Over three quarters of design businesses in Northern Ireland export their services outside of the country. However, 10% more businesses would like to begin to export their goods and services. Of businesses that do export, 34% proactively go to other countries in order to sell their product, and 28% have a business strategy.
- In order to foster business growth, 59% of respondents stated that they need to develop a larger base of clients, while just under a third of respondents believe that cementing existing relationships will help them to grow.
- One in five businesses stated that they did not know where they could access support for business development.
- In terms of the NI Design industry, there is clearly an appetite for the creation of a formal design industry body, with some 44% of respondents stating they would like to access support from this in future.

Conclusions and recommendations

The research has for the first time been able to provide a measure of granular detail on the design businesses and designers working in Northern Ireland. The report shows that while these businesses to a great extent mirror those in the UK as a whole, there are also areas where more support could be provided to bolster growth. These areas are formed into a number of recommendations for government, industry and other stakeholders:

1. **Create an online design directory for Northern Ireland:** This would lead to greater collaborative practice between design agencies and provide a hub for those looking to procure design services.
2. **Provide Design-specific business advice:** Develop a programme to address specific business needs as identified in the survey and ensure the design sector better understands current government support available.
3. **Examine the role of government in business generation:** Recognising the role of design in driving innovation, the NI Executive should examine whether there are further areas in which it could facilitate links between designers and prospective businesses or government departments in need of design services.
4. **Expand the breadth of design CPD in Northern Ireland:** The Northern Ireland Design Alliance should examine its own potential role in delivering training and in partnering with other organisations to provide a suite of CPD.
5. **Formalise the role of the Northern Ireland Design Alliance:** The survey responses indicate strong support for an industry body which can facilitate business support, training and importantly act as a lobbying organisation for the design industry as a whole. Looking at the responses from the survey and recent developments within NI government strategy, there are a number of areas where the design sector is seeking an industry body to take the lead:
    - Embedding design within government policy as a strategic tool.
    - Developing collaborative business and design networks, to drive and support innovation.
    - Embedding design thinking into every business strategy.
    - Establishing a professional design network across Northern Ireland, helping designers to work effectively with business, education and government.
    - Supporting the NI Executive to adopt a design led approach to solving society’s big challenges, e.g. transport, health, housing, unemployment and crime.

1

Introduction

Design is more than just the aesthetic of how something looks; it is increasingly embedded as a holistic function throughout an entire process or system.[1] This function in turn fosters innovation across the whole economy, and has been identified as a key component of future growth for businesses in Northern Ireland.

Mapping the Design Industry in Northern Ireland (NI) presents a first attempt by Creative & Cultural Skills to examine the characteristics of the design sector in NI. It has previously proven difficult for official government and top level business surveys to locate and gather detailed information on the sector, due to the relative size of the industry, and the issue that a number of very small businesses and freelancers may fly 'under the radar' due to their size.

Creative & Cultural Skills, with guidance from the Northern Ireland Design Alliance, have therefore attempted a census-style approach to gathering detailed information on the design industry. The objectives were to gather information on the business characteristics of the sector in NI, the approach that design businesses take towards exports and working outside NI, and the current and future support mechanisms that might enable the sector to both grow and support the wider economy.

This study does not provide a complete overview of the design sector in Northern Ireland, but is intended to act as a snapshot of what the industry and aspects of the embedded sector [2] look like. This research is therefore conducted with the intention that future work by NIDA and other organisations are able to coordinate and harness the strength of the sector as a whole, which may also lead to more comprehensive research design in NI.

1 The RSA, Embedded Design (2010).

2 'Embedded sector' refers to design teams or designers that work in businesses not wholly related to design (e.g. a design team working for a car).

2

Methodology

Mapping the Northern Ireland Design Sector was aimed at canvassing the views of as many design businesses in Northern Ireland as possible through an online survey of their business characteristics and habits. The survey was created by Creative & Cultural Skills, but received input from key members of NIDA. The survey was of both design businesses (either answered by the business owner or an employee) and design teams within businesses outside the design sector. This approach remains consistent with previous research by organisations such as the Design Council.

The approach to gathering responses was based around a communications effort from both Creative & Cultural Skills and NIDA. The survey was therefore distributed through the following channels:

- Various types of social media, including Twitter and Facebook
- Dissemination to the NIDA membership base and mailing list
- A news item on the Creative & Cultural Skills corporate site, and a message to the mailing list.

In total, this approach helped gather 144 responses.

3

The role of Design in the NI Economy

The design industry, and design as a discipline in the wider economy, is being increasingly championed by the NI Executive as a route to growth. The NI Executive's economic strategy sets out that by 2030 it wants:

'An economy characterised by a sustainable and growing private sector, where a greater number of firms compete in global markets and there is growing employment and prosperity for all.' [3]

Within this, there is also a firm commitment to the idea of harnessing creativity and design for wider economic gains. The strategy states that the NI Executive will grow the private sector through stimulating 'innovation, R&D and creativity so that we widen and deepen our export base'.[4] While the Economic Strategy sets out the top-line intentions for economic growth in Northern Ireland, the current draft innovation strategy for 2013-2025 outlines a much bolder intention for the use of design in the wider economy, drawing on persuasive previous research by organisations such as the Design Council and Nesta. In particular, the current draft strategy sets out that it will:

1. Develop a creative Northern Ireland framework to 'catalyse and enhance' design, creativity and innovation across a range of public, private and third sector areas.
2. Continue to encourage businesses to incorporate design into the business planning process in order to foster innovation and growth.[5]

The stated intention to both develop a Creative Framework for how organisations, businesses and stakeholders can effectively harness creativity, and the increased focus on design as a means of giving businesses in NI a competitive edge are both extremely encouraging for the creative industries, and particularly the design industry. The challenge in all of this is stark though, Northern Ireland currently only ranks 11th out of 12 in the UK's regional innovation ranking, and only has 32,200 people currently employed within the knowledge economy.[6] In order to assert itself Northern Ireland will have to improve at a faster rate than other parts of the UK in terms of establishing design and creativity at the core of its approach to fostering growth.

The potential of design to foster growth

Design is widely regarded as one of the key mechanisms by which firms can innovate, and in turn cause economic growth. The Design Council in particular has amassed a persuasive body of evidence on the ability of design to lead to economic growth. The Design Council have found that 80% of businesses in the UK think that design will help them to stay competitive in the current environment. Further to this, 97% of rapidly growing businesses think design will help them stay competitive.[7]

3 Northern Ireland Executive, Economic Strategy, Priorities for Sustainable Growth and Prosperity: Building a Better Future (2012).

4 *Ibid.*

5 Northern Ireland Executive, Draft Innovation Strategy for Northern Ireland 2013-2025 (2013).

6 *Ibid.*

7 The Design Council, Design for Innovation (2011).

The Design Council have also tracked the tangible benefits of design on growth. Their research has found that for every pound invested in design, you can expect a £4 increase in profit and a staggering £26 in social return on investment. They also found that businesses that perceive design as integral to growth are more than twice as likely as a normal business to see rapid growth.

Recent research has also pointed to the increasing influence and importance of design in the corporate world. The Design Council's research, Leading Business by Design, examines the value of design in various large businesses through the process of interviews with its senior managers. The research found that design was a key driver in opening up 'uncontested market spaces', 'differentiating products and services' and 'embodying a company's values'.[8] Clearly, the message is getting through to business leaders that embedding design at the core of their businesses will help them to become more efficient, innovative and ultimately profitable.

This is particularly pertinent in Northern Ireland, given the release of statistics by the DCMS in 2014 indicating the number of designers who may be embedded in the wider economy outside the creative industries. The statistics show that there are some 116,000 people working in the design 'industry' (support workers + creative workers), however there are a further 50,000 designer professionals working outside of the industry in other sectors of the economy. Furthermore, the total figure of all of these workers has increased by 10.4% from 2011 to 2012, showing a level of growth that has outstripped the rest of the economy by ten times.

Design exports have also gone up considerably in the design industry from 2009 until 2011, although the figures are not available for Northern Ireland specifically. In the UK as a whole though, exports have risen from £116 million in 2009 to £131 million in 2011, or a 13% increase over two years. Clearly design exports are a significantly growing area of the economy and this places them approximately 2% ahead of the growth of exports in the whole economy.[9]

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[8] The Design Council, *Leading Business by Design: Why and How Business Leaders Invest in Design* (2013).

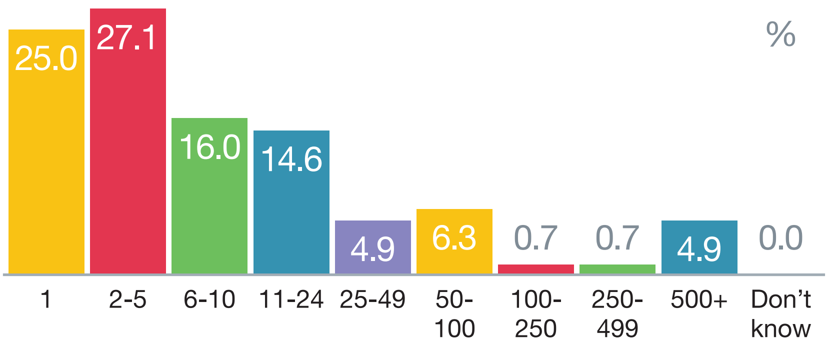
[9] DCMS, Creative Industries Economic Estimates (2014).

4

Demographics of design businesses in Northern Ireland

55.6% of respondents to the survey where business owners in their own right, 28.5% of respondents were employed within a design business (not as the owner), and 16% were members of an in-house design team in a non-design business. In terms of the size of business which respondents represented, over half were either sole traders or businesses that employed five people or less.

Figure 1: Size of NI Design Businesses



It is likely that the companies with over 500 members of staff are made up of the in-house design teams of large businesses, but otherwise the picture is broadly reflective of what previous statistics have proven about the design industry - that it is predominantly made up of micro-businesses, with a small number of larger employers also present.

Figure 2: Time that business has been operating

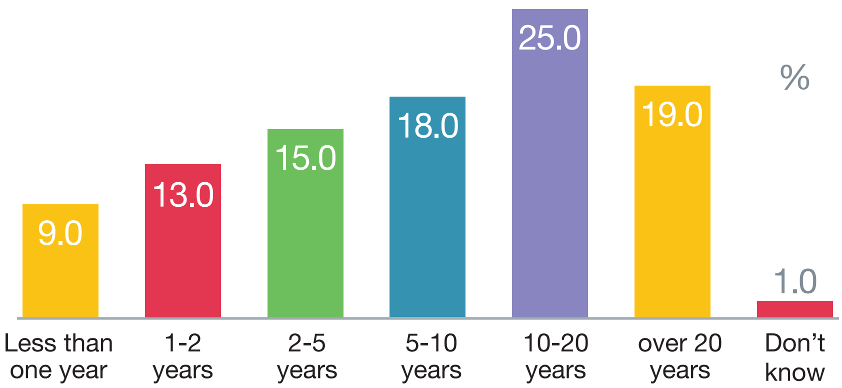


Figure 3: Average turnover of all respondent design businesses in Northern Ireland

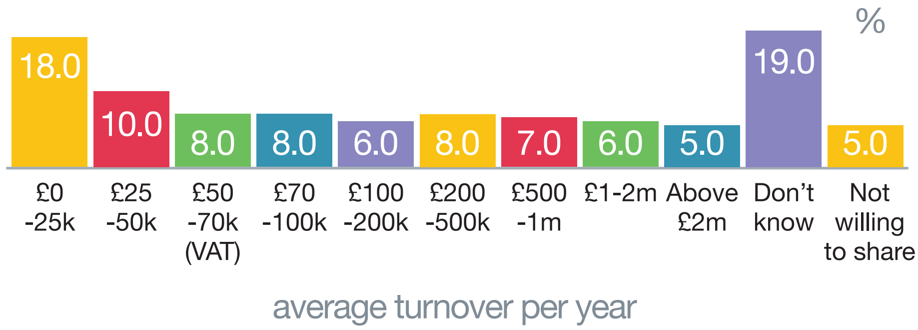
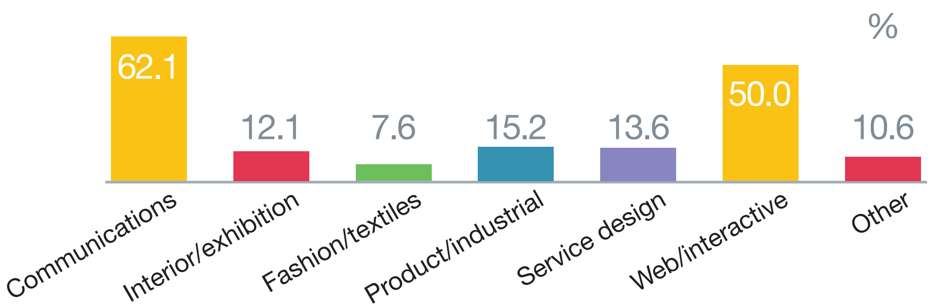


Figure 4: Primary category of design undertaken by respondents



In terms of the 'other' category, respondents cited areas such as architecture, landscape architecture, jewellery design and various types of consultative services as their area of specialisation. Broadly though, it seems that design businesses within NI were able to see themselves under these characteristics.

5

Survey Findings

Beyond gathering details about the business demographics of the design industry in Northern Ireland, the survey was designed to gather data to inform future policy interventions for the design industry. The survey particularly focused on three areas, namely

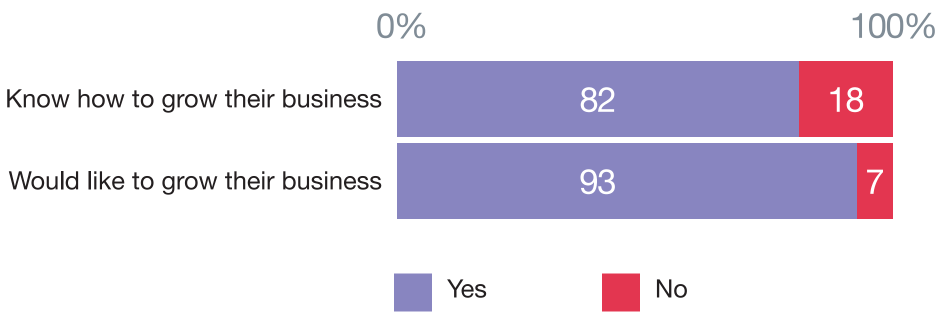
1. Business confidence, characteristics and key challenges
2. Design industry approaches to exporting goods and services
3. Support mechanisms to foster growth in the design industry.

The following set of key findings is therefore split into these three sections.

5.1 Business confidence, characteristics and key challenges in the design industry

Design businesses in Northern Ireland are overwhelmingly positive about their potential for future growth. 70% of those surveyed stated that they believed the turnover of their business would grow in the next three years. 11% felt that their turnover would remain static, and a further 11% said they did not know. Only 2% of design businesses said that they expected their turnover to decrease.

Figure 5: Business attitudes to growth



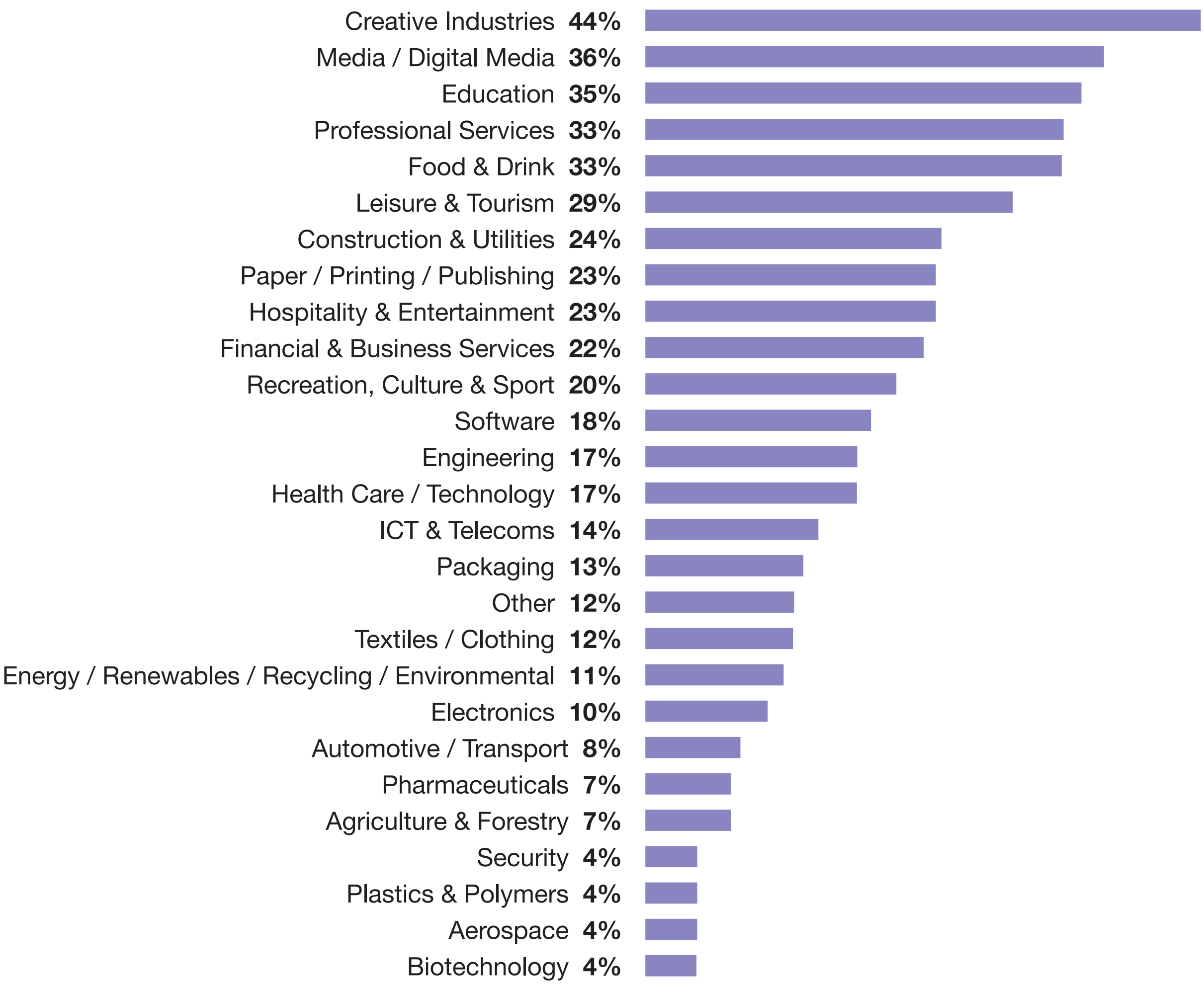
There is a 9% gap between those that would like to grow their business, and those that know how to grow their business. This indicates that there may be a role for further business support, which is examined later in the report. Overall, one in five design businesses in NI does not know how to grow their organisation.

Sectors the design industry engages with in Northern Ireland

The survey findings were able to unpack the areas of the economy which the design industry most closely worked with. Respondents were able to give a whole list of sectors in which they had conducted, or were currently conducting work. Figure seven shows these sectors clearly.

Another key characteristic of design businesses in Northern Ireland is the extent to which they work with each other in order to provide design services. 73% of design businesses collaborate with other designers in order to offer a wider range of services to clients. This level of collaboration implies that these businesses are not necessarily all in competition for the same work, and are able to move quickly to collaborate and network when opportunities present themselves for more work.

Figure 6: Industrial sectors which the NI design industry provides products/services for



Key Challenges

Despite servicing such a wide range of sectors within the economy, the NI design industry faces a number of challenges in conducting their work, and in creating growth within their business.

Figure 7: Challenges faced by design businesses in their everyday work

As is often the case with micro-businesses engaged primarily in delivering a service for other clients, the primary challenge faced by design businesses was managing the workflow, with 43% of respondents stating that this was an issue. In line with many other businesses in Northern Ireland and the UK, the current economic climate was also seen as a key challenge, particularly as design businesses are dependent on other businesses having a willingness to spend on design services.

Just over a third of respondents stated that finding opportunities to penetrate and exploit new markets was a key challenge, and just less than a third found the time needed for business administration a significant issue. One in five businesses stated that a lack of skilled workers was a key issue, and just under a quarter cited competition from other firms.

5.2. Business export patterns

In a country the size of Northern Ireland, with links to the UK, Europe and other parts of the world, exporting services is extremely important to ensure a steady flow of work. This survey asked respondents about a number of issues related to exporting design services, to both map how design is being exported from Northern Ireland and look at some of the characteristics of this issue.

Currently, over three quarters of design businesses in Northern Ireland export their services outside of the country. However, it can also be seen that there is a gap between the number of businesses that currently export outside of NI, and those that would like to develop business through exporting outside NI. There is a 10% gap in these two figures, suggesting that there is still the potential for more design businesses in NI to develop their export activities.

Figure 8: Design businesses current practice and interest in exporting products/services

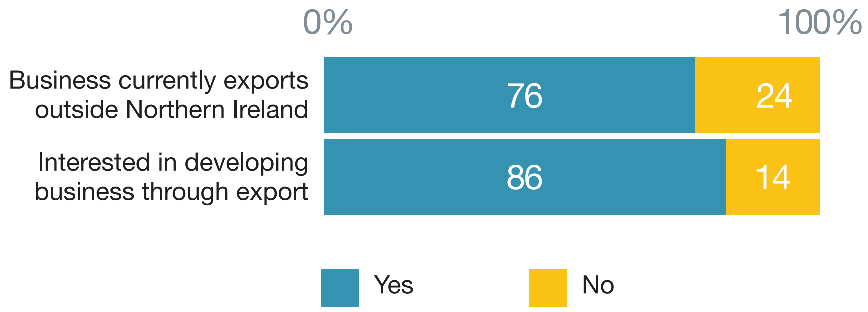
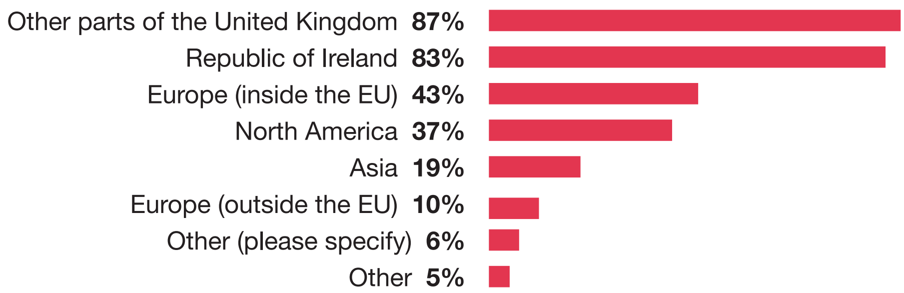


Figure 9: Areas that Design Businesses in NI export to



Some design businesses in Northern Ireland have a developed and strategic approach to exporting their services to a wider area, either inside the UK or further afield. Over a third of respondents that did export services, proactively visit other countries in order to sell products and services. 28% of respondents also have a specific business export strategy which they utilise to try and bring in more business. Interestingly, one in five businesses that export have specific staff working on exporting products/services, which might be seen as a fairly high rate given the plethora of micro-businesses and freelance operators that make up the sector.

Figure 10: Mechanisms used by design businesses in order to boost export business

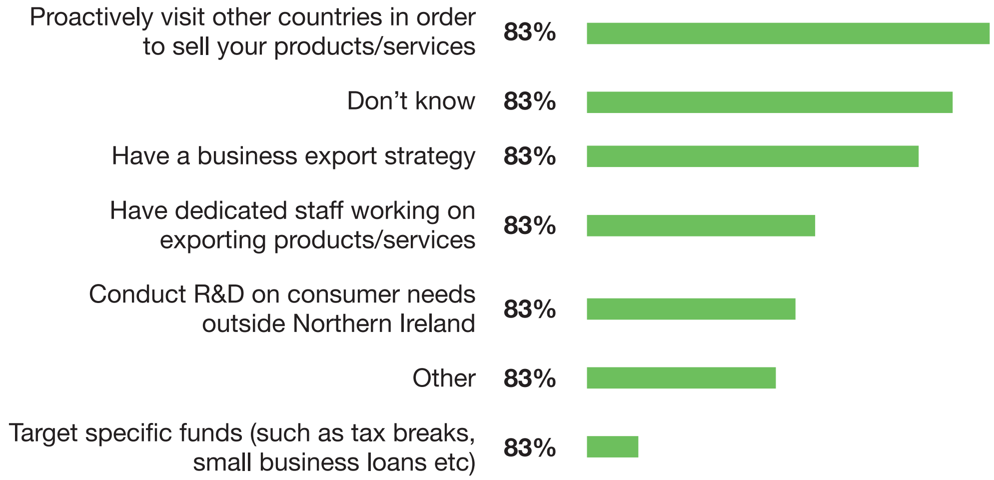
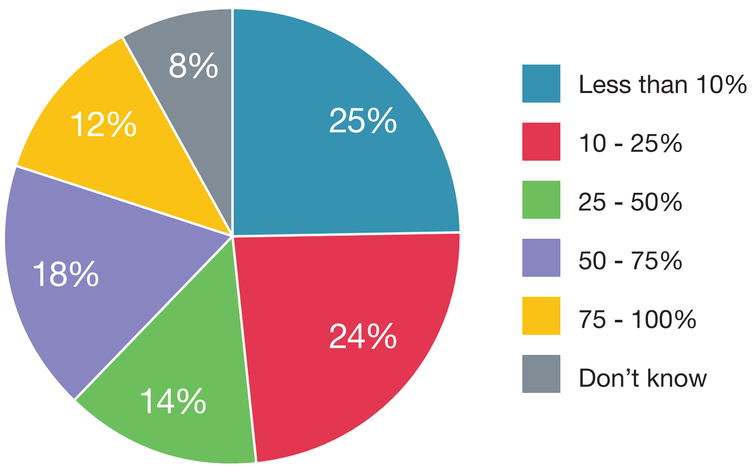


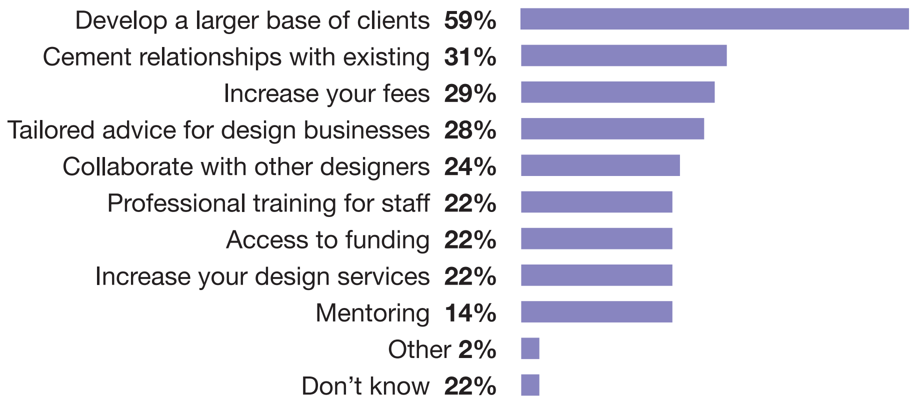
Figure 11: Percentage of NI Design Businesses turnover made from export business



5.3. Current and future support mechanisms for the design industry

When asked what areas could be developed within design businesses in order to help them grow, a wide range of areas were cited, with each respondent able to choose three separate answers from the list identified in figure fourteen.

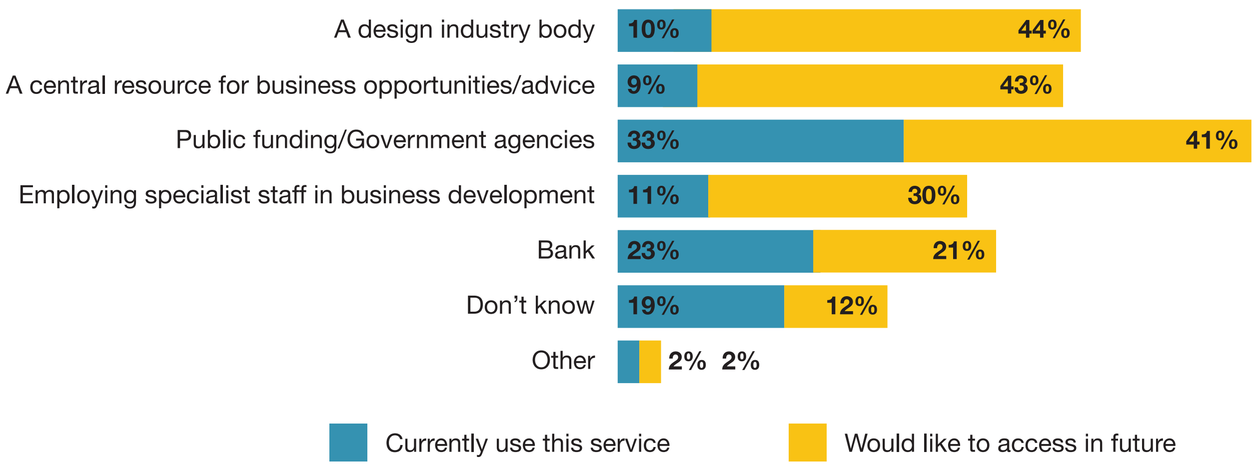
Figure 12: Areas which could be developed within design businesses to foster growth



Support for business development

Moving beyond what businesses believe will lead to them grow their business, the research examined the practical issues of what current steps businesses were taking to receive support, and whether there was appetite for more of this in future.

Figure 13: Currently used support mechanisms and the appetite for their expansion



A third of respondents currently access support from public funding and government agencies to enhance their businesses. Furthermore, 23% of respondents access support from their bank in order to try to increase their turnover. However these were the two most widely utilised support mechanisms for the design industry, and one in five businesses stated that they did not know where they could access support for business development. In terms of the NI Design industry, there is clearly an appetite for the creation of a formal design industry body, with some 44% of respondents stating they would like to access support from this in future. Using public funding and government agencies to support business development was also popular, and 41% of respondents felt that they would like to access support from this in future. 43% felt that being able to access a centralised resource for business opportunities and advice was something that could be pursued. There are clearly overlaps between these responses - for example a design industry body could provide a central resource for advice - but respondents clearly felt that they would like this to be up-scaled to some extent.

6

Expectations of the Northern Ireland Design Alliance

Engagement with the Northern Ireland Design Alliance (NIDA) from respondents was generally very strong. 88% of respondents had heard of NIDA, which is unsurprising as the bulk of respondents were drawn through mailing lists and social media channels related to NIDA. Perhaps because of this, there was a strong reaction when participants were asked what types of support or help NIDA could offer design businesses in the future. These qualitative responses provide some insight into the appetite of the NI design industry for further co-ordination, collaboration and other joined up work within the sector.

A number of respondents felt that NIDA should act as a lobbying organisation for the design industry as a whole. One respondent stated that while the design sector contained many small businesses, NIDA was needed to ‘promote the design message and build a sense of collective ambition to export our services to the world stage’. Further respondents more baldly stated that they felt NIDA could ‘co-ordinate all design professions under one umbrella and act as a voice and lobbying body’ and ‘lobby for the importance of design as a key component of public life in NI’.

A further group felt NIDA had a practical role to play in training and business development, rather than advocacy. A variety of respondents stated that they would like NIDA to provide ‘discounted staff training’, ‘training opportunities’ and ‘professional training on strategy’. Further design industry respondents gave more detail on exactly how they would like this to manifest. One respondent mentioned needing ‘more information on developing skills, mentoring for business growth and skills exporting’ while another stated that they needed advice on how to grow beyond being a freelancer to taking on one or two more members of staff.

Networking was seen as critical by respondents, and many felt that this was a specific area where NIDA could benefit the industry. The majority of design businesses in Northern Ireland have collaborated with others in order to create a better service or product, so the fact that networking and collaboration rank highly is unsurprising. One respondent said that they liked ‘the idea of networking, through conversations, seeking kindred spirits who might collaborate on work a little’. Another stated that they explicitly wished to gain ‘networking opportunities with other industries’.

Finally, a few respondents felt that NIDA could have a direct role in assisting with procurement and funding. One design business stated that they would like to be able to look to NIDA for support with tendering for work in the public sector, ‘something that can be quite off putting for smaller businesses. Another stated that they would like to see NIDA provide ‘funding for creative to access training and development and yet another thought there might be a direct role with ‘someone on the ground (from NIDA) selling or identifying clients’.

While the responses were wide ranging, they were broadly positive of the work being conducted by NIDA up to this point. A number of respondents pointed to the need to maintain and increase the positivity felt within the sector, ‘demonstrating success stories’, as one respondent put it. The open responses from design businesses seem to point to an active appetite for engaging with each other and NIDA in order to target improvements and growth within the industry.

7

Conclusion and recommendations

The design sector in Northern Ireland has not been the focus of recent study in terms of its characteristics or business habits. While this research has only gone some way to rectify that, it does present a first census-style approach to mapping the design sector in Northern Ireland, beyond government data sets which experience problems when it comes to examining micro-businesses and freelancers.

On the whole, the sector in NI mirrors the UK – the vast majority of businesses are either very small, employing fewer than five people, or are one-man-bands who provide specific design services and products. Despite this though, we can also see that the design industry in NI works across almost every sector, although it is perhaps most closely linked with other businesses closest to it in terms of work – the wider creative industries and digital media.

Design businesses in Northern Ireland also derive a significant amount of their business from exporting beyond their base, both to wider parts of the UK, but also to significant markets in Northern American and Europe. Further to this, design businesses in Northern Ireland are collaborative in nature, and often work closely amongst themselves to offer a better product or service.

Despite this, the responses elicited in this research clearly point to a gap between the ambitions of design businesses in NI and their ability to 'break through' certain barriers. More effective and targeted government support, better advice and access to a larger base of potential clients would all enable the sector to close the gap between their aspirations and their current business trajectory. It is hoped that the Northern Ireland Design Alliance, working with other stakeholders and government can address some of these issues to further the sector in Northern Ireland.

Recommendations

Create an online design directory for Northern Ireland: The survey demonstrates that design businesses in Northern Ireland already collaborate with one another. Creating an online directory would allow this process to potentially flourish further, leading to even greater collaborative practice. The creation of a directory would also be useful from a demand perspective. The research has shown that design businesses still work most closely with the wider creative industries and media sectors. A directory of businesses may therefore help prospective clients to find the services they need, and expand the rate of design work in other sectors.

Provide design-specific business advice: In the current absence of funding to establish a design industry body exclusively for Northern Ireland, a programme could be developed to better understand current government schemes and make public funding available specifically for the design sector. There is clearly an appetite to tap into this, and it may be a case of simply 'translating' available opportunities, funding and networks for the design industry to take advantage of. In particular, the survey suggests the need for support for design businesses to penetrate new markets and increase their client base. This could be facilitated through work by NIDA and the NI Executive.

Examine the role of government in business generation: Recognising the role of design in driving innovation, the NI Executive should examine whether there are further areas in which it could facilitate links between designers and prospective businesses or government departments in need of design services.   Creative & Cultural Skills is aware of the Invest NI Design Development programme for their clients, which is a useful starting point, but there is potential to extend this further.   For example, offering tax incentives to businesses using design processes, to develop products and services, or developing collaborative business and design networks.

Expand the breadth of design CPD in Northern Ireland: NIDA should look to examine the breadth of CPD available in Northern Ireland for design professionals. In doing so, it should examine its own potential role in delivering training, or partnering with other organisations to provide a suite of CPD. At the heart of training for designers in NI is the opportunity to both learn and network effectively at the same time, as reflected by many of the qualitative survey responses.

Formalise the role of the Northern Ireland Design Alliance: The survey responses indicate strong support for an industry body which can facilitate business support, training and importantly act as a lobbying organisation for the design industry as a whole, particularly advocating for the use of design as a strategic tool in government and business. Looking at the responses from the survey and recent developments within NI government strategy, there are a number of areas where the design sector is seeking an industry body to take the lead:

- Embedding design within government policy as a strategic tool.
- Developing collaborative business and design networks, to drive and support innovation.
- Embedding design thinking into every business strategy.
- Establishing a professional design network across Northern Ireland, helping designers to work effectively with business, education and government.
- Supporting the NI Executive to adopt a design led approach to solving society's big challenges, e.g. transport, health, housing, unemployment and crime.

Appendix 1: A note on survey methodology and statistical validity

The survey conducted by Creative & Cultural Skills took an open approach to gathering respondents, with the view of conducting a 'mini-census' of the design industry in Northern Ireland. There are therefore some important considerations to take into account when considering the robustness of the findings.

1. Comparison to other statistics on the design sector in Northern Ireland

As the design industry in Northern Ireland is comparatively small, it has previously been difficult to actually 'find' the sector in official statistical releases such as the Inter Departmental Business Register. In particular, these government statistics are often unable to identify and account for businesses that operate below the VAT threshold (70,000).

A number of previous attempts have been made to establish the size of the design sector in Northern Ireland. Creative & Cultural Skills commissioned TBR to interrogate the Inter-Departmental Business Register (IDBR) for their 2012/13 Impact and Footprint research. The study identified 256 design firms in NI (excluding design teams within businesses in other areas of the economy) employing a total of 6,110 people. Meanwhile, research by the Design Council through an interrogation of the 2008 Labour Force Survey suggests that there are 216 design consultancy businesses, 130 in-house design teams and 2,636 freelance designers.

Clearly then, the design industry in Northern Ireland is fairly small as a proportion of the whole economy. Given there are 808,000 people currently in employment in NI, fewer than 1% of the NI workforce are employed as designers. As the design industry compromises such a small part of the overall workforce then, it becomes very difficult to track the exact size of the sector.

2. Statistical significance testing

This research has not had the capacity to conduct any specific significance testing on the results. Beyond presenting the number of respondents then, we are not able to look into the statistical significance of the findings. Where possibly, we attempt to not draw findings from a low number of respondents. The statistics in this research are therefore indicative of the findings, rather than absolute.

3. Representative nature of the findings

Through our approach there are some concerns about the representative nature of the findings, particularly with regards to export and future support, due to the self-selecting nature of an open online survey. While attempts have been made to ensure that as wide as possible a cross section of design businesses and freelancers in NI were targeted for the research, no specific measures were put in place to gain a representative sample. Furthermore, there were no questions designed to 'rule out' certain respondents throughout the survey, although it seems unlikely that anyone apart from bone fide design businesses and design teams would see the survey through to completion. There is therefore confidence that the findings are from genuine businesses within the design sector, despite no specific definition being given at the start of the survey.

www.nidesignalliance.com