

FROM MOMENTUM TO SCALE

**DIGITAL CREATIVE INDUSTRIES IN THE
WEST AND NORTH WEST OF IRELAND**

A Decade of Progress and the Path to 2036

EXECUTIVE SUMMARY

White paper prepared for EDGE26 - Ireland's Creative Economy Summit
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UNIVERSITY OF GALWAY

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Regional Skills
Partnerships for Skills



**An Roinn Breisoideachais agus Ardoideachais,
Taighde, Nuálaíochta agus Eolaíochta**
Department of Further and Higher Education,
Research, Innovation and Science

EXECUTIVE SUMMARY

The digital creative industries of the West and North-West of Ireland are at an inflection point. Over the past decade, a sector that was largely invisible in national policy and enterprise data has built a recognisable firm base, a strengthening institutional infrastructure and a growing body of work with genuine market reach. That progress is real. It is also incomplete, unevenly distributed and more fragile than it should be at this stage.

This white paper makes the case that the transition from momentum to scale is not automatic, and that the conditions required for the next decade are different from those that produced the first. It draws on company-level data from the March 2026 FAME extract, A Vision-Net tailored extract, CSO Business Demography analysis, the EDGE26 Sector Survey of 57 firms and practitioners, and a structured interview programme across the seven-county region of Galway, Mayo, Roscommon, Donegal, Sligo, Leitrim and Clare.

The evidence is consistent across every data source on three central findings.

1

Finance is the dominant structural barrier.

Access to investment was identified by 64.9% of survey respondents as their primary constraint on growth, and the finding recurs in infrastructure needs data, open-text responses and interview evidence. The issue is not simply volume. The investment instruments currently available to the sector are not calibrated to the project-based, IP-driven, long-cycle business models through which digital creative firms actually operate. The region needs sector-literate capital, not more generic SME finance.

2

Commercial and market access gaps follow closely behind.

Business development, pricing, IP management, licensing and export readiness are the skills most frequently identified as difficult to source and most urgently needed over the next five years. Many organisations carry genuine creative and technical capacity but lack the commercial infrastructure to convert that capacity into sustainable income. Demand-side supports - commissioning pathways, procurement access, buyer introductions, export programming - are as important as supply-side training.

3

The geographic distribution of both opportunity and support remains too uneven.

Galway accounts for 43.3% of active identified digital creative companies in the regional baseline and is home to the majority of the region's institutional infrastructure. The remaining six counties are not without creative activity, but that activity is smaller, more dispersed and less visible to the policy and investment systems that could support it. A regional strategy that operates in practice as a Galway strategy will not build the kind of ecosystem the evidence points toward.

The white paper sets out seven recommendations:

- 1** Developing a sector-literate investment pathway
- 2** Strengthening demand-side and market access supports
- 3** Establishing a recurring regional evidence framework
- 4** Redesigning skills provision around commercial and IP capability
- 5** Implementing a distributed hub-and-network support model
- 6** Providing dedicated AI literacy and IP readiness support
- 7** Treating network infrastructure and intermediary capacity as core economic infrastructure rather than optional programming



The core message is simple: the region does not need to start from scratch.



CREW, the Western Development Commission, Regional Skills Fora, Skillnet Ireland, Atlantic Technological University, University of Galway, Údarás na Gaeltachta, IDA Ireland, Enterprise Ireland, Local Enterprise Offices, local authorities and Creative Ireland already form much of the delivery landscape.

What is missing is not activity, but scale, reach, accessibility, sustainability and alignment with how digital creative enterprises actually operate.

The seven recommendations focus on three linked pillars:

- **Finance and markets**
- **Capability and firm resilience**
- **System infrastructure.**

The paper therefore proposes a three-phase regional pathway:

- 1. Pilot and Proof**
- 2. Scale and Formalise**
- 3. Consolidate and Mainstream.**

Underpinning all seven is an argument that goes beyond the economic. The digital creative industries of the West and North West are not simply a sector to be developed. They are the region's identity, its signal to the world and its most persuasive case to the next generation that a life here is not a compromise. The practitioners choosing to remain in or return to the region - building studios, developing IP, making work that travels - are doing something the economic data does not fully capture.

They are demonstrating that the West is worth betting on.

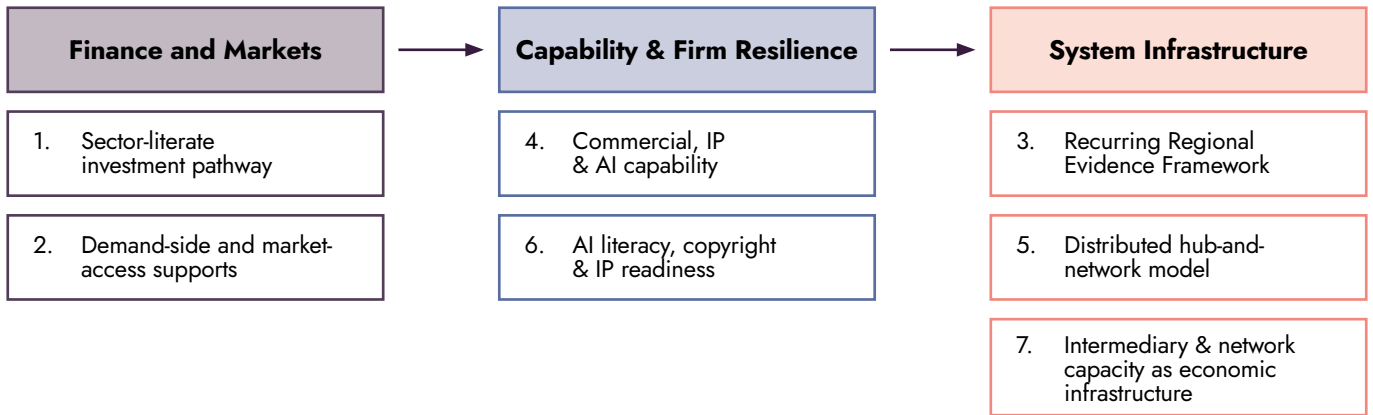
That demonstration depends on their survival and growth.

The recommendations in this paper are designed to build the conditions in which both happen.

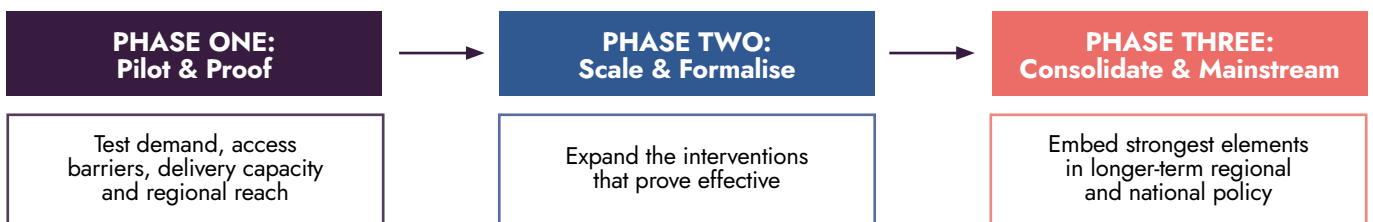
FROM MOMENTUM TO SCALE

Seven Recommendations for the Digital Creative Industries in the West & North West of Ireland

THREE LINKED PILLARS



THREE-PHASE PATHWAY



Integrated system: phases apply across all pillars

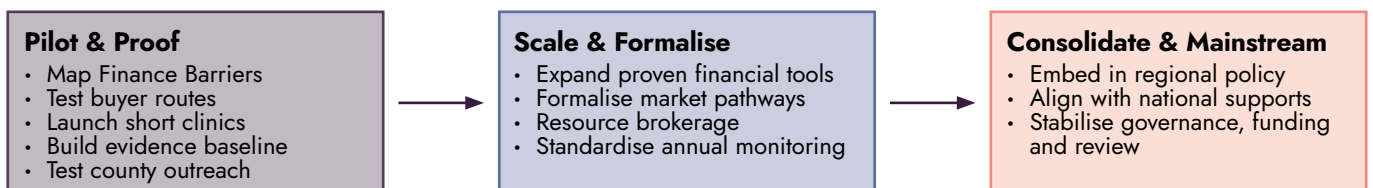
CORE MESSAGE

The region does not need to start from scratch. The challenge is not an absence of activity, but the need for greater scale, reach accessibility, sustainability and alignment with how digital creative firms actually operate.

BUILD ON EXISTING ACTIVITY

CREW • CEED • CLIMB • ELEVATE • Creative Catalyst • Western Development Commission
Regional Skills Fora • Skillnet Ireland • Atlantic Technological University • University of Galway
Údarás na Gaeltachta • IDA Ireland • Enterprise Ireland • Local Enterprise Offices • Local Authorities • Creative Ireland

HOW THE FRAMEWORK MOVES



GOAL:

Align finance, market access, capability and infrastructure so that regional momentum becomes durable scale



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