

FROM MOMENTUM TO SCALE

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

A Decade of Progress and the Path to 2036

White paper prepared for EDGE26 - Ireland's Creative Economy Summit
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OLLSCOIL NA GAILLIMHE
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**An Roinn Breisoideachais agus Ardoideachais,
Taighde, Nuálaíochta agus Eolaíochta**
Department of Further and Higher Education,
Research, Innovation and Science



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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.

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, IP and AI capability
- 5 Strengthening a distributed hub-and-network support model
- 6 Providing dedicated AI literacy, copyright and IP readiness support
- 7 Treating network infrastructure and intermediary capacity as core economic infrastructure



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.

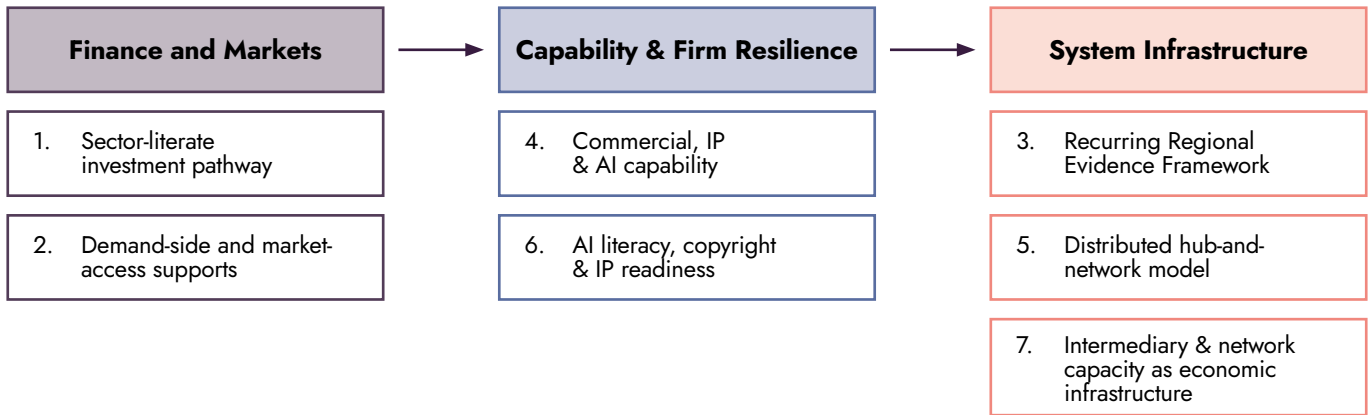
That demonstration depends on their survival and growth.

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

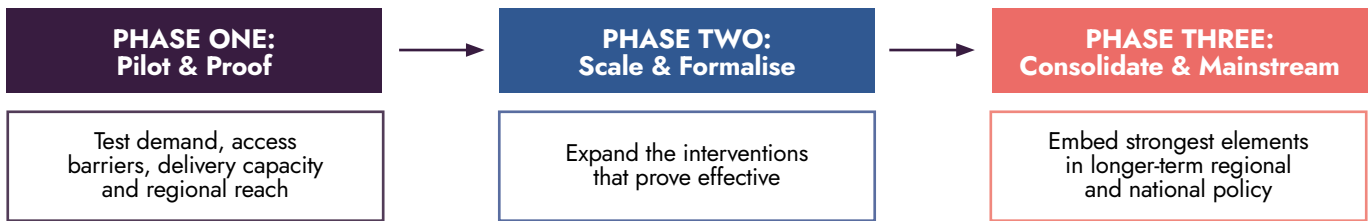
FROM MOMENTUM TO SCALE

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

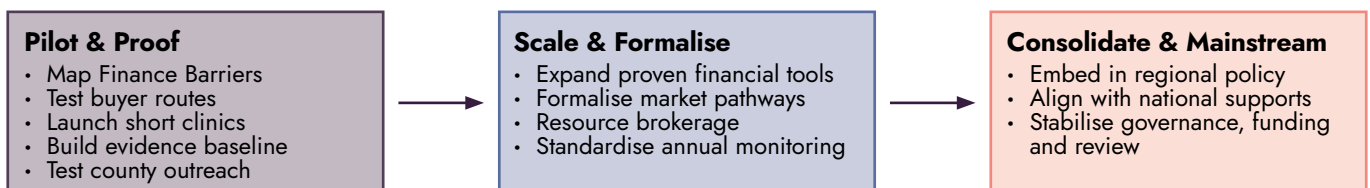
CORE MESSAGE

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

1. INTRODUCTION: FROM MOMENTUM TO SCALE

There is a structural shift underway in the West of Ireland. It does not announce itself in the language of major infrastructure or foreign direct investment, and for that reason it risks being overlooked. Yet its significance is comparable. Across the region, a digital creative economy is taking shape—one built not through large-scale intervention, but through the cumulative decisions of firms and practitioners choosing to locate, remain and build their work here.

Those decisions matter. They signal a departure from a long-standing pattern in which creative and technical talent migrated toward Dublin or beyond. Instead, animators, developers, designers, filmmakers, musicians and creative technologists are assembling viable careers in place. Enterprises are forming, work is being recognised, infrastructure is emerging, and a distributed but connected ecosystem is becoming visible. What has often been described as potential is now, increasingly, practice. This white paper is concerned with what follows from that shift.

Momentum is not the same as scale. The conditions that allow a sector to emerge are not the same as those required for it to stabilise, expand and sustain itself over time.

Across the seven counties of Galway, Mayo, Roscommon, Donegal, Sligo, Leitrim and Clare, those conditions remain only partially in place. The region is geographically diverse and economically uneven. Galway, as the only city, carries a disproportionate share of institutional density and creative visibility, while activity elsewhere is more dispersed, less visible and more weakly supported. Any strategy that treats the region as a single, undifferentiated unit risks misunderstanding both its strengths and its constraints.

The focus of this paper is deliberately specific. It concentrates on the digital creative industries: screen production and animation, games and interactive media, immersive technologies, digital design, music technology, creative software and application development, web and user experience design, digital marketing, publishing and visual media production. This is the segment of the creative economy in which culture and technology converge most directly—where creative work becomes a scalable product, and where regional distinctiveness can translate into economic activity that travels beyond place while remaining rooted in it. The wider cultural sector is not the primary object of measurement here, but it remains foundational, providing the talent, identity and creative depth on which digital activity depends.

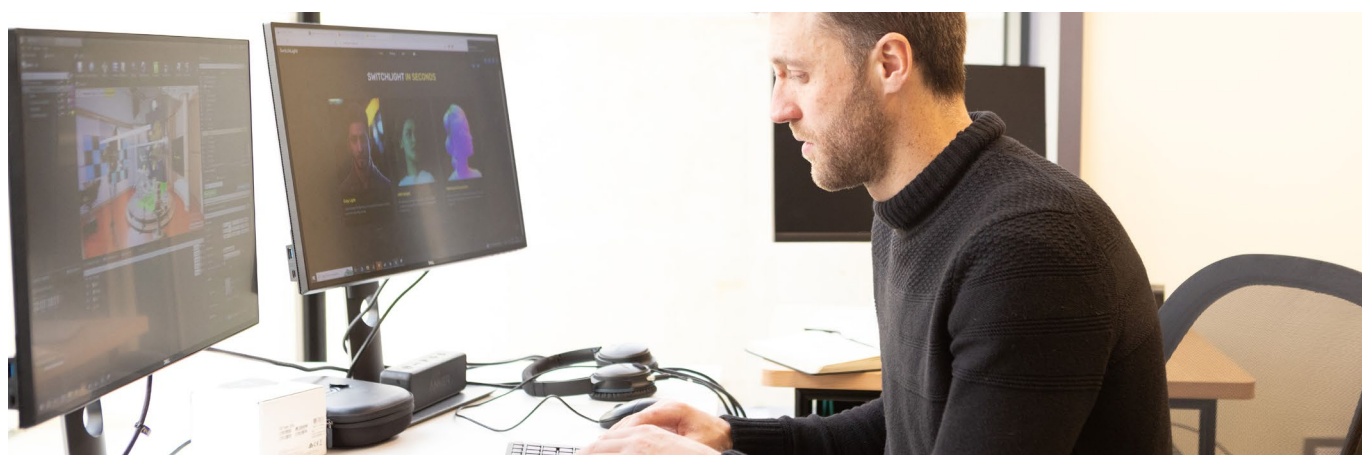
This scope reflects a wider policy direction. National and European frameworks increasingly position digital creative industries as both cultural assets and economic drivers, with particular emphasis on games, design and content creation (Creative Ireland, 2024; European Commission, 2024). Earlier regional studies adopted broader definitions of the creative economy (Collins et al., 2011; 2018; Collins, 2021). These provide essential context, but their measurement frameworks differ from the baseline developed here, and their headline figures should not be treated as directly comparable.

The argument advanced in this paper is not that the region's digital creative industries are without difficulty.

It is that a credible foundation now exists - of firms, talent, infrastructure and identity - on which a more deliberate phase of development can be built. The challenge is that the system within which these organisations operate is not yet aligned with how they actually grow. Finance is poorly matched to project-based and IP-driven business models. Market access remains uneven. Commercial capability is underdeveloped. And the geography of support remains too concentrated.

The opportunity, therefore, is not simply to expand the sector, but to reconfigure the conditions around it: to build a model of digital creative development that is rooted in place, connected to global markets, and supported by finance, skills, evidence and market access designed around the realities of creative enterprise.

Culture has long contributed to the vitality of the West. What is needed for the next decade is to make that contribution structural.



2. METHODS AND EVIDENCE BASE

The evidence base for this white paper draws on five complementary sources. No single source is treated as definitive. The value of the approach lies not in any single source, but in identifying recurring patterns, structural features and strategic priorities that are consistent across multiple streams of data.

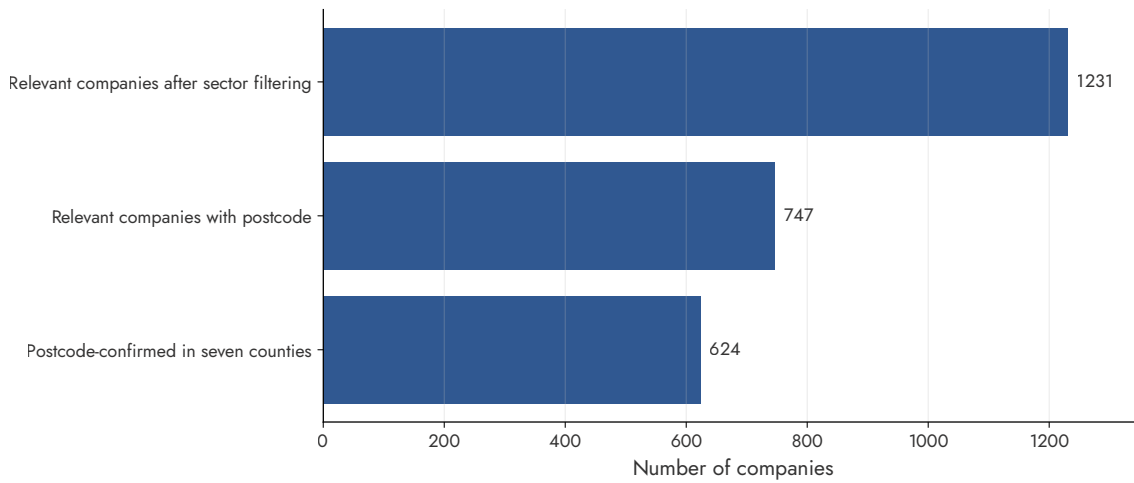
1

The first evidence stream is author analysis of the Central Statistics Office Business Demography dataset, specifically table BRA34, covering 2019 to 2023. This dataset provides annual counts of enterprises, employees and persons engaged at county level, classified by NACE Rev. 2 codes. It is used here for trend context rather than as a precise measure of the digital creative industries. NACE classifications may not capture the hybrid, project-based and often multi-disciplinary character of digital creative activity, and several relevant subsectors - particularly freelance, sole-trader and micro-enterprise activity - may be undercounted or classified under general headings that do not reflect their creative orientation.

2

The second evidence stream is derived from the FAME database, extracted in March 2026 across five relevant sector groups: Publishing; Film, TV, Music and Radio; Software Publishing, Computer and Information Technology; News, PR, Advertising and Marketing; and Architecture, Design and Photography. After sector filtering, 1,231 companies were identified as relevant. Of these, 747 had postcode data sufficient to confirm geographic location, and 624 were confirmed within the seven-county study area. Employment data were available for 494 of the 1,231 relevant companies; revenue data were too incomplete to support robust output estimation and are not used for that purpose. This FAME baseline is referred to throughout as the visible firm baseline. It should not be treated as a complete census.

FAME filtering pathway



Source: Author analysis of FAME extract, March 2026.

3

The third evidence stream is a Vision-Net company extract, used to provide a more current enterprise count for the seven-county region. The extract was filtered to retain active companies only, with dissolved, liquidated, struck-off and ceased firms removed. County location was assigned through address fields, county names and location keywords.

Companies were then grouped into digital creative subsectors using NACE codes, supported where necessary by NACE descriptions and industry-sector labels. Broad software, IT and consultancy categories were treated cautiously, with firms included only where there was a plausible creative, media, design, screen, content or digital-production signal.

This process produced a working count of 1,045 active companies with relevant or potentially relevant digital creative classifications. The figure is best read as a practical enterprise estimate rather than a full census: it will undercount freelancers and sole traders not visible in company-register data, while some broad NACE categories remain imperfect proxies for creative activity.



4

The fourth evidence stream is the EDGE26 Survey, conducted between 26 March and 22 April 2026 via Microsoft Forms and distributed through project partners and sector networks. It received 57 final responses. Respondents were predominantly based in Galway and Donegal, with smaller numbers from Roscommon, Sligo, Mayo, Clare and Leitrim. By organisation type, 23 respondents were sole traders or freelancers and 21 were micro-enterprises. The sample is self-selecting and should be treated as indicative sector intelligence rather than as a definitive profile. Where findings are consistent across survey responses, open-text coding and interview evidence, this convergence strengthens interpretive confidence.

5

The fifth evidence stream comprises ten in-depth qualitative interviews with firms and practitioners across the seven counties, conducted in 2026. All interviews were anonymised. The sample spans animation and screen production, immersive technology, creative technology and AI tools, publishing and digital media, indie games development, film and Irish-language screen production, games and creative agency work, and photography and visual content production. Interview findings are used to contextualise and deepen the quantitative evidence rather than to substitute for it.



3. GLOBAL TRAJECTORIES AND REGIONAL ALIGNMENT

Over the past two decades, the digital creative industries have moved from the margins of economic policy to its centre. They are no longer framed as a cultural adjunct, but as a structural driver of growth, employment and export value. For the West and North West of Ireland, this shift defines both the opportunity and the pressure: the region is not developing its digital creative economy in isolation, but within a global system that is expanding rapidly and becoming more competitive at the same time.

The scale of that system is now well established. UNCTAD identifies the creative industries as among the fastest-growing sectors in global trade, with digital creative activity—content, platforms, immersive technologies and AI-enabled production—emerging as a primary driver of growth in services exports (UNCTAD, 2022; 2024). UNESCO situates this expansion within a broader argument: that the creative economy generates not only economic value, but cultural diversity, social cohesion and place-based identity (UNESCO, 2022).

The economic and cultural cases are not in tension. They are mutually reinforcing.

European policy has increasingly adopted this dual framing, treating cultural and creative industries as both economic capacity and cultural infrastructure.

This matters for regions such as the West and North West, where EU-derived funding, research programmes and policy instruments shape the conditions under which sectors can develop (European Commission, 2024; European Parliament, 2025).

The United Kingdom provides the most comparable reference point, and its experience is instructive less for its scale than for its spatial structure. While the UK creative industries make a substantial contribution to GVA, employment and exports, growth remains highly concentrated in London and the South East. Elsewhere, activity is characterised by smaller clusters, microclusters and dispersed networks of practitioners (DCMS, 2023; 2024; 2026; Creative Industries Policy and Evidence Centre, 2026). Research on rural creative microclusters shows that in peripheral regions, creative economies tend not to follow the agglomeration logic of major cities. Instead, they operate through distributed networks, project-based collaboration and reliance on a small number of anchor organisations (Creative Industries Policy and Evidence Centre and National Innovation Centre for Rural Enterprise, 2022). This is not a distant analogy. It is a close description of how the West and North West already functions.

Ireland's policy direction reflects similar recognition, but with a less developed evidence base. The Digital Creative Industries Roadmap 2024–26 identifies the sector as a national priority, with ambitions spanning IP creation, export growth, immersive technologies and a more coherent support infrastructure (Creative Ireland, 2024). Ireland's National Smart Specialisation Strategy for Innovation 2022–2027 provides a further policy frame, emphasising regional innovation, research and development, and the need for places to build enterprise growth around distinctive regional strengths. The Regional Enterprise Plans provide the main place-based enterprise framework through which these priorities are translated into regional objectives, collaborative projects and targeted enterprise development activity (Department of Enterprise, Trade and Employment, 2022a; 2022b). The Regional Skills Fora add a necessary skills architecture to this landscape by connecting employers with education and training providers so that regional skills needs can be identified and responded to more directly.

**The strategic intent is clear.
The ability to measure progress
against it remains limited.**

This limitation is not incidental. Standard industrial classifications were not designed for an economy organised around intellectual property, hybrid activity and project-based work. They systematically undercount digital creative activity, particularly in regions where it is dispersed, freelance-driven and operating below the threshold of institutional visibility (Creative Industries Policy and Evidence Centre, 2020). The OECD has long noted that the contribution of culture to local development extends beyond what conventional metrics can capture—through talent attraction, social capital, identity and spillover effects (OECD/ICOM, 2019).

In the West and North West, this is not a methodological footnote. It is a structural constraint on how the sector is understood, supported and invested in.

The policy landscape has, nevertheless, become more articulated over the past decade. At national level, the shift from the Creative Ireland Programme 2017–2022 to the Digital Creative Industries Roadmap 2024–26 marks a move from a predominantly cultural framing towards one grounded in enterprise, export, innovation and regional development (Creative Ireland, 2017; 2024). This shift matters because it changes what kinds of interventions can be justified, what outcomes are expected, and what types of firms the system is designed to support.



The audiovisual sector provides a clear precedent. Through sustained alignment of policy, finance, training and international market engagement, Ireland has built a functioning screen industry. The significance of this is not sector-specific success, but the demonstration that growth follows when supports are designed around how firms actually operate — how they finance projects, manage production cycles and connect to global markets (Government of Ireland, 2021).

At regional level, the West and North West now has a more visible and purposeful infrastructure. CREW provides a dedicated anchor for creative enterprise in the region, combining workspace, networks and enterprise development. The Western Development Commission has supported investment and coordination, while Regional Skills structures provide an important bridge between employers, education providers and training needs, particularly where organisations require more industry-facing, commercial, and technical capability. Údarás na Gaeltachta is also significant, given its enterprise-development role in Gaeltacht areas and the importance of Irish-language, place-based and cultural production within the wider regional creative economy. International recognition in the form of Galway's UNESCO Creative City of Film designation has further strengthened the region's profile (CREW, 2021; 2024; WDC, 2023; 2024; Atlantic TIDE Partners and Creative Ireland, 2022; UNESCO Creative Cities Network, 2024).



Yet this landscape remains uneven. Screen and audiovisual activity benefits from the most coherent alignment of funding, training, commissioning and market access. In contrast, firms in design, publishing, advertising, creative technology and software-linked creative activity remain more dependent on general enterprise supports. These supports are often valuable, but they are not consistently designed for the operating realities of digital creative firms: long development cycles, intangible IP, project-based cashflow, micro-enterprise structures and the need to invest well in advance of returns.

The implication is not that the region lacks support, but that support is not yet fully aligned with the sector it is intended to serve. The challenge for the next decade is therefore not simply to expand the policy landscape, but to recalibrate it - to design finance, skills provision, infrastructure and market access in ways that reflect how digital creative industries actually function in a dispersed, micro-enterprise-dominated regional economy.

4. A DECADE OF PROGRESS: 2016–2026

The West and North West did not enter this period without a creative economy base.

Earlier regional studies showed a substantial wider creative, cultural and craft economy, with close to 5,000 companies, nearly 13,000 jobs and direct sales of €486.2 million recorded in 2016 (Collins et al., 2018). Those figures relate to a broader sector than the digital creative industries measured in this paper. Their significance lies elsewhere: they show that the present digital creative economy has not emerged from nothing. It is developing from a deeper regional culture of creative work, enterprise and place-based identity.

Since 2016, the most visible progress has been institutional.



The screen and audiovisual ecosystem has strengthened through Ardán, TG4, Galway City of Film, Galway Film Fleadh, production networks and training initiatives.



Higher education pathways through the Atlantic Technological University and the University of Galway have expanded the regional talent base.



National policy has become more explicit in recognising digital games, design and content creation as strategic priorities.



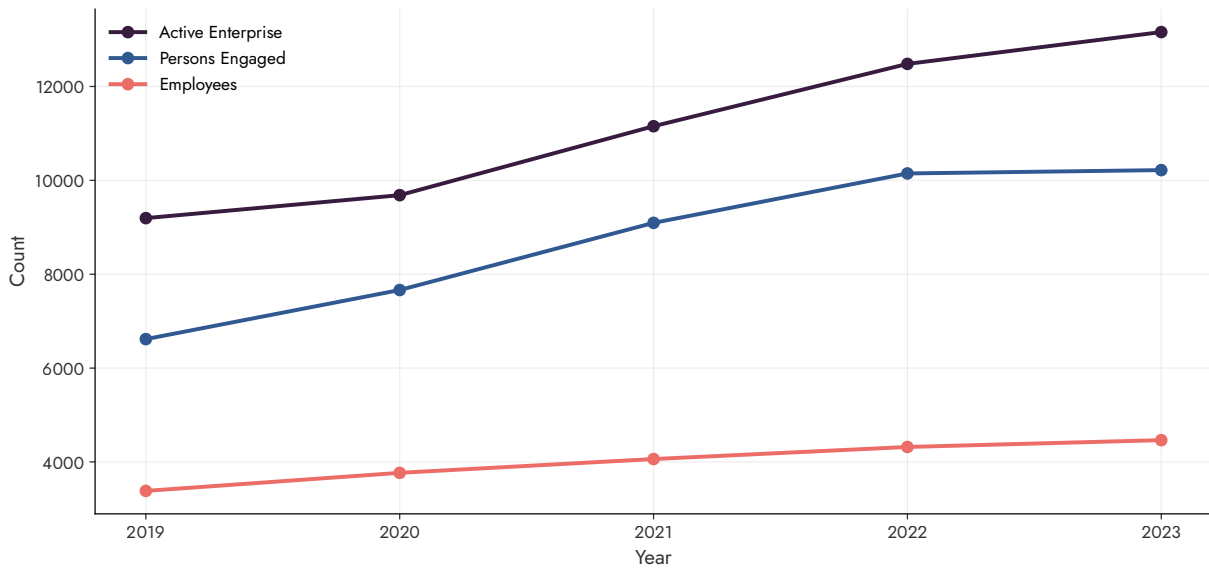
CREW has provided a dedicated anchor for creative enterprise, games, animation, design, digital media and creative technology. That enterprise-development role is now expressed through a more formal programme architecture. CREW's programme offer includes accredited and non-accredited supports for creative entrepreneurs, including CEED, an incubation programme delivered with Atlantic Technological University and supported by Local Enterprise Office Galway and Gréasán na Meán Skillnet, designed to help early-stage creative entrepreneurs move from idea development towards sustainable business formation.

It also includes CLIMB, a two-year programme focused on scaling, innovation and leadership capacity co-funded by the Government of Ireland and the European Union through the ERDF Northern and Western Regional Programme 2021–27; ELEVATE, a business-development programme for games developers focused on leadership, financial management, legal compliance and market strategy delivered in partnership with Imirt and supported by the Screen Ireland Stakeholders Fund; and Creative Catalyst, a cross-border innovation support programme funded through InterTradelreland's Innovation Call 2025 to address capability gaps among digital creative SMEs and academics across the island of Ireland.

Taken together, these developments have moved the region beyond a language of creative potential towards one of more clearly defined enterprise capacity.



CSO baseline trend, selected digital creative sectors, 2019-2023



Source: CSO BRA34, selected NACE-derived sectors, seven-county region.

The available data support this picture of movement. Author analysis of CSO Business Demography BRA34 data shows growth across selected relevant sectors in the seven counties between 2019 and 2023. Active enterprises increased from 3,383 to 4,465; employees from 6,617 to 10,218; and persons engaged from 9,195 to 13,159. These figures are broad indicators rather than a precise census of the digital creative industries, but they point to a relevant activity base that has expanded rather than stood still.

The interview evidence reinforces this trajectory. Across subsectors, respondents described a region that is more connected, more visible and better supported than it was a decade ago. Games practitioners noted stronger recognition and more formal programme support. Screen respondents described increased activity and a more developed production environment. Others pointed to the role of hubs, networks and education providers in making creative-digital work feel more possible in the region than it once did.

That progress should be acknowledged. But it should not be overstated. The same evidence points to persistent constraints: rising costs,

uneven profitability, limited local demand and uneven access to national and international markets, difficulty accessing investment, limited commercial capacity and continued challenges in retaining talent.

Several interviewees suggested, in different ways, that the region has become better at helping enterprises start, connect and become visible, but less consistently able to help them grow, internationalise or sustain employment over time.

This distinction is central to the argument of the paper. The decade from 2016 to 2026 was a decade of establishment. It built institutions, visibility, networks and confidence. The task for the decade to 2036 is different. It is to convert that progress into more durable business models, stronger market access, better-aligned finance and a regional ecosystem capable of supporting firms beyond the point of emergence.

Momentum has been built. Scale remains fragile.

5. THE REGIONAL ECOSYSTEM TODAY: FIRMS, GEOGRAPHY, INFRASTRUCTURE AND SKILLS

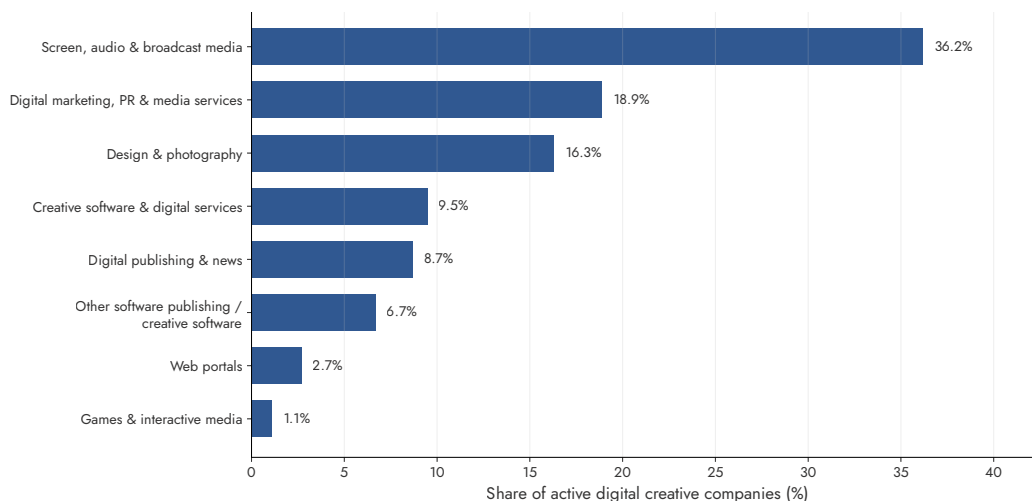
The current firm-level picture confirms both the scale and the unevenness of the regional digital creative economy.

Author analysis of the 2026 Vision-Net extract identified **1,045** active companies in the **seven-county** region with relevant or potentially relevant digital creative classifications.

The largest category was Screen, Audio and Broadcast Media, followed by Digital Marketing, PR and Media Services and Digital Design, Photography and Visual Media. Digital Publishing, Creative Software and App Publishing, Web Platforms and Games and Interactive Media appear smaller in firm count but remain strategically important because of their connection to IP creation, content production, platform development, interactive media and market-facing creative work.

This distribution should be read carefully. NACE-based company data gives a useful view of the registered enterprise base, but it cannot fully capture the hybrid, project-based and multi-disciplinary character of digital creative activity. Some broad software, IT and consultancy categories may overstate creative relevance, while other firms with strong creative or digital-production activity may sit under general classifications. A digital design studio, an immersive media producer, a creative technologist or a small games firm may be more strategically significant than its industrial classification suggests. The Vision-Net analysis is therefore best understood as a practical enterprise estimate: a strong indication of what is visible in the company data, but not a complete census of the sector.

Subsector profile of active digital creative companies



Source: Vision-Net data extract; active digital creative companies.

The geography of that baseline is highly concentrated. Galway accounts for **452** of the **1,045** postcode-confirmed relevant firms, or **43.30%** of the regional total.

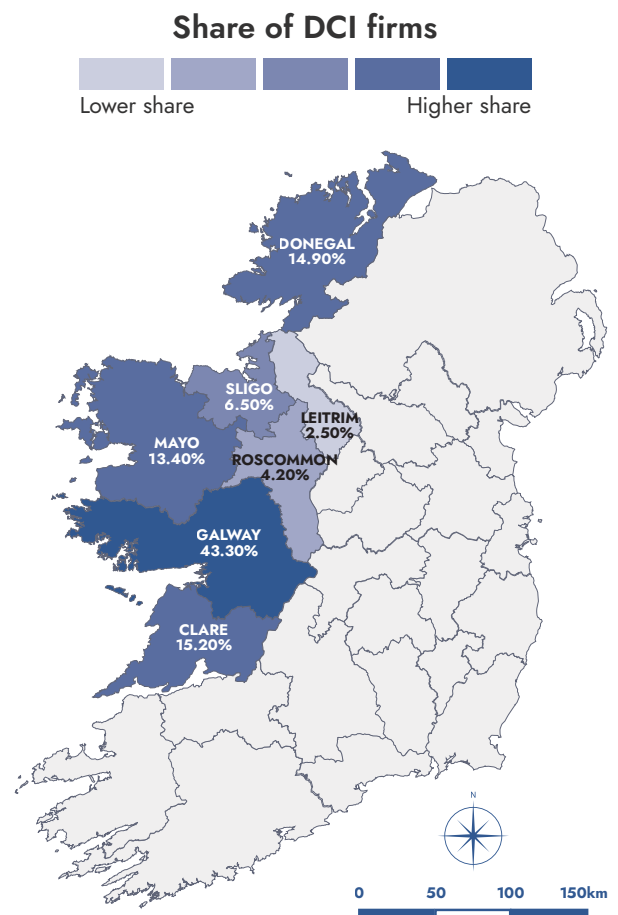
Clare, Donegal and **Mayo** form a visible second tier, while **Sligo, Leitrim** and **Roscommon** appear much less prominently in the company-level data.

This does not mean that creative activity is absent outside Galway. It means that registered company activity, institutional visibility and measurable firm presence are heavily weighted towards the regional city.

That concentration is both an asset and a risk. Galway provides density: firms, institutions, higher education, networks, cultural visibility and support infrastructure. It is the region's principal creative-digital anchor. But if the wider regional strategy depends too heavily on Galway, the result will be a strong core surrounded by weaker and less visible peripheral activity.

For the West and North West, the strategic question is not whether Galway should lead; it is how Galway's strength can be used to support a more distributed regional ecosystem.

Digital creative industries in the West and North West of Ireland



COUNTY	PERCENTAGE
Clare	15.20%
Donegal	14.90%
Galway	43.30%
Leitrim	2.50%
Mayo	13.40%
Roscommon	4.20%
Sligo	6.50%

Firm size reinforces this point. In the FAME data, among companies with available employment information, micro-enterprises dominate. The survey evidence points in the same direction: 23 of 57 respondents were sole traders or freelancers, and a further 21 were micro-enterprises. This is not a marginal feature of the sector. It is the sector's basic operating structure. Digital creative activity in the region is carried largely by small studios, freelancers, production companies, designers, developers, creative technologists and support organisations, rather than by a small number of large employers.

This structure gives the sector much of its energy. It supports flexibility, collaboration, experimentation and strong attachment to place. But it also produces vulnerability. Micro-enterprises often lack the time, cashflow and administrative capacity to apply for support, develop new markets, manage IP, absorb long payment cycles or hire specialist staff. In the survey, 15 respondents identified time and capacity for business development as a main barrier to growth, while 37 identified access to finance or investment. These should not be read as separate.

Together, they describe the operating reality of a small-firm ecosystem trying to grow without the commercial and financial infrastructure usually required to support that growth.

The policy implication is clear. A conventional enterprise-development model, built around assumptions of linear growth, stable staffing and readily measurable output, will only partially fit this sector.

The digital creative economy of the West and North West requires supports designed around micro-scale, project-based, IP-driven and networked forms of work.

That means finance suited to development cycles, skills provision that fits around small firms and freelancers, market access supports that reduce the burden of business development, and infrastructure that connects dispersed practitioners to the region's main institutional anchors.

The ecosystem today is therefore neither weak nor fully mature. It is visible, active and increasingly connected, but still uneven, undercapitalised and heavily dependent on small firms carrying more risk than they should. It is important to not replace this structure with a conventional large-firm model, but to strengthen the conditions that allow a micro-enterprise-led creative economy to become more resilient, more commercially capable and more regionally distributed.



6. VOICE OF THE SECTOR: SURVEY AND INTERVIEW FINDINGS

Numbers describe a sector. People explain it.

The EDGE26 Survey and interview programme provide the clearest insight into how firms and practitioners experience the digital creative economy from within. The survey should be read as indicative rather than representative, but its value lies in the consistency between structured responses, open-text answers, interview evidence and the firm-level baseline.

Across these sources, the same pattern emerges: this is an active and ambitious sector, but one operating under persistent financial, commercial and geographic constraints.

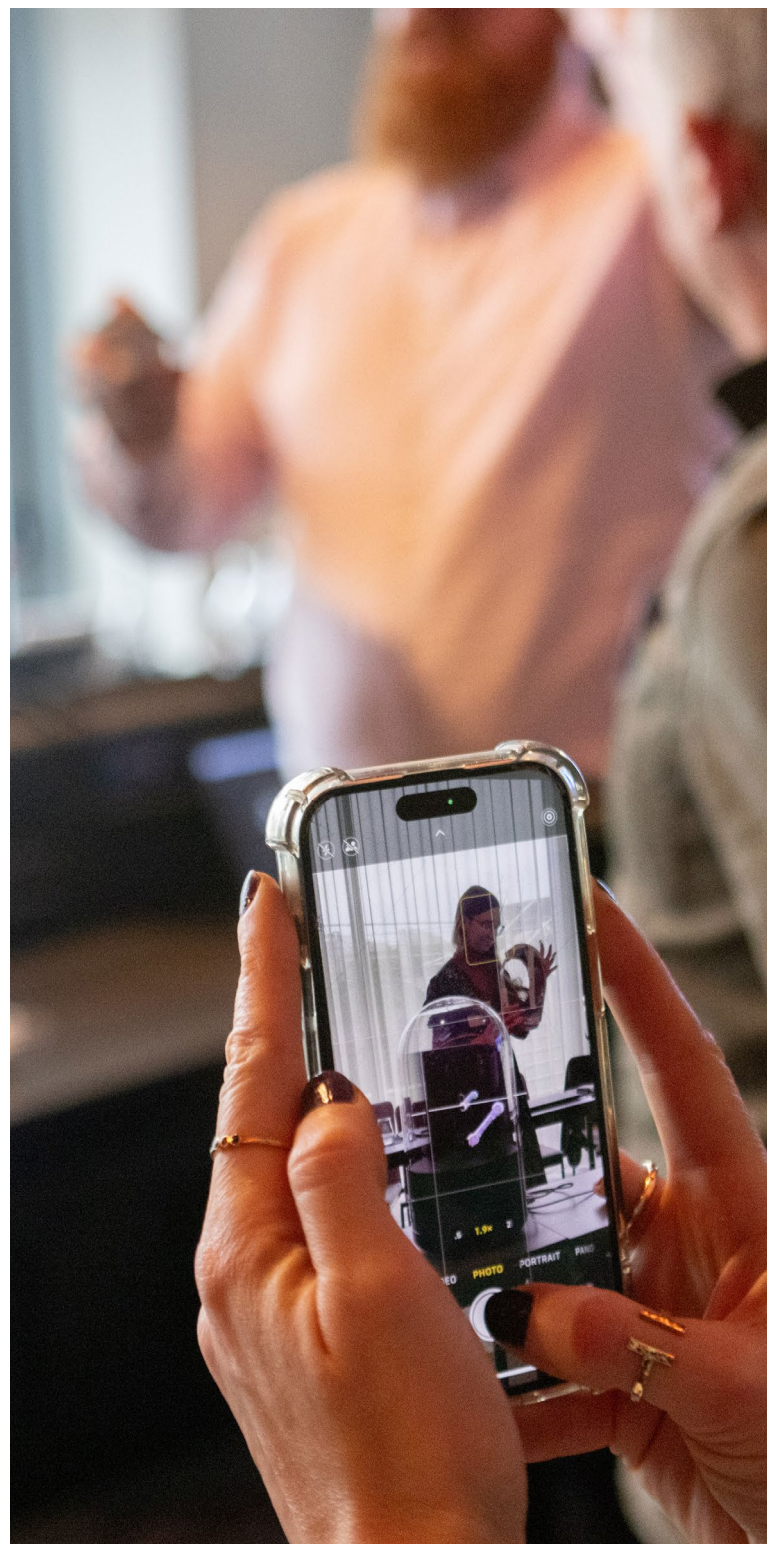
The survey profile is itself revealing.

Of 57 responses, the largest location group was Galway, with 24 responses, followed by Donegal with 13.

The largest organisation types were **sole traders** and **freelancers**, with 23 responses, and **micro-enterprises**, with 21.

Film and TV production was the most common activity category, with 19 responses.

This profile is consistent with both the FAME evidence and wider research on creative economies in peripheral regions: the sector is **dispersed**, **micro-scale** and **practitioner-led**.



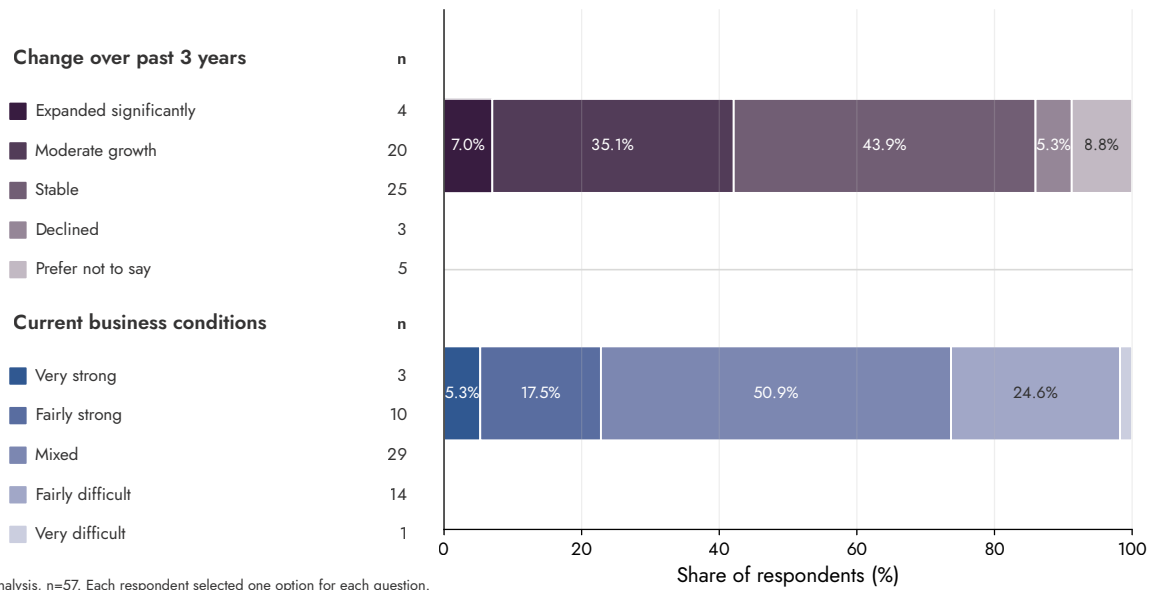
EDGE26 Survey respondent profile

DIMENSION	CATEGORY	COUNT	%
Location	Galway	24	42.1%
	Donegal	13	22.8%
	Roscommon	3	5.3%
	Sligo	3	5.3%
	Mayo	2	3.5%
	Clare	2	3.5%
	Leitrim	1	1.8%
	Other / mixed	9	15.8%
Organisation type	Sole trader / freelancer	23	40.4%
	Micro-enterprise	21	36.8%
	Small enterprise	8	14.0%
	Medium enterprise	1	1.8%
	Large enterprise	1	1.8%
	Other / non-standard response	3	5.3%
Main activity category	Film / TV production	19	33.3%
	Games / interactive media	8	14.0%
	Digital design / creative technology	8	14.0%
	Digital marketing / content production	5	8.8%
	Photography / visual media production	5	8.8%
	Software / app dev with a creative focus	3	5.3%
	Animation / VFX	2	3.5%
	Immersive technologies (AR / VR / XR)	2	3.5%
	Other	5	8.8%

The current business picture is mixed rather than simply positive or negative. Twenty-nine respondents described conditions as mixed, while 15 described them as difficult or very difficult. At the same time, 25 reported stability over the past three years, 20 reported moderate growth and four reported significant expansion.

The most common future ambition was to strengthen long-term sustainability and resilience rather than to scale internationally. This matters. It suggests that many firms are not rejecting growth, but first need a more secure base from which growth can become realistic.

Survey: change over past 3 years and current business conditions



Source: EDGE26 survey analysis, n=57. Each respondent selected one option for each question.

Interview evidence reinforces this point. Firms described progress, visibility and stronger networks, but also rising costs, weak profitability, intermittent work, undercapitalisation and difficulty converting creative capacity into sustained income. Several firms were not primarily speaking about rapid expansion. They were speaking about survival, continuity and the ability to plan beyond the next project.

In that sense, sustainability is not a lack of ambition. It is the necessary condition for ambition to become credible.

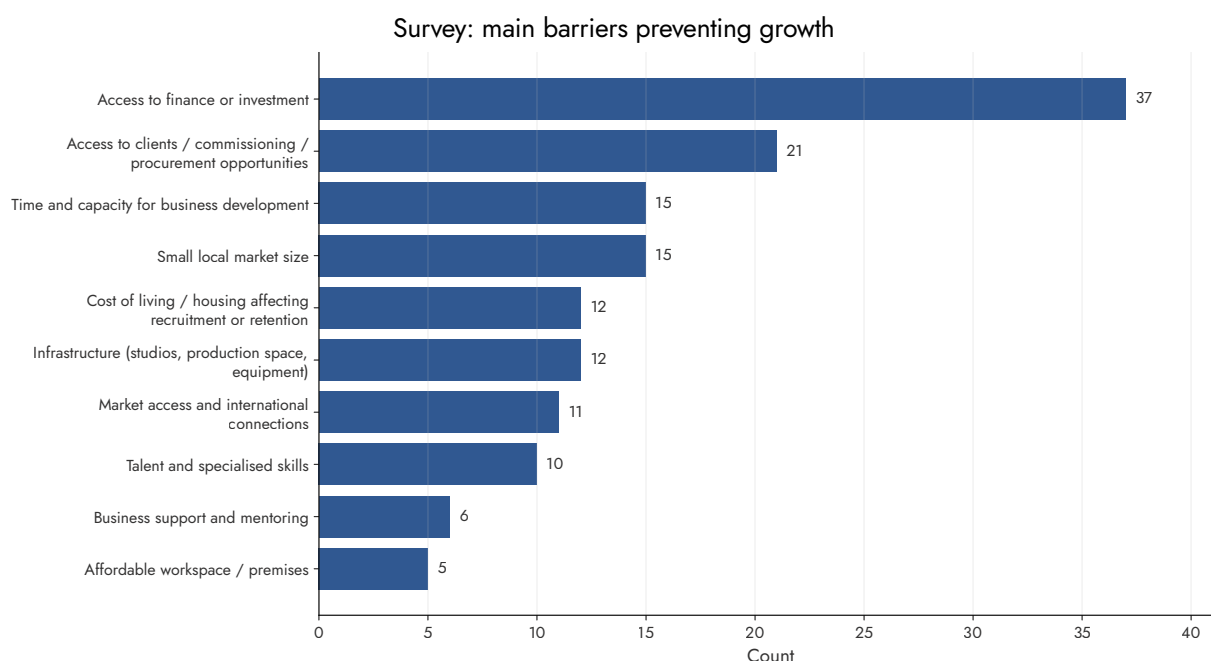
“We should adopt a long-term approach to develop this sector, It’s a marathon. It’s not a sprint, it takes years to grow, it takes multi-agency collaboration”

- Interview participant,
Supporting ecosystem

The evidence on barriers to growth is the clearest finding in the survey. Access to finance or investment was selected by 37 of 57 respondents, or 64.9%, making it the dominant barrier by a substantial margin. This finding recurs across the wider evidence base:

Investment and funding infrastructure was the most frequently selected infrastructure need, and finance and investment was the most common theme in open-text responses.

When a finding appears this consistently across structured survey data, open-text coding and interview evidence, it should not be read as a general complaint. It is a structural diagnosis.



Source: EDGE26 survey analysis, n=57; respondents selected up to three options.



The interviews sharpen this diagnosis. Firms are not simply asking for more grant aid. They are describing a mismatch between the finance available and the finance that digital creative businesses actually require. Games developers, animation studios, creative technologists and IP-driven content producers often work through long development cycles, prototype stages and uncertain early revenue. Conventional short-cycle enterprise supports do not easily fit that model. The interview summary repeatedly points to funding gaps, licensing complexity, undercapitalisation, weak investor understanding and public supports that are still too often designed for more conventional sectors.

One participant captured the pressure of sustaining a small creative team directly:

“We need to get more cash because we’re undercapitalised at the moment and we don’t want to shrink the team, so we never level down. We always level up.”

- Interview participant, Micro-enterprise

This is the finance problem in lived terms. It is not just that money is scarce. It is that creative firms often have to carry risk for long periods before returns are visible, while still paying staff, contractors, software costs, workspace costs and development costs. In games, animation, immersive technology and AI-native creative tools, the value may sit in IP or product development long before there is stable revenue. That requires patient, sector-literate capital.

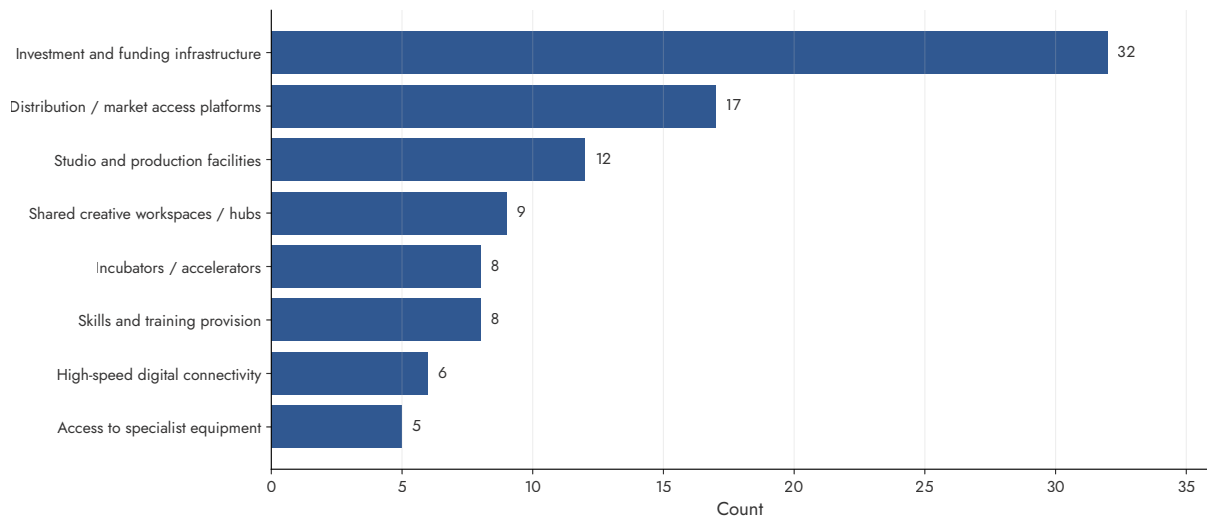
Market access is the second linked constraint. Access to clients, commissioning and procurement was selected by 21 respondents, or 36.8%, while small local market size and time for business development were each selected by 15 respondents. These findings are connected. A micro-enterprise can have strong creative capacity and still lack the time, contacts or procurement route to convert that capacity into sustained income. Demand-side supports - showcase events, public commissioning, procurement pathways, buyer introductions and export-readiness programming - are therefore not peripheral interventions. They are part of the route from creative practice to sustainable enterprise.

The interviews give this issue sharper definition. Screen and production respondents pointed to slow commissioning decisions, weak domestic broadcaster funding and the need for more sustained regional production. Immersive and creative-technology respondents described procurement barriers and licensing complexity. Freelance and multimedia respondents pointed to visibility, sales capacity and access to clients as more pressing than creative ability itself. Across these accounts, the same pattern appears: firms can make work, but too often lack reliable routes to the markets, commissioners and buyers that would allow that work to become durable income.

“The first thing, every funder from Amazon, Netflix, Disney, Apple, you name it, they say, who’s your home broadcaster?”

- Interview participant, SME, Screen

Survey: infrastructure and services most needed



Source: EDGE26 survey analysis, n=57; respondents selected up to two options.

The skills evidence points in the same direction. Business and commercial skills were the most frequently selected difficult-to-source skills, chosen by 56.1% of respondents. Business development and commercial skills were also the most frequently identified emerging skills need over the next three to five years, selected by 36 respondents, close to two thirds. IP and legal skills were selected by 40.4% of respondents.

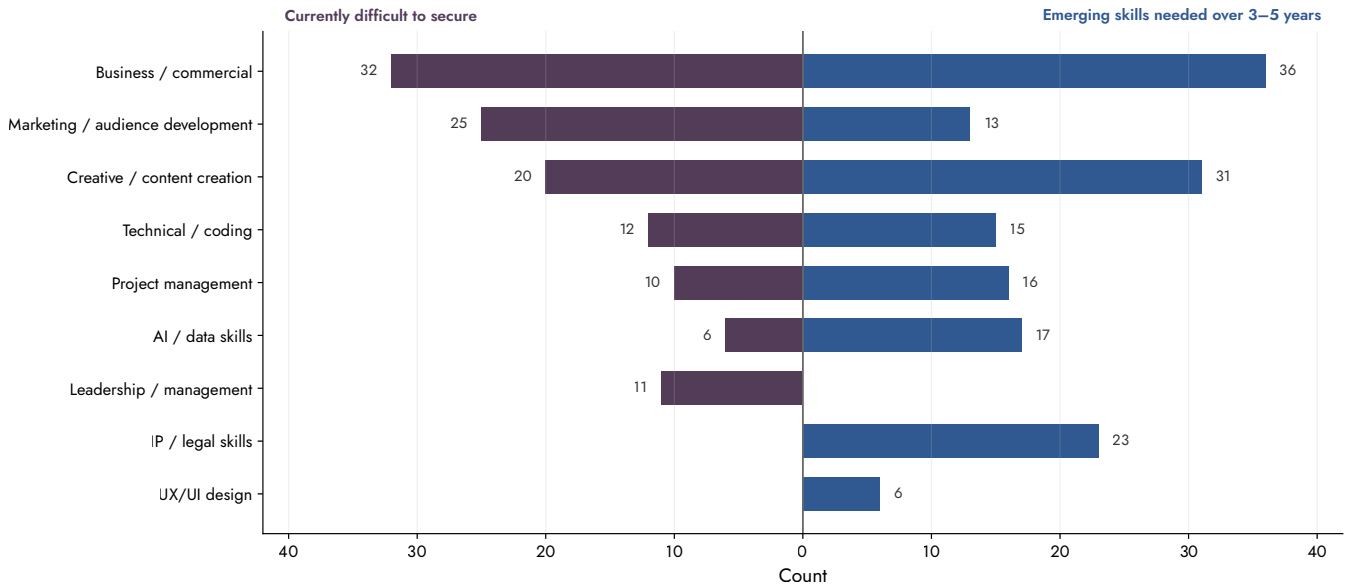
The significance of this finding is that it reframes the skills challenge. Digital content creation, software development and AI capability matter, but they are not the primary gap.

The skills most directly connected to sustainability and scale are commercial:

- pricing,
- sales,
- licensing,
- IP management,
- contract negotiation,
- audience development,
- export readiness and
- business development.



Survey: current skills gaps and emerging skills needs



Source: EDGE26 survey analysis, n=57; respondents selected up to three options.

Interview respondents did not describe a sector lacking creativity. They described a sector in which creative and technical capability often runs ahead of commercial infrastructure. The multimedia and photography interview points to sales capacity, visibility and practical support as more important constraints than talent. The games and digital design interview identifies a similar issue from another angle: graduates may be improving, but still require significant upskilling to become production-ready, especially in design, delivery and industry-facing work. The immersive technology interview makes the same point in technical terms: graduates may have relevant knowledge, but often need substantial applied training before they can contribute fully to commercial projects.

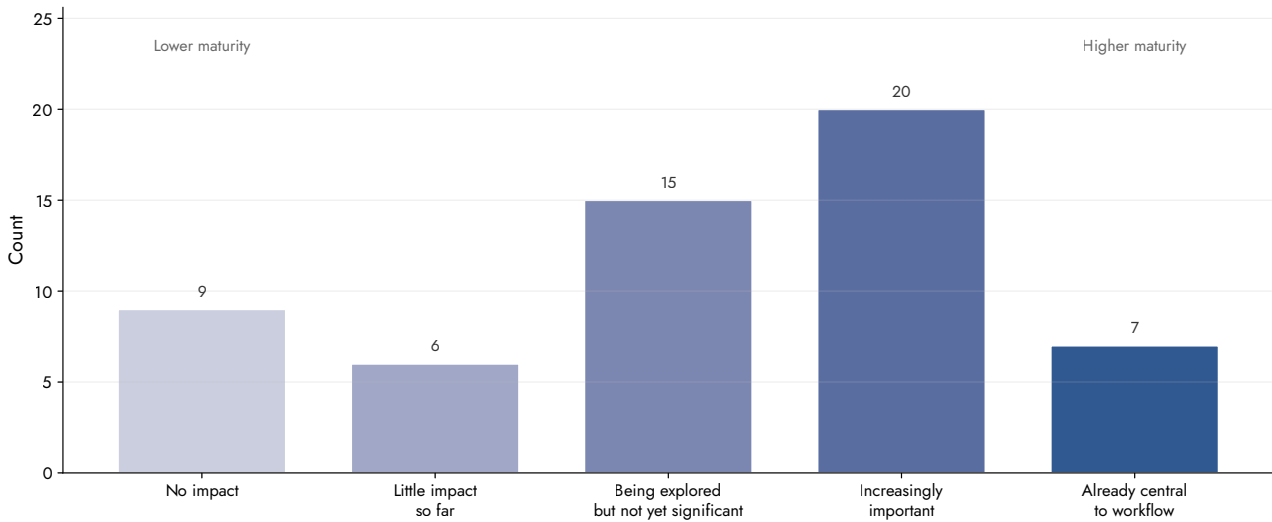
Taken together, the skills evidence suggests that the next phase of support should not simply produce more creative workers. It should help creative workers and firms capture more value from what they already produce.

The gap is not between creativity and technology. It is between creative capability and commercial sustainability.

“We looked at universities, they had great people, but the skill wasn’t there, and the schools weren’t preparing them for real case scenarios.”

- Interview participant, Small enterprise, Games

Survey: AI and automation in business workflows



Source: EDGE26 survey analysis, n=57.

AI sits across the evidence as both an opportunity and a source of uncertainty. Twenty respondents described AI or automation as increasingly important, 15 said it is being explored but is not yet significant, and seven described it as already central to their workflow. When asked whether AI is mainly an opportunity or a risk, the largest group selected both equally. This is not indecision. It reflects the reality of a technology that can reduce administrative burden, support early-stage development and extend the capacity of small teams, while also raising serious questions about originality, pricing pressure, copyright, rights ownership and the value of human creative labour.

The interview evidence shows how uneven this is in practice.

- For the AI-native creative technology firm, AI is not an external disruption but the core of the business model.
- For games firms, AI may support prototyping, boilerplate tasks, process automation or workflow efficiency, but its role in core creative implementation remains more uncertain.
- In screen production, AI is viewed as a tool that needs monitoring and governance, particularly where it touches development, creative judgement or critical thinking.
- For visual content producers, AI may be useful, but it also increases the risk of generic output and lower perceived value.

For the region, the AI question should not be framed simply as adoption or resistance. The more important issue is whether firms can be supported to use AI in ways that strengthen, rather than weaken, creative value.

That means practical support on AI literacy, copyright, IP protection, ethical workflows, contract terms and pricing. Without that, smaller firms may adopt tools quickly but remain exposed to the commercial and legal uncertainties those tools create.

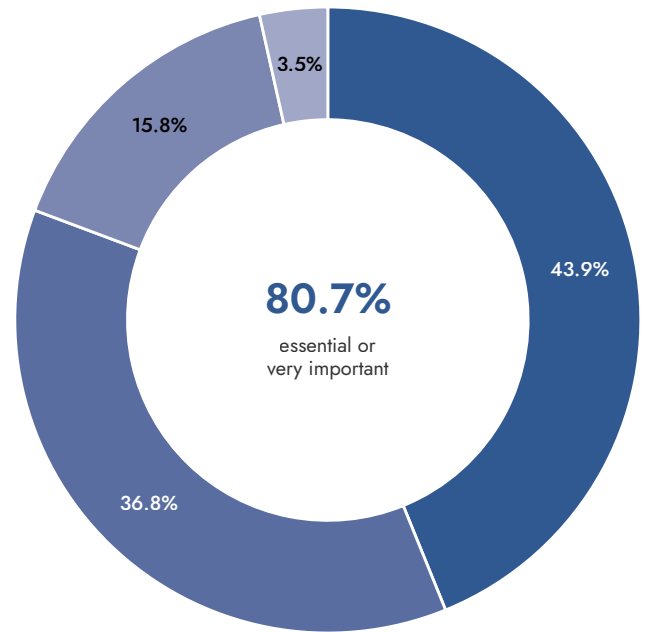
“AI will support us, but it certainly will not take over from an artist’s hand or an instructional designer’s eye.”

- Interview participant, Immersive Tech

“We are looking to build a closed loop small language model... We don’t want everything about our IP for this particular product to be out in the world”

- Interview participant, Small social enterprise, Publishing

Importance of regional networks



Source: EDGE26 survey analysis, n=57, respondents selected one option.

- Essential (n=25)
- Very important (n=21)
- Somewhat important (n=9)
- Not very important (n=2)

Regional networks complete the picture. 80.7% of respondents described regional networks, clusters or organisations as essential or very important. In a sector dominated by small firms and freelancers, networks are not a soft benefit. They are economic infrastructure. They create trust, share information, broker opportunities and reduce the professional isolation that can accompany project-based work in a dispersed region.

The games development interview describes a scene that has become more visible, more connected and less siloed. The rural publishing and story-development interview points to the importance of relational infrastructure:

- hubs,
- education links,
- rural development programmes and community-facing supports opened doors to training,
- product development,
- credibility and funding.

The creative agency interview similarly describes the value of exposure, contacts and export-facing networks, while also warning that the same small circle can dominate visibility and recognition.

Networks matter, but they must continue to widen.

One participant described the practical value of CREW in precisely these terms:

“You can sit in CREW and meet people who have established studios who can kind of guide you along some of the more common road bumps, let’s say.”

- Interview participant, Small enterprise

The regional dimension is especially important. Galway is the anchor, but the interview evidence shows that the wider region cannot be treated as simply a hinterland. Rural and county-based practitioners face different conditions: weaker broadband, transport costs, limited workspace, smaller local markets and fewer informal opportunities to meet clients, collaborators or funders.

For some, the issue is not whether creative work can happen outside Galway. It clearly can. Rather it is whether it can be sustained without excessive dependence on personal resilience, informal networks and travel to the main hub.

“I had work and I had to send it up to Dublin and the internet wouldn’t do it and I had to drive all the way up to Dublin just to get it into the client on time.”

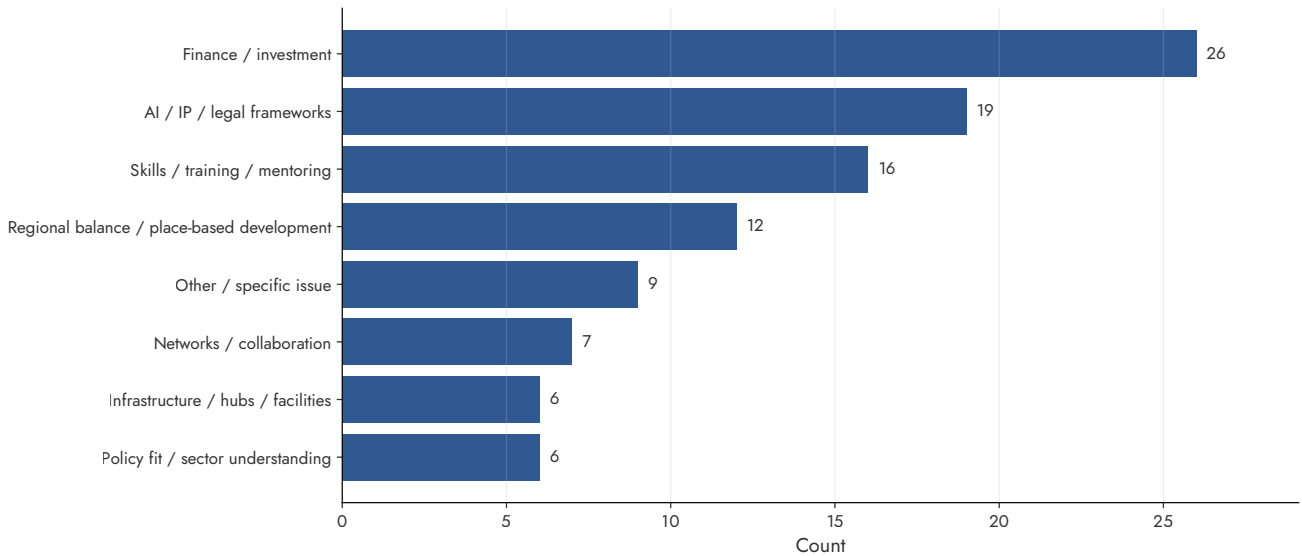
- Interview participant,
Freelancer, Photography

“If you want the digital creative sector or any digital sector to grow, then we have to have access to the digital highway, which is broadband, right?”

- Interview participant, Publishing



Open-text coding: most common change needed for the decade ahead



Source: EDGE26 survey open-text coding, n=57.

The open-text responses bring the wider strategic picture into focus. Finance and investment was the most common theme, appearing in 26 responses. AI, IP and legal frameworks appeared in 19. Skills, training and mentoring appeared in 16. Regional balance and place-based development appeared in 12. These themes should be read together rather than separately. The sector is not describing one isolated problem. It is describing a system of interconnected needs:

- finance,
- commercial capability,
- legal and IP readiness,
- routes to market, and
- regional coordination.

Taken together, our evidence paints the picture of a sector that is not weak, but structurally constrained. Firms and practitioners are active, networked and ambitious. What limits them is not a lack of creativity, but the absence of a fully aligned support system around them. Finance, market access, commercial capability, AI readiness and regional connectivity are not separate issues. They are the conditions through which momentum either becomes scale or remains fragile.



7. THE PATH TO 2036: OPPORTUNITIES, RISKS AND CONDITIONS FOR SCALE

The evidence assembled in this white paper points to a clear conclusion:

the West and North West has built momentum, but momentum will not become scale by itself.

The region now has visible firms, stronger networks, institutional anchors, emerging subsectors and a growing sense of creative-digital identity. What it does not yet have is a fully aligned system capable of turning that activity into durable, widely distributed growth.

The next decade could follow one of three trajectories.

1

The first is business as usual: individual success stories, periodic programme support and continued activity, but limited structural change.

2

The second is uneven growth: Galway continues to strengthen while the surrounding counties remain more dependent on informal networks, small-scale supports and individual resilience.

3

The third is coordinated scale: a regional ecosystem in which firms, funders, skills providers, agencies, universities, hubs and markets are deliberately connected around the actual operating needs of digital creative enterprise.

The third path is the one this paper argues for. It is ambitious, but not unrealistic. The assets are already present: Galway's institutional density, CREW, the Western Development Commission, Ardán, TG4, Atlantic Technological University, University of Galway, Údarás na Gaeltachta and IDA, the Regional Skills architecture, a recognised screen identity, emerging games and immersive activity, and a distinctive regional culture that gives the sector more than technical capability. Atlantic Technological University is especially significant as a multi-campus institution serving the West and North West, while the Regional Skills Fora provide a formal mechanism for connecting employers with education and training providers around emerging regional skills needs.

**This is not to create a sector from nothing.
It is to connect and strengthen what already exists.**

The opportunity areas are clear:



SCREEN AND ANIMATION



GAMES AND INTERACTIVE MEDIA



IMMERSIVE TECHNOLOGIES



DIGITAL DESIGN



MUSIC TECHNOLOGY



AI-ENABLED WORKFLOWS



DIGITAL STORYTELLING



CREATIVE APPLICATIONS IN TOURISM, HEALTH, EDUCATION AND HERITAGE

These are fields with genuine growth potential. But opportunity is not inevitability. Without more appropriate finance, stronger market access, better commercial and IP capability, AI readiness and a more distributed regional support model, the sector may remain active but fragile.



Scale should also be understood carefully. For this region, scale does not only mean larger firms or more employees. It can mean

- more sustainable micro-enterprises,
- more retained IP,
- more repeatable production pipelines,
- stronger export readiness,
- better commissioning routes,
- more resilient freelance careers and
- clearer pathways for talent to stay in the region.

In a digital creative economy dominated by small firms and project-based work, scale is as much about capacity and continuity as it is about size.

The central risk is misalignment. Firms are operating through project cycles, hybrid revenue models, intangible assets and small teams, while many support systems still assume more conventional patterns of business growth. If that mismatch remains, the region will continue to produce talent and ideas without capturing their full value. If it is addressed, the West and North West can build a distinctive model of digital creative growth: rooted in place, connected to global markets and capable of sustaining creative careers across the region.

The path to 2036 is therefore not a question of whether the sector has potential. That has already been demonstrated.

The question is whether the region can build the financial, commercial, infrastructural and institutional conditions that allow that potential to hold, grow and travel.



8. RECOMMENDATIONS

The seven recommendations that follow are drawn directly from the evidence in this white paper.

They should be read as a connected set rather than a menu, because the problem identified here is systemic rather than isolated.

These recommendations recognise the work already being carried through CREW and its programme architecture (including CEED, CLIMB, ELEVATE and Creative Catalyst); through the Western Development Commission and its support programmes; and through the wider enterprise, skills and education ecosystem, including Regional Skills, Skillnet Ireland, Atlantic Technological University, University of Galway, Údarás na Gaeltachta and IDA, Enterprise Ireland, Local Enterprise Offices and local authorities.

It is not whether support exists, but whether it has sufficient scale, reach, accessibility and sustainability for the operating realities of digital creative enterprises, especially freelancers, sole traders and micro-enterprises.

The recommendations sit within three linked pillars:

- **Finance and Markets,**
- **Capability and Firm Resilience,**
- **System Infrastructure.**

The aim is not to create a parallel support system, but to make the existing one work more coherently for digital creative firms in the West and North West.

The recommendations should be understood within a three-phase regional framework.

- **Phase One:** Pilot and Proof should test demand, access barriers, delivery capacity and regional reach.
- **Phase Two:** Scale and Formalise should expand the interventions that prove effective and give them a clearer regional delivery structure.
- **Phase Three:** Consolidate and Mainstream should embed the strongest elements within longer-term regional and national policy, aligned with existing policy architecture including the National Smart Specialisation Strategy, the Regional Enterprise Plans and the Digital Creative Industries Roadmap.

1

Develop a sector-literate investment pathway

Access to finance remains the dominant structural barrier across the evidence base. This is not simply whether the volume of funding available, but whether finance is designed around how digital creative businesses actually work. Games developers, animation studios, immersive producers, creative technologists and IP-driven content firms often operate through prototype stages, long development cycles, uncertain early revenue and intangible assets. Conventional SME finance, short funding windows, match-funding requirements and State-aid complexity can therefore be difficult for freelancers, sole traders and micro-enterprises to navigate.

The region should develop a sector-literate investment pathway that combines development and prototype finance, project or production finance, patient capital, investment-readiness support and clearer routes to appropriate public, commercial or blended finance. This should build on existing instruments and agencies, but with a sharper focus on the finance needs of digital creative enterprise. The priority is to move from fragmented access to a clearer pathway through which firms can develop IP, complete projects, attract investment and remain regionally rooted.

2

Strengthen demand-side and market-access supports

The finance gap and the market-access gap are connected. Firms cannot scale if they remain weakly connected to buyers, commissioners, procurement routes and export opportunities. A firm that cannot convert creative capacity into sustained income will not scale, regardless of how well-supported it is in other respects.

The region should strengthen demand-side supports that connect digital creative firms to real market opportunities. This means buyer development, procurement guidance, public-commissioning pathways, curated introductions and export-readiness support suited to small firms and project-based businesses. The aim should not be one-off visibility, but repeat demand: more commissions won, more buyers reached, more IP retained, and more firms able to turn creative work into sustainable revenue.



3

Establish a recurring regional evidence framework

The region does not lack data so much as a stable evidence system. Vision-Net and FAME data are useful but incomplete. CSO data are authoritative but too broad for the hybrid character of digital creative work. Survey and interview data are rich, but episodic. The result is a sector that is visible in fragments but difficult to track consistently over time.

A recurring regional evidence framework should combine annual firm-level monitoring, periodic CSO analysis, a biennial sector survey, structured qualitative intelligence and refreshed infrastructure mapping. This should build on existing regional evidence assets, including the Western Development Commission's county dashboards, while adding a specific digital creative industries layer. Better evidence is not a technical extra. It is the basis for smarter investment, stronger advocacy and a more credible regional case to national and European funders.

4

Strengthen sector-specific commercial, IP and AI capability

The central capability gap is not a lack of creativity, nor simply a shortage of generic training. The sharper gap is sector-specific commercial support delivered by people who understand the operating realities of digital creative businesses: pricing, contracts, licensing, commissioning, export routes, IP management, production management, audience development, sales and AI-related workflow risk.

Existing programmes and skills structures provide a strong base, but the offer needs greater scale, coordination and accessibility for freelancers, sole traders and micro-enterprises. The region should strengthen short-format, practice-based supports focused on commercial readiness, IP, contracts, pricing, commissioning and AI. The goal is not training for its own sake, but a clearer pathway from creative capability to commercial sustainability.



5

Strengthen a distributed hub-and-network support model

Galway's concentration is an asset. It provides institutional density, higher education, cultural visibility, networks, firms and support infrastructure. But the wider regional opportunity cannot depend on Galway alone. Digital creative activity across Donegal, Sligo, Mayo, Clare, Roscommon and Leitrim is often more dispersed, less visible and more costly to connect to support systems.

The region should strengthen a distributed hub-and-network model that uses Galway and CREW as anchors, while extending lighter-touch supports across the wider geography. This does not mean replicating Galway in every county. It means reducing the cost of geographic peripherality through outreach, advisory clinics, referral pathways, brokerage, shared workspace access and regular connection between practitioners and institutional supports. The aim is a regional ecosystem anchored by Galway, but not overly dependent on it.

6

Provide dedicated AI literacy, copyright and IP readiness support

AI is already affecting workflows across the sector, and respondents are divided between opportunity and risk. The priority is not abstract digital awareness, but practical guidance on rights, ownership, copyright, pricing, contract terms, ethical workflows, data governance and the safe integration of AI into commercially viable practice.

For small organisations and freelancers, the AI question is inseparable from value capture. Used well, AI may reduce administrative burden, support prototyping and extend the capacity of small teams. Used poorly, it may weaken originality, reduce pricing power and expose enterprises to legal or commercial uncertainty. AI support should therefore be embedded within the wider commercial and IP-readiness agenda, with a clear emphasis on protecting creative value rather than simply accelerating adoption.



7

Treat network infrastructure and intermediary capacity as economic infrastructure

In a sector dominated by freelancers, micro-enterprises and project-based collaboration, intermediary organisations do more than convene. They reduce transaction costs, broker trust, connect firms to support systems, make opportunities visible and help a dispersed regional economy understand itself. This is not a soft function. It is part of the economic infrastructure of the sector.

Brokerage, peer learning, sector events, referral pathways and network coordination should therefore not be funded as optional extras. They are the delivery machinery through which finance, skills, evidence and market access become usable in practice. Without intermediary capacity, supports remain fragmented. With it, organisations are more likely to find the right programme, funder, buyer, collaborator or skills pathway at the right time.

Taken together, these recommendations do not call for a blank-slate intervention. They call for a more coherent, better-resourced and more accessible regional system. The activity is already there. The institutions and programmes are already partly there. The job of work for the decade to 2036 is to align them more deliberately around the realities of digital creative enterprise, so that the momentum built over the past decade can become durable scale.



9. LIMITATIONS

This white paper should be read as an evidence-informed strategic baseline rather than a complete census or econometric impact assessment.

The evidence base is the strongest the region currently has for the digital creative industries, but it carries real limitations - and those limitations should inform how the findings and recommendations are interpreted.

The Vision-Net company-level data provide the most comprehensive baseline of registered firms in the region, but the coverage is incomplete. Some relevant companies could not be geographically confirmed because of missing postcode data. We used FAME for Employment data, though this too was incomplete, with figures for less than half of relevant companies, while revenue data was too sparse to support any reliable output estimation. Both Vision-Net and FAME capture registered companies, which means they do not see sole traders, informal practitioners or the project-based collaboratives that make up a meaningful share of digital creative activity in a region structured around freelancers and micro-enterprises. The five sector groups used to identify relevant companies are also necessarily broad, and include firms - particularly within software and technology - whose primary activity may not be digital creative work as defined here. The baseline is useful. It is not the whole picture.

The CSO Business Demography BRA34 data offer an authoritative basis for broad enterprise and employment trends, but the NACE Rev. 2 classification system was not designed for the hybrid, multi-disciplinary, project-based character of digital creative work. Several relevant subsectors are likely undercounted, misclassified or aggregated with non-creative activity in ways that reduce the precision of the trend data. The direction of travel that the CSO data show is reliable. The exact magnitude is not.

The EDGE26 Survey was self-selecting and received 57 responses, it is geographically weighted toward Galway and Donegal, and likely biased by distribution through project partner networks toward organisations and practitioners who are already institutionally connected. The voices of more isolated or informal practitioners are almost certainly underrepresented.

The survey is best understood as indicative sector intelligence - useful where it is consistent with other evidence streams, and treated cautiously where it is not.

The interview programme, comprising ten in-depth interviews, offers depth rather than breadth. The sample was designed to capture a range of subsectors and firm types, but cannot claim representativeness across all counties, subsectors or firm sizes. The interviews are valuable for what they explain, not for what they prove. They contextualise and sharpen the quantitative evidence rather than standing as independently generalisable findings.

Finally, the absence of reliable revenue data across the firm base means it was not possible to produce a robust estimate of the digital creative industries' contribution to regional GVA from the evidence currently available.

That is a significant limitation of this study, and it is also the clearest illustration of why the wider evidence infrastructure for the sector needs work. A sector that cannot be reliably measured is a sector whose investment case is systematically harder to make - and that is precisely why the first recommendation of this paper is the establishment of a recurring regional evidence framework.

The limitations of this study are not just constraints on what it can claim.

They are part of what it is arguing needs to change.



10. CONCLUSION

The digital creative industries of the West and North West of Ireland have travelled a considerable distance over the past decade.

From a position of relative invisibility in national policy and enterprise data, they have developed into a sector with a recognisable firm base, a strengthening institutional infrastructure, a growing body of recognised work and a more articulate sense of their own identity, needs and potential. That progress is real, and it deserves to be named as such before anything else is said.

But this white paper is not, ultimately, an economic argument. Or rather, it is an economic argument built on something deeper - on the conviction that creativity is not one of many possible paths for the West and North West. It is the path. The region has natural beauty, cultural depth, a coastline that stops people in their tracks and a way of being in the world that is genuinely distinctive. What it has not always had is the economic infrastructure to let people build a life here on the strength of those things. The digital creative industries are changing that. Slowly, imperfectly, with more difficulty than should be necessary - but they are changing it.

The practitioners at the centre of this white paper are doing something that matters far beyond what they produce.

- The animator in Galway building IP for international markets,
- The games developer in Donegal running a studio from a town that a generation ago would have assumed that kind of work was impossible there,
- The filmmaker in Sligo, the creative technologist in Mayo,

these are not simply economic actors.

They are proof of concept. They are the people who decided that the West was worth betting on, and whose presence makes the same decision easier for the person behind them.

They are the region's identity, its calling card to the world, and - perhaps most importantly - its most powerful argument to the next generation that a life here is not a compromise. That you do not have to leave to do work that matters.

That argument is fragile. It depends on these enterprises surviving, on practitioners being able to build sustainable livelihoods, on the region offering enough of the conditions - finance, networks, markets, skills, infrastructure - that the choice to stay does not become untenable. The evidence in this white paper is honest about how far those conditions still fall short.

- Finance is too scarce and too poorly calibrated to how creative businesses actually work.
- Market access is too limited.
- Commercial skills are undersupported.
- The geography of investment is too concentrated.
- Too many firms are operating in survival mode when they should be growing.

The decade from 2026 to 2036 will not resolve those gaps automatically.

What it can do - if the agencies, funders, institutions and policymakers who share responsibility for this sector act on the evidence rather than around it - is move the West and North West from a region that has demonstrated creative momentum to one that has built the conditions for creative scale.

Not a replica of Dublin or London, but something more interesting and more durable: a regional model of digital creative growth rooted in place, open to the world, and capable of making the case - in the work it produces, the enterprises it sustains and the lives it makes possible - that the West of Ireland is not the edge of anything. It is the centre of something.

The digital creative industries will not save the West on their own. But without the firms, practitioners and networks that now carry this work - without the identity they project, the talent they retain and the signal they send - the West is a harder place to make the argument for. They deserve better than a support system that recognises their value only after they have struggled to survive. And the region needs them more than it has yet admitted.



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