Sustainable Enterprise – Creative Economy

Western Development Commission

INTERNAL REPORT

by Jessica Fuller for the WDC, March 2022

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Section 1:

Executive Summary

The Western Development Commission (WDC) policy position is to support the development of the creative economy in the Western Region/AEC. It does this through strategic regional, national and global stakeholder engagement; capital and enterprise investment in collaboration with stakeholders and promotion.

The WDC is identified by government on the Department of Tourism, Culture, Arts, Gaeltacht, Sport, Media (DTCAGSM) Creative Industries Framework, as the primary entity in the Western region and Atlantic Economic Coast, to drive the creative economy. The WDC has an opportunity through this mechanism to influence policy, strategy and resource flow to the West.

The WDC has a significant track record of investment in creative economic research, policy analysis, development and activation. Harnessing evidence based data, the WDC has invested in strategic activation of creative business development and infrastructure e.g. through the WRAP fund. Working in collaboration with key regional, national and European partners, the WDC continues to lead the agenda to maximise the creative economy in the Western Region/AEC in order to consolidate existing enterprise activity, attract investment, create jobs and sustain prosperity.

The WDC Strategic aim is to position the Creative Economy as a competitive advantage for Western Region/AEC on the global stage. This aim sits in the context of and aligns with the Western/AEC region of innovation. In order to establish if the aim is achievable, this work set out key tasks as follows:

» Map the creative economy in Western Region/AEC

» Identify and Engage Senior Stakeholders

» Identify priority opportunities for the creative economy and cross sectoral including specifically Virtual Reality.

» Identify funding for these key opportunities

Building on the WDC investment and future focused strategic activation, data indicates that this is the opportunity to establish a CreaTech region to drive competitive advantage and subject to the appropriate investment to potentially create at least 1000 FTE jobs within the next five years.

The lifeblood of the creative economy, self-sustaining enterprises in the creative industries are an integral element of the product and service supply chain in entertainment, tourism, pharma, med tech, fin tech, education, health, non-profit cultural and arts, retail, manufacturing, construction, energy, public sector among others. Often invisible, there is significant cross sector and cross industry interoperability.

The Q3 2021 – Q1 2022 review of creative industry activity, using available, accessible public data, identifies significant creative enterprise activity in the Western Region/AEC, with the key components of an ongoing CreaTech industry across the nine counties:

» Almost 3000 established and new entities catalogued – predominantly small and medium scale, many are future facing and operating within global creative industry networks/systems

» Projected global growth sectors Audio-visual, Design, Music, Craft, Visual Arts are dominant in Western Region/AEC

» Skilled creative graduate flow and existing workforce talent in the regions

» 14 hubs across Mid West (MW), Northwest (NW) and West with emphasis on creative industry (complete/in progress)

» 8 Industry Standard Studio Facilities Centres – Virtual Reality/AV/Design Studios (complete/in progress)

» Inter and cross Industry market activity in region, nationally and globally

The above underpinned is underpinned by

» Education, training and industry skills development provision with industry relevant programmes

» Regional and National graduate base with transferable and transversal skills

» Enterprise development + FDI provision through local and regional services

» Services infrastructure – broadband networks

» Creative Industry enterprise incubation

» Creative Industries RDI – Accelerate initiative (all island)

» Community environment and amenities – offering work/life balance

» Proximity of clusters to industry appropriate transport networks

» Financial incentives (EIIS/Regional Uplift/Games + Film scheme, WRAP Fund, regional development funds)

» Identifiable lead agency to drive collaborative strategic development (WDC)

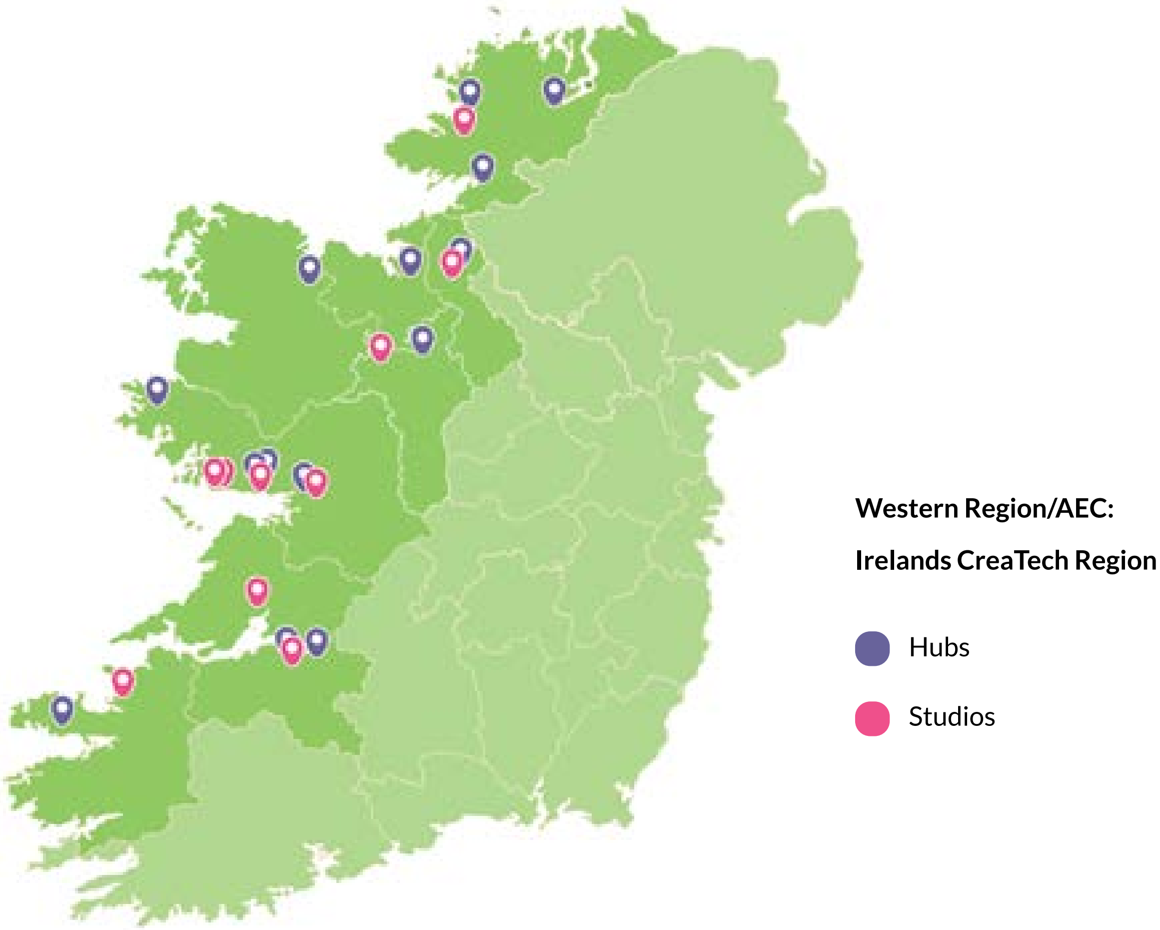
Western Region/AEC Creative Economy USP

The current scale of ongoing and planned activity means that there is an opportunity to establish a CreaTech region from Donegal to Kerry.

X8 Industry standard studio (facilities) in development – future proofed for cross sectoral service CreaTech provision.

CreaTech covers the commercial and cultural possibilities of artificial intelligence (AI), Machine Learning, Telecom and media tech, virtual and augmented reality.

Creative sectors driving CreaTech include Design, Music, Audio-visual games, Marketing, AR/VR Media, Craft, Adtech, Entertainment among others[1].



Donegal
- Creative Coast Enterprise Hubs (3)
- The Bothy AV+ XR Studios

Leitrim
- FutureCast Enterprise + Innovation Hub + Manufacturing Skillnet FutureCast Virtual Studios

Sligo
- Strand Campus Games Hub
- Sligo XR Studios

Galway
- Atlantic Studios Crew Hub
- CREW Digital Creative Industries Innovation Hub
- CREW Digital Creative Industries Incubation Hub (x2)
- National Film + TV Academy
- Gréasan na Meán Skillnet
- Danú Studios
- Atlantic Studios
- Galway Film Centre/Studios

Mayo
- Ballina Digital Hub

Roscommon
- The Spool Factory Enterprise Hub
- An Bealach XR Studios

Clare
- Ennis TV Studios

Limerick
- Digi-Container Creative Hub
- Film in Limerick Crew Hub
- Troy Film Studios

Kerry
- Dingle Creative Enterprise Hub
- National Animation Academy

1. (CIC 2021/technation.io)

CreaTech examples:

Tourism – Placemaking – Marketing	Algorithm	Dublin based – producing in West and globally
Animation	Studio Meala	Roscommon – global market
EdTech for Pharma/Med/Energy	Mersus	Roscommon – global market
Audio-visual + Advertising	The Bothy Post An Bealach Volume Studio *(in development)*	Donegal – global market Roscommon – global market
Audio-visual – tv, film	Danú Media	Galway - global market
Construction Design	FutureCast	Leitrim – national market – global links
AV/VR Facilities	Troy Studios	Limerick – global market
Music + Games Industry	Eimear Noone Maria Callas Hologram Tour	Galway / US – global market

Conclusion:

» The WDC and the Western Region/AEC has the opportunity to achieve the WDC vision, to consolidate existing creative industry activity and to future proof by identifying Western Region/AEC as Irelands CreaTech region in order to drive competitive advantage and to potentially create at least 1000 FTE jobs within the next five years.

» This CreaTech identity may be framed around the existing and planned AV and Design Facilities infrastructure in the Western Region/AEC, and the existing enterprises

» To deliver the above requires a creative industry strategy, CBA and a business activation plan. This document sets out a roadmap to deliver the CreaTech region in the coming 5 years. The proposed actions are outlined in a separate document.

» Led by the WDC, the stakeholders are:

  » Government departments + Creative Ireland

  » Creative Industries enterprises + advocacy agents

  » Industry and enterprise enablers (inc. WDC)

Gaps/Challenges

- Critical gap – absence national creative industry strategy, sectoral strategies and business plans
- Absence of creative industries data lake.
- Incomplete infrastructure and slow pace of capital investment. This is leading to loss of market opportunity and provision of sustainable creative industry jobs in existing and new clusters.
- Consequent impact is fragmented enterprise development, inter agency and inter sectoral dissociation and limited economic growth at scale.

Recommended WDC Macro Actions 2022-2026:

Strategic 2022-2026 – WDC Policy Position re. creative industries to be formalised; Draft and Implement a Creative Industry Strategy and Business Investment and Activation Plan [est. €550K total]

Infrastructure – Facilities completion 2022-2024

WDC to take lead role in securing and facilitating an estimated €30million for studio facility infrastructure across the regions.

Visibility/Positioning 2022-2024

WDC to lead on establishing "Western Region/AEC Irelands CreaTech Region" identity and roll out global communications plan about existing creative industry and tracking the growth of the CreaTech region. [est. €1million p.a. over five years]

Sectoral Interventions 2022-2023

Design + Music Industry – partner projects – activated Q1 2022 [est. €200k over 18 months]

Section 2:

Objective | Scope | Timeframe Methodology | Output

Objective/Scope:

WDC Strategic aim: Creative Economy is a competitive advantage for Western Region/AEC on global stage. In order to establish if the aim is achievable, key tasks/outputs required as follows:

- Mapping creative economy in Western Region/AEC
- Identify and Engage Senior Stakeholders
- Identify priority opportunities for the creative economy and cross sectoral including specifically Virtual Reality.
- Identify funding for these key opportunities

Timeframe:

Q3 2021 – Q1 2022 (55 days) – Action and desk research over a period of nine months based on schedule provided.

Methodology:

- Individual /Organisation consultation (remote)
- Group consultation undertaken through participation in the West and NW Regional Enterprise Plan 2021-2024 development process (remote)
- Literature review – EU, regional, national and global creative economy reports, strategies
- Data sources: CSO/WDC; Mapping data, Creative Economy Sectoral Sources; Sectoral Sources
- EU Funding 2021-2027 Programme; National + regional Funding calls 2021-2022.

Output:

Identified Senior stakeholders; Creative Economy Map; Strengths /Challenges /Gaps / Opportunities analysis; Priority initiatives + funding proposals; Recommended actions; Internal Report March 2022

Section 3:

Positioning the Western Region/AEC, the WDC and the Creative Economy

The WDC vision is to establish the creative economy as a competitive advantage on the global stage. The WDC is concerned, in the context of this project, with the development of sustainable enterprise across the West and Atlantic Economic Corridor (Western Region/ AEC). This work builds on previous and existing work by the WDC to maximise the creative economy assets, attract investment, create jobs and sustained prosperity in the regions.

3.1 Western Region/AEC Economic Context/ Environment:

The review of the creative economy is situated in the context of the WDC remit across nine counties in the West and along the Atlantic Economic Corridor. The focus of this review is self-sustaining creative enterprise and entrepreneurs in the Western Region/AEC.

Population	» 1.7 million – 36% of Ireland's population
Urban Centres	» 2 major Centres: Galway City (80k+), Limerick City (100k+)
Regional Towns	» 12 regional towns: Letterkenny, Sligo, Ballina, Castlebar, Westport, Tuam, Ballinasloe, Loughrea, Ennis, Shannon, Tralee and Killarney
Transport Hubs	» 1 Major Airport: Shannon » 3 Regional Airports with international links: Kerry, Knock, Donegal » Port of National Significance: Foynes; Multiple Ports of Regional significance: Galway, Killybegs » Inter-regional road, rail and bus links to main urban and rural centres.
Education, Training & Research	» Universities x 5: UL, NUIG, MTU, ATU, TUS – L7+ » ETB x5: Donegal; MSL/RG/CL/Kerry » Audio-Visual Academies x2: Galway, Kerry » AV Crew Hubs x2: Galway, Limerick
RDI centres	» CCI RDI Initiative ACCELERATE- a coalition led by NUI Galway and Ulster University in partnership with CCU (GMIT and LIT) and University of Limerick, CREW, Connected Hubs.

Industry/Enterprise development	» Tourism + Agriculture identified by DRCD; WDC/AIRe identifies two dominant industries – Life Sciences and AI/Big Data/Analytics. Four emerging are CleanTech, AgTech, Fintech, Advanced Manufacturing & Robotics. Growth anticipated in AutoTech, IoT, renewable energy, digital services, creative, health and food. CreaTech identified as emerging in 2021.
Industry Specialisms	» Design, Crafts, Music, Museums, Fashion, Film/ TV/ Radio, Music and Entertainment, esports, Marketing Tech, Architecture, Augmented Reality, Virtual Reality, Adtech, Gaming and Media. » 2956 catalogued enterprises providing inter and cross industry services and products, with online presence and global reach.
CI Incubation	» 1 CREW – Galway + satellite hub in Roscommon
Industry Centres	» AV/XR/Design Facilities Clusters (actual / in development) – Donegal, Leitrim, Sligo, Roscommon, Galway (2), Clare, Limerick » Connected Hubs x14 identified as CI focused – Donegal (3), Leitrim, Sligo, Roscommon (2), Galway (4), Mayo, Kerry, Limerick.
Regional & Local Development **Government policy + strategy – cross departmental;**	» 2 Regional Assemblies (NWRA, SRA) – all strategies reference the creative economy as intrinsic/important to the region and the community. » 3 Regional Enterprise Plans – North-West, West and Mid-West – + all strategies reference the creative economy as intrinsic/important to the region and the community. » 10 Local Authorities: All county plans reference the creative economy as intrinsic/important to the region and the community. All have divisions responsible for SM enterprise, and creative, cultural and arts offices with responsibility for local creative economy development. Each division has suite of resource services relevant to the division remit. Most relevant to creative industries are the LEOs. » Regional EI, IDA and Skills Development Offices » Western Development Commission – identified as the lead pan regional entity within the DRCD structure on the Dept TCAGSM/Creative Ireland Creative Industries roadmap.

3.2 Defining the Creative Economy and Creative Industry:

"The creative economy is an evolving concept which builds on the interplay between human creativity and ideas and intellectual property, knowledge and technology. Essentially it is the knowledge-based economic activities upon which the 'creative industries' are based... the creative industries are the lifeblood of the creative economy."[2]

The European Union classification of the creative industries includes: advertising, design, software and games, the audio-visual sector, publishing, architecture, music, the wider arts and cultural heritage[3].

While not always visible, there is significant interoperability, interaction and inter-reliance across all sectors within the creative industries supply chain and across other industries. Creative industries are an integral element of the product and service supply chain in entertainment, tourism, pharma, med tech, fin tech, education, health, non-profit cultural and arts, retail, manufacturing, construction, energy, public sector among others.

3.3 Creative Industries in Ireland:

Project 2040 aims to provide a comprehensive social, economic and cultural infrastructure. It articulates a vision that includes a creative and innovative society.

Department of Rural and Communit Development (DRCD) policy and strategy identifies the creative and cultural economy as integral to rural development. Through the Department of Enterprise, Trade and Employment (DETE), there is a defined system, development framework and resource model in place for enterprise in Ireland, within which the creative industries and creative enterprise is situated. Policy and strategy actions for the creative economy are amplified in multiple policies and strategies at national, regional and local level. However, there is no national strategy or business activation plan for the creative industries as a whole.

Creative Ireland (CI), situated within the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media (DTCAGSM), is a cross-government entity and is the main implementation vehicle for the priorities identified in Culture 2025/Éire Ildánach, the draft cultural policy published in 2016[4]. As part of this initiative, CI has published a Roadmap for the Creative Industries[5]. *This work has a focus on businesses which utilise creativity as a means to deliver commercial success and employment.* CI will present a new 2023-2027 framework to government in Autumn 2022.

2. UNCTAD 2021
3. Creative Ireland – Creative Industries Framework
4. https://www.creativeireland.gov.ie/app/uploads/2019/12/Creative-Ireland-Programme.pdf
5. European Union (EU) classification of the creative industries includes: advertising, design, software and games, the audio-visual sector, publishing, architecture, music, the wider arts and cultural heritage. (Source -Creative Ireland)

3.4 Creative Industries + WDC Remit:

WDC is identified as the lead regional entity within the DRCD structure on the government roadmap (*see appendix 2*). With no other or equivalent entity with a statuary remit and stated intent to strategically consolidate and grow the creative industries in the Western Region/AEC, it may be assumed that the WDC is the entity with exclusive responsibility for this remit. With regards to creative industries and Western Region/AEC consolidation over the next 5-10 years, the WDC has a primary role in high level strategic stakeholder orchestration and evidence based targeted industry intervention.

3.5 Western Region/AEC Creative Industries:

Western Region/AEC dominant creative industry activity, based on CSO data and data collected as part of this research is in Craft, Visual Art, Design (including gaming, advertising, fashion, AR/VR etc), Music (including streaming, live, synchronised), Audio Visual (including animation, esports, XR, tv, radio, film).

Creative technology (CreaTech) is where creativity meets technology. The term is used to address the field where technology enables the creative sector to produce new services, products or experiences, or vice versa. It covers the commercial and cultural possibilities of artificial intelligence (AI), Machine Learning, Telecom and media tech, XR, and other growing fields. Creative sectors driving CreaTech Design, Crafts, Music, Museums, Fashion, Film/ TV/ Radio, Music and Entertainment, esports, Marketing Tech, Architecture, Augmented Reality, Virtual Reality, Adtech, Gaming and Media.

Global and national reports indicate steady activity in the last five years with projected growth in these creative industry sectors to 2030.

The identified enterprises and their market base are the primary stakeholders in the creative economy in the Western Region/AEC. Collectively they are represented, in the main, by diverse range of advocacy organisations – the voice of the creative industries. Industry and enterprise development entities including government and public enterprise agencies are also key stakeholders.

Baseline data indicates that there is suitable infrastructure, industry knowledge, policy, strategy and resource frameworks, including diverse and industry relevant education, training and skills services. Critically, there is an ambition to establish the leading competitive environment for creative economy in Ireland and Europe.

Based on the desk and action research, key priorities to address are infrastructure, stakeholder engagement, enterprise investment/business development, enterprise capacity, talent acquisition/retention, data, visibility.

The significant challenge identified is the absence of a creative industry business activation plan and a driver/orchestrator.

The WDC is the only entity with exclusive responsibility for this remit in the Western Region/AEC. It has an opportunity to facilitate sustainable creative enterprise consolidation and growth cross-regionally.

This may be achieved through the orchestration of structured, strategic and sustained **collaboration, cohesion and communication** between the identified stakeholders.

With effective and swift intervention, led by the WDC there is an opportunity to strengthen the creative economy in the Western Region/AEC, establish as Irelands CreaTech region and to deliver on the ambition to position the Western Region/AEC creative economy as a competitive advantage on the global stage.

Section 4:

Positive Outlook

This process has identified that the creative industries outlook is positive, with growth forecast over the next decade. The global pandemic impacted severely on some sectors e.g., live events, theatrical release (cinema), however even within these sectors, market segments within these sectors accelerated, driven predominantly by online activity.

4.1 Global:

» Advanced Digital Technologies (ADT) are seen as "the fundamental building blocks to future economic growth and competitiveness around the world, spanning transformational capabilities such as artificial, intelligence, immersive technologies such as virtual and augmented reality (VR and AR); block-chain and distributed ledger technologies (DLT); 5G, advanced digital networks and the internet of things (IoT)" (Digital Culture, Digital Future Index '21). Many sectors within the creative industries are intrinsic to ADT.

» CreaTech sectors include AR, VR, MR data consumption, OTT video, internet advertising, video games and esports, internet access, out of home advertising, music, radio podcasts, B2B, consumer books, TV advertising, cinema, Traditional TV and home video, Newspaper and consumer magazines[6].

» PwC Entertainment + Media Outlook 2020 Global Entertainment + Media Markets (including Ireland) forecast a 5% CAGR rise between 2020-2025 leading to projected revenues of $2.6 trillion.

» Global specialised design services market is expected to reach $174.21billion in 2025 at a CAGR of 8%. Research + Markets 2021).

» The global Industrial Design Services market is projected to reach growing at a CAGR of 3.9%. (Research + Markets 2022).

» The emergence of online retail and various e-commerce channels is driving handicraft sales globally. The global handicrafts market size reached US$ 680 Billion in 2021. Looking forward, the market is forecast to reach US$ 1,252 Billion by 2027, exhibiting at a CAGR of 10.41% during 2022-2027 (IMARC 2021)

» The global music market is expected to witness a CAGR of 8.5% in the forecast period (2021 – 2026). Significant global reach and connection, with the ongoing extensive investment by record labels in artists set to continue to drive music market growth. (Research + Markets 2021)

6. (CIC 2021/technation.io)

- Europe is identified as an emerging CreaTech investment hub. France, Germany, Sweden, Netherlands, UK have demonstrated consistent, significant increase in VC investment YOY 2017-2020 with growth anticipated globally. CreaTech companies are now among the top valued worldwide with an ever-increasing amount of companies becoming unicorns[7].

4.2 National:

Recent creative industry reports published by sectoral representative agencies indicate significant economic value and forecast growth potential across key sectors to 2026.

- **Audio-visual Industry Value and Future Forecast (DTGASM 2020)**
  In 2016, the audio-visual sector comprising film, tv, commercial advertising, animation and games) in 2016 had a full-time equivalent employee base of 14,370. The industry GVA in 2016 was €1.1 billion. Screen Ireland 2022 report projected continued growth.

- **Craft Industry and Design Industry Value and Future Forecast (2021)**
  DCCI Grant Thornton report 2021 states that combined, craft (handicrafts), design intensive and design in other sectors referenced in the report, contribute almost €53billion of turnover and €20.6 billion in GVA, supporting 105k roles. The authors future forecast to 2026, significant increased employment in Craft and in Design. They forecast craft turnover to potentially exceed €1 billion with GVA potentially reaching €500million. Design is forecast by the authors to potentially reach €4.1 billion turnover and GVA €3.6 billion by 2026.

- **Music Industry Value and Future Forecast (IFPI 202/IMRO 2017*)**
  The most recent Irish music industry report from the royalty agency IMRO was published in 2017. The report states that the overall contribution of the whole industry (including music related consumer expenditure and supply chain impacts) stood at €703. 2015 industry employment was 13,130 (including those employed as a result of music related expenditure). An updated report is anticipated for 2023. The IFPI Global Music Report (2021) places the Irish recorded music industry at #27 in the Global ranking of markets in 2020 with recorded music revenues in 2020 (mid-pandemic) at $74.6million, a growth of +2.3% on 2019 figures. The growth was in streaming (+18.2%) and synchronisation (+13%).

7. (CIC 2021/technation.io)

Section 5:

Mapping

5.1 Process Overview:

Industry data is necessary in order to maximise the creative economy assets, to attract investment, create jobs and sustained prosperity in the regions. The mapping process aims to build on previous and ongoing data analysis and research by the WDC.

To establish the potential competitive advantage of the creative economy, it is necessary to understand the current position of the creative economy in Ireland and situate the Western Region/AEC in this context. This includes identifying dominant sectors, existing self-sustaining enterprises and their capacity, market engagement and reach, market ecosystem, supply chain data including b2b and b2c mapping, employee and industry service provision mapping, enterprise turnover etc.

The original intention was to collect and collate individualised creative enterprise data, generate a public map/directory and to harness the data for analysis and formal engagement with key identified stakeholders in order to identify economic development opportunities.

The process was inhibited by significant challenges:

- Absence of a central data lake for the national and regional creative economy
- Absence of multi-sectoral creative industries report(s)
- Limited sectoral data lakes
- CSO 2016-2019 data available however it is anonymised
- Limited comprehensive sectoral databases available from state agencies and advocacy/ representative organisations. A review of 71 active creative industry stakeholder public data sources showed the databases vary significantly in function, presentation format, design, available fields, categorisations, classifications, with duplicate membership/client base).

5.2 Baseline Data Actions + Findings:

Taking into consideration the constraints identified, three key actions were undertaken to usefully harness the available disclosed public data:

1. Ascertain the proportion of creative enterprise activity in the Western Region/AEC relative to the rest of the ROI
2. Capture and catalogue disclosed baseline data about creative enterprises in Western Region/AEC that may be used for future research
3. Identify key sectoral centres/hubs/clusters

Action 1

Using the identified official stakeholder public databases, available baseline comparative data about some creative enterprise sectors in the Western Region/AEC was reviewed. The aim was to approximately ascertain the proportion/percentage of dominant creative industry sector activity relative to the rest of the ROI. This information was derived from official sectoral statistics sourced from recognised national sectoral entities as available in Q3 2021.

Based on this indicative base line data, the Western Region/AEC creative economy constitutes a significant proportion of the activity of the creative economy in Ireland[8].

» 50% – AV studios – global industry standard (existing/in dev)
» 46% – Games companies
» 27% – Craft + Design companies
» 20% – Film + TV production companies funded by Screen Ireland
» 16% – Literary Publishers
» 15% – Commercial music bands
» 10% – Animation studios

8. Sources Q3 2021: Screen Ireland, Tech Ireland, Galway games, Design + Crafts Council Ireland, Words Ireland, First Music Contact, Animation Ireland, Companies Registration Office.

Action 2

Using the identified official stakeholder public databases, available baseline data about the Western Region/AEC enterprises was collected from these lists. Entities in the Western Region/AEC were catalogued based on the primary creative industry sectors (18 primary sectors). This process alone identified a key challenge for mapping – the primary sectors are restrictive and confusing. Usable data was available from 67/71 identified stakeholder sources. Due to time and resource limitations, landing page data only was captured including primary category (in the 18 formal creative industry categories), entity name, address/location, contact, primary and secondary data source for duplicate references. The entities comprise sole traders, SMEs and large companies (+250). Data available does not distinguish self-sustaining creative industry enterprises.

The process identified 3078 entities within the creative industries categories. This total includes libraries and museums which are institutional entities.

Excluding the 122 organisations in these two categories, this process has catalogued 2956 entities in the regions identified as operating in the creative industries. The charts show the breakdown per region including all categories. The chart in appendix 3 provides a breakdown of figures per region in primary categories. It is to be noted that this is indicative and further and ongoing data research is advised.

The majority of entities catalogued are members of nationally recognised, sectoral advocacy organisations (non-union).

Action 3

The process mapped AV/XR facilities, centres and enterprise hubs with a focus on creative industries as follows:

Western Region/AEC Centres (Existing/In Development)

	AV/XR Studio Facilities (Commercial / PP – Industry Standard)	Key Creative Enterprise Hubs
Donegal	» The Bothy Broadcast Studios + Post Production Facilities – Mid Scale	» Donegal – Creative Coast (3 hubs)
Leitrim	» Future Cast Virtual Reality Studio	» Leitrim – Future Cast / IMR partner
Sligo	» XR + AV – Large Scale	» Sligo – Strand Campus Games
Galway City / County	» Atlantic Studios – Film + TV – Large Scale	» Screen Ireland Film/TV Drama Academy/Ardán » CREW Creative Industries Incubation Hub Galway City » CREW Creative Industries Incubation Hub Letterfrack » Spiddal Greasán na Mean » Atlantic Studios Crew Hub
Mayo		» Ballina Digital Hub
Roscommon	» An Bealach XR + Animation Studios – Mid Scale	» Spool Factory; An Bealach (CREW Satellite)
Clare	» Ennis Studios – TV Broadcast (temp.) – Small Scale	
Kerry	» N/A	» Dingle Creative Industries Hub » Screen Ireland Animation Academy
Limerick	» Troy Studios – AV + XR – Large Scale	» Film in Limerick Crew Hub » Digi-Container Creative Hub (Birdhill)

9. Refer to appendix for data breakdown

5.3 Mapping process takeaways:

While significant creative industry data gaps have been identified during this process, baseline data about active sectors indicates strong prospects for growth, subject to appropriate sustained, strategic investment. Further data collection and analysis is necessary to ascertain specific subcategory prospects and to inform a strategic business activation plan for creative industries in the Western Region/AEC. This is recommended in the next phase of strategic development.

» The WOI/AEC creative economy constitutes a significant proportion of the activity of the creative economy in Ireland

» Baseline data collected during this process indicates creative industry in Western Region/AEC comprises enterprises active in key sectors forecast for growth over the next decade

» There is no overarching data lake for the creative industries in Ireland

» The WDC is now the only entity in the Western Region/AEC that has as baseline creative industries database

» Further research is required to complete full mapping and in order to inform strategic business activation

» All enterprises identified have some online presence and have the opportunity and potential to reach and harness global markets

» Priority stakeholders identified were engaged with the WDC vision

» Stakeholders identified the need for consistent comparable creative industry business metrics

» Key stakeholders have indicated support for the WDC vision and in principle will collaborate to develop a creative industries strategy and plan

» The baseline data gathered demonstrates that there is activity classified as CreaTech.

» There is a growth in CreaTech studio infrastructure, in response to identified rapidly accelerated global industry processes and market demand

» There is an identifiable spine of CreaTech activity from Donegal to Kerry

» The stories about the creative enterprises and a story of the ongoing development tracking Ireland's CreaTech region is a powerful communications tool for the Western Region/AEC.

Section 6:

Senior Stakeholders

This process has identified three senior stakeholder segments:

1. Government departments + Creative Ireland
2. Creative Industries enterprises + advocacy agents
3. Industry and enterprise enablers

Within these segments, priority entities were identified as the senior stakeholders in the creative economy and more specifically, the creative industries.

1. Government

As noted, the cultural and creative economy is a national priority in Ireland 2040. A review of multiple department policy and strategy material demonstrates that the creative economy is woven within the fabric of our economic and community endeavour. With regards to the strategic development of creative industries, the remit straddles multiple departments. The DTCAGSM / CI summary of cross-government impact on the creative industries indicates a role of each department in driving growth and delivering the national ambition. While all are relevant to the creative economy, for the WDC and its remit for the West and AEC in the context of the DRCD framework, the four departments below are identified as key stakeholders for the WDC.

i. Department of An Taoiseach

The Creative Ireland programme is overseen by the Department of An Taoiseach and led by the DTCAGSM. The Creative Ireland 2022-2027 Framework will be agreed in Autumn 2022. The role for the WDC and senior teams is to ensure communication and information flow on relevant cross cutting action in context of creative industries as well as other relevant frameworks listed in the strategic priorities to 2023 including Restoring the economy, strengthening Irelands place in Europe and the World and various frameworks e.g., Global Ireland, Digital Ireland Framework among others.

ii. Department of Tourism, Culture, Arts, Gaeltacht, Sport, Media/Creative Ireland

With an overarching remit for the "protection and presentation of Irelands cultural assets, the Dept delivers across five divisions: Tourism; Culture and Arts; Gaeltacht; Sport; Media + Corporate Affairs. The Creative Ireland office is situated in the DTCAGSM.

In July 2021, through the consultation process, the WDC activated and formalised contact with the Department and CI Director in the context of the roadmap and the WDC strategic aim. This had led to regular and ongoing positive engagement, with the WDC expected to lead on collaborative interventions to deliver the current national strategic creative industry priorities, as well as informing future policy and strategic direction based on identified, evidence based regional industry opportunities. It has also activated engagement between DTCAGSM and DRCD with regards to infrastructure programmes in the region.

iii. Department of Enterprise, Trade and Employment

The creative economy and the business of the growth of the creative industries and enabling sustainable enterprise growth at national and global level is within the remit of the DETE across eight policy pillars:

- The business environment
- Trade and investment, Supports for SMEs
- Enterprise Innovation
- Workplace and Skills
- Company and Corporate Law
- EU and Internal Market
- Consumer and Competition

The creative industries + design is a sectoral cohort identified by DETE in Enterprise Renewed 2025. Activation of formal engagement is recommended with view to enabling cross departmental communication, information flow and debate as well as to inform and influence creative industry policy, strategy and resource flow to the West of Ireland/ AEC. In November 2021 the WDC activated and formalised contact with the EI LEO office and established a framework of creative industry activations for exploration. Engagement with Enterprise Ireland was activated in Q1 2022.

iv. Department of Foreign Affairs

The creative economy and the growth of the creative industries at national and global level is relevant in the context of the DFA remit vide Trade and Promoting Ireland, Ireland in the EU and the Irish Abroad. Activation of formal engagement is recommended with view to enabling cross departmental communication, information flow and debate as well as to inform and influence creative industry policy, strategy and resource flow to the West of Ireland/ AEC.

2. Advocacy Agents

The agencies detailed below have been identified during this process as key primary sectoral stakeholders (non-union) responsible for driving creative industries in Ireland. These are national entities that represent, in the main, industry professionals and enterprises who along with their market base are the core stakeholders. The agencies vary in their company formation, remit, funding structure, organisational capacity + resource, visibility and status. Some share sectoral objectives and/or membership/client base. All share a common goal: – sectoral representation and advocacy. In addition, each agency undertakes some or most of the following functions:

- sectoral research
- influencing national policy
- influencing national strategy
- sectoral strategy development and/or implementation
- business development
- skills development
- networking opportunities
- market engagement (national and/or global)
- royalty collection
- grants
- promotion/communications
- public membership directories
- national representation on global fora

Key Sectoral Stakeholders:

- AIM Ireland
- Animation Ireland
- Arts Council of Ireland[9]
- Design and Crafts Council Ireland (+ guilds/councils)
- IBEC
- Institute of Advertisers in Ireland
- Institute of Designers in Ireland
- Irish Music Rights Organisation
- Irish Recorded Music Association
- Irish Visual Artists Rights Organisation
- Music and Entertainment Association of Ireland
- Phonographic Performance Ireland
- Recorded Artists and Performers
- Royal Institute of Architects Ireland
- Theatre Forum Ireland (tbc)
- Screen Ireland
- Screen Producers Ireland
- Visual Artists Ireland

In the context of their advocacy function, these agencies are identified as integral to enabling the consolidation and growth of creative industry market opportunities in the Western Region/AEC.

Collectively, these agencies are the creative industry voice.

The research process has identified that there is presently no formal interaction between all of these agencies with regards to an overarching national creative industry strategy and business activation plan for sustainable growth. The review of national plans demonstrate that the audio-visual sector is the only sector to have a government led national development plan.

There is significant interoperability, interaction and inter-reliance across all sectors within the creative industries supply chain and that of other industries.

While this is a national issue, the absence of a national and regional creative industries strategy and plan is inhibiting sustainable enterprise growth in the Western Region/AEC. The WDC is the appropriate entity to write and activate this strategy.

There is an opportunity to establish an engagement mechanism that facilitates debate, knowledge transfer, sectoral insights, data cohesion, interoperability and a collective approach to a devising a whole of industry strategy and business activation process. This requires orchestration, co-ordination and a structured time-bound process, led by an independent, neutral agent. It is proposed that this be reviewed during the development of a creative industries strategy.

9. Engage re. grant aided model

3. Industry and enterprise enablers

The development of the economy and community is underpinned by a multiplicity of statutory agencies with diverse agendas and priorities, geographic reach and varied resources.

Those identified as part of this research are key senior stakeholders and are charged with responsibility for enabling the establishment and strategic sustainable development and growth of enterprise in all industries within local, national and global markets.

All share a common goal: – enabling the establishment and sustainable growth of enterprises in all sectors in the creative industries in the Western Region/AEC.

In addition, each agency includes some or most of the following functions:

» informing and/or devising and implementing national policy
» informing and/or devising and implementing national strategy
» as above – sectoral industries
» industry research, development, innovation intervention – local, national, global
» skills development
» mentoring, coaching
» infrastructure development/capital investment
» networking opportunities
» market engagement /activation (national and/or global)
» business investment loans/grants/equity
» FDI
» RDI
» national sectoral representation at international level

Enterprise + Industry Stakeholders

- » Enterprise Ireland Centre of Excellence – LEO offices central co-ordination
- » DETE Regional Enterprise Initiatives – West REP (WDC); Northwest REP (Donegal, Leitrim, Sligo Local Authorities combined), Mid-West REP (Limerick City and County Local Authority)
- » DETE Knowledge Transfer Ireland
- » Local Authorities
- » Economic and Community Development Divisions (10)
- » Local Enterprise Offices (10);
- » Atlantic Economic Corridor Officers (10)
- » Film Offices (7)
- » Enterprise Ireland regional offices: Borders, West, MidWest
- » IDA regional officers: Border, West, MidWest
- » Irish Venture Capital Association
- » RDI – Accelerate Consortium (NUIG/ATU/UL/UU)
- » Regional Assemblies: SRA, NWRA
- » Regional Skills Offices: Northwest, West, Mid-West
- » Scale Ireland
- » Skillnet (screen, animation, virtual reality, design, radio) *
- » Údarás na Gaeltachta – all offices
- » Connected Hubs – identified Creative industry hubs (10)
- » Tertiary level creative enterprise incubation: CREW
- » Tech Ireland

In the context of their enterprise activation, investment and development remit, these agencies are identified as integral to enabling the consolidation and growth of creative industry market opportunities in the Western Region/AEC.

Section 7:

Process Overview + Opportunity Assessment

7.1 Overview:

WDC research, supported by CSO data, has previously identified significant creative enterprise activity in the West. This research has influenced national policy and has advanced development and investment resources for the creative economy in the West. This 2021 review aimed to build on this work and to advance the WDC strategic vision for the creative economy.

The work was scheduled as a set of linear actions – identify stakeholders; gather data and map the creative economy; identify existing and new opportunities and source funding with the overarching objective of consolidating sustainable enterprise activity and contributing to the WDC vision for the creative economy as a competitive advantage. The process did not follow a linear structure as anticipated due to significant identified gaps and challenges.

A review of policies, enterprise strategies, CCI plans, and resource vehicles confirm that there is an appropriate national, regional and local enterprise while under-developed framework within which to activate and drive the Western Region/AEC creative economy.

The mapping task identifies numerous globally trading creative entities operating in growth sectors. There are a range of planned industry appropriate infrastructure developments throughout the nine counties.

During the process individual project opportunities were highlighted for exploration and developed – these are listed in the appendices.

However, what became evident during these tasks is that most significant challenge is the lack of stakeholder cohesion and common pan-industry strategic vision to translate the predominantly local creative endeavours to scale.

Identifying senior stakeholders involved a process of broad engagement with multiple potential stakeholders in government, the creative industry sector, the education and enterprise development entities. Senior stakeholder entities were not immediately evident in the context of the WDC vision and objective.

The stakeholder engagement process highlighted a significant and primary challenge to progressing the creative economy in the Western Region/AEC (and nationally): the absence of a national evidence based creative industries economic development strategy. The mapping task identified the absence of a creative industries data lake.

The absence of a pan-industry representative forum to drive a strategy has in turn led to a gap in appropriate horizontal strategic enterprise intervention mechanisms for national entities such as EI, IDA, Ú n G.

Consequently, creative industries activation and growth is fragmented and appears to be driven by individual sectoral interests.

This is problematic given the significant interoperability, interaction and inter-reliance across all sectors within the creative industries supply chain and across other industries.

The impact at regional and local level is cross agency confusion regarding remit and responsibility for the creative economy; mission creep and a range of rudimentary enterprise interventions which inevitably disable opportunities of scale and sustainable enterprise growth in the regions.

Herein lies the opportunity for the Western Development Commission. The WDC is identified by the Department of Tourism, Culture, Arts, Gaeltacht, Sport + Media as the primary entity responsible for driving creative enterprise in the West. In this, the WDC is charged as the architect and orchestrator of the strategic development of a future proofed creative economy.

7.2 Strengths:

National Strategic Framework

» Appropriate high level national and regional policies, strategies, plans and funding resource frameworks in place to consolidate the industry

» Formal active relationship between WDC and Creative Ireland established during the process. Ongoing engagement vide appropriate stakeholder engagement initiatives, strategic development and investment opportunities in the Western Region/AEC.

» Stakeholders consulted have indicated support for collaborative engagement to consolidate and grow opportunities for sustainable creative economy activity.

» Western Region/AEC has opportunity to position as Irelands CreaTech region.

Industry/Enterprise Development Environment

- Formal active relationship between EI Centre of Excellence – LEO national co-ordination desk during the process. Discussion underway with regards to national programme of engagement vide creative industries.
- REPs MW/NW/W 2021-2024 synched to national policy plans.

Creative industries

- Advantage of pan-regional strategic activation, aligned to the Region of Innovation, under the remit of WDC – no similar entity in ROI
- Creative enterprise activity in all counties in the Western Region/AEC. Self-sustaining entities with global market growth ambitions identified
- Indicative sectoral data positions the Western Region/AEC as Irelands CreaTech industry region.
- Market research reports indicate steady growth for CreaTech sectors to 2030
- Cross industry business opportunities in the Western Region/AEC for CreaTech enterprises in identified dominant industry base and emerging sectors
- Industry appropriate CreaTech infrastructure (studio facilities) activated across the Western Region/AEC. During the process WDC engaged directly with x2 studio hubs to advance business plans and funding submissions (An Bealach, Roscommon and The Bothy, Donegal)
- Identifiable hubs throughout the regions with specific focus on creative industries
- Western Region/AEC home to only incubation hub with exclusive focus on CreaTech (CREW)
- CreaTech industry skills development framework exists in the Western Region/AEC and via virtual platforms.
- WDC – Pan-regional statutory entity identified and cited by DTCAGSM on creative industries framework as responsible for driving creative economy in regions.
- Financial incentives:
  - WDC Investment fund for Western region entities – applicable to some CreaTech activity
  - Creative industries targeted investment scheme for Western region entities (WRAP Fund)
  - Audio-visual uplift scheme
  - Tax breaks for some CreaTech activity (games and audio-visual – includes online activity)

» Harnessing the identity as Irelands CreaTech region, the Western Region/AEC has key components to position the creative economy as a competitive advantage over the next decade.
» Significant recent public investment by Department of Further and Higher Education for industry relevant programmes and skills development initiatives e.g., Solas, Skillnet, AV academies.
» Creative Industries all-island RDI Initiative to be established in Western Region/AEC.

7.3 Challenges + Gaps:

The consultation process and a review of national, institutional and sectoral reports 2012-2021 identified the following ongoing challenges:

National Strategic Framework

» absence of creative industries strategy and business activation plan
» absence of creative industries sectoral plans – only one in place (AV plan)
» absence creative industries data lake
» absence of a pan-industry platform – multiplicity of sectoral and sub sectoral interest groups (sometimes competing)
» limited availability of comprehensive consistent creative industry business metrics on which to build business case
» dissociation between DETE and DTCAGSM

Creative industries

» Creative Enterprise Capacity – for SME consolidation and scale and for product/ service development
» Infrastructure requires urgent completion
» Talent acquisition / retention
» Real-world skills development / CPD
» Investment / Business development supports
» Industry fragmentation / dissociation / lack of cohesion
» Visibility – industry ecosystem/supply chain/
» Clustering requires consolidation

Industry/Enterprise Development Environment

- invisibility of the CI ecosystem and clusters is a challenge for proving business case for industry potential and scale, SME investment and FDI attraction.
- apparent confusion about the distinction between non-profit arts activity and self-sustaining creative enterprise activity.
- assumption by most stakeholders in enterprise, creative, cultural and arts sectors, that the remit for creative enterprise development is with the Arts Council (national) and arts offices /creative Ireland officers (local) – this is not accurate.
- perception LEOs do not support CI product and service development. This is inaccurate – LEOs support international trade endeavour in all sectors. (CI SMEs and government entity)
- education + skills investment improved however concurrent investment required in jobs and market development frameworks for CI
- Clustering NB – talent attraction and retention for Western Region/AEC SME
- Slow decision making and pace of investment – impact includes loss of income to exchequer, loss of jobs for Irish industry, loss of up-skilling opportunity for Irish talent, limited sustained opportunity for jobs for Irish talent, skills development, advance, consolidate and grow
- some sectoral disengagement /non engagement with industry ecosystem – SME enterprise support frameworks perceived to be inefficient/not relevant (*"not for me/I'm not a business person"*, *"State doesn't help creative enterprise"* (SME in receipt of LEO funding)
- stabilisation and intervention urgently required post-covid for some sectors particularly live entertainment segments – linked to tourism
- gap in communication with regional and national funding entities – infrastructure being developed by enterprise entities is not meeting CI needs
- limited awareness of the formal definition of the creative economy and the constitution of the creative industries and the enterprises therein – inhibiting engagement and investment *"they're all cottage industry set ups"*; *"they can't scale"*; *"there's no market".*
- in absence of a creative industry strategy, relevant CI business metrics and CI SME cast studies – enterprise supports largely reactive
- improved knowledge / base and expert panels required within the industry and enterprise development services/networks

Section 8:

Conclusions

- The WDC strategy articulates a vision to establish the creative economy in the West as a competitive advantage on the global stage within the next decade.
- Building on WRAP and the work in the creative economy in the Western region to date, there is now an opportunity to achieve the WDC vision, to consolidate existing creative industry activity and to future proof by positioning Western Region/AEC as Irelands CreaTech region in order to drive competitive advantage.
- This identity may be framed around the existing AV and Design facilities infrastructure in the Western Region/AEC and the existing enterprises.
- The sustainable enterprise development may be achieved through sustained, strategic and targeted investment in: centre and cluster development, business capacity / acceleration resourcing of existing SMEs for service and indigenous product output, R+D; harnessing existing incentives to attract existing indigenous creative enterprises to base in region, harnessing existing incentives to attract FDI to clusters; establishing and owning the CreaTech region identity.
- To deliver the above requires a creative industry strategy, CBA and a business activation plan. This plan should outline overarching creative industries strategy with a focus on the development of the CreaTech sector in the Western Region/AEC.
- This can only be achieved through cross agency collaboration on planning and resource investment in partnership with the creative industry leaders and driven by the WDC.
- This process has identified three stakeholder segments:
    1. Government departments + Creative Ireland
    2. Creative Industries enterprises + advocacy agents
    3. Industry and enterprise enablers (inc. WDC)

Section 9:

Recommendations

Recommended WDC Macro Actions 2022-2026:

Strategic 2022-2026 – WDC Policy Position re. creative industries to be formalised; Draft + Implement a Creative Industry Strategy and Business Investment and Activation Plan [est. €550K total]

Infrastructure – Facilities completion 2022-2024

WDC to take lead role in securing and facilitating an estimated €30million with studio facility infrastructure across the regions.

Visibility/Positioning 2022-2024

WDC to lead on establishing "Western Region/AEC Irelands CreaTech Region" identity and roll out global communications plan about existing creative industry and tracking the growth of the CreaTech region. [est. €1million p.a. over five years]

Sectoral Interventions 2022-2023

Design + Music Industry – partner projects – activated Q1 2022 [est. €200k over 18 months]

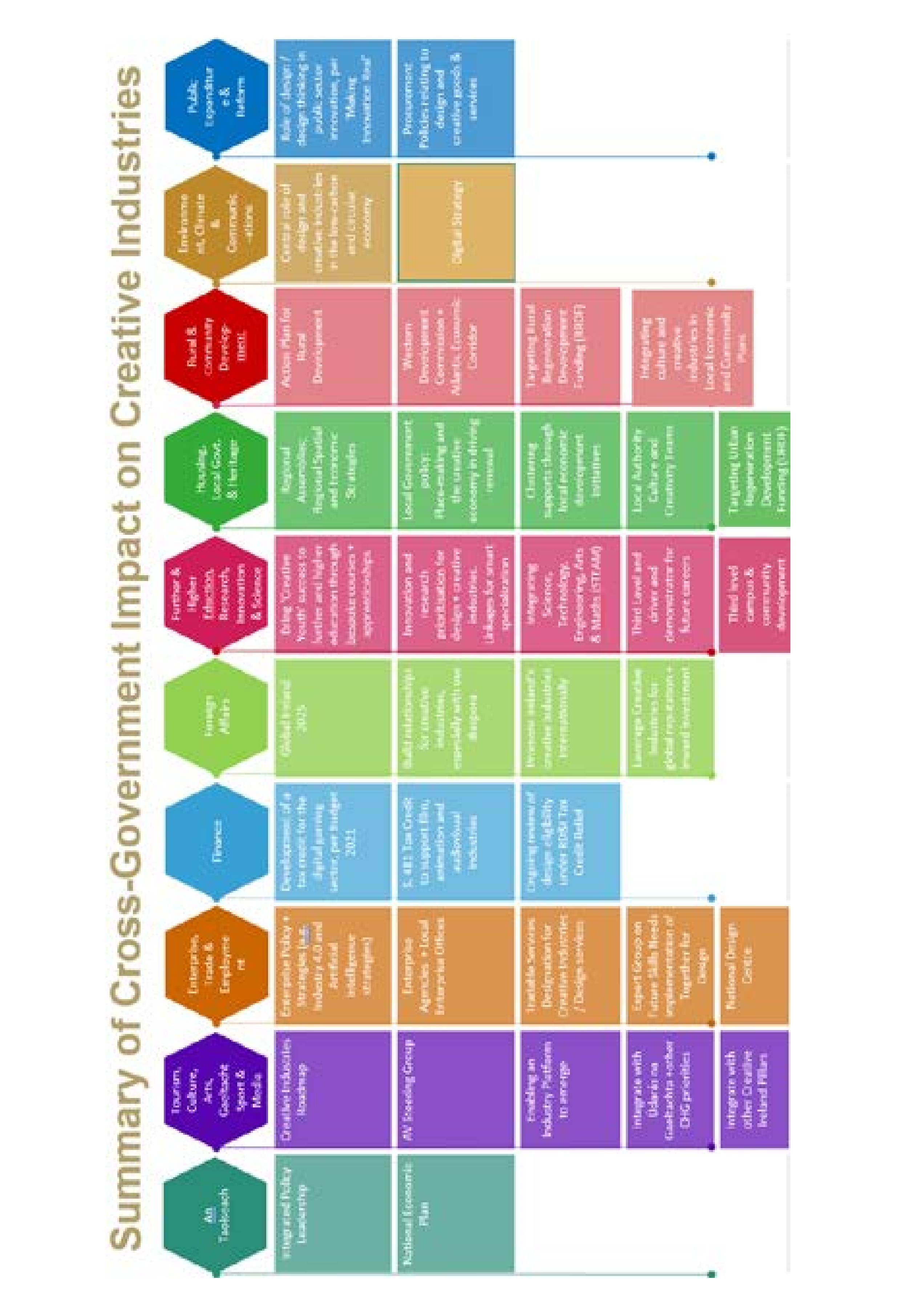
Appendix 1

Identified opportunities explored during the process Q3 2021 – Q1 2022

1. EIT (West REP) and EIT (National/EI)
2. Music City Sligo – proposal review – on hold pending further research
3. SpotLit XR (NW/W REP) – Interim funding submission (prepared with WDC EU funding team) (underway)
4. Accelerate All Island RDI Initiative (MW/NW/W REP) – submission to NWRA (underway)
5. Data Unit for Creative Industry (All Island) – submission to RCC (pending)
6. An Bealach – XR Studio Expansion (West REP) – submission to DRCD (underway)
7. Design Industry Activation- Consortium Initiative – submission to Creative Ireland Economic Development Fund (underway)

Appendix 2

DTCAGSM/Creative Ireland: Creative Industries Framework



Appendix 3

W/AEC Catalogued Entities Q3 2021-Q1 2022										
Formal Definition Macro Category /Sector (Creative Ireland/Dept TCGASM)	**Clare**	**Donegal**	**Galway**	**Kerry**	**Leitrim**	**Limerick**	**Mayo**	**Roscommon**	**Sligo**	**W/AEC**
Advertising and Marketing	12	39	42	13	2	22	9	3	8	150
Architecture	7	11	22	11	3	20	14	2	7	97
Craft	102	133	187	159	54	72	118	26	67	918
Design	14	22	74	23	6	21	18	9	10	197
Fashion	1	3	1	0	0	3	2	1	0	11
Film	8	25	38	27	3	7	8	6	16	138
Commercial Galleries	1	1	2	1	0	0	2	0	2	9
IT, Software, Computer Services (2 categories)	7	8	22	5	4	12	4	0	6	68
Libraries	4	14	29	8	8	16	15	6	4	104
Museums	1	3	3	2	0	2	5	1	1	18
Music *	40	58	138	40	15	87	44	7	56	485
Performing	5	12	12	11	2	4	2	1	12	61
Photography	3	4	10	11	1	7	4	0	1	41
Publishing	4	22	7	23	2	5	7	5	10	85
Radio	2	2	4	2	0	7	4	3	1	25
TV	0	1	5	1	0	2	0	0	1	10
Visual arts	91	36	152	111	24	80	58	19	90	661
	302	394	748	448	124	367	314	89	292	**3078**

* Footnote – Music Industry – Data source available hardcopy only – data not included. Indicative info included from First Music Contact Breaking Tunes Portal – Contemporary Music Bands 2017-2021 (average 3 members)

Appendix 4

A significant number of individuals and companies were contacted during this process. Thank you to all who engaged and have informed the process and recommendations towards achieving the WDC strategic vision for the creative economy in the West.

100 Design Archive

Aidan McKenna – Enterprise Ireland

Alan Duggan – Galway Film Centre

Alex Gibson – Tech Ireland

Algorithm

Anne McTernan – Regional Enterprise

Barry Sorbey – CSO

Brendan O' Brien – AIRe

Brian Barrett – Galway City Council

Brian Kelly – Creative Heartlands SLR Film

Brian O' Malley – Enterprise Ireland

Carina Lennon – An Bealach

Charlotte Baker – IDI

Chris O' Malley- ATU

Clare Carty – An Bealach

Clare Chamber of Commerce

DCCOI – Rosemary Steen + Sorcha O'Raw

Deirdre Frost – WDC Policy

DETE – IPOI

Dingle Creative Enterprise Hub

Eamon Kelly – DTCAGSM

Eileen Rafferty – The Bothy

Eimear Noone

Elaine Moyles – Mayo LEO/AEC

Eugene Cummins – Roscommon County Council

Fastnet Films

Gareth Lee – Screen Skills AV/Animation

Garret Murray – Enterprise Ireland

Geoff Allan – Mersus Technologies

Geraldine McLoughlin – WDC Investment

Gerard Kennedy – Enterprise Ireland

Gill Dooley – AIM Ireland

Gillian Buckley – WDC Investment

Grace Korbel – LEO Donegal

Grainne Ryan – EI Brussels

Helena Deane – Regional Enterprise

HighRes

Ian Brannigan – WDC EU/Creative Economy

Jim Livesey – NUIG

Joan Maher – DTCAGSM

Joe Lowe – LEO Leitrim

John Higgins – An Bealach

John O'Dea – Tech Ireland

John Offere

John Reilly -LEO Sligo

Johnathan Dempsey – Pivotal Edtech

Josh Siepel – Sussex University NESTA

Keith Johnson – IMRO

Lar Power Leitrim County Council

Liam Horan – Connected Hubs

LU Immersive Software Engineers -Stephen Kinsella

Ludgate Innovation Hub

Margaret O'Brien Clare Chamber

Marilyn Gaughran – Galway 2020 Legacy

Mark de Faoite – Údarás na Gaeltachta

Mark Long – Piranha Bar VFX

Martina Earley – An Bealach

Mary Keaveney – WDC SpotLit

Micheál Freyne – An Beach

Miriam Ní Néill – Údarás na Gaeltachta

Niamh Costello – CREW

Noel Kelly- VAI

NW REP Consultation Process – 19 companies + DETE + enterprise entities

Paddy Tobin – ATU

Padraic McElwee – LEO Clare + Chair LEO Offices group

Paraic Rattigan – Regional Enterprise MW

Pat Collins – NUIG

Paul Higgins + Enda Candon Strand Campus – Games Hub

Paul Ryan – Film in Limerick

Pauline White – AEC

Richard Murphy – EI LEO

Rick Officer – ATU

Ricky Conneely – IDA

Roger Sweetman – WDC Sustainable Enterprise

Sarah Dillon- WDC WRAP

Screen Ireland – Desiree Finnegan

Screen Producers Ireland

Shane Mitchell – Dervish/ Start-Up x2

Siobhaán Ní Ghadhra – Danú Media

Stephen Carolan – Connected Hubs

Stephen Fagan – Studio Meala

Stuart Lawn _ Creative Heartlands SLR Design

Susan Talbot – Skillnet VR

Tania Banotti – Creative Ireland

Appendix 5

Data Mapping – Sources

AIM Ireland

Animation Ireland

Arts Council of Ireland

Broadcast Authority of Ireland

Clare Arts Office

Clare Film Office

Clare LEO

Comhaltas Ceoltoirí Éireann

Companies Registration Office

Connected Hubs

Council of Irish Fashion Designers Ireland

Creative Circle Kerry

Creative Frame-Creative Heartlands -Leitrim Arts Office

Creative Ireland Directory (Not linked to CI DTCAGSM)

Creative Momentum/My Creative Edge

CREW

CSO

Design and Crafts Council of Ireland

Donegal Arts Office

Donegal Film

Donegal LEO – Creative Coast

Enterprise Ireland

First Music Contact

Galway City Arts Office

Galway City LEO

Galway County LEO

Galway Film Centre

Garden Landscape Designers Association

Hot Press Yearbook/Directory 2021

IDA

Institute of Advertising Professionals Ireland

Institute of Designers in Ireland

Irish Music Rights Organisation

Interiors Association of Ireland

Kerry Arts Office

Kerry Film Office (Screen Kerry)

Kerry LEO

Leitrim Arts Office

Leitrim LEO

Libraries Ireland (DrCD)

Limerick Arts Office

Limerick Film

Limerick LEO

Mayo Arts Office

Mayo Film

Mayo LEO

NUJ

Press Photographers Association of Ireland

Recorded Artists and Performers

Roscommon Arts Office

Roscommon LEO

Royal Institute of Architects in Ireland

Screen Ireland

Screen Producers Ireland

Sligo Arts Office

Sligo LEO

SLR Design

SLR Film

Tech Ireland

Theatre Forum

Údarás na Gaeltachta

Visual Artists Ireland

VFXAI

Appendix 6

Literature – Selection of documentation reviewed

AIRe 2021- Dr Brendan O' Brien (WDC)

Building for a Creative Future – Screen Ireland 2021

CCE Report Pre & Post Covid – EY 2021

CCI Value Chains European Commission 2017

CCS Market Analysis Europe – European Investment Fund 2021

Creative Economy Index – Creative Momentum 2018

Creative Industries Radar – Mapping the UK's Creative Clusters and Micro Clusters – NESTA 2020

Creative Ireland Eire Ildánach – DTCAGSM

Creative Sector Supports in the West of Ireland – Entrepreneur Perspectives on Future Needs – Creative Momentum 2018

CSO 2019 Data

Design and Crafts Council Ireland Strategy 2022-2026

Design Skillnet Design Practice in Ireland Report 2021

Digital Future Index – Digital Catapult 2021

Digital Transformation -Assessing the Impact of Digitalisation on Ireland Workforce – EGSKN 2018

DTCAGSM – EI Audio Visual Action Plan + progress reports 1 + 2

Economic Impact and Assessment of the Design and Crafts Sector of Ireland – DCCI 2021

EI Strategy 2021-2024

EuroStat 2019

Framing Creative Futures White Paper – ECIS 2020

Future Jobs Ireland – GOI 2019

GOI Global Ireland

GOI Strategy Statements 2021 – DTGASM; DETE; An Taoiseach

Houses of the Oireachtas – Joint Committee Jobs, Enterprise, Innovation – Report on hearings in relation to Examining the Potential for Job Creation, Innovation and Balanced Economic Development in the Creative Economy July 2015

IDA Regional Strategy

IDA Strategy

Impact Investing in the Global Creative Economy CCC 2021

Industry Recovery Roadmap (Tourism) – ITIC 2020

Investing in our Culture, Language and Heritage 2018-2027 – GOI

Lets Celebrate Live Entertainment Report _ IMRO 2017

Life Worth Living – Arts and Culture Recovery Taskforce GOI 2021

Literary Tourism Market Analysis Karan Thompson 2018

National AI Strategy – GOI 2021

National Cultural Policy Framework to 2025 -GOI

NWRA RSES

On Artificial Intelligence – A European approach to excellence and trust – EC 2020

Project 2040 Building Irelands Future GOI

Reinforcing the Creative West WDC 2021

REPS MW/NW/W 2018-2020

Screen Industry Report – SPI/PWC 2021

SME + Entrepreneurship Growth Plan SME Task Force 2021

Solas Profile of the West Region 2021

SWRA RSES

The AV Industry in the West of Ireland – The Role of the WRAP Fund – Patrick Collins 2020

The Future of Content Creation: Virtual Production – Unlocking Creative Vision and Business Value – Deloitte 2020

The Future of Media Commission – Consultations (online reports) 2021

The Future of the Creative Economy – Deloitte 2021

Together for Design – EGFSN 2018

UK Immersive Tech VIVE Investment Report – Immerse UK 2020

Údarás na Gaeltachta

Virtual Reality and its Potential for Europe- ECORYS 2017

Western Region/AEC County Development Plans

WDC Strategy 2019-2024

XR and its Potential for Europe – Ecoyrs 2021

XR for Change – Games for Change 2020

Various market reports – creative industries /creative economy