



Riailtas na hÉireann
Government of Ireland

Clár Éire Ildánach
Creative Ireland
Programme



Digital Creative Industries Roadmap 2024–26

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Introduction

The Programme for Government recognises the significant economic opportunity to unlock potential within the digital creative industries. Building on the work of the *Audiovisual Action Plan*¹, the goal of this Roadmap is to add value in establishing Ireland as a global leader in supporting commercial success and export growth across design, digital games, and wider content creation sectors, recognising their importance to our economy.

In general, creative industries are those industries which utilise creativity as a means to deliver commercial success and employment. Consistent with EU industrial activity classification² and within UN organisations, these industries are taken to encompass a broad range of sectors including advertising, design, software and digital games, the audiovisual sector, publishing and press, architecture, music, fashion, the wider arts, libraries and cultural heritage.

Building on the progress made with the implementation of the Audiovisual Action Plan, this Roadmap focuses on the digital creative industry sub-sectors of design, digital games and wider content creation.

Target Sectors for this Roadmap

-
- **Design sectors** including industrial design, product design, visual communications, Ui/Ux (User-interface/User-experience) and interaction design, service design and strategic design;

 - **Digital games sector;** and

 - **Content creation sectors** including advertising and brand agencies, visual and audiovisual content for commercial social media, multimedia content for mobile applications ('apps'), and content for newer and emerging platforms such as AR/VR/MR (Augmented Reality / Virtual Reality / Mixed Reality).

Section 1, Context, outlines the Irish and international research that has identified such sectors as key drivers of sustainable growth and resilient employment in the future economy. It is equally clear that these targeted digital creative sectors provide wider benefits as drivers of innovation both upstream, for suppliers, and downstream for clients and users of innovative products and creative services. Indeed, the Government has recognised the critical importance of quality design with the *Action Plan for Designing Better Public Services*, which provides the implementation framework for *Designing our Public Services*³.

This section also sets out the wider European context for this approach, where digital creative industries are already a critical engine of European economic growth and are forecast to grow further. At a European level, the creative industries are recognised as a sector to invest in, and EU policy and investment frameworks have evolved to harness the potential of the creative industries in strengthening European job creation, innovation, and global competitiveness. This section outlines the approach to be taken to support these sectors, inspired by the success of the focused and cohesive approach taken by a range of Government departments and agencies to the audiovisual sector.

Section 1 also sets out the significant alignment of Ireland's national and regional policy ambitions with those of the EU. Ireland has strong policy foundations and investment strategies in place to enable the development of the digital creative industries, from work on creative skills, to the National SME and Entrepreneurship Growth Plan, to the ambition of the nine Regional Enterprise Plans, through to recognition of the creative industries as an area of comparative advantage for Ireland.

Section 2 identifies the Priorities for Delivery across People, Skills, Business Supports, Innovation and Internationalisation.



Racing Simulator
Image: Gerd Hülsmann

Working across Government and in partnership with industry, the Roadmap will adopt an integrated approach, principally to address issues of fragmentation and efficiency through the following objectives:

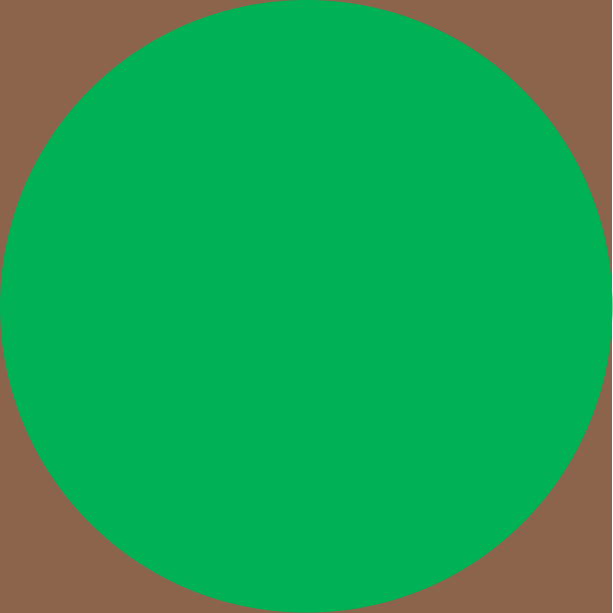
- 1 Enabling a collective industry voice to support sectoral engagement and to facilitate the perspectives of export potential digital creative industry sectors in the development of relevant policy and initiatives;
- 2 Enhancing and driving stronger collaboration with relevant further and higher education partners to address education and training needs;
- 3 Strengthening our focus on supporting enterprises within the targeted digital creative industry sectors, particularly at microenterprise and SME levels;
- 4 Further leveraging the innovation and export-potential of digital creative industries;
- 5 Continuing to build on the success of place-based approaches to the development of the targeted digital creative industry sectors; and
- 6 Enhancing opportunities for trade, exports and MNC linkages for the targeted digital creative industry sectors.

In order to achieve these objectives, this Roadmap will ensure Government departments and agencies can support export potential digital creative industry enterprises in the design, digital games and wider content creation sectors within an appropriate and cohesive framework.

Finally, Section 3, Implementation and Governance, outlines the structures through which the actions set out in Section 2 will be delivered. Responsibility for driving this implementation will rest with a Digital Creative Industries Implementation Group, which will report to Government on an annual basis. Effective dialogue between Government and industry will be key to the successful implementation of this Roadmap over its three-year timespan, subject to review at the end of 2024. Therefore, a Digital Creative Industries Forum will be established to facilitate information and knowledge sharing on market supports and opportunities and industry input to formation of policy to support the development of the digital creative industries across enterprise, skills and regional development.

OffsetDublin19 Film by Windmill Lane
Image from the 100 Archive





Context

A broad view of the ‘Cultural and Creative Industries’ (often termed CCI, or CCS — Cultural and Creative Sectors) encompasses sectors from advertising and design, software and digital games, to the audiovisual and immersive sectors, publishing, architecture, through to music, the wider arts, libraries and cultural heritage. Creative industries grow from a thriving cultural sector — providing content and value creation, inspiring new business models and new growth opportunities.

Sectors such as software and digital services, telecommunications services and hardware, tourism, consumer electronics, manufacturing and service industries all depend on creative input. More directly, the creative industries boost competitiveness, productivity, sustainable growth, employment and export potential⁴.

Recent research and analysis identify a value in more targeted definitions⁵ which draw distinction between core cultural sectors such as the arts, libraries, and museums; cultural industries such as audiovisual, craft, recorded music, and publishing; and creative sectors such as advertising, design and digital games.

The call for more targeted definitions reflects a need to strengthen data gathering and analysis across these important drivers of growth and innovation. This refined nomenclature also recognises the emergence of new platforms and creative sub-sectors that are intertwined with the evolution and potential of digital technologies.

Why focus Government action on the Digital Creative Industries?

The creative industries, as a whole, are already a critical engine of European economic growth, with a contribution greater than other leading sectors such as telecommunications, pharmaceuticals, and the automotive industry⁶. The contribution of these creative industries is estimated to represent over 5.5% of the EU Economy, or €413 billion in value added. Ireland's creative industries are estimated to contribute 3.73% to our Gross Value Added. This is below the 5.54% EU average and points towards opportunities to grow the economic contribution of Ireland's creative industries⁷.

The creative industries also have a key role to play in the re-industrialisation of Europe⁸. These industries are catalysts for innovation; demanding innovative approaches from suppliers (upstream), enabling innovation in clients and customers (downstream)⁹, and supporting the development of new processes, products and services; as well as their manufacture and marketing¹⁰.

In terms of wider spill-over effects, it is recognised that the creative industries can be a key attractor for talent, visitors and citizens, and are highly transversal to many knowledge-led sectors, from ICT to medical services to tourism, boosting cross-sectoral innovation and local development¹¹.

Creative industries are also a key employment sector for Ireland, accounting for 8.9% of national employment, placing our creative industries employment quotient as the second highest in the EU.

Research undertaken by the World Economic Forum (WEF) ranked creative thinking as the second most important skill for the future of jobs in 2023, up from 10th in 2015¹². Jobs with a high creative quotient are more resilient and less likely to be displaced than jobs with a low creative quotient¹³. Developing skills in the creative industries will therefore underpin these high-growth sectors and help to futureproof Ireland's workforce.

Creative businesses are also more resilient than many other businesses, with similar survival rates to ICT companies after five years, while outperforming the accommodation and food services sector over the same timeframe¹⁴.

‘The creative industries boost competitiveness, productivity, sustainable growth, employment and export potential.’

Gaming Industry
Image: Andrew Downes

What approach are we taking?

The growth of our film, TV and animation sectors benefited from a focused and cohesive approach across a range of Government departments and State agencies, coupled with sustained financial investment since 1980. The returns on this sustained and targeted approach are clear from the success of Irish film, TV drama, documentaries and animation at home and abroad.

This approach has also driven significant growth and additional employment for the audiovisual sector in Ireland. In an EU context, the economic contribution of Ireland's creative industries registered the highest growth rate of any Member State between 2013 and 2017, with growth in value added of 44.8%. This growth was mainly led by audiovisual activities which jumped from €441m in 2013 to €3.86bn in 2017.

In response to the audiovisual sector's growth and potential, Department of Tourism, Culture, Arts, Gaeltacht, Sport & Media (DTCAGSM) brought forward an *Audiovisual Action Plan* in 2018¹⁵. Through this Action Plan, Government support for the audiovisual sector has increased significantly both through Screen Ireland and through Coimisiún na Meán. As a result of this targeted and sustained investment, our audiovisual sector continues to go from strength to strength.



Targeting the Digital Creative Industries



Storytoys

The Programme for Government recognises the opportunities in adopting a targeted approach to the development of the creative industries and therefore committed to ‘develop a Digital Creative Industries Roadmap’¹⁶.

Building on the success of the *Audiovisual Action Plan*, this Roadmap will focus on the key sub-sectors of design, digital games and wider content creation.

These targeted sectors offer significant potential for innovation, growth and export and can play a key role in the resilience of Ireland’s economy.

The European Innovation Scoreboard (EIS) (2023) ranks Ireland as a ‘Strong Innovator’ (9th in the EU) with a performance rate above EU average. In *Impact 2030 — Ireland’s Research and Innovation Strategy*, Ireland has committed to becoming an Innovation Leader by 2030. As part of achieving this target we will continue to improve our performance in areas such as R&D expenditure and design applications.

Across a diverse range of enterprise sectors, the integrated use of design is a significant bridge to other innovation activity¹⁷ and robustly correlated to enhanced business performance¹⁸. But spill-overs between creativity and innovation need to be strategically enabled¹⁹. Targeted support for design and design innovation will therefore strengthen Ireland’s innovation ecosystem and enhance our attractiveness as a location for broader innovation activities.

The importance of design to the Irish economy is recognised in the current commitment to a National Design Centre in the National Development Plan 2018–2027. Under Project Ireland 2040 and the National Development Plan 2018–2027, it is envisaged that a national design centre will be established as an incubation, training and demonstration capacity to support market-led innovation in our enterprises to grow international sales.

The Design & Crafts Council of Ireland (D&CCI) has also published a new five year strategy which is committed to embedding design more deeply in society and the economy, to achieve better opportunities for the design sector and increase its impact²⁰. The increasing importance of design will also see growth in the number of people working in this sector. Research commissioned by D&CCI shows that employment in design-intensive sectors has the potential to grow by over 20,000 jobs between 2020 and 2026, with potential growth of €1.4bn in GVA across the same timeframe²¹.

The global digital games industry has more than doubled in size since 2011, while employment in the industry in Ireland has fallen by over 18% in that timeframe despite strong graduate output from digital games relevant third and fourth level courses²².

Dedicated Enterprise Ireland development advisors and market advisors are supporting the digital creative sector development agendas across Start Up, HPSU, established and scaling companies. Direct Investment by way of grant and equity funding is provided in addition to capability and leadership development, support to expand overseas footprints research collaboration and third level support programmes.

Ireland has introduced a tax credit for the digital games industries, which is a cornerstone of unlocking Ireland’s potential in this sector. This tax credit is one part of the solution. Ireland’s experience in the audiovisual sector demonstrates that it was the combination of the S.481 tax credit, the *Audiovisual Action Plan*, and the combined expertise and integrated working of Government departments, Screen Ireland, Enterprise Ireland and the IDA that ultimately led to the transformation and growth in this area.

The advertising industry generates over €1.2bn for the Irish economy. The industry employs a workforce of almost 2,400 employees, representing growth of over 20% since 2021. Only 16% of current business for Irish advertising agencies comes from international clients, but over 60% of Irish advertising agencies are now pursuing business from international clients, recognising that ‘the ability to remotely work for international clients, post-Covid, has clearly opened up the international market for Irish agencies and represents a significant growth area’²³.



Creative is Native Logo
Image: Institute of Advertising Practitioners in Ireland (IAPI)

Continued growth in the uptake of digital, online and mobile technologies and rapid development of the metaverse indicate, there will be significant growth opportunities in mobile and immersive content.

The immersive space is more nascent in Ireland, but many Irish immersive companies have been 'born global' and already have a strong export focus. Almost two thirds of customers for Irish immersive businesses are located outside Ireland and, overall, 78% of Irish immersive companies are exporting²⁴. With the global market for AR and VR headsets expected to grow from \$4.3 billion in 2021 to \$36 billion in 2025, there are clear growth opportunities for content creation in this sector in Ireland²⁵.

Ireland also has a vibrant immersive technologies research and development ecosystem which can support sector development. Immersive technologies such as VR/AR and MR are enabling technologies and are impacting across other areas of the creative industries e.g., virtual production for the film industry, pre-visualisation for set design, as well as being new storytelling mediums for content dissemination. Allied to the potential for linkages with the tech sector based in Ireland, the immersive sector represents an opportunity for world-class Irish companies to achieve strong positions in global markets.

The design, digital games and content creation sectors are therefore primed for further growth. Nurturing creativity and fostering these targeted digital creative industries is important for continued economic success. Promoting and strengthening Ireland's digital creative industries will not only sustain direct employment in the future economy, but also help to grow new businesses, develop skills and attract the talent needed to support more resilient employment across a more diversified enterprise base.

From designing products and services to enhancing industrial manufacturing processes, from creating digital games for education or entertainment to developing new audiovisual and interactive content for use across the internet, social media and mobile apps, these targeted digital creative industries are central to, and are transforming, the lives of our citizens, our society, our economy, and our place in the world.

Caitriona Ni Mhurchú in VR Theatre show
Emperor 101 from the Performance Corporation.
Image: Mark Stedman



The Current Policy Landscape

The growing evidence base for investment in digital creative industries has been mirrored in recent policy developments across EU, national, regional and local levels.

European Union

There has been a marked intensification of the creative industries agenda and this is particularly noticeable in the EU's Multi-annual Financial Framework 2021–2027. The InvestEU Programme supports sustainable investment, innovation and job creation in Europe. It aims to trigger more than €372 billion in additional investment over the period 2021–27. InvestEU offers a targeted Cultural and Creative Portfolio Guarantee Product to underpin financing for creative enterprises, and support development of thriving, agile and profitable European creative industries²⁶.

Horizon Europe is the European Union's €95.5bn research and innovation programme aimed at securing the EU's global competitiveness. Creative innovation and creative industries are identified centrally²⁷ within Pillar 2 'Global Challenges & European Industrial Competitiveness' and Pillar 3 'European Innovation', which account for over €66bn of the Horizon Europe programme.

Creative Europe 2021–2027 brings €2.44bn to support the cultural and creative sectors with a greater emphasis on cooperation at European level and cross-sectoral innovative and collaborative actions²⁸.

The opportunities for the creative industries are also enabled within the European Regional Development Fund (ERDF)²⁹, and the European Agricultural Fund for Rural Development (EAFRD)³⁰. The ERDF programme targets the sustainable and integrated development of urban, rural and coastal areas supporting enhanced cultural infrastructure, targeting an increase in design applications, but also seeks to increase the number of resilient and high-growth enterprises supported. The EAFRD programme seeks to strengthen our rural economy through 'Smart Villages' and support projects which grow employment in rural areas. This programme provides opportunities to promote social inclusion, leveraging wider cultural/creative industries potential.

The centrality of creativity to European ambition can also be seen within the New European Bauhaus initiative which seeks to be 'a driving force to bring the European Green Deal to life in an attractive, innovative and human-centred way'³¹ through art, architecture, science, engineering and design.

Ireland

Ireland has a range of policies and strategies in place that directly or indirectly support the digital creative industries across enterprise, innovation, education and skills development.

Export potential SMEs within design and the digital creative industries occupy a complex policy landscape and operating environment and there is a need for a more co-ordinated, cohesive and data-driven approaches to realise the full economic value of these identified sectors.

DTCAGSM and its agencies oversee development of national arts, culture, broadcasting and media policies; as well as enterprise development and training in Gaeltacht areas and in relation to the audiovisual sector.

The Department of Enterprise, Trade and Employment (DETE) and its agencies lead delivery of enterprise policy including on SME and entrepreneurship growth, artificial intelligence, the future of industry, development of design and crafts sectors, and support for the implementation of national, regional and local enterprise plans and initiatives.

The Department of Further and Higher Education, Research, Innovation and Science (DFHERIS) and its agencies enable policies and plans that deliver a well-trained and educated, talented and skilled workforce to support general and specific sectoral needs. Delivery of research and innovation strategies to support national priorities is also a key priority.

The Department of Rural and Community Development (DRCD) and its agencies ensure emphasis on balanced rural and community development and regeneration with a number of regionalised approaches to enterprise support for local economies and communities.

The Department of Housing, Local Government and Heritage (DHLGH), the local authorities and regional assemblies deliver policies and strategies in support of place-making, regeneration, local enterprise, and community development.

The Department of Public Expenditure, NDP Delivery and Reform (DPENDR) oversees the *National Development Plan 2021–2030* and the implementation of innovation policies within the public service, along with leading on national procurement policies. Ireland's *National Development Plan 2021–2030* recognises the importance of the digital creative industries and acknowledges the development of this Roadmap by DTCAGSM and DETE.

Furthermore, DPENDR has led the development of the *Designing our Public Services — Design Principles for Government in Ireland*. As its accompanying Action Plan points out:

'Within the context of public services, design extends beyond mere aesthetics and form. It delves into problem solving, strategy and user experience, with a focus on creating services that resonate with people's needs, harness technology to meet those needs and align with the operational capabilities of our organisations. This design approach also enables us to embody responsibility, addressing environmental, social and purposeful impacts'³².

This understanding of the potential of design in the public sector is fully aligned with the vision for its potential for industry and our future economy as set out in this Roadmap.

The Department of the Environment, Climate and Communications (DECC) drives policies in relation to waste management, the circular economy and climate action. The *Climate Action Fund II — Agents of Change* is an initiative co-funded by DECC and the Creative Ireland Programme in DTCAGSM that includes projects that focus on design to foster engagement on climate action and behaviour change to embrace sustainability.

The Department of Foreign Affairs (DFA) is central to the promotion of Ireland as a destination for business and investment while also building overseas opportunities and leading on Global Ireland.

This Roadmap seeks to ensure that the work of relevant Government departments and their agencies is aligned in supporting the growth of Ireland's digital creative industries. Figure 1, below, sets out the range of Departments, related agencies and relevant policy initiatives that can support, or be supported through, implementation of this Roadmap.

Regional

All nine Regional Enterprise Plans (REPs)³³ highlight the creative industries, or sub-sectors within the creative industries, as integral to the economic viability of their region. Alongside this, Ireland's three Regional Assemblies also underpin the creative industries through implementation of their Regional Spatial and Economic Strategies (RSES), as set out in Fig.2, below.










Further regional focus is provided by the work of both the Western Development Commission³⁴ and Údarás na Gaeltachta³⁵ and in their foresight and track record in the growth of the creative industries.

At local level, the local authorities and Local Enterprise Offices have additionally recognised the potential of the digital creative industries, and a number also have initiatives supporting the development of the creative economy in general in their areas.

'Ireland has a range of policies and strategies in place that support the digital creative industries.'

Design Declares Ireland Launch
Image: Sean Casey



Department	Policy Initiatives	Agencies
 An Roinn Turasóireachta, Cultúir, Ealaíon, Gaeltachta, Spóirt agus Meán Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media	Audiovisual Action Plan; Roadmap for the Digital Creative Industries, in partnership with the Department of Enterprise, Trade and Employment (DETE); Culture 2025	Údarás na Gaeltachta Screen Ireland Arts Council
 An Roinn Fiontar, Trádála agus Fostaíochta Department of Enterprise, Trade and Employment	National SME and Entrepreneurship Growth Plan; Here for Good: National Artificial Intelligence Strategy for Ireland; Industry 4.0 Strategy for Manufacturing in Ireland; Regional Enterprise Plans; Trade and Investment Strategy 2022–2026	Enterprise Ireland IDA
 An Roinn Breisoideachais agus Ardoideachais, Taighde, Nuálaíochta agus Eolaíochta Department of Further and Higher Education, Research, Innovation and Science	Emerging Skills Strategy 2025; The Action Plan Apprenticeships 2021–2025; Technology Skills 2022; Human Capital Initiative (HCI); Strategy to Higher Education to 2030; The Further Education and Training Strategy; Impact 2030: Ireland’s Research and Innovation Strategy	Higher Education Authority IRC SFI Skillnet Ireland Solás
 Roinn Cumarsáide, Gníomhaithe ar son na hAeráide & Comhshaoil Department of Communications, Climate Action & Environment	Climate Action Plan; Circular Economy Action Plan	EPA
 An Roinn Gnóthaí Eachtracha Department of Foreign Affairs	Global Ireland 2025	
 An Roinn Forbartha Tuaithe agus Pobail Department of Rural and Community Development	Our Rural Future: Rural Development Policy 2021–2025; The Rural Regeneration Development Fund; Atlantic Economic Corridor Initiative	Western Development Commission
 An Roinn Airgeadais Department of Finance	Finance Act 2021 tax credit for digital gaming industry; Taxes Consolidation Act 1997 S.481 Tax Credit to support film, animation and audiovisual industries	
 An Roinn Caiteachais Phoiblí Sheachadadh PEN agus Athchóirithe Department of Public Expenditure NDP Delivery and Reform	Making Innovation Real; National Development Plan 2021–2030; Strategic Public Procurement	
 An Roinn Tithíochta, Rialtais Áitiúil agus Oidhreachta Department of Housing, Local Government and Heritage	Regional Spatial Economic Strategies; Urban regeneration Development Funding	Local Authorities Regional Assemblies



Roinn an Taoisigh
Department of the Taoiseach

Figure 1 Government Departments and the Digital Creative Industries

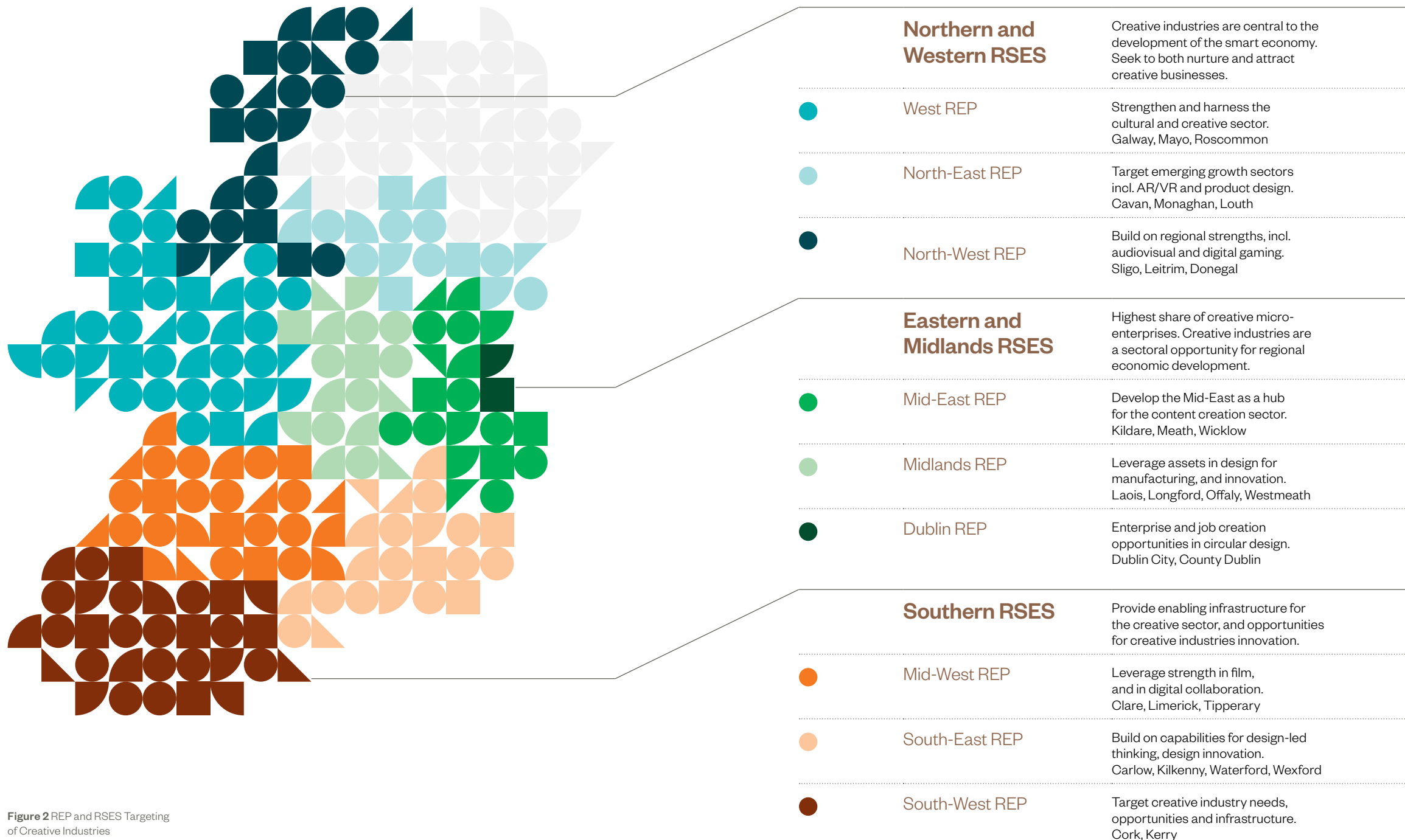
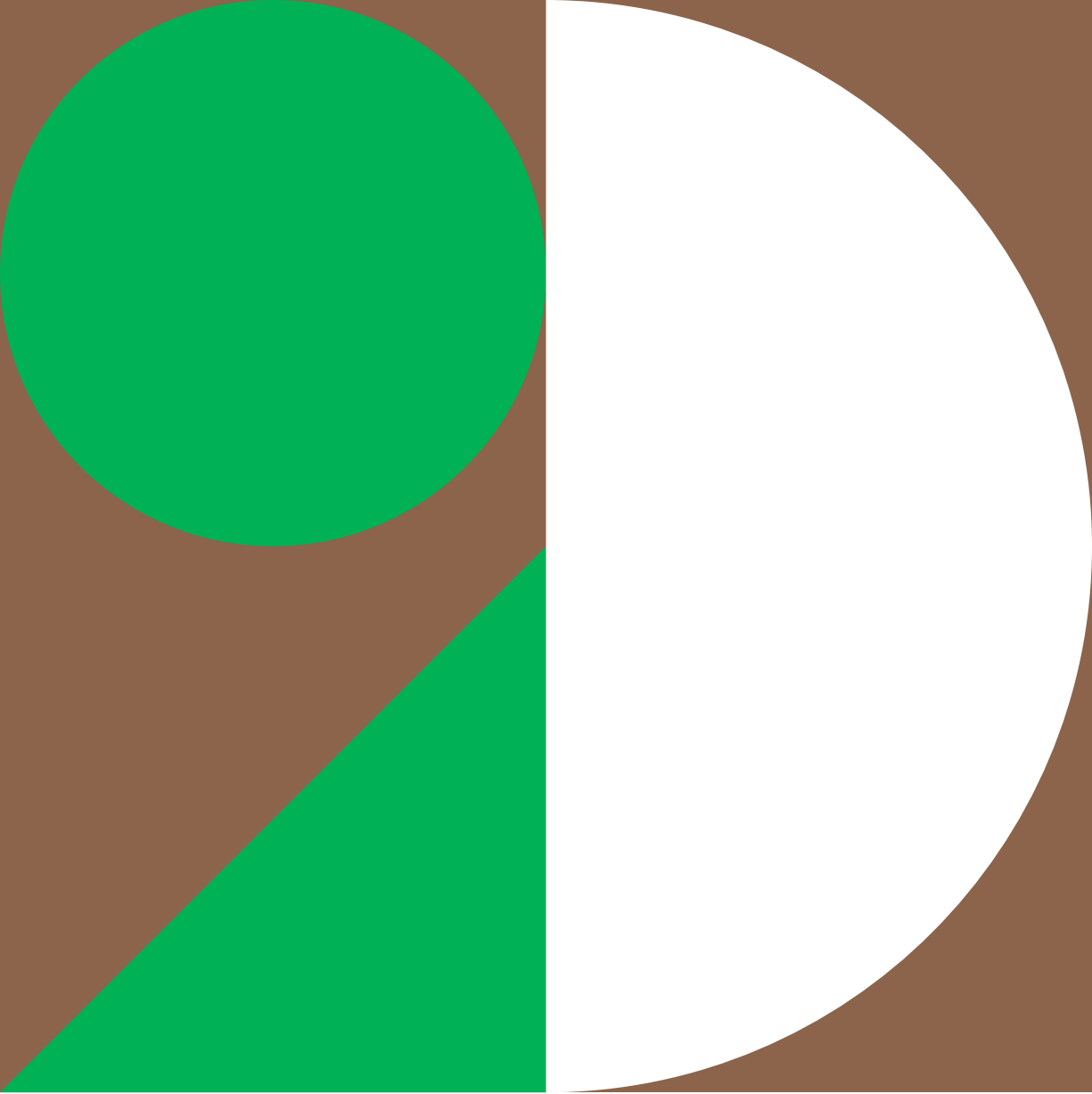


Figure 2 REP and RSES Targeting of Creative Industries



Priorities for Delivery

Developing our digital creative industries through this Roadmap will place creative people at the heart of delivery across skills, business development, creative spaces, innovation and internationalisation. The Roadmap sets out a range of actions to deliver on each priority, with the lead Department(s) identified for each action.



Figure 3 Six Priority Areas

2.1 Creative People Collaboration and Communication

→ Ambition: Support the digital creative industries in the development of an Industry Forum.

Supporting the digital creative industries is about enabling creative professionals and their creative businesses to realise their creative and commercial potential. The absence of a collective voice for the design and digital creative industries, however, has been challenging for the constituent sectors and the Government in relation to ongoing policy and programme development.

A cohesive Industry Forum has a vital role to play in strengthening engagement with Government and its agencies, as well as supporting more effective communication with the industry sectors targeted under this Roadmap³⁶. This builds on the approach of the National SME and Enterprise Growth Plan under which a National Entrepreneurship Forum exists to ensure that the perspectives of the entrepreneur / SME community are systematically included in policy discussions³⁷.

International models for cross-industry collaboration (such as Creative UK) are well established. In Ireland, the development of Animation Ireland is good example.

Given that the digital creative industries targeted within this Roadmap are a vital part of Ireland's future economic growth, a pro-active approach to the development of industry representation is essential. When built around sustained collaboration and partnership, the involvement of industry will ensure a leading-edge industry focus for Ireland.

The Ark Environment and Wayfinding by Gareth Jones
Image from the 100 Archive



Digital Creative Series Waterford
Image: DGM Photography

Industry Action

2.1.1

Establish a collective Government/Industry Forum on a pilot basis to:

- 1 Facilitate a collective voice for the digital creative industries;
- 2 Provide input to the design of supports and incentives required;
- 3 Support skills development and mentoring;
- 4 Bring their knowledge of international best-practice to bear in ensuring that Ireland can be a leader in design and the digital creative industries; and
- 5 Provide industry insights and data to support access to enterprise supports and the development of skills opportunities.

Supporting Actions

2.1.2

Government will actively support the development of a pilot collective Government/Industry Forum over a three-year period for the design, digital games and content creation industries in Ireland through facilitation and partnership resources required to support this initiative.

Lead Department: DTCAGSM / DETE

2.1.3

Where a collective and sustainable Government/Industry Forum is established, Government will support this group in the development an industry-led platform. Such support will include proportionate funding to develop and deliver a sustainable platform, and collaboration in relation to information on relevant resources, enterprise supports and opportunities, data and insights that would be of interest to the targeted digital creative industries, to enable the implementation of this Roadmap.

This platform will seek to strengthen communication for the targeted digital creative sectors, and may include elements such as:

- 1 Establishing an agreed approach to data collection.
- 2 Identifying and disseminating EU, national and local supports,
- 3 Showcasing employment and investment opportunities and promoting talent attraction from abroad;
- 4 Communicating success stories, new innovations and research in relation to the design and digital creative industries in Ireland;
- 5 Promoting market intelligence in relation to market trends and export markets;
- 6 Promoting Ireland as a destination for digital creative industries investment (in relation to its skills-base and industry supports); and
- 7 Supporting networking, collaboration and cluster development, helping to tackle challenges of scale and fragmentation.

Lead Department: DTCAGSM / DETE

2.2 Creative Skills Education, Skills & Talent

→ **Ambition:** Enable new modes of learning in partnership with and for the digital creative industries, and embed creativity across further and higher education activities to future-proof our economy.

A 2020 report by the Expert Group on Future Skills Needs³⁸ (EGFSN) identified that enterprises are struggling to find the design skills needed for businesses in Ireland. This finding is borne out by the industry engagement carried out in the development of this Roadmap, where talent attraction is the second highest priority for SMEs seeking to grow. Ireland is experiencing further skills shortages relating to areas of 2D and 3D animation affecting both animation and gaming industries³⁹. These are areas of high-growth potential for the Irish economy.

Industry and education partners recognise that creative skills are resilient and will be essential in the future economy. The development of such skills applies to joint initiatives, such as the UCD/IADT/NCAD Creative Futures Academy, funded through the Human Capital Initiative⁴⁰.

There is significant additional potential, however, in integrating creative skills more generally across other disciplines in further and higher education (e.g., integrating creativity and design in areas of science, technology and engineering) and in strengthening the role that further and higher education can play in championing creativity. The 2023 OECD Skills Strategy Ireland — Assessment and Recommendations notes that, in order to strengthen Ireland's adaptive capacity and competitiveness, Ireland should develop skills for innovation across the education system. This should include strengthening the strategic positioning of skills, improving connectivity with wider policy domains and improving 'the development of transversal skills for innovation (e.g. creativity, critical thinking and communication) across the education system'⁴¹.

Five key challenges have been identified in relation to education, skills and talent.

- 1 We are facing skills shortages in key areas.
- 2 The digital creative industries are changing more quickly than the programmatic cycles of third level and new models of learning need to be established.
- 3 Rapid technological change within the digital creative industries means that continuing training and professional development is more important than ever.
- 4 The type of creative engagement being embedded at primary and secondary levels also needs to be embedded at third level.
- 5 The cost of training is high, even when subsidised, and challenging for micro-businesses who struggle to make a reasonable margin that would allow reinvestment in L&D.

The ICT Skills Action Plan⁴² recognises the value in targeting the growth of technology skills in further and higher education, and through industry training. The Action Plan for Apprenticeships⁴³ seeks to simplify systems and processes through which apprenticeships can be developed. The National SME and Entrepreneurship Growth Plan⁴⁴ seeks to strengthen awareness and uptake of training and micro-credentials for business owners.

The Roadmap for the Digital Creative Industries will build on these plans, targeting the challenges identified for Ireland's digital creative industries, through three key actions:

Actions

2.2.1

Advance sectoral initiatives in Further Education and Training (FET) by:

A Advancing apprenticeship/traineeship initiatives for digital creative industries, in line with supporting the ambition of Regional Enterprise Plans, through directing industry to available supports.

B Developing competency frameworks relevant to roles in identified sub-sectors of this Roadmap;

Lead Department: DFHERIS / DTCAGSM

2.2.2

Exploring the establishment of further talent academies for identified sub-sectors of this Roadmap (similar to those recently established for Animation, Film & TV Drama, and the DCOI Academy).

Lead Department: DTCAGSM / DETE

2.2.3

Identifying aims, principles and features of a creative campus, in collaboration with further and higher education institutions, the creative sectors and communities.

Lead Department: DFHERIS / DTAGCSM



Dublin Theatre Festival by Detail. Design Studio
Image from the 100 Archive

2.3 Creative Businesses Targeted Enterprise Supports

→ Ambition: Grow design, digital games and content creation output and employment through targeted support..

From initial industry engagement undertaken by the Creative Ireland Programme in 2019⁴⁵, and reaffirmed in 2022/2023 (with representative bodies for advertising, design, digital games, and immersive content), creative businesses identified the need for focused supports to: identify future opportunities and growth markets; ensure continuing professional development for existing staff; secure access to finance; actively engage in new markets; promote success in current markets; and develop strategies for growth.

Since 2019, there are a number of new initiatives on which this Roadmap can build. Enterprise Ireland published its three year strategy⁴⁶, which includes aims and ambitions to accelerate the export growth and diversification of Irish enterprises, increase the number of new entrepreneurs, fast growing start-ups and HPSUs across the regions, and ensure that Irish enterprises are achieving competitive advantage through customer-led innovation and digitalisation.

The National SME and Entrepreneurship Growth Plan⁴⁷ notes the need for *'better agency coverage for SMEs of all sizes and across all sectors'* and suggests consideration of initiatives to *'close the gaps'* currently faced by a significant cohort of SMEs. This plan additionally recommends SMEs' interests to be taken into account at a very early stage of policy making, including an *"SME test"* to be applied by Departments for relevant policy proposals.

The SME and Entrepreneurship Growth Plan also commits to development of a single sectoral online hub and agency point for all SME supports, information and entrepreneur/SME collaboration under which general and specific sectoral supports can be accessed.

Supporting delivery on these policy initiatives for digital creative industries will benefit from a targeted approach, which can also address the challenges of industry fragmentation and communication. This is in line with European Union research⁴⁸ which identifies that creative industries are predominantly small and micro-enterprises and these enterprises encounter challenges in relation to changed modes of work, access to new markets and access to finance, particularly in relation to new product development.

DETE and its agencies already actively work with client companies in the digital creative industry space including support, for example, for companies to develop and scale in addition to supporting these companies to enter new international markets.

Many indigenous digital creative enterprises are small businesses, and it is also noteworthy that a new pilot has been launched to expand the mandate of the Local Enterprise Office (LEO) network enabling them to work with firms that have grown to more than 10 employees in the manufacturing and internationally traded services sectors, but are not yet eligible for Enterprise Ireland support.

Actions

2.3.1

Ensure clarity and consistency in the recognition of the digital creative industry services sectors targeted in this Roadmap as services industries under the Industrial Development (Service Industries) Order 2010, as appropriate in terms of their eligibility for both financial and non-financial support from Enterprise Ireland and all Local Enterprise Offices to grow and export, subject to individual funding and support criteria.

Lead Department: DETE

2.3.2

Collaborate with the pilot Digital Creative Government/Industry Forum with a view to developing a more integrated leadership role across Government partners in relation to enterprise development for the targeted digital creative industries, and review where additional specialist resources may be required to support this work in the context of the ongoing implementation of the White Paper on Enterprise.

Lead Department: DTCAGSM / DETE

2.3.3

Promote the current range of relevant enterprise supports which can enable and strengthen the capacity of ambitious, export-oriented micro-enterprises to grow, and develop specific case studies to highlight the potential of enterprise supports for the targeted sectors.

Lead Department: DETE

2.3.4

Build awareness of Enterprise Ireland's pre-seed start-up funds and their relevance to the targeted digital creative industries sectors.

Lead Department: DETE

2.3.5

In the context of Regional Enterprise Plans, and the ongoing implementation of the White Paper on Enterprise, explore the feasibility of identifying the targeted industries for enhanced clustering and, where applicable, seek to make maximum benefit of funding and opportunities arising from the European Regional Development Fund and the InvestEU Programme⁴⁹.

Lead Department: DETE



Wild Games Initiative
Image: Andrew Downes



Image: Tool., Inc on Unsplash

2.4 Innovation and Knowledge Creation

Creative Industries

Creativity in Industry

- Ambition: Expand Ireland’s current innovation ecosystem to increase design innovation and innovation within design, digital games and content creation industries.

Ireland is recognised within the European Innovation Scoreboard as a strong innovator⁵⁰, performing above the EU average and with the ambition to become recognised as an ‘Innovation Leader’ in Europe by 2030. There are a number of factors that could support Ireland in this ambition. These include addressing Ireland’s low level of design applications, relatively lower numbers employed in innovative enterprises, and our low levels of public and private R&D expenditure.

*Impact 2030: Ireland’s Research and Innovation Strategy*⁵¹, recognises these key challenges, including around Ireland’s digital transformation, and ensuring that enterprise research, development and innovation drive our national competitiveness. The strategy’s flagship initiatives include ensuring that enterprise innovation capability will be broadened and deepened, increasing the number of enterprises and SMEs investing in RD&I and increasing numbers of new high-value, IP rich start-ups from research.

The evidence-base for the Roadmap shows that creative industries are a driver of innovation, and creative industries’ innovation has been identified as a priority for the European Union⁵². The Horizon Europe Programme (2021–2027) identifies that:

‘Europe needs to remain competitive in the global digital race for creation of new technologies (e.g. AI, IoT, blockchain) for which CCIs (cultural and creative industries) are important generators of content, products and services globally’.

Diverse sectors such as healthcare, manufacturing and retail are already seeking the leverage the potential of AR/VR/MR to innovate across operations, consumer engagement and training⁵³.

In terms of design, the International Organization for Standardisation (ISO) best practice guide on innovation management identifies a customer-centric approach (the core of design and design thinking) as a cornerstone of successful innovation⁵⁴.

Across the manufacturing sector and its supply chains, Ireland’s Industry 4.0 Strategy 2020–2025 recognises the role played by design in increasing productivity, and in the role of product design, service design and strategic design in relation to the growth in product/service convergence.

DETE design policy⁵⁵ also recognises there is:

‘a need to ensure that State supports offered for innovation activities are eligible for design activities related to development of products/services’.

The importance of design to the Irish economy is recognised in the current commitment to a National Design Centre under Project Ireland 2040 and the National Development Plan 2018–2027. It is envisaged that a National Design Centre will be established as an incubation, training and demonstration capacity to support market-led innovation in our enterprises to grow international sales.

The development of a National Design Centre requires a pro-active approach in terms of identifying the best operational and financial model for the project, and leveraging the strong connections between D&CCI, Enterprise Ireland, LEOs, industry bodies and other promoters of design at home and abroad.

This Roadmap proposes the following actions to enhance Ireland’s innovation performance and leverage the potential of the design, and digital creative industries to drive innovation, while also keeping pace with the emerging European agenda on innovation and competitiveness.

Actions

2.4.1

Promote the range of LEO innovation initiatives to the targeted digital creative industry sectors, along with signposting to relevant Enterprise Ireland schemes for microenterprises/SMEs in innovation, innovation funding, innovation partnerships and commercialisation.

Lead Department: DETE

2.4.2

Collaborate with the Digital Creative Industries Forum on approaches to innovation and new product/service development, such as:

- A** Training and mentoring to inform and upskill ambitious creative businesses in relation to the impact and potential of new tools and technologies (such as AR/VR/XR, artificial intelligence and the emergence of new platforms and distribution channels) on their business models;
- B** Support for collaborative ideation for new product/market opportunities, across creative sectors, and between creative businesses and those engaged in new technologies; and
- C** Support for prototyping in new product development, through to commercialisation, intellectual property (IP) and patenting processes.

Lead Department: DTCAGSM / DETE

'Ireland is recognised within the European Innovation Scoreboard.'

2.4.3

Progress the establishment of the National Design Centre to assist market-led innovation in Irish-based enterprises to grow international sales:

- A** Develop business case for National Design Centre to include objectives, functions, resources, SME engagement model, funding and governance based on international best practice and in consultation with stakeholders.
- B** Secure approval and resources to establish and oversee the National Design Centre.

Lead Department: DETE

2.4.4

Explore the potential of design within the work of The Irish Research Council (IRC) and Science Foundation Ireland (SFI) by:

- A** Undertaking a high level review of respective funding programmes to determine where it may be appropriate to include Design as a consideration; and
- B** Highlighting where there is scope for Design to participate in existing programmes (e.g., teams competing for Challenge Based Funding⁵⁶).

Lead Department: DFHERIS

2.4.5

Seek to make maximum benefit of opportunities available under EU Research and Innovation initiatives, such as the Horizon Europe programme⁵⁷, the New European Bauhaus and other relevant funding streams; and promote potential partnerships, where appropriate, to help unlock research and the innovation potential of Ireland's digital creative industries.

Lead Department: DFHERIS / DETE

2.4.6

Enable the potential for design thinking across project design, service design and wider public sector innovation⁵⁸, in line with *Making Innovation Real*⁵⁹, the strategy that supports innovation across the public service in Ireland, *Designing our Public Services* and the implementation of the *Action Plan for Designing Better Public Services*⁶⁰.

Lead Department: DPENDR

Towards a Creative Ireland
Image: Dún Laoghaire-Rathdown County Council,
in collaboration with the Public Design Lab, IADT



2.5 Creative Spaces Sustainable Places

→ Ambition: Enable smart specialisation, clustering and place-based approaches to the development of the design, digital games and content creation industries.

The importance of creative cities is well recognised⁶¹ and a 2019 EU study of 190 creative cities scores Irish cities⁶² very favourably in the rankings, particularly in relation to cultural vibrancy and the enabling environment. However, Ireland's cities did not fare as well in the assessment of the creative economy when creative employment, patent applications and design applications were taken into account.

Overall, the EU study highlights that leading cultural and creative cities are more prosperous than their less creative counterparts. The importance of the cultural and creative industries to regional and rural development is also well established⁶³.

EU research⁶⁴ also notes the benefits of clustering for creative industries in relation to peer-learning, innovation and commercial partnerships. It is important therefore to support the role of urban, regional and rural development authorities in growing and sustaining the digital creative industries.

In Ireland, the National SME and Entrepreneurship Growth Plan places a strong emphasis on networks and clustering. This includes a commitment to identify good practice and gaps to inform the development of a national network and cluster programme, and funding to formal business networks and cluster management organisations. Enterprise Ireland's strategy⁶⁵ further commits to driving collaboration through cluster and network development to support SMEs, underpinning the ambitions of the White Paper on Enterprise and the National Clustering Policy.

These approaches can also be backed by a range of locally and regionally-based organisations and initiatives; from regional assemblies to local authorities, from regional enterprise plans and regional skills fora to LEOs and LEADER Local Action Groups, from universities to Institutes of Technology to further education providers, alongside the targeted work of Údarás na Gaeltachta (Údarás), the Western Development Commission (WDC) and the Atlantic Economic Corridor (AEC) initiative.

Sustainable places will be supported by the kinds of resilient employment that the digital creative industries provide. The digital creative industries also have a role to play in broader sustainability and the climate action agenda. The 'Waste Action Plan for a Circular Economy'⁶⁶ provides a roadmap to transition Ireland to a circular economy in the decade ahead and recognises the important role design has to play in this regard. Circuléire.ie, the national platform for circular manufacturing, is already working with design industries and the D&CCI to support innovation, research and skills development in circular design.

Additional coordination of existing initiatives and State structures is required to achieve the full potential of design, digital games and content creation industries within our wider economy and society.

Actions

2.5.1

Establish a CreaTech Cluster Initiative for the targeted industry sectors, aligned to:

- A** Strategic centres with higher education provision relevant to the digital creative industries;
- B** Regional Enterprise Plans ongoing prioritising the digital creative industries; and
- C** The work of Údarás na Gaeltachta and the WDC.

The initiative will encompass elements such as:

- Area-based clustering, supported by local and regional level mapping and data;
- Collaborative actions with further and higher education;
- Partnership approaches to delivering creative enterprise and innovation resource investment e.g. National Annual Creative Business Cup; and
- Knowledge exchange between enterprise agencies, regions and European partners e.g. via the European Institute of Innovation & Technology Knowledge Innovation Communities Creative & Cultural Sectors of which the WDC is the national representative partner (associate status).

Lead Department: DRCD

2.5.2

Consider support for smart specialisation and regional clustering through the Smart Regions Enterprise Innovation Scheme and across Government-led funding programmes, where such investment aligns with Regional Enterprise Plans.

Lead Department: DETE

2.5.3

Support regional enterprise partners to build on the potential of the WRAP fund⁶⁷, Creative Industries Micro-Loan Fund⁶⁸ and the Creative Enterprise West (CREW) initiative⁶⁹, to underpin the continued development of the digital creative industries in the West of Ireland and establish the Western region and Ireland's Atlantic Economic Corridor as a hub for digital creative industries.

Lead Department: DRCD

2.5.4

Continue to support growth of local creative economies through the Creative Ireland Programme's *Creative Communities*.

Lead Department: DTCAGSM

2.5.5

Leverage the potential within Ireland's design and digital creative industries to support climate action and the transition to a low carbon and circular economy.

Lead Department: DECC and DTCAGSM

2.6 Ireland in an International Marketplace

Attracting Talent, Trade, and Investment

→ Grow Ireland's trade in the targeted digital creative industries and strengthen our international profile.

A key feature of successful creative industries policy is the strategic approach undertaken to actively target export markets and foreign direct investment⁷⁰. International trade in the digital creative industries therefore has direct economic benefits for Ireland, but such trade can also play a dynamic role in supporting talent attraction and in wider international promotion⁷¹.

Based on previous industry engagement undertaken by the Creative Ireland Programme, it is clear the relative proportion of creative businesses engaged in export is noteworthy and many who are not currently selling into international markets wish to develop export opportunities. Identified barriers to exporting included:

- 1 The difficulty of competing for visibility in an international marketplace;
- 2 The absence of on-the ground expertise to support business development in identified markets; and
- 3 The challenge of identifying and winning opportunities in export markets.

Ireland's National SME and Entrepreneurship Growth Plan (SME Plan) commits to the development of sector-specific networks for data gathering, shared learning and mentoring for exporting.

In addition, the SME Plan will see dedicated investment and financing facilities for all SMEs with export ambitions, the development of sectoral export guides, an exporters' portal used to increase knowledge of challenges for specific sectors and markets and direct SMEs to specific supports, and tailored supports for digital exports as opposed to physical exports⁷².

The UK has a dedicated export strategy for the creative industries⁷³ and it is recognised that a similar initiative is warranted for Ireland, particularly in the context of the challenges and opportunities arising from Brexit. The Roadmap therefore supports delivery of Recommendation 3.3 — *to develop sector-specific policy measures within an overall framework to support exporters* — within the SME and Entrepreneurship Growth Plan.

Such sector-specific support recognises the export potential of the targeted digital creative industries and will be particularly timely for the digital games sector following the introduction of a refundable tax credit to support and incentivise the development of the digital games industry in Ireland.

The digital creative industries also offer huge potential for global business relations. Ireland's Diaspora Strategy 2020–2025 recognises the value in strengthening linkages with Ireland's diaspora, in terms of business development, mentoring and innovation⁷⁴. Growing Ireland's digital creative industries will create opportunities for trade and further support inward investment. It will also support vital talent attraction and create opportunities which could encourage Irish talent, working abroad, to return home to work in Irish industry, aligning with the Diaspora Strategy's highlighting of the need to harness the insights and expertise of the Irish diaspora with regards to trade, innovation, investment, research and development.

Realising the growth potential of Ireland's digital creative industries will also require an ability to continue to attract highly skilled people into the Irish labour market. For the digital creative industries, this includes people in the areas of 2D and 3D animation⁷⁵, as well as people with digital, product and strategic design skills⁷⁶.



Actions

2.6.1

Harness market intelligence of our enterprise agencies to target export growth within the identified digital creative industries sectors.

Lead Department: DETE

2.6.2

Explore the establishment and use of Digital Creative Clusters to identify opportunities and secure linkages for the digital creative industries in Ireland in relation to MNCs, in the context of the National SME and Entrepreneurship Growth Plan, White Paper on Enterprise 2022–2030 and the national clustering policy.

Lead Department: DETE

2.6.3

Create stronger linkages with Ireland's diaspora in the commercial creative industries.

Lead Department: DFA / DTCAGSM

2.6.4

Build on the strong overseas activities to promote the targeted digital creative industry sectors in key trade and investment markets, working with Ireland's Local Market Teams.

Lead Department: DTCAGSM / DETE / DFA

Gaming Industry
Image: Andrew Downes



Implementation & Governance

Effective dialogue between Government and industry will be key to the successful implementation of this Roadmap over its timespan of 2024 to 2026. Therefore, a Digital Creative Industries Forum will be established to facilitate information and knowledge sharing on market supports and opportunities and industry input to formation of policy to support the development of the digital creative industries across enterprise, skills and regional development.

A work programme for the Forum will be put in place based on the actions set out in the Roadmap. The Forum will be co-chaired by senior officials from DTCAGSM and DETE with the relevant industry representative bodies speaking for their sectors.

The progress of the Roadmap will be overseen by an Implementation Group co-chaired by DTCAGSM and DETE. It will also include DFHERIS, DRCD and Enterprise Ireland, along with the relevant State agencies.

The Implementation Group and Forum will meet quarterly with additional work undertaken on an ongoing basis on specific issues, which will then feed into the work of the Forum.

It will be a task of the Implementation Group to report to Government on the progress on the implementation of the Roadmap. This will be done through an annual Memorandum for Government. The Implementation Group will also review progress on an annual basis to ensure the work plan for the Forum remains up to date.

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