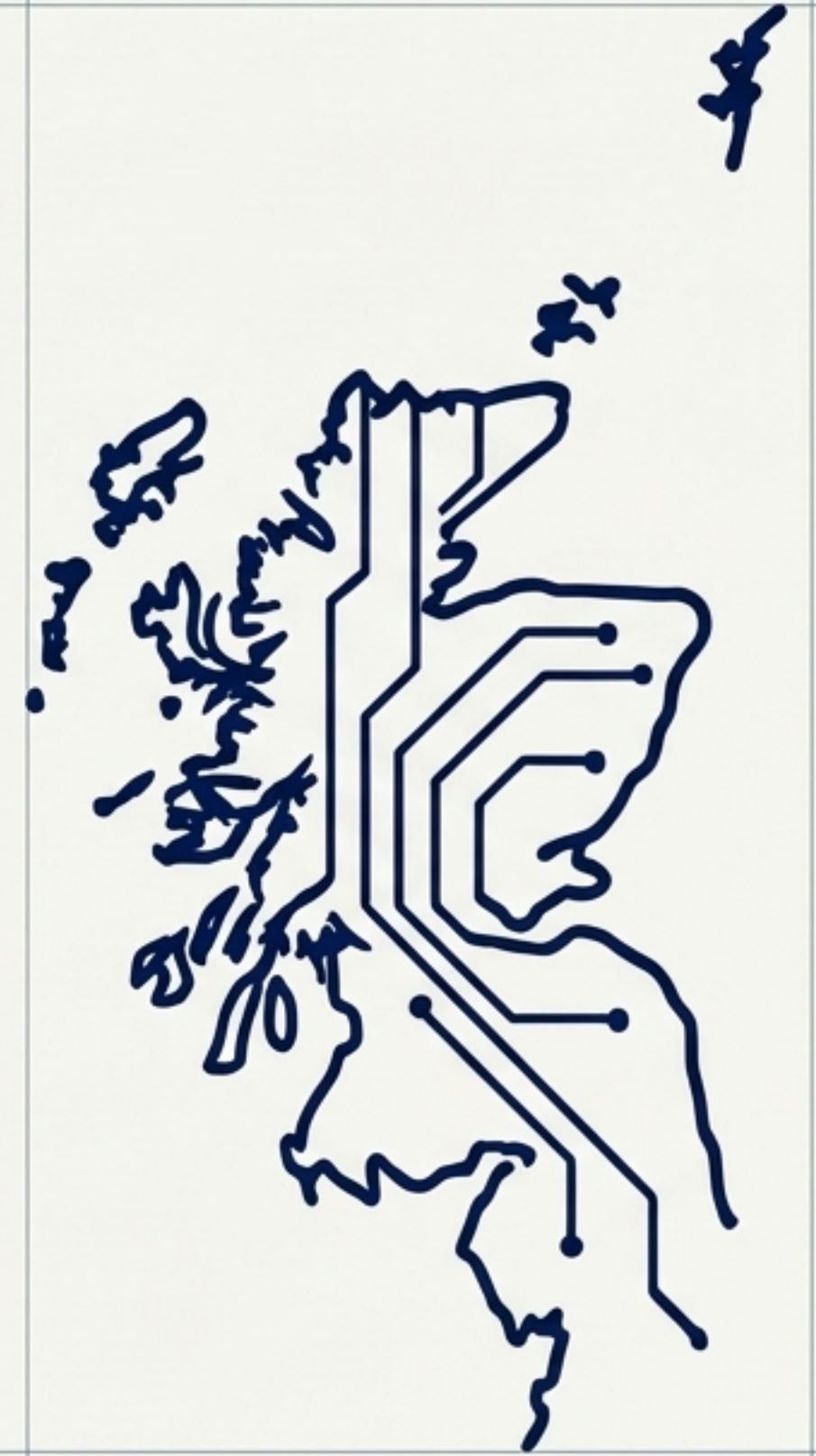


# Scotland's Technology Council

2025-26 Report / A Blueprint  
for Global Tech Leadership

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## The Strategic Pivot

Scotland possesses world-class universities, a trusted NHS, and emerging leadership in critical tech. We are positioned to lead the next wave of global innovation.

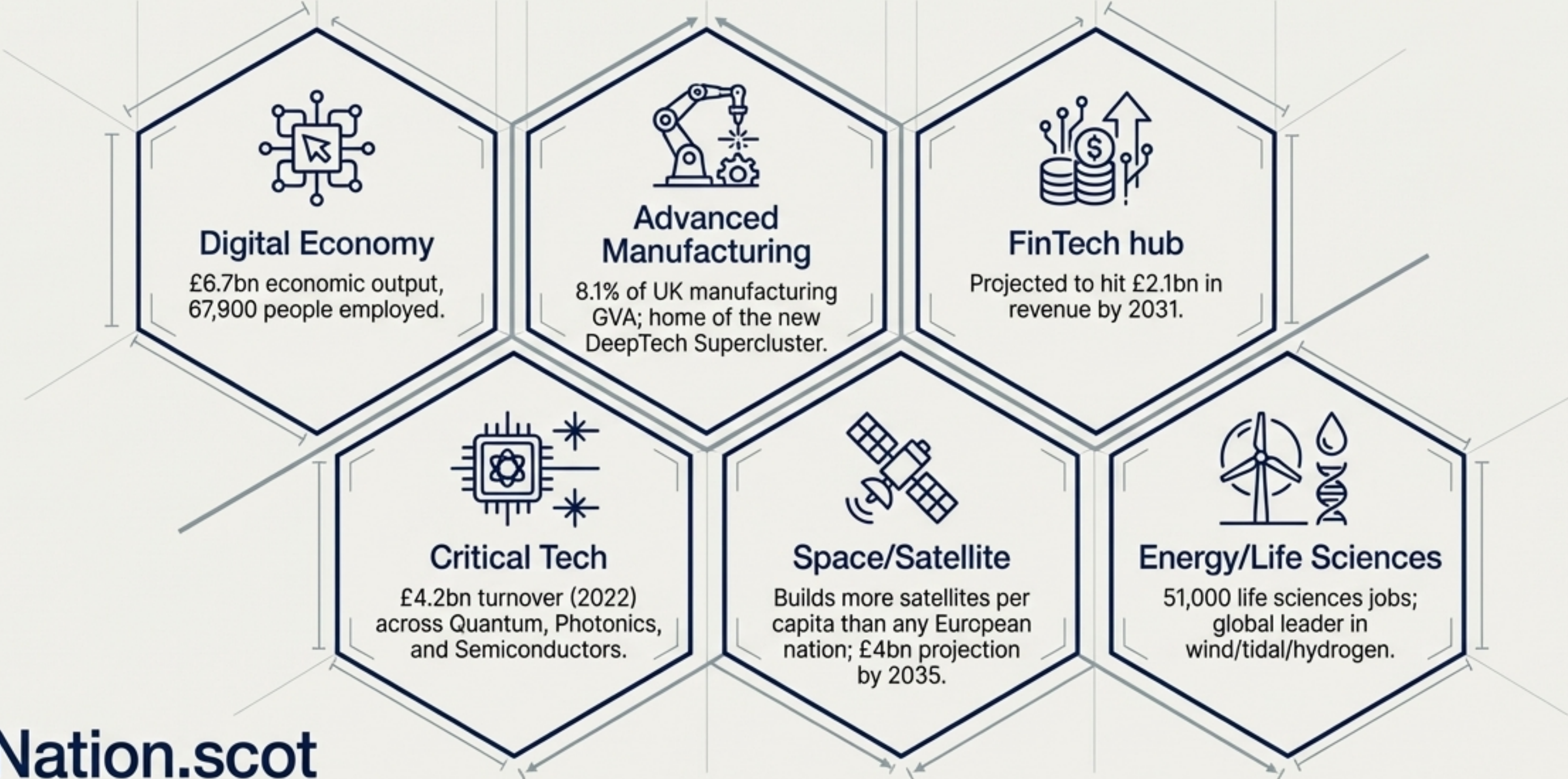
## The Systemic Friction

Global competition is accelerating. Persistent barriers in scaling leadership, disjointed procurement, and capital gaps mean high-potential companies stall or relocate.

## The 10-Month Window

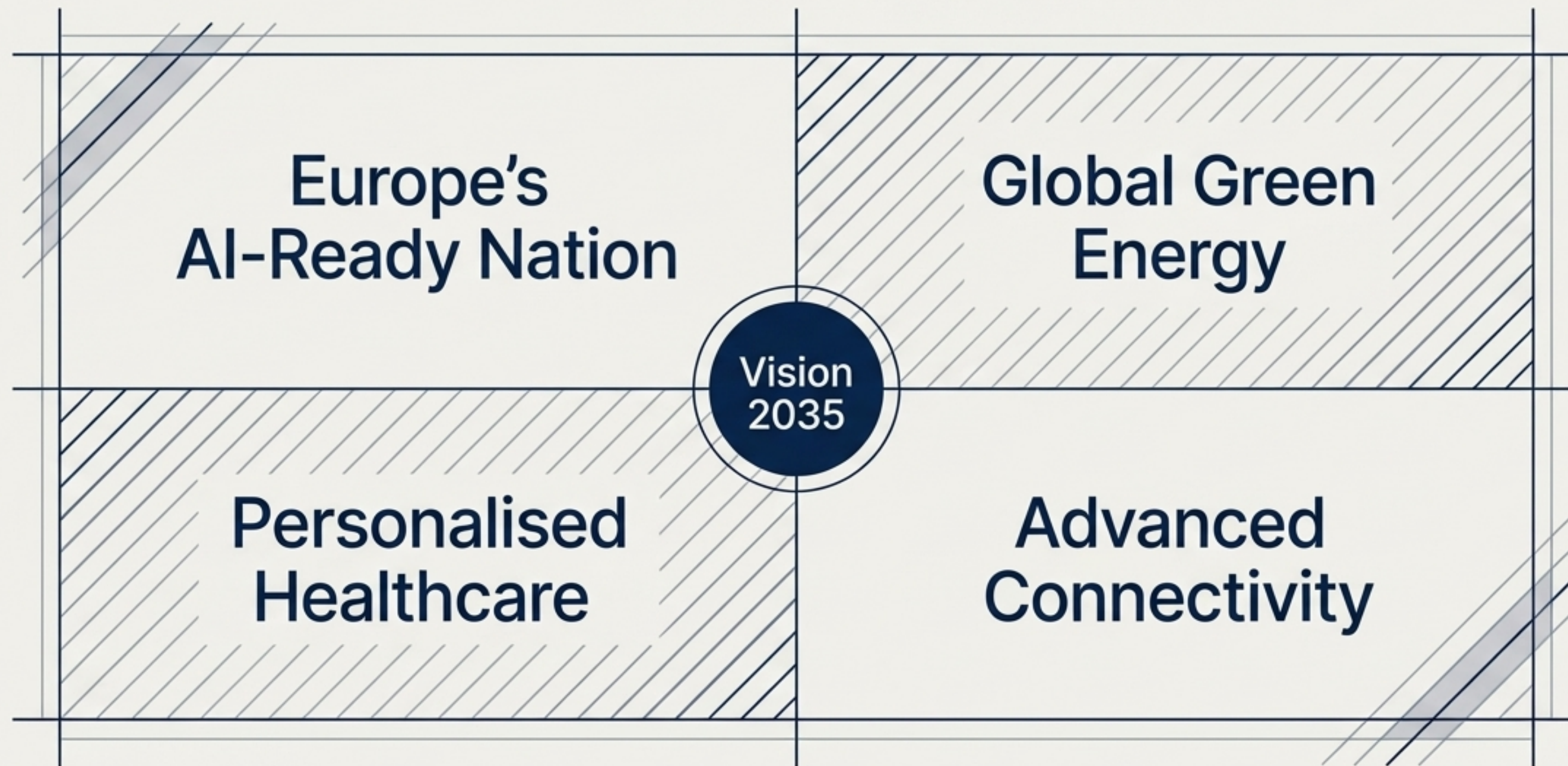
The direction of travel is clear: Scotland must prioritise scale, speed, and system alignment. We have a narrow window to build the infrastructure required for global dominance.

# The Foundation: A Nation Built on Tech Strengths

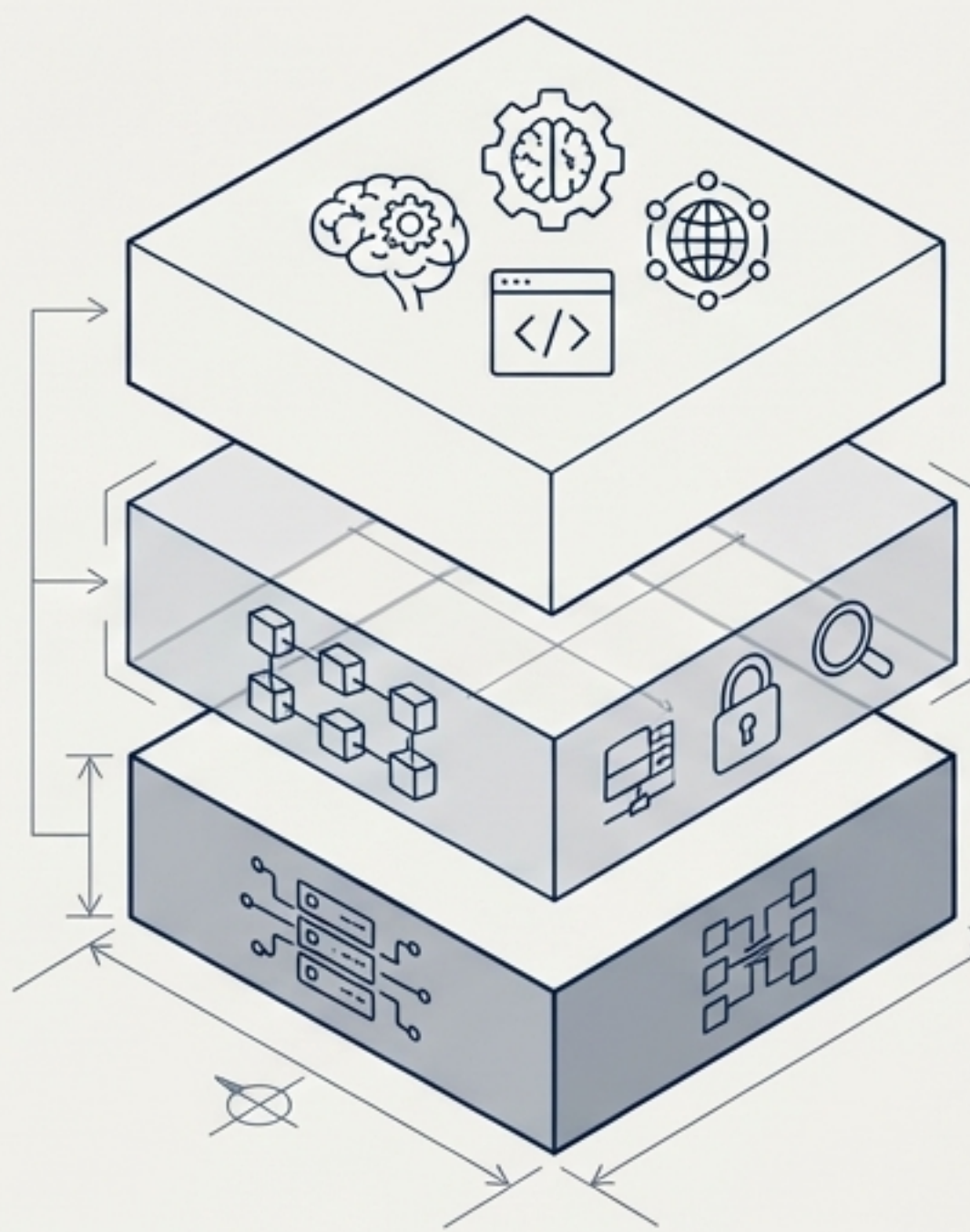


# Vision 2035: Four Domains of Global Leadership

Benchmarking against top innovation nations like Singapore and Estonia to compete for talent and investment on a global scale.



# Deep Dive: Europe's Leading AI-Ready Nation



**Software** / Open-Source Model Development (Equitable access for citizens and companies).

**Data** / Openly Licensed Datasets (Unlocking safe, privacy-preserving innovation).

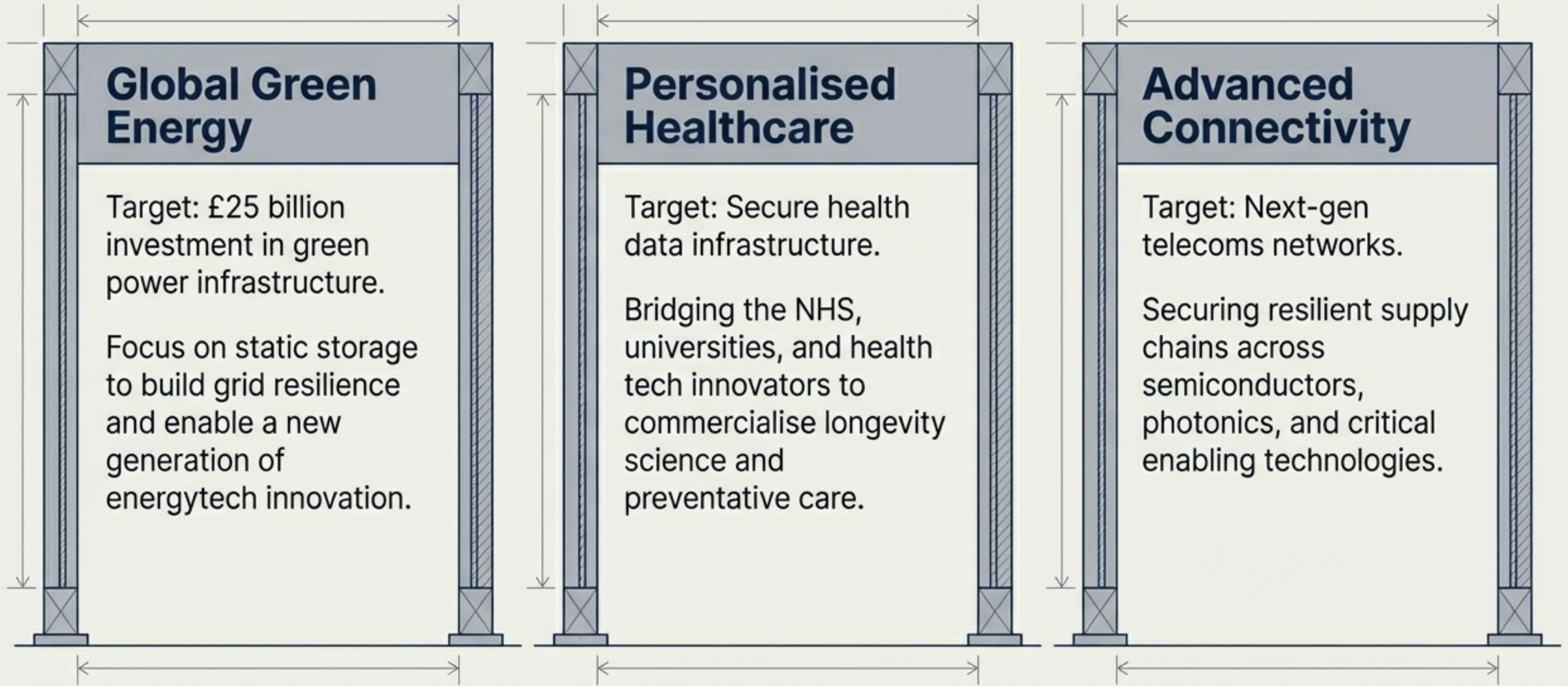
**Hardware** / 5GW Sovereign Data Centre Capacity (Built for public, academic, and commercial innovation).

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## The AI Catalyst

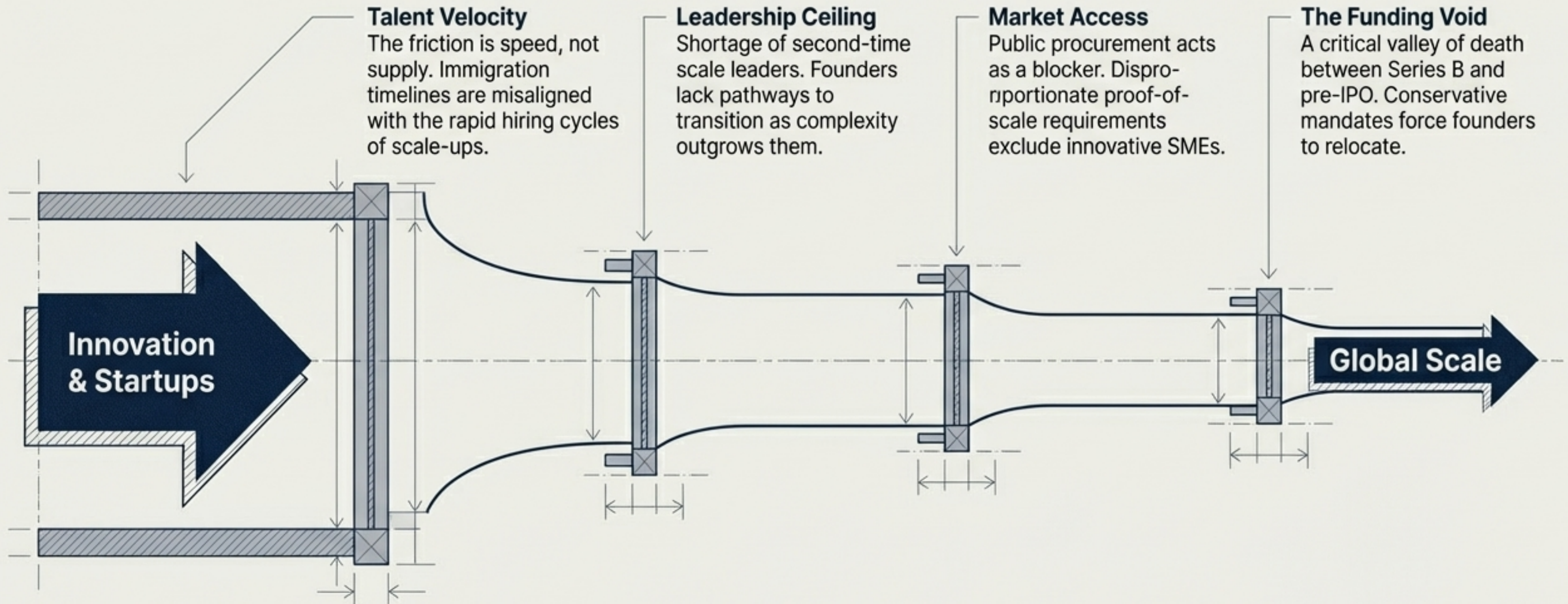
The dedicated AI Sub-group has shaped Scotland's AI Strategy 2026-2031, positioning AI not just as a tool, but as a core driver of economic growth and competitive advantage.

# Vision 2035: Energy, Health, & Connectivity



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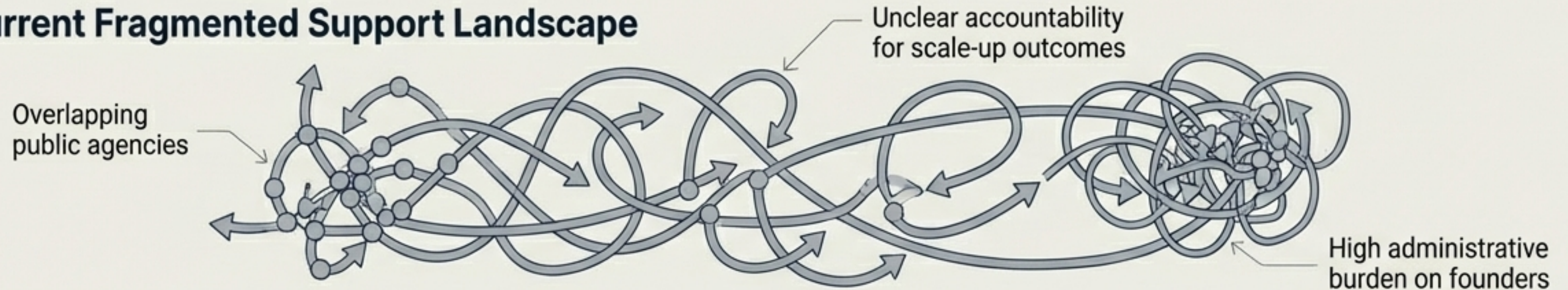
# The Chasm: Four Critical System Frictions



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# The Hidden Threat: Systemic Fragmentation

## The Current Fragmented Support Landscape



The overarching **friction** multiplying all other barriers is structural fragmentation.  
There is currently no single owner of the scale-up journey.

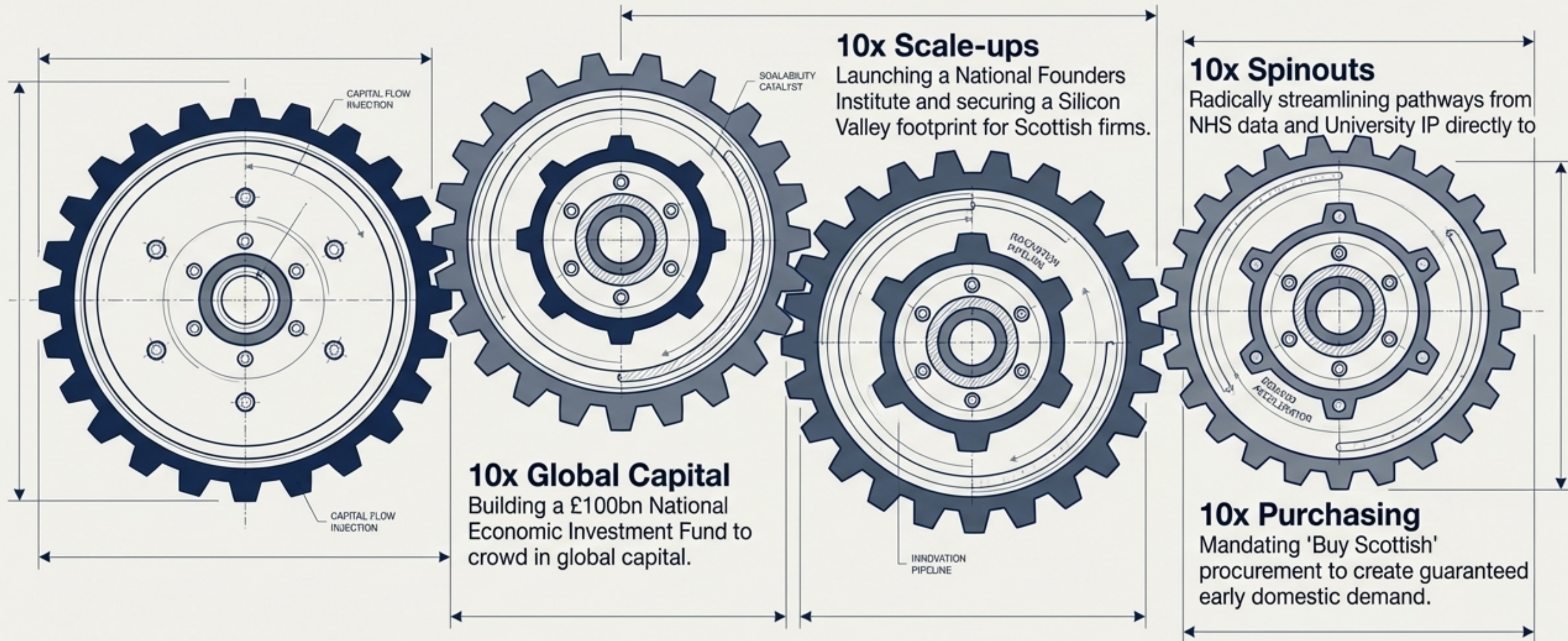
## The Required Streamlined Pathway



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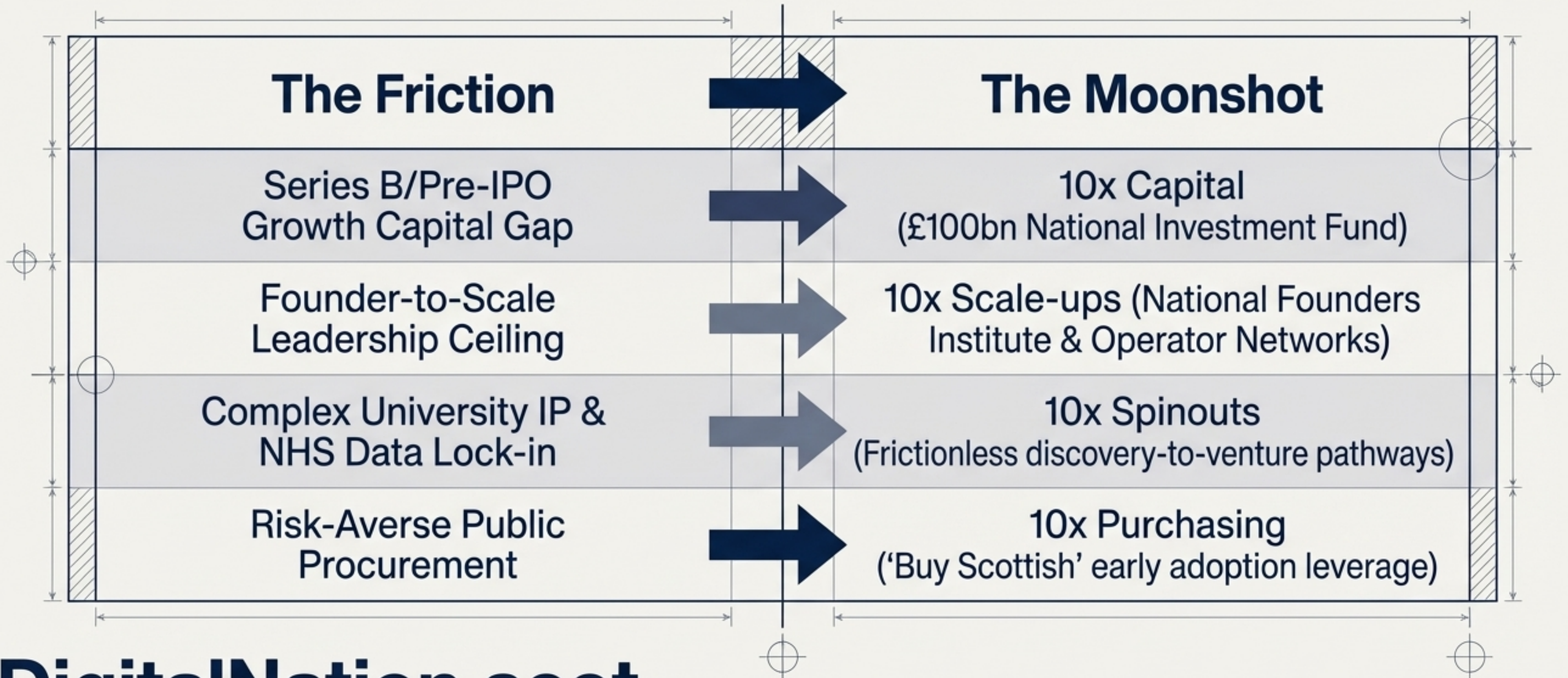
# The Engine: Delivering Vision 2035

Radical ambition requires radical intervention.

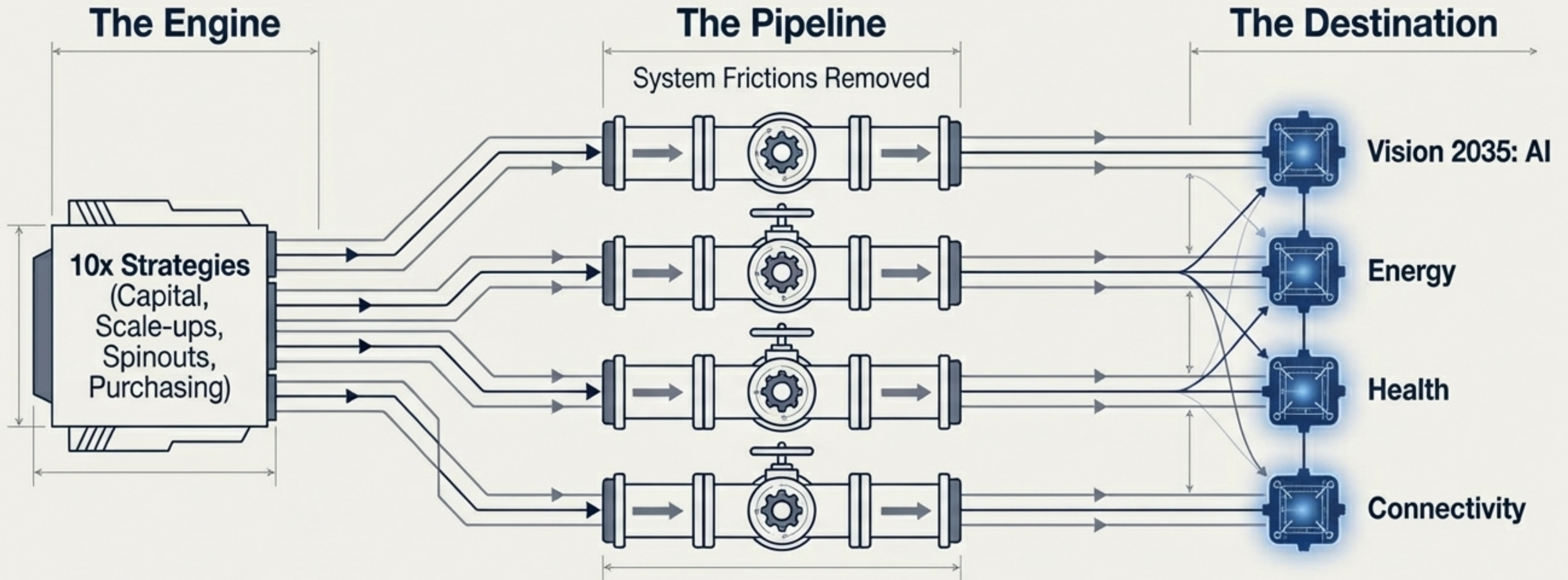


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# The Friction vs. Transformation Matrix



# Synthesis: The Ecosystem Architecture

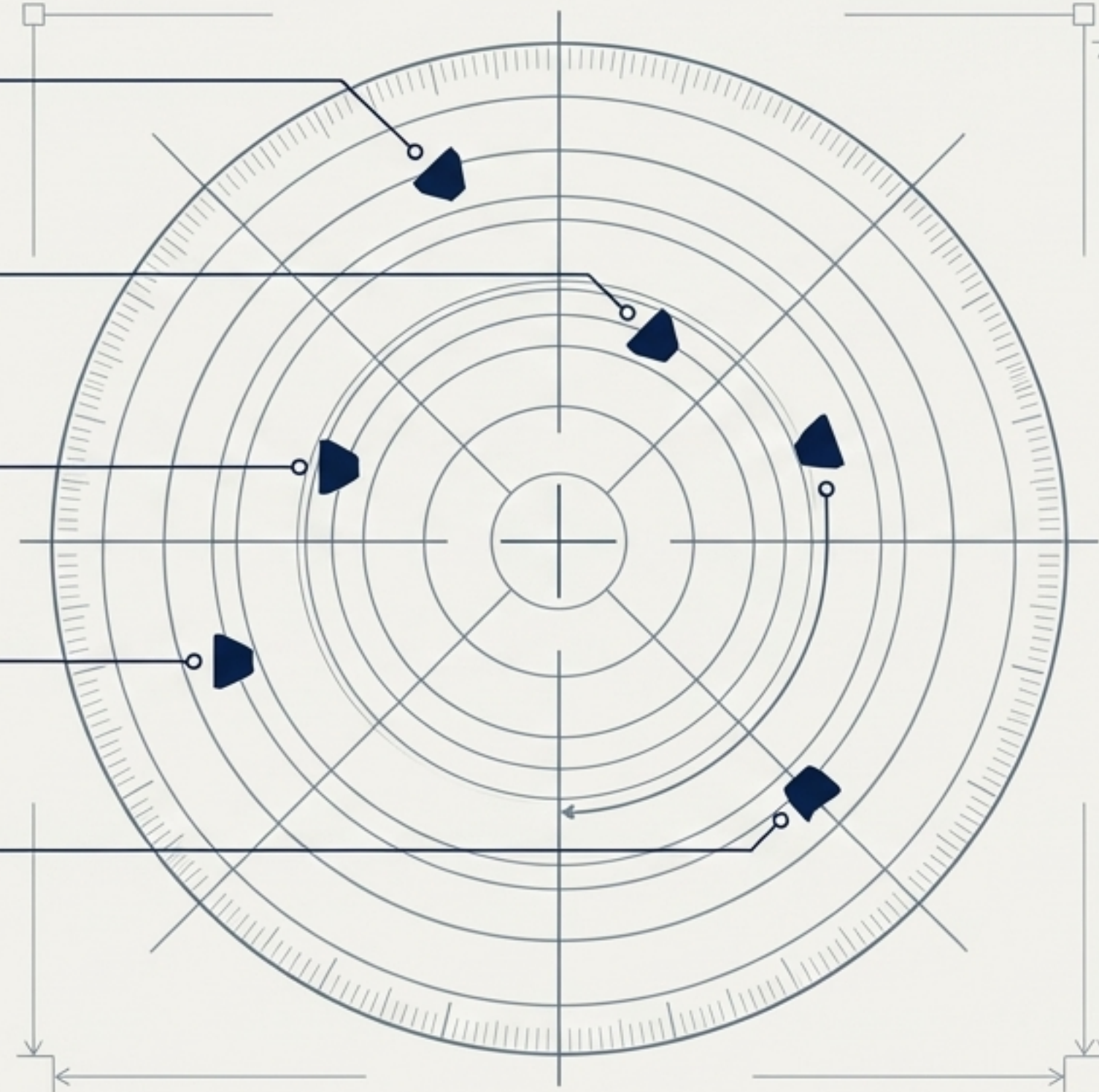


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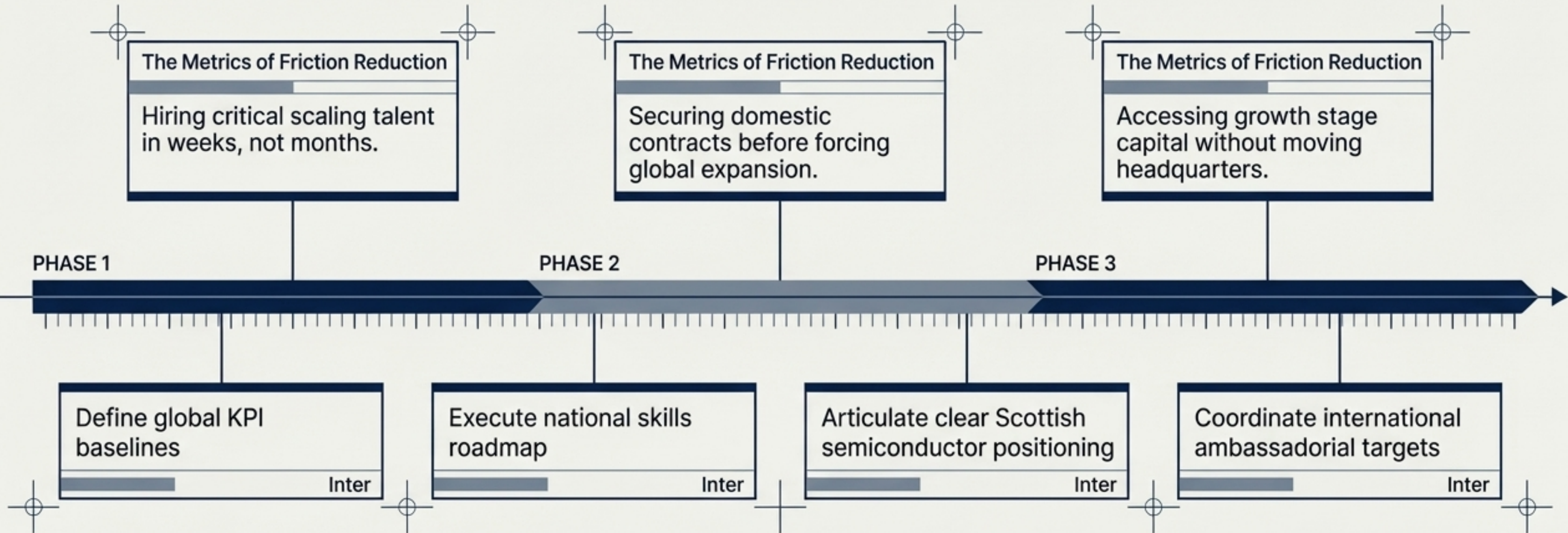
Solving the four systemic frictions with the four moonshot strategies is the definitive mechanism to unlock global leadership in our four target domains. This is a single, integrated economic machine.

# System Guardrails: Navigating Systemic Risks


- Infrastructure Limits**  
Data centres demand vast power grids and digital connectivity that must be built now.
- The Skills Deficit**  
Requires a sustained AI education strategy and urgent Higher Education funding model reform.
- Data Sovereignty**  
Sharing NHS data requires ironclad ethical governance and protection against vendor lock-in.
- Cultural Inertia**  
Risk-averse public/private sector attitudes constrain agile innovation.
- Institution Burnout**  
Universities and the NHS are at capacity; they require dedicated resourcing to act as commercialisation engines.



# Measuring Success: The Next 10 Months



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**“Scotland’s future prosperity will be shaped not only by the number of startups created, but by how effectively the country supports those with real momentum to scale.”**

The challenge ahead is not the creation of more programmes, but the radical removal of friction.

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