Vision 2035

A Blueprint for Scotland to Develop a World Leading Technology Sector

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Executive Summary

Published on the 25th March, the Scottish Technology Council has released their 2025-26 Report. This defines ‘Vision 2035: Scotland’s Next Horizon‘, which aims to develop a world leading Scottish technology sector.

The Council, a non-statutory advisory body established in May 2025 and chaired by Business Minister Richard Lochhead MSP, brings together leaders from industry, academia, and entrepreneurship.

Its goal is to guide Scotland’s tech-driven economic growth and position the country as a global technology leader by 2035.

Policy Implementation Roadmap: Delivering Vision 2035

The Scotland's Technology Council 2025-26 Report outlines a strategic roadmap for establishing Scotland as a global leader in innovation and emerging technologies. Established in May 2025, the Council provides expert advice to the Scottish Government on leveraging national strengths in artificial intelligence, clean energy, and life sciences.

The document introduces Vision 2035, a framework centered on four "moonshot" strategies designed to attract international capital and accelerate the growth of high-potential scale-ups. It identifies critical structural barriers, such as talent shortages and procurement hurdles, that must be addressed to enhance national competitiveness.

Ultimately, the report serves as a call to action for the incoming government to prioritize infrastructure investment and system alignment to secure a prosperous, tech-driven economic future.

1. Strategic Context and the Mandate for Change

The formation of Scotland's Technology Council in May 2025 represents a decisive structural shift in the nation's economic trajectory. In an increasingly volatile global landscape, Scotland can no longer afford the inefficiencies of fragmented support; instead, we must move toward a systemic roadmap that translates high-level governmental ambitions into actionable growth.

The Council is tasked with navigating the rapid evolution of AI, clean energy, health innovation, and advanced manufacturing to ensure these sectors drive long-term, sustainable economic prosperity.

While Scotland's historical innovation "DNA" is legendary—from the steam engine to ultrasound—the modern competitive environment demands a fundamental pivot. Our legacy of invention must now be matched by a relentless focus on scale, speed, and system alignment. These strategic pillars serve as the essential economic anchors required to secure Scotland's position on the 2035 horizon.

2. The Pillars of Technological Ambition

Selecting specific "priority domains" is a strategic necessity to anchor national competitiveness and attract the high-velocity global investment required for systemic growth. By concentrating resources where Scotland possesses a demonstrable competitive advantage, we can foster the density and specialization found in the world's most successful innovation hubs.

The four core ambitions of Vision 2035 are:

- **Europe's Leading AI-Ready Nation:** Scotland will establish 5GW of sovereign inference data-center capacity to support public and commercial innovation. This is underpinned by the development of open-source AI models and the release of openly licensed datasets to ensure equitable access and safe, scaled adoption.
- **Global Green Energy Leadership:** Targeting a £25 billion investment in green power infrastructure, this pillar focuses on long-duration energy storage and grid resilience. We will prioritize static storage solutions for industrial and residential use to maximize the utility of our renewable generation.
- **Personalised Healthcare:** By integrating secure health data with longevity science, Scotland will lead in preventative clinical care. This ambition is delivered through a strengthened interface between the NHS, our world-class universities, and health-tech innovators to translate research into clinical impact.
- **Advanced Connectivity & Critical Technologies:** We will modernize national telecoms and secure semiconductor supply chains. This includes supporting the **Critical Technologies Supercluster**—a network of over 150 companies—with the goal of reaching £10 billion in critical tech turnover and £4 billion in space sector revenue by 2035.

To achieve these milestones, Scotland must benchmark itself against high-performing innovation nations like Singapore, Estonia, and Ireland.

These peers provide a blueprint for success, specifically regarding the implementation of open data infrastructure and the total strategic alignment between government policy and high-growth industrial needs. However, these ambitions serve only as the destination; the "moonshot" strategies detailed below provide the propulsion.

3. The Four Moonshot Strategies: A Unified Delivery

Framework

The "10x Strategies" are not merely initiatives; they function as a cohesive engine designed to transform world-class research into global market leadership. These strategies operate through a "push/pull" mechanic: domestic procurement creates the initial demand "pull," while massive capital injection provides the scaling "push" required for international expansion.

1. **10x Global Capital:** We will facilitate the formation of a £100bn National Economic Investment Fund. It is critical to note that this is **not via Scottish Government funding**; rather, it is a partnership of the public, private, and third sectors designed to "crowd in" global private capital and anchor world-class companies in Scotland.
2. **10x Scale-ups:** To bridge the "growth stall" for maturing firms, we will establish a National Founders Institute. This includes a dedicated Silicon Valley footprint to provide Scottish founders with operator-led mentoring and direct access to global networks.
3. **10x Spinouts:** We will streamline the commercialization pathways for university research and NHS data, ensuring discovery-phase breakthroughs transition rapidly into investment-ready ventures.
4. **10x Purchasing ("Buy Scottish"):** This strategy aligns domestic public and private procurement with innovation priorities. By providing SMEs with early domestic demand, we grant them the "proof-of-scale" necessary to win global contracts.

The interconnectedness of these strategies ensures that as we commercialize research (**10x Spinouts**), we simultaneously provide the capital to grow (**10x Capital**), the leadership to scale (**10x Scale-ups**), and the domestic market to validate (**10x Purchasing**). This framework's success depends on the immediate removal of the systemic frictions identified by the Council.

4. Overcoming Systemic Frictions: Talent, Leadership, and Markets

Structural barriers, rather than a lack of foundational ideas, remain the primary constraints on Scotland’s growth velocity. For Scotland to transition from a nation of

startups to a nation of global scale-ups, we must mitigate the following frictions.

Systemic Friction Mitigation Matrix

Friction Category	Core Constraint	Strategic Impact	Proposed Solution
Talent	Immigration and hiring speed	Scale-ups miss growth windows due to slow recruitment.	Prioritize hiring speed over supply; streamline scale-up hiring cycles.
Leadership	The "second-time" leader gap	Companies experience a "growth stall" in the £50m–£500m range.	Founders Institute; build peer networks; access to "operator" mentors.
Markets	Risk-averse procurement	SMEs excluded by "proof-of-scale" and duplicated compliance.	"Buy Scottish" strategy; align inconsistent buyer expectations.
Finance	Series B to pre-IPO gap	High-potential firms relocate to seek larger capital rounds.	£100bn Fund; improve capital timing; address the Series B gap.

The "Leadership Capacity" friction is a major systemic blocker; as companies mature, they often suffer from thin peer networks that prevent the transition from founder-led to scale-led organizational structures. Similarly, Market Access is stifled by fragmented procurement structures that impose duplicated compliance burdens on innovators. Removing these frictions is the most cost-effective lever available to the government.

5. Risk Mitigation and Governance Foundations

Robust governance and ethical frameworks are prerequisites for public trust and the sustainable adoption of emerging technologies. The success of this roadmap requires a clear-eyed assessment of systemic risks.

1. **Skills Pipeline:** We must develop a coherent national AI strategy for education to prevent a widening talent gap.
2. **Data Sovereignty:** While leveraging NHS data is a competitive advantage, we must caution against sharing NHS data outside the UK due to security and sovereignty implications.
3. **Institutional Capacity:** Universities and the NHS are at capacity; they require dedicated resourcing to act as engines of commercialization.
4. **Cultural Barriers:** Risk-aversion in the public sector remains a constraint on the "moonshot" mindset.
5. **Managing Disruption:** We must actively plan for disruption in key sectors, specifically the Creative Industries.
6. **Higher Education Funding:** Tightening limits and financial strain in the university sector risk the foundations of our R&D.

The "AI Sub-group" established by the Council serves as a benchmark for specialized governance. This model successfully informed the **"Scotland AI Strategy 2026-2031,"** proving that industry-led expertise can effectively shape government policy.

6. Implementation Timeline and Performance Indicators (KPIs)

The next ten months represent a critical window to define success, establish baseline data, and prepare the infrastructure for long-term evaluation. This period will focus on the transition from strategy to measurable delivery.

Next Steps Roadmap:

- **Establish Baseline Data:** Quantify the current tech ecosystem to contextualize future change.
- **Define Measurable Indicators:** Agree on the specific metrics of a tech-driven economic future.
- **Priority Interventions:** Finalize government actions to be implemented post-May 2026 election.
- **Semiconductor Positioning:** Clarify Scotland's specific leadership role in the global supply chain.
- **Talent Strategy:** Develop a detailed skills and talent retention strategy.
- **Ambassadorial Coordination:** Clarify roles for Council members to promote

Scotland internationally.

Key Performance Indicators (KPIs) for Global Leadership:

- **Hiring Speed:** Reduction of recruitment timelines for key technical roles from months to weeks.
- **Founder Retention:** Increased percentage of high-growth founders remaining in Scotland post-Series B.
- **Tech-Job Quality and Volume:** Measuring the growth of high-value employment within priority sectors.
- **Investment Density:** Quantifying the volume of external private capital "crowded in" by national funds.

Call to Action

The challenge ahead is not the creation of more programmes, but the removal of friction. Achieving Vision 2035 requires a relentless focus on the scale-up segment and the attraction of substantial external investment. By eliminating structural barriers and aligning our systems, we will ensure that Scotland's future is as pioneering as its past.