# LEVEL UP SCOTLAND:

## A NATIONAL ACTION PLAN FOR THE SCOTTISH GAMES SECTOR

**Powering Scotland's Creative and Economic Future**

SCOTTISH GAMES NETWORK

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# foreword

The core mission of the International Game Developers Association (IGDA) is clear: to empower game developers worldwide in building fulfilling, sustainable careers. We work every day to ensure creators have access to the resources, community, and support systems that enable them to thrive.

Scotland's games community has long demonstrated exceptional creativity, technical excellence, and global influence. Yet as we see in many regions around the world, talent alone cannot sustain an ecosystem. Developers succeed when they are supported by evidence-based structures that uplift careers, encourage innovation, and reduce the barriers to building and scaling game projects.

What makes the Games Action Plan for Scotland especially compelling is its foundation in community feedback. This strategy emerged through extensive consultation with studios, developers, educators, and practitioners across the ecosystem, ensuring it reflects the real conditions and aspirations of the people it aims to serve. It stands as a model of how industry-led insight can guide long-term strategy.

The Games Action Plan takes a holistic, ecosystem-focused approach to solving critical industry challenges while keeping collaboration, inclusion, and sustainable growth at the core of Scotland's games sector. It recognises the cultural, economic, and cross-sector value that game developers contribute, as well as the important role these skills play across the wider digital economy.

The IGDA is excited to see the Scottish games community take this ambitious, structured step toward a more connected and supportive environment for developers. By prioritising people, skills, and long-term sustainability, this Action Plan contributes to a stronger global ecosystem and reflects the type of developer-centred thinking that is needed in today's rapidly evolving industry landscape.



**Jakin Vela** Executive Director,
International Game Developers Association (IGDA)

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NOTES FOR READERS:

This document contains only the high-level recommendations and supporting business cases for each. The detailed supporting data and context for all of the recommendations, and a more detailed breakdown of how each recommendation will be delivered, are in the Implementation Annexe document.

The Implementation Annexe document can be found here.

*Dedicated to Francesca, Jacob and Jamie.*


DIESEL


trc.
KO
Ask Me
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Video Games

# Executive Summary

**Scotland's world-class games sector is an economic powerhouse and a catalyst for innovation. Yet, for too long, its full potential has been held back by a lack of a unified national strategy. This changes now. The Scottish Games Action Plan is the decisive, evidence-based solution - a community-driven blueprint to position Scotland as the UK's first "games supercluster" and a global leader in creative technology (createch).**

This is not a plan for a single organisation; it is a unified vision for a national agenda. Developed over 18 months of intensive industry consultation with over 250 individuals and companies, this document is the community's vision for its own future. It is a collaborative strategy that leverages existing government resources and infrastructure to build a robust, sustainable, successful ecosystem.

## THE PLAN IS DESIGNED AS A PHASED, DE-RISKED BLUEPRINT FOR GROWTH:

**■ Phase One:**
**A Two-Year Pilot: This low-cost phase focuses on building foundational structures and providing a high return on investment. It includes four core recommendations:**

**▶ Recommendation 1:**
**Strategic Alignment:** Create a cross-portfolio working group for games, led by a dedicated Chief Games Officer (CGO) who reports to the Chief Entrepreneur. This will provide immediate strategic coherence and expert leadership, directly supporting the National Strategy for Economic Transformation (NSET), the Scottish Technology Ecosystem Review (STER) and other strategic plans.

**▶ Recommendation 2:**
**Games Growth Catalyst Pilot Fund:** Establish the feasibility for and prototype a targeted fund to support new intellectual property (IP) and the work-for-hire sector, a low-cost pilot that leverages private investment to prove the plan's economic viability.

**▶ Recommendation 3:**
**National Games Skills & Education Forum:** Convene a collaborative body to establish industry needs with education, identify critical skills gaps and build a lifelong learning pipeline connecting each stage of education and supporting ongoing professional development.

**▶ Recommendation 4:**
**Games Enterprise & Sustainability Service:** Launch a dedicated service to provide on-demand business support and mentorship to new and growing studios, delivered through existing enterprise agencies.

**■ Phase Two:**
**The National Games Innovation Centre: This is the long-term vision, with a full business case to be built during the two-year pilot.**

Deliver the full Games Growth Catalyst Pilot Fund and implement the findings of the National Games Skills & Education Forum for curricular reform and comprehensive scaling-up support.

**▶ Recommendation 5:**
**National Games Innovation Centre:** Establish a physical and strategic hub that consolidates Phase One efforts, driving long-term growth and cross-sectoral innovation, and becoming a world-leading centre for creative technology.

This is more than a strategy. It is a community-driven call to action. It offers Scotland a clear path to a billion-pound industry, valuable new jobs and businesses, and a unique opportunity to build more integrated and modern digital and creative economies, rooted in innovation.

# INTRODUCTION

## Scotland's Secret Weapon - A Vision for 2030

**The Scottish games ecosystem has a proud history, from the pioneering days of DMA Design to the world-class studios of today. Yet, for too long, its full potential has been held back by a lack of a unified national vision or strategy. This absence has left the sector fragmented and volatile within the rapidly evolving $200 billion global games market. This Action Plan is the decisive, evidence-based solution. It provides a community-driven blueprint to transform our individually successful cities and companies into the first cohesive 'games supercluster' in the UK by 2030.**

This plan delivers a unified vision for a national agenda - and the ecosystem's own vision for the future. As an economic and cultural force, games are Scotland's secret weapon: an under-valued asset with an exceptional capacity for growth, job creation, transformational impact and international influence.

### The Case For Investment

Scotland's games sector is not a speculative venture; it is an existing, high-value global economic industry. Our productivity is already world-class, generating **£151,382** in Gross Value Add (GVA) per head - more than double the Scottish average. This Action Plan is not a request for support; it is an opportunity to invest in a proven, Scottish high-yield asset with a track record of growth and innovation.

Around the world, nations and regions are no longer asking if or why they should support their games industries; they are asking how. Countries with similar populations to Scotland are now world leaders because of dedicated government support:

Finland's industry, driven by proactive policy, now has a turnover of **€2.85 billion**, and its public funding has returned an exceptional **£22** in tax revenue for every **£1** invested.



Australia's Victorian government has seen an **85%** increase in new projects and a **1:11** return on investment from a targeted, pilot-based funding model - the same approach our plan recommends.

The return on public investment has also been proven right here in Scotland and across the UK. Targeted funding models such as the UK Games Fund and Scotland's own InGAME innovation centre have delivered a substantial return for every pound invested.

The question is not if this model works, but how we can scale its success.



This Action Plan provides the blueprint to build upon the recent UK government Modern Industrial Strategy and Creative Industries Review and to make Scotland the UK's first "games supercluster." In the increasingly competitive consumer market and the wider games ecosystem, Scotland has the opportunity to take its pioneering heritage and transform it into a world-leading future.

### ■ A Cultural Force & A 'Golden Thread' for the Future

While the economic case is strong, the true potential of the games sector lies in its power as a cultural and social force. Games are a dynamic and powerful medium with a higher engagement rate among young people than film, music, and literature combined. They offer a new way to tell Scottish stories, celebrate our creativity on the world stage, and engage with our population in entirely new ways.

Furthermore, games technology is a 'golden thread' running through our wider economy, powering innovation in education, health, urban planning, manufacturing, financial services, energy and engineering. The **£7.63 billion** UK video games consumer market generated an estimated **£760 million** in GDP from this technology spillover alone.

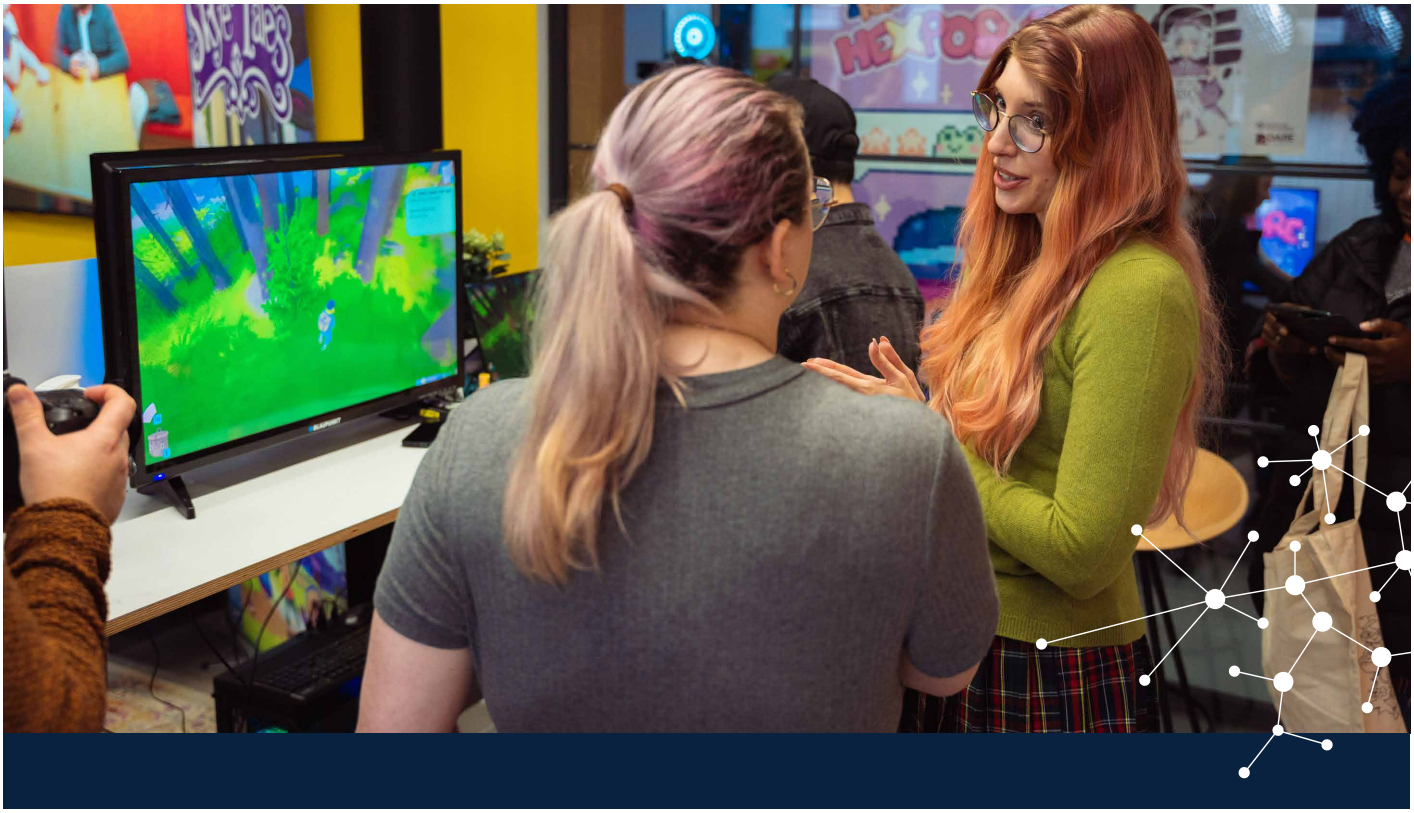
This is an investment not just in a single sector, but in a central, cross-cutting technology that will build Scotland's digital future.

### ■ Strategic Alignment: A Unified Vision for Growth

This Action Plan is designed to be a direct and effective delivery mechanism for growth. It aligns with Scotland's own strategic goals, directly supporting the National Strategy for Economic Transformation (NSET) and the recommendations of the Scottish Technology Ecosystem Review (STER) and many of the other strategies and plans released in recent years (a full breakdown of these plans and how we align with them can be found in the Implementation Annexe document).

Crucially, it also builds upon the UK Government's recent policies on the digital and creative economies. It is a proactive response that addresses the core findings of the UK's Creative Industries Review and directly supports the ambitions of the UK Government's Modern Industrial Strategy.

**By investing in Scotland's games ecosystem, the Scottish Government is not just backing a local industry; it is leading the way in delivering a united, 'supercharged' UK-wide vision for growth.**



# A 'CANNY' BLUEPRINT FOR GROWTH

**This Action Plan is designed as a phased, de-risked approach to growing Scotland's games ecosystem. It is not a request for a large, upfront investment, but a pragmatic and evidence-based approach that builds upon proven models of success.**

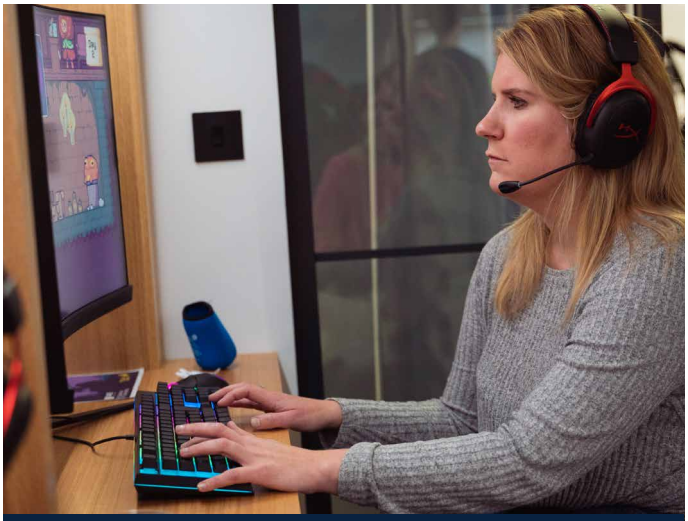
**Phase One:**
A Two-Year Pilot This initial phase is a low-cost, high-impact pilot programme focused on establishing foundational structures, providing immediate strategic coherence, and delivering a high return on investment. The five recommendations in this plan are all a part of this initial phase.

**Phase Two:**
The National Games Innovation Centre The long-term vision is to establish a National Games Innovation Centre. This physical hub will be the culmination of Phase One's successes, providing a focal point for the sector, a catalyst for international investment, and a legacy asset for Scotland. This phase will only proceed after the business case is proven by the successful delivery of Phase One.

**This approach ensures that public funds are used effectively and that every step of the journey is backed by data and proven outcomes.**

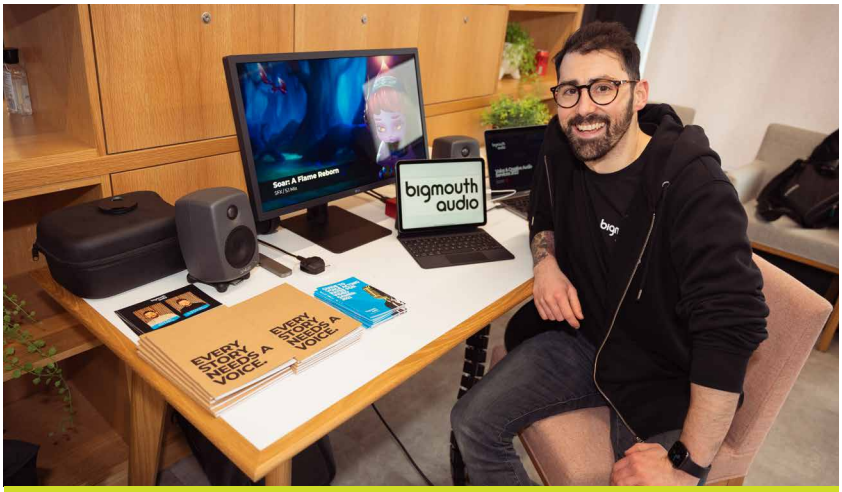
# AN INTERCONNECTED ECOSYSTEM

**The Games Action Plan is a single, interconnected solution to our fragmented ecosystem. The five recommendations that follow are not isolated ideas; they are interdependent components of a single, strategic blueprint. Each part - from the work across the education pipeline, to targeted investment fund, and tailored business support - is designed to work in concert with the others, creating a single, comprehensive system for creativity and growth. As shown by multiple international benchmarks, a piecemeal approach to support is ineffective. This plan is designed to be a complete solution, which enables every intervention to support every other.**








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# KEY RECOMMENDATIONS







## Recommendation 01: Strategic Alignment

Goal: **To formally recognise games as a key strategic sector, securing Cabinet-level sponsorship and embedding this recognition and games expertise across government. To build knowledge and understanding of games across directorates and portfolios, and to create a single, expert, and accountable leader to drive the initial implementation of the national Games Action Plan.**

**Context:** The Scottish games ecosystem has long been characterised by fragmentation and a lack of a unified, strategic voice. Independent academic research has repeatedly identified the absence of a dedicated, expert-led body as a key challenge holding the sector back from its full potential. This recommendation is the direct and evidence-based solution to that problem. By creating a clear line of leadership and formalising the sector's position within government, we will provide the strategic coherence and expert guidance required to deliver this plan effectively and ensure it is embedded across all relevant government departments.

This framework ensures the Action Plan serves as a dedicated delivery mechanism for Scotland's existing National Innovation Strategy and the Scottish Technology Ecosystem Review (STER), formalising the games sector's critical contribution to Scotland's innovation agenda.

■ **Actions:**

▶ **Appoint a Chief Games Officer (CGO) for Scotland:** This new, funded, interim post will be the government's lead expert and the industry's primary point of contact during the critical initial phase. The CGO will be tasked with delivering all Phase 01. functions outlined in this plan.

▶ **Proactively Seek UK-Level and International Funding:** The CGO's mandate will explicitly include leading a coordinated effort to access new UK-wide and international funding streams for the Scottish games ecosystem. This aligns with a new interest at the UK level in creative industries and positions Scotland to attract significant external investment.

▶ **Establish a Formal Cross-Portfolio Working Group for Games:** Chaired by the CGO and championed by the Deputy First Minister's office, this group will provide inter-departmental alignment and expert advice on delivery.

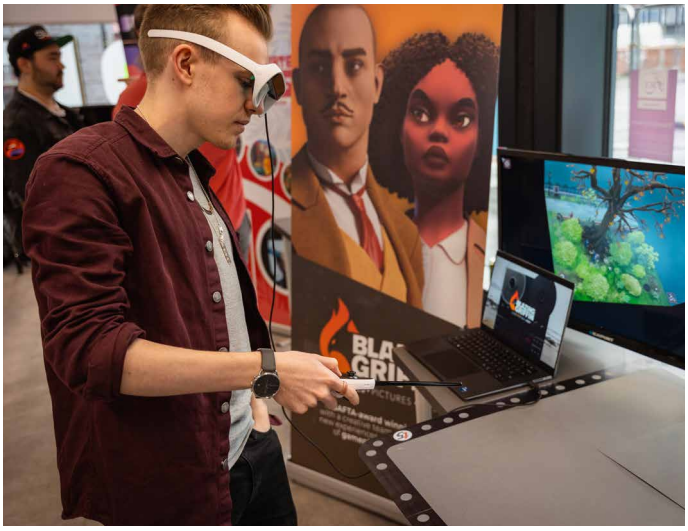
▶ **Embed Fair Work and Inclusion Principles:** All public support will mandate commitment to Scotland's National Fair Work Convention and the Pathways report, ensuring that the sector's growth is both inclusive and sustainable.

▶ **Define the Purpose of the Cross-Portfolio Working Group:** The primary function of this group is to break down government silos, ensuring that the games agenda is not isolated within a single department. It will convene senior officials and decision-makers from all relevant portfolios - including culture, education, economy, and digital - to ensure the plan is delivered as a truly cross-governmental priority. This coordination is essential for maximising the impact of interventions and limiting unintended outcomes.

▶ **Embed the Games Sector into Key National Strategies:** The CGO's mandate will include leading a coordinated effort to review and where relevant, update and embed the games sector into relevant national strategies and policy documents, including the **National Strategy for Economic Transformation (NSET), National Innovation Strategy, the Digital Economy Skills Action Plan, Creative Industries Strategy**, etc. This ensures the games agenda is not a standalone initiative but a cross-cutting priority for government.

▶ **Establish a Robust National Data Collection Framework and an Investment Tracking Framework:** This will provide accurate Scottish benchmarks for the first time, track the flow of capital into the ecosystem, and build investor confidence.

**Reference:** A full Terms of Reference for the CGO role is available in the **Implementation Annexe document**.








# Recommendation 02:
# Games Growth Catalyst Pilot Fund

**Goal: To establish a dedicated pilot fund that provides comprehensive financial support for the entire games ecosystem, with a dual focus on generating new Scottish IP and strengthening the work-for-hire sector, thereby building an undeniable business case for long-term investment.**

■ **Context:** The public investment case for games is clear and has been proven right here in the UK. Dedicated funding models such as the UK Games Fund have delivered a substantial return for every pound invested. While Scotland has a proud track record of creating world-class games, the ecosystem has long been hampered by a lack of access to dedicated funding. This recommendation provides a direct and decisive solution, ensuring that Scottish talent has the capital to grow and retain intellectual property, which is where the greatest long-term value is created.

■ **Actions:**

▶ **Launch a Phase 01 Pilot Fund:** A smaller-scale, two-stream pilot fund designed to test key assumptions, validate the delivery model, and build the undeniable business case for a larger, multi-year fund.

▶ **Stream A: IP Incubation:** Providing prototype grants up to **£50,000** per project to de-risk 'creative experimentation' and the creation of new Scottish IP.

▶ **Stream B: Co-Development Competitiveness:** Providing targeted grants up to **£100,000** per project to help work-for-hire studios compete on the global stage, with its continuation beyond Phase 1 subject to a positive ROI evaluation.

▶ **Establish Administration & Governance:** The fund will be administered by an existing body (e.g., Creative Scotland) to avoid duplication and will have strategic oversight from the Interim Chief Games Officer and an independent expert panel to ensure decisions are made by games industry professionals.

▶ **Determine Most Effective Funding Relationships:** As a core task, the Chief Games Officer (CGO) will investigate and determine the most effective relationships with existing Scottish and UK-wide funding mechanisms (i.e., Scottish EDGE competition, UK Games Fund, etc.).

▶ **Establish a Clear Investment Pipeline:** The fund will be a critical first step in a clear investment pathway, with a link to the Scottish National Investment Bank (SNIB) for commercial follow-on funding for successful projects.

**Reference:** Full details, including a proposed structure for the pilot fund and an analysis of its economic impact, are available in the Implementation Annexe.




# Recommendation 03:
# National Games Skills & Education Forum

**Goal: To create a coherent, coordinated, and industry-focused talent pipeline that supports individuals throughout their careers, from initial education and training to professional development and upskilling.**

■ **Context:** The Scottish games ecosystem has long been hampered by a significant and well-documented skills gap. The absence of a formal, coordinated mechanism to bridge the gap between education and industry has left the sector with a "precarious" talent pipeline. This recommendation is a direct and evidence-based solution. By establishing a dedicated forum that brings all key stakeholders together, we will ensure the curriculum aligns with industry needs, talent is retained in Scotland, and the sector can meet its ambitious growth targets in a rapidly-evolving global marketplace.

■ **Actions:**

▶ **Establish a National Games Skills & Education Forum:** Convened and chaired by the CGO, this professionally coordinated Forum will be the engine for change, bringing together leaders from industry, education, and government to break down silos and align curriculum with industry needs. This body will act as the primary interface for Scotland with the new UK Games Skills Council, ensuring our needs are met and our expertise is shared.

▶ **Launch a Dedicated 'Pathways to Games' Initiative:** This will directly and practically improve diversity and inclusion and support the 2023 Pathways Report within the games ecosystem to support founders and talent from underrepresented, disadvantaged and minority backgrounds.

▶ **Develop a Lifelong Learning Framework (Phase 01):** This framework will create a clear pathway for the existing workforce to access Continuing Professional Development (CPD), reskilling, and upskilling opportunities, with a specific focus on supporting professionals with **3+ years of experience**. This is a key differentiator that will help retain and attract senior talent to Scotland.

▶ **Link the Talent Pipeline to Business Development:** This Forum will work in concert with the **Games Enterprise & Sustainability Service (Recommendation 04) and the Games Investment Fund (Recommendation 02)** to ensure that graduates and upskilled professionals have clear pathways to becoming founders or securing high-value employment within Scotland's games ecosystem.

**Reference:** A proposed structure for the Forum is available in the Implementation Annexe.




# Recommendation 04:
# Games Enterprise & Sustainability Service

**Goal: To provide agile, specialist support that addresses the real-world challenges of founding, sustaining and scaling a games business in Scotland, and to create a mature, professional, and interconnected business environment that supports the entire ecosystem.**

■ **Context:** While Scotland's games talent is world-class, the ecosystem's growth has been hampered by a lack of access to specialist business support. This has contributed to a high rate of company failure and a precarious business environment. Research shows that a lack of business knowledge is a major reason for games companies failing to scale and grow. This recommendation directly addresses this gap by providing an agile, on-demand service that integrates games-specific expertise into existing national support infrastructure, ensuring that studios have the tools to professionalise, sustain and scale their businesses.

■ **Actions:**

▶ **Provide a Business Creation Programme:** Offering specialist, on-demand support and mentorship to potential founders and new games startups to help them navigate the early stages of business creation and identify potential funding.

▶ **Support Companies to Scale:** Provide expert, tailored guidance to existing, sustainable companies with high growth potential, helping them to professionalise their operations and scale to become major employers and global players within Scotland.

▶ **Facilitate Publisher & Investment Connections:** Actively coordinate and fund attendance at international events and host targeted meet-ups in Scotland to connect local developers with global publishers and investors. This will increase opportunities for project funding and equity investment.

▶ **Deliver an Investment-Readiness Programme:** The service will prepare companies to successfully attract private capital, as well as help them to access grants from the **Dedicated Games Investment Fund (Recommendation 02)**.

▶ **Integrate With the Talent Pipeline:** The service will work in concert with the **National Games Skills & Education Forum (Recommendation 03)** to provide tailored guidance on how to attract, recruit, and retain the best talent from the pipeline.

▶ **Utilise Existing Infrastructure:** The service will be a specialist layer coordinated by the CGO, providing games-specific expertise to existing support bodies, including **Scottish Enterprise**, **Techscaler**, and **Business Gateway**, avoiding the need to duplicate existing infrastructure.

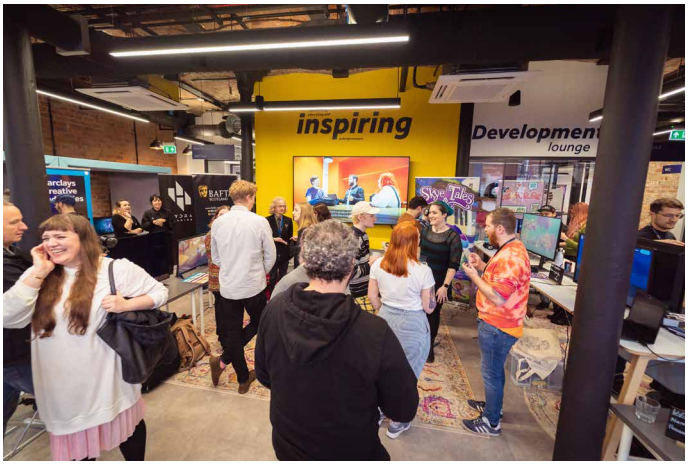
**Reference:** The proposed operational plan for this service is detailed in the Implementation Annexe.

# Recommendation 05:
# A National Games Innovation Centre

**Goal: To establish a new, single national institution that serves as the strategic, physical, and operational core of Scotland's games supercluster. This institution will be the ultimate long-term home for this Games Action Plan and any future national games strategy.**

■ **Context:** The five recommendations in this plan are designed to build a unified, interconnected ecosystem. This national institution is the culmination of those efforts and the long-term, sustainable home for this strategy. It is the definitive solution to the fragmentation and lack of a central hub that has historically held the sector back from its full potential. This institution will provide Scotland with a 'front door' - a catalyst for international investment, and a permanent asset for a world-leading sector.

Furthermore, it will enable the games ecosystem to engage with and contribute to Scotland's wider innovation landscape, forging collaborations with other innovation centres like The Data Lab, CENSIS, and the Digital Health & Care Innovation Centre to deliver even greater cross-sectoral economic and social benefits.




■ **Actions:**

▶ **Establish a Commercially Focused 'Games Scotland' Body:** This new, expert-led agency is designed to grow the games ecosystem through targeted investment, business support, and market development. This hybrid model will operate with the commercial agility of a body like **Screen Scotland**, while embodying the innovation-driven, data-led principles of a hub like **The Data Lab**.

▶ **Investigate a Feasibility Study for a Physical Innovation Hub:** Based on the success of the two-year pilot, a full business case will be developed to establish a physical hub. This hub will act as a force multiplier, driving industry-academia collaboration and housing initiatives like the **'Ethical AI for Games' Lab**.

▶ **Develop a Long-Term Business Case:** A key function of the new body will be to develop a comprehensive business case for long-term investment. Drawing on the proven performance of Scotland's **InGAME R&D centre**, which generated **£15.90 GVA for every £1 of public funding**, we project this investment will generate a similar or greater return.

**Reference:** A business case for this new institution is provided in the Implementation Annexe.

# ■ MEASURING OUR SUCCESS:

## A Framework for Accountability

■ **Purpose:** To establish a clear, data-driven framework for measuring the performance of the Action Plan against its strategic goals, ensuring accountability and demonstrating a clear return on public investment.

■ **Key Performance Indicators (KPIs):** The success of this Action Plan will be measured through a set of interconnected KPIs, demonstrating both the direct economic impact and the long-term health of the ecosystem.

■ **Economic Impact:**

▶ **GVA:** We will track the Gross Value Add contribution of the Scottish games sector, with a target of a **£1 billion** turnover by 2030. This is our primary measure of economic productivity and is directly tied to the sector's ability to create high-value output.

▶ **Job Creation:** We will monitor the number of high-value jobs created across the ecosystem, aiming to exceed **5,000 jobs** by 2030. This demonstrates the sector's capacity to support careers and contribute to national employment.

▶ **Private Investment:** We will track the amount of private capital leveraged by public funding, with a target of exceeding **£1.40** of private investment for every **£1** of public funding. This is a key measure of the plan's ability to de-risk investment and attract private capital.

▶ **Exports:** We will monitor the value and cultural impact of exports of games and games-related services from Scotland, with a target of a **25%** increase in both value and recognition (awards, etc.) by 2028. This demonstrates the sector's international competitiveness and cultural reach.

■ **Ecosystem Health:**

▶ **Studio Creation:** We will track the number of new studios founded and successfully incubated (released more than one game sustainably), with a target of **20** new studios by 2028. This measures the health of the entrepreneurial pipeline.

▶ **IP Development:** We will monitor the number of new, original IPs created in Scotland, with a target of **50** new IPs receiving prototype funding by 2028. This measures the creative vitality of the ecosystem and its potential for long-term value creation.

▶ **Collaboration:** We will measure the number of collaborations between industry and academia (e.g., joint R&D projects), with a target of **15** new projects initiated annually through the national institution by 2028. This measures the interconnectedness of the ecosystem.

▶ **Diversity & Inclusion:** We will track the diversity of founders and the workforce, with a target of increasing the representation and retention of underrepresented groups (women, ethnic minorities, and people with disabilities) by **15%** in the workforce by 2028. This ensures the sector's growth is both inclusive and sustainable.

■ **Talent & Skills:**

▶ **Talent Alignment:** Increase the percentage of graduates securing relevant games-sector employment in Scotland within six months of graduation (Baseline and target TBD by CGO).

▶ **CPD/Retention:** Build the number of experienced professionals (3+ years) participating in the new Lifelong Learning Framework across the games ecosystem.

▶ **Entrepreneurial Pathway:** Increase the number of games-related graduates accessing the Games Enterprise Service to explore founding a studio.

▶ **Talent Retention:** We will track the percentage of graduates who remain in Scotland to pursue a career in the games sector through employment or business creation, with a target of a **10%** increase in retention rate by 2028. This is a critical measure of the ecosystem's long-term health and a key indicator of our success in becoming a global supercluster.

# CONCLUSION

## A Vision for a World-Leading Scotland

**The Scottish Games Action Plan is not just the first step in a national strategy; it is a shared vision to build Scotland's digital future. For too long, the sector's fragmentation and lack of visibility have been vulnerabilities. This plan enables a unified, interconnected ecosystem that is ready to deliver on its world-class potential. Instead of a top-down agenda driven by a few high-profile individuals, this is a community-led, bottom-up vision for long-term, sustainable growth.**

This is an offer to invest in a proven, high-value asset. Our phased, de-risked blueprint, led by a dedicated Chief Games Officer, is designed to generate a significant return on public investment while creating a robust talent pipeline, a sustainable business environment, and a far more creative, connected and collaborative resource for Scotland's innovation agenda.

The moment for action is now. As other nations race to recognise and support their games sectors, Scotland stands uniquely positioned with its own 'secret weapon' - a creative, productive, and resilient ecosystem ready for its moment on the world stage.

This plan is not a request; it is a blueprint for a future in which Scotland becomes the UK's first games supercluster and a pioneer in the global creative technology (createch) economy. By backing this plan, the Scottish Government is not just supporting a single sector; it is making a strategic investment in the creative, cultural, and economic future of the nation.

**"The moment for action is now."**



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Skye Tales



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