

Early Evaluation of the Techscaler Programme 2022-2024

Executive Summary

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Executive Summary for the Scottish Government

February 2026



In partnership with



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Key evaluation findings

Observations

The early evaluation of the Techscaler Programme found that, two years into a five-year contract, the intervention has made strong progress in mobilising and providing support for Scotland's tech ecosystem.

CodeBase has successfully established the programme at pace, building on the recommendations of the STER report, and has engaged over 1,400 members through a mix of education, mentoring, and regional hubs.

The programme has created a vibrant community of early-stage founders, with the member survey evidence showing high levels of satisfaction: more than 80% of respondents rated their experience positively, and mentorship was consistently highlighted as the most valuable form of support. Early outcomes are also encouraging, with 73% of businesses reporting that Techscaler helped them overcome barriers to startup or growth, and 40% crediting the programme with directly enabling business creation.

Member companies have raised £118 million in capital investment across 147 businesses, signalling strong traction and a solid foundation for future impact. Importantly, the programme has also made progress on diversity, with female founders representing 36% of membership – above the national SME average – and 37% of applicants identifying as from ethnic minority backgrounds.

At the same time, the programme has demonstrated agility in adapting to evolving needs. For example, the education offer has been refreshed and new courses introduced, and the mentor network has expanded significantly.

Stakeholders particularly valued the international programmes, which were seen as raising ambition and shifting entrepreneurial mindsets, though calls were made for greater transparency in company selection.

The policy environment remains highly supportive, with national strategies emphasising entrepreneurship, innovation, and inward investment. Scotland's tech sector continues to perform strongly in startup creation and equity investment, reinforcing the rationale for a dedicated programme like Techscaler.

Challenges

Despite these successes, several challenges have constrained the programme's effectiveness.

Stakeholders noted ambiguity around the programme's role and purpose, with communications and branding often seen as fragmented or overly complex. The balance of support has leaned toward ideation and early-stage companies, reflecting demand but leaving growth and scaling stage engagement weaker than some stakeholders had expected.

These issues have contributed to a perception among some stakeholders that the Techscaler Programme's purpose is narrower than intended, and that duplication with other support providers adds to ecosystem confusion.

Some operational issues have also emerged over the first two years of the programme's delivery. For example, a reactive approach (in some cases) to partner engagement, challenges around effective data sharing, and the use of high-level metrics that do not fully capture the impact of the programme.

Regional hubs, while valuable for networking, have faced difficulties in aligning with post-pandemic working patterns, raising questions about sustainability and relevance of the current model.

Looking ahead

Looking ahead, the evaluation highlights clear opportunities to strengthen impact. Sharper positioning and clearer communication of the Techscaler Programme's role within the ecosystem could help reduce confusion and align expectations.

Improved monitoring and reporting, with more granular impact data and celebration of success stories, will build confidence among stakeholders and partners.

A more proactive engagement strategy, supported by structured data sharing agreements, could unlock greater collaboration and reduce duplication.

Delivery models for regional hubs could be revisited, with consideration given to more flexible digital or pop-up approaches that reflect founder needs and market dynamics.

Finally, further targeted partnerships with sector-specific organisations could diversify reach and deepen impact.

Summary

In conclusion, the Techscaler Programme has established a strong foundation and is well aligned with Scotland's policy priorities and investment performance. Its early successes in community building, mentorship, and capital raising demonstrate clear value. To fully realise its ambition of accelerating scale-ready businesses, the programme should focus on sharpening its identity, strengthening engagement with growth and scaling companies, and embedding more robust monitoring and partner collaboration. With these refinements, Techscaler has the potential to become a cornerstone of Scotland's entrepreneurial ecosystem and deliver transformative long-term impact.

Background

This evaluation summary

This executive summary report presents the high-level findings from the independent early evaluation of the [Techscaler Programme](#) which is the Scottish Government's flagship, transformational programme for creating, developing, and scaling digital technology (tech)¹ startups in Scotland. The evaluation was undertaken between January and December 2025.

Following an open, competitive procurement exercise undertaken by the Scottish Government, CodeBase was identified as the programme's preferred delivery partner for the Techscaler Programme.

Research aims and scope

This early evaluation covers the period from procurement of the Techscaler Programme contract to the mobilisation period as well as the first two full years of programme delivery – the period from July 2022 to December 2024.

The aims of the early evaluation of the Techscaler Programme were to:

- undertake a process evaluation².
- undertake an early indicative impact³ assessment in relation to emerging and intermediate outcomes achieved (for example, emerging and intermediate capabilities within supported individuals and companies, and across the ecosystem).
- identify lessons learned of Techscaler Programme delivery experience to date to facilitate continuous improvement in terms of implementation and delivery.
- provide recommendations as appropriate.

This early evaluation is the first stage of a longer-term evaluation programme which is being developed by the Scottish Government to measure the programme's outcomes and impact, and to assess 'harder' quantifiable economic impacts.

¹ There is a distinction between the tech sector and the digital tech sector. The former includes a wider range of manufacturing (advance manufacturing, etc.) activities which in some instances is outside the Scottish Technology Ecosystem Review (STER) and Techscaler Programme. The digital tech sector is more focused on solving problems and meeting customer needs through the use of scalable computer technology solutions.

² A process evaluation is a systematic assessment of how a programme or intervention is implemented, focusing on the delivery, fidelity, participant engagement, and contextual factors, to understand why and how outcomes are achieved or not achieved.

³ An impact evaluation is an objective test of what changes have occurred, the scale of those changes and an assessment of the extent to which they can be attributed to the intervention.

At the time of the evaluation, the Techscaler Programme entered its third year of delivery and CodeBase continues to refine, develop, and improve programme processes and support in line with Scottish Government and user feedback as well as market trends. This evaluation report has not considered the changes introduced beyond December 2024 in line with the agreed time period for this early evaluation.

Study methodology

The evaluation methodology comprised wide ranging secondary and primary research, see **Appendix A**. The secondary desk research element included a review of existing information and data. This spanned a review of Techscaler Programme documentation and data provided by both the Scottish Government and CodeBase (for example, specification, bid and contract documents, quarterly reports, etc.), and a review of published strategy and research documents.

In addition to initial scoping interviews with representatives from the Scottish Government, CodeBase (staff) and enterprise agencies, the wider primary research stage was designed to combine approaches that would help to ensure breadth and depth of coverage and to capture the views and experiences of the programme's:

- members and founders – that is, end-beneficiaries of the programme's support.
- stakeholders and partners, including for example, CodeBase board members, local government, universities, funders and investors, innovation centres/innovation-related organisations, startup and scaleup accelerators.
- mentors.

In relation to the impact assessment element of the early evaluation it is acknowledged (and supported by wider evidence in the literature on ecosystem support) that it will take time for the Techscaler Programme to translate into quantifiable economic impacts – recognising the lead-in time for genuine transformation in the company base and ecosystem will take years. The focus of this early evaluation has been on the extent to which the support provided is building the capabilities and expertise of entrepreneurs and what improvements can be made to how the support is provided and on how the programme is administered.

Scottish Technology Ecosystem Review

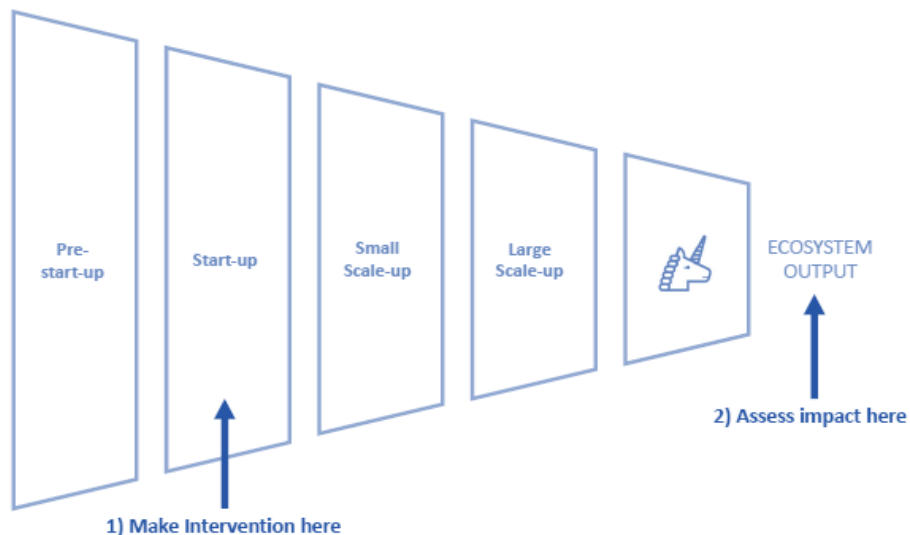
The independent [Scottish Technology Ecosystem Review](#) (STER, August 2020) was commissioned by the Scottish Government to better understand the nature and extent of blockages and challenges that exist in the tech ecosystem in Scotland. STER's main observation was that technology ecosystems exist in either the 'post-tipping point' (the preferred state) or 'pre-tipping point' state.

While Scotland's technology ecosystem is the strongest it has ever been, it remains in a pre-tipping point state.

The 'post-tipping point' state is characterised by a critical mass of viable startups and scaleups to continually strengthen the ecosystem without requirement for state intervention.

The recommendations in STER seek to optimise the rate at which large scaleups are achieved, as well as to create other successful companies of scale along the way, see **Figure 1**.

Figure 1: Ecosystem model – the funnel model



Source: STER, 2020

The origins of the Techscaler Programme stem from STER's central recommendation that Scotland should:

“Create a nationwide network of Tech-Scaler centres...whose capabilities build upon and extend beyond traditional incubation programmes. Tech-Scalers combine best practice in incubation, intensive founder education in Internet Economy best practice, ecosystem social infrastructure, and integrated funding.”

The overall goal is to help increase the rate of profitable, scaled tech businesses, and reduce the average time taken for viable individual startups to reach scale – the theory is that building startups is teachable, and that being 'playbook-literate' can help communicate and build ideas better, and faster.

STER recommended:

“At least a five-year contract window (with appropriate exit clauses for non-performance), based on a combination of key build-out milestones, occupancy milestones and performance against an ecosystem-value-based north-star metric with associated target levels. This timescale provides a sufficient period for the model and implementation to demonstrate its value to the ecosystem and aligns the measurement of that value with the point in the ecosystem where the value is manifested.”

The Scottish Government, in its formal response (September 2020) to the technology review, accepted the STER recommendations in full. See [Building the next generation of start-ups – Scottish Government news release](#).

The Techscaler Programme

Techscaler is a free national membership programme – it is open to anyone in Scotland working in startups who are at all stages of the startup journey, from ideation through to scaling, and with ambitions to grow the business.

Techscaler vision, ambition, mission, and method

- **Vision:** Scotland is recognised as Europe’s leading startup economy
- **Ambition:** The Scottish ecosystem reaches tipping point and generates positive economic output
- **Mission:** Increase the number of successful tech startups from a diverse group of founders
- **Method:** Deliver a programme which supports founders and employees to accelerate the creation and growth of tech startups

The Scottish Government’s specification for the procurement of the Techscaler Programme identified seven broad objectives, based on the STER recommendations, to guide programme delivery.

1. Contribute, over time, to a sustained increase in the rate of profitable, scaled technology businesses generated by the Scottish tech ecosystem.
2. Create, for the first time, a truly world-class national infrastructure to co-locate, educate, and scale technology companies.
3. Provide technology companies with free access to first-rate commercial education in internet economy growth techniques and related disciplines.
4. Provide technology companies with access to high-quality, long-term, flexible, and affordable incubation space.
5. Support the creation of a world-class community and market square environment - facilitating collaboration, networking, and the exchange of ideas.
6. Provide full virtual access to commercial education and community events for technology companies unable to physically co-locate.
7. Provide a clear focal point for the Scottish tech ecosystem and to create a scaled, expert partner to collaborate with the broader STER programme to establish Scotland as a first-rate European tech hub.

The Scottish Government purposefully designed the specification for delivery of the Techscaler Programme and its objectives to be broad. This was with a view to inviting bidders to:

- provide their own vision for the service.
- encourage innovation in service delivery.
- ensure sufficient flexibility within the Services Contract for the Scottish Government's Techscaler Programme delivery partner to continue to evolve how, and what, is delivered through the programme in response to changing needs and circumstances and based on experimentation and learning – but within the parameters of the Techscaler Programme objectives.

To deliver against the specified programme objectives, the Techscaler Programme in the first two years of delivery has provided eligible members with access to a range of activities and support under three broad pillars. This has included support to:

1. **Build core startup and scaleup skills** – the Techscaler Programme provides Scottish entrepreneurs with access to expert-led education courses and mentorship sessions which provide founders with the practical playbooks, frameworks, and tools needed to launch and grow their business. STER notes that education is important since pre-tipping point ecosystems such as Scotland will typically lack a critical mass of experienced founders and senior employees – 'since we are short on experience we must go long on education.'
2. **Foster social infrastructure development** – the Techscaler Programme nurtures a supportive community which supports founders and their teams to make valuable connections, explore collaborative opportunities, and find relevant support from ecosystem builders and experts.
3. **Increase investor connectivity and internationalisation** – the Techscaler Programme fosters actionable connections with investors, creating accessible funding pathways for high potential companies and offers global opportunities through international residencies.

The Techscaler Programme is a national endeavour and has a focus on people – it invests in founders and their teams to provide the right support and environments to help reach their potential.

Techscaler Programme mobilisation

The mobilisation period has been a key and early success

The early evaluation found that the mobilisation period for the Techscaler Programme, which commenced on 8th July 2022 and ended when the programme formally commenced on 30th November 2022, has been a key success. The mobilisation period is a critically important and pivotal phase because it helps to establish a strong and structured foundation and can help ensure that a project or programme is positioned for seamless operations and effective and successful delivery from the outset.

Throughout the early evaluation, the Scottish Government emphasised that CodeBase had:

- a strong understanding of government's requirements for the programme.
- a deep knowledge of the Scottish tech ecosystem – including staff with direct experience of working in tech businesses or who have been entrepreneurs themselves.
- designed an innovative approach to programme delivery.

The successful mobilisation phase was testament to the efforts of individuals within the Scottish Government and CodeBase involved in the procurement and mobilisation exercises. Most notably, this included CodeBase's ability to:

- meet a relatively tight deadline in respect to the scale of the programme.
- scaleup employment and to set up the physical regional hubs at pace.
- use its existing networks and connections to bring experienced team members into the programme, including some with startup, scaleup, and private sector backgrounds and experience.
- partner with other existing physical hubs to minimise the rental/lease costs to the Scottish Government – focusing expenditure on the staffing/events.
- design an actionable and deliverable programme that was a strong reflection of the STER recommendations.
- develop a series of online education modules that are now firmly part of the core offer and that require minimal updating going forward – allowing resources to be redirected to other areas and to new services and courses as required.

Lessons learned

In line with Scottish Government requirements, CodeBase had to 'scaleup' the organisation to be ready to start delivering the Techscaler Programme in a relatively short period of time. As is to be expected for a programme of this nature and scale, this had a considerable impact on CodeBase's internal processes, procedures, and systems, as well as its communications. Some of these were not as well developed or advanced at the outset of the programme as they could have been if more time had been made available.

Techscaler Programme delivery

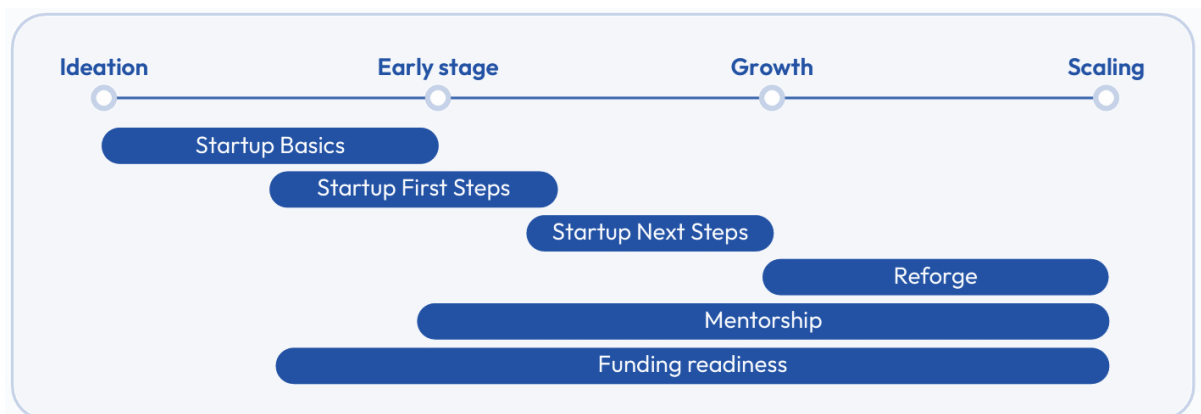
Tailored and flexible programme delivery

Over the first year two full years of Techscaler (to the end of December 2024), activity and support was designed and developed across the programme's three strategic pillars. CodeBase, through the Techscaler Programme, continues to provide accessible support to entrepreneurs and founders from all over Scotland to:

- strengthen entrepreneurial skills and mindsets.
- create a supportive environment where founders (and their teams) can build better startups faster.
- enable businesses to improve their growth prospects.

A key feature of the programme's support is that it has been tailored for those at every stage of starting and scaling a tech business, see **Figure 2** – with enhanced levels of support available as founders/startups progress along their startup journey. Techscaler community and events activities, including those delivered in partnership with other ecosystem partners, are delivered throughout the year.

Figure 2: Techscaler Programme support offer in 2023 and 2024



Source: Techscaler Annual Report 2024.

Another key feature of the programme's support is that it has been designed to be flexible and adapt to members' changing needs and circumstances.

A growing membership

Techscaler membership numbers got off to a very strong start in 2023 and membership has continued to grow in 2024. Individual Techscaler membership stands at 1,411 members in 2024 – an increase of 57% since 2023.

Over one-third (36%) of members are female – this is a good level of representation and is higher than the [industry average](#) where 20% of SME employers are women-led (defined as a business with the majority of the combined total number of owners, partners and directors being female).

Techscaler is a pan-Scotland programme – the offer has been purposefully designed to reach all areas including those on Scotland’s island communities. Over two-thirds (69%) of the Techscaler membership are based in the central belt – this is, however, where the main population, business and academic bases are located.

The majority (60%) of Techscaler members at the time of becoming a member are at a very early-stage of their startup development journey – that is at the ideation stage or early-stage. The remainder (40%) are either at the growth or scaling stages.

While companies in later stages (growth and scaling) have steadily joined Techscaler over the first two years of delivery, the most significant increase in members has come from very early-stage founders. In the early years of programme delivery, the Scottish Government and CodeBase considered this approach necessary to fill and widen the funnel of early-stage companies entering the Scottish tech economy.

Programme key facts and figures

This section looks to highlight a few specific examples of what has been delivered by the programme to the end of December 2024, with more detail provided in the main evaluation report.

Pillar one – build core startup and scaleup skills

Education programmes

The Techscaler education programmes, such as Startup Basics, Startup First Steps and Startup Next Steps have been developed by CodeBase to provide startup and scaleup founders with the skills, knowledge, and networks needed to grow their businesses. Delivered by experienced founders and industry operators, the programmes combine self-paced online courses with cohort-based workshops and hybrid formats to ensure accessibility and peer learning across Scotland’s ecosystem.

- 742 members enrolled in education courses by the end of 2024.
- 52% of all members enrolled in education programmes by the end of 2024.

Techscaler has also partnered with Reforge, a global scaleup education platform who run a range of programmes, to help established startups and scaleups grow beyond product and market fit. Scaling members have access to advanced Silicon Valley playbooks. While also open to founders, Reforge is ideal for scaleups that would benefit from upskilling senior leaders or key staff through structured learning.

- over 200 members from 50+ companies supported by Reforge by the end of 2024.

Overall, the education programmes have demonstrated strong demand and have been iteratively refined (and new courses have been developed for delivery in 2025) based on participant feedback to better align with founder needs and ecosystem development.

Mentorship programme

Mentoring support via the Techscaler Programme has been in strong demand and is highly valued. Mentees have sought advice on a range of topics, in particular – product market fit, investment readiness/fundraising, product refinement, growth strategies, and building teams.

- a pool of 150 mentors.
- 45% of Techscaler members have received mentoring support to end of 2024.
- 2,300+ mentoring sessions delivered.
- Net Promoter Score (NPS) for mentorship remains high at 90 which is excellent.

Pillar two – foster social infrastructure development

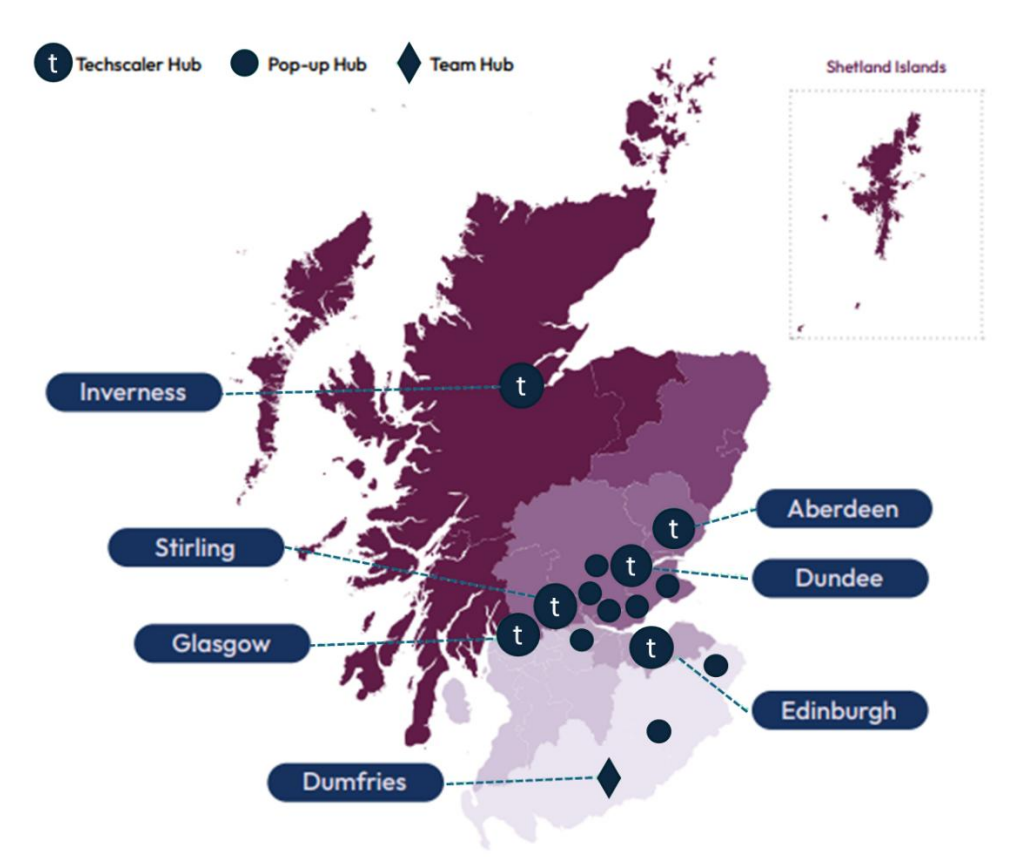
Hub network

By the end of 2024, Techscaler had six regions with physical hubs and eight pop-up hubs. Edinburgh and Stirling are the only physical hub sites operated directly by CodeBase (and pre-dated the Techscaler Programme) – all others are operated by partners.

The regional hubs typically comprise a mix of hot-desking, co-working, private office space, meeting space, and/or event space. Techscaler members who are not also hub tenants may be able to pay for meeting rooms and event spaces directly with the hub space, but the arrangement varies by hub partner. Hub occupancy data for Techscaler members was not available for those hubs managed by external partners.

CodeBase does not incur a cost for running the physical spaces (other than for the Edinburgh hub). Rather the main cost associated with the hub network is staffing – that is, for the Engagement Teams, whose role is to respond to the specific needs in their region and to build community through regular engagement with founders.

Figure 3: Techscaler regional and pop-up hubs (to date)



Source: Techscaler Annual Report 2024.

Note: The Dumfries hub was only confirmed in November 2025.

Community and events

Techscaler Programme community and events activity seeks to connect people/founders at all stages of the startup journey as well as across the ecosystem in Scotland and beyond. Together with the hub networks, community and events supported via the programme look to provide founders and their teams access to the physical and social infrastructure required to develop and grow successful startups. Over 950 events were held to the end of December 2024 (8,500 attendees) and this included a mix of CodeBase/Techscaler Programme hosted events and those hosted in partnership with other organisations.

Pillar three – increase investor connectivity and internationalisation

CodeBase, via the Techscaler Programme, has also sought to foster actionable connections between founders and investors, creating accessible funding pathways for high potential companies, offering global opportunities through international residencies, and hosting investor events in Scotland.

International connectivity

Some examples of international connectivity activity supported via the Techscaler Programme has included:

- hosting delegates from other countries in Scotland – for example, CodeBase hosted a delegation of representatives from Singapore in 2023 to give founders the opportunity to engage with Scotland’s Trade and Investment Envoy to Singapore.
- international pop-up hubs.
- presenting and speaking at the global tech events and forums – for example, at the World Incubators Forum (Shanghai).
- attending leading startup and scaleup events and conferences in America, Asia, and Europe.

International programmes

International programmes have sought to engage with mature tech ecosystems like Silicon Valley and Singapore – the approach has been to help embed and integrate founders within these tech ecosystems for extended periods.

CodeBase (in partnership with others, for example Scottish Development International) has provided opportunities for three cohorts of Scotland-based founders (35 unique companies involved to the end of 2024), to:

- work on their startups directly from these locations.
- broaden their ambition and mindset.
- foster meaningful connections with local networks, and meet investors, peers, and potential customers.
- implement key changes and share insights with their team on their return.

Fundraising

Data on capital raised by Techscaler members as detailed in the Techscaler Annual Report 2024 is provided below.

The £118 million capital raised by member businesses since the Techscaler Programme began (to the end of December 2024) is based on the investment figures reported by Beauhurst, which is based on a combination of account filings and announced raises. However, it is not clear to what extent these impacts are fully or partially attributable to the programme.

- £54.1 million capital raised by member businesses by the end 2023.
- £63.3 million capital raised by member businesses during 2024.
- a total of £118 million capital raised by member businesses over the first two years of the programme.

Other notable achievements

While the Techscaler Programme is still in its relative infancy, the programme is well-regarded. Notable achievements include:

- CodeBase's mentorship programme was ranked 6th in [Europe's Leading Startup Hubs](#) (Financial Times, March 2024).
- at an early stage in its delivery period, the Techscaler Programme has been recognised as [Sifted's 13th best first founder community in Europe](#) (August 2025; albeit outside the timeframe of this early evaluation).

Programme funding and expenditure

A budget of circa £42.4 million (excluding VAT) has been provided by the Scottish Government to CodeBase for the Techscaler Programme for the five-year contract period. A fixed fee of circa £1.8 million (excluding VAT) (4% of the total budget) was agreed for the mobilisation period and was not subject to variation.

By March 2025, approximately £22.8 million (excluding VAT) has been spent, representing 54% of the total budget. Available breakdowns indicate that staff costs remain the largest expenditure, followed by the management fee.

Expenditure to date is in line with expectations. While this evaluation is not an audit of expenditure, we note the following caveats:

- there are no formal targets for expenditure. Instead, financial outlooks, budget updates, and variation proposals are reviewed quarterly by the Scottish Government. This remains, in our view, an effective approach – allowing for flexibility without imposing arbitrary annual spending targets.
- both the Scottish Government and CodeBase have strengthened financial reporting and oversight processes (for example, regarding eligible spend) since programme inception. However, in looking at the period to December 2024 we consider that there is still room for improvement, particularly around clarity and granularity of reporting as this would support both Scottish Government and CodeBase to better understand where expenditure was occurring in terms of market segmentation.

The Scottish Government is leading changes to financial reporting to strengthen contract management, improve transparency, and enable more detailed evaluation.

Lessons learned

- Segmentation needed refinement – and CodeBase has recognised this. Early segmentation was too loose – clearer, evidence-based criteria are essential for matching founders to the right support at the right time.
- Hybrid delivery is essential for national reach – hybrid models are not just convenient, they are essential for equitable access for a pan-Scotland programme like Techscaler.

- Education programmes could be timed and targeted more precisely – education needs to be modular, flexible, and delivered at the moment of need.
- Mentorship is the programme’s strongest pull factor and is the anchor of the programme – maintaining quality, diversity, and matching accuracy is vital.
- Regional disparities reflect ecosystem maturity, not programme failure – physical hubs shape engagement patterns and complementary digital strategies are needed to avoid reinforcing geographic inequalities.
- Later-stage founders require more specialised, targeted support – growth and scaling companies benefit most from bespoke, high-value interventions rather than generalist education.
- Data quality and consistency need ongoing improvement – robust, consistent data collection is essential for monitoring impact and informing future programme design.
- Progression pathways must be clearer – the next phase should focus on tracking progression and ensuring founders move through the funnel with purpose and support.
- Iteration is a core strength but communicating the “why” behind changes will build trust and clarity.

Engaged members feedback

The programme is supporting progression

Many members who responded to the survey were at the ideation or early-stage when they joined Techscaler and more than half now self-describe as being at growth or scaling stage, suggesting that the programme has supported progression in their entrepreneurial journey. Engagement levels with the programme varied, with just over half reporting high involvement, while the remainder have engaged less intensively. Motivations for joining Techscaler centred on building community, accessing mentorship, and gaining practical resources. Finance was consistently identified by members (61%) as the most significant barrier to startup and growth, alongside limited ecosystem knowledge and connectivity.

Satisfaction with programme processes

Satisfaction with marketing, onboarding, and CodeBase's responsiveness was generally high, with members praising the clarity of the application process and the speed of initial engagement. However, member feedback also pointed to challenges around regional branding, central belt bias, and the need for clearer differentiation between the Techscaler Programme and CodeBase. Relationship management was rated positively by most members who took part in the survey, but nearly one-third described it as 'average' or 'poor', calling for more personalised and proactive contact, regular check-ins, and a single point of contact.

Satisfaction with programme support

Mentorship emerged via the members survey feedback as the most accessed and valued form of Techscaler Programme support, with members highlighting the quality of matching and the confidence gained from one-to-one advice.

Education courses such as Startup Basics, First Steps, and Next Steps were widely used, though feedback suggested that content was sometimes too generic or basic, with calls for more tailored, sector-specific provision and improved follow-up. International programmes and Reforge were highly valued, with 100% satisfaction among survey participants who had accessed this type of support, offering exposure to global markets and scaleup-relevant expertise.

Use of physical hubs was limited among members who responded to the survey, largely due to cost, location, or lack of need, though many members expressed interest in future use, particularly for networking and workspace as companies grow.

Overall satisfaction with Techscaler Programme support was strong, with most members reporting that the programme met their expectations, addressed barriers, and supported their needs.

Benefits and impacts

Benefits were particularly evident among ideation and early-stage members, who reported improved knowledge of startup fundamentals, new networks, increased confidence, and greater motivation (among other benefits). Business benefits included (among other things) improved understanding and access to ecosystem support, signposting, and in some cases, successful startup formation. Harder outcomes such as funding raised remain limited at this stage, but softer impacts – such as enhanced resilience, investor readiness, and community belonging – are clear.

Lessons learned

- Early-stage founders need clearer positioning, more tailored pathways, and simplified onboarding that signals exactly who each offer is for.
- A differentiated pathway for growth and scaling companies – with deeper specialisation and stronger investor access – is essential for retaining relevance.
- A structured, proactive relationship management model – with predictable touchpoints and personalised follow-up – is essential for maintaining engagement and perceived value.
- Techscaler’s role as an ecosystem guide and connector is critical – members expect more deliberate, visible brokerage into funding, partners, and complementary support.
- A more regionally nuanced, multi-channel, and founder-centred marketing strategy could ensure equitable reach and early clarity.
- Mentorship is the programme’s strongest asset – but requires operational tightening, clearer expectations, and more structured progression to maximise impact.
- International programmes are a high-impact differentiator – improving timelines, preparation, and communication would amplify their value.

Summary

The Techscaler Programme is delivering value in building Scotland’s startup ecosystem, particularly through mentorship, education, and international exposure. While satisfaction among members is high, they consistently called for more tailored, proactive, and regionally balanced support, alongside stronger investor connectivity activity/support. These findings highlight both the programme’s early successes and the opportunities to refine delivery to maximise impact as it evolves/matures.

Mentor feedback

Mentor engagement with the Techscaler Programme is strong

Mentor engagement with the Techscaler Programme is strong, with most surveyed mentors bringing extensive prior experience in founding, scaling, and investing in tech companies. Around two-thirds of mentors surveyed have been involved in the programme for more than a year, and over half have been matched with mentees many times, offering a depth of knowledge and continuity to Techscaler mentees.

Primary motivations for mentor involvement

Mentors' primary motivations for involvement in the Techscaler mentorship programme are to share expertise, support founders, and give back to the tech community, reflecting a strong commitment to ecosystem building.

Financial compensation is widely valued, with 93% of mentors who responded to the survey welcoming remuneration as recognition of their expertise and as an enabler to commit more time, while also signalling to mentees the professional value of the service.

Satisfaction with onboarding and relationship management is mixed

Satisfaction with onboarding and relationship management among mentors is mixed, though 95% of mentors surveyed rated CodeBase's relationship management as good or very good.

However, mentors highlighted the need for clearer communication, single points of contact, and stronger feedback loops to ensure their insights are fully harnessed.

A minority reported to have received formal training, though shadowing and peer meet-ups were valued, with calls from mentors surveyed for more structured facilitation and advance scheduling to strengthen peer learning and mentor engagement.

Matching process works well but there are areas for improvement

The matching process was viewed as generally effective, with 65% reporting good alignment, but some mentors noted mismatches with very early-stage mentees and suggested stronger filtering, clearer role definition, and group mentoring options.

Significant benefits for mentees and mentors

Mentors reported significant benefits for mentees, both personal and business.

Founders were said to gain improved knowledge of startup fundamentals, sharper focus on priorities, and supportive challenge, alongside increased confidence and networks. Business impacts for mentees mentioned by mentors included for example, stronger strategy development, greater resilience, and enhanced investor readiness.

Mentors also emphasised the unique value of actionable advice and networks that cannot be replicated by playbooks.

Importantly, mentors themselves have also derived benefits, with 90% reporting satisfaction, sharpened skills, inspiration, and expanded networks, reinforcing their sense of belonging to the wider tech ecosystem.

Overall, 85% of mentors said the programme has met or exceeded expectations, citing positive matches, engaged mentees, and tangible impacts on founder journeys.

Lessons learned

- Impact is maximised when mentoring is structured, intentional, and integrated with other programme supports.
- The mentor community is a strategic asset and there is untapped strategic value this network – CodeBase could harness mentors as co-designers, not just service providers.
- Matching needs stronger filtering, better segmentation, and clearer communication to ensure mentors meet founders who are ready and aligned.
- Flexibility is essential – founders need different things at different times, and the programme should adapt to that reality.
- A more sophisticated relationship management approach should be considered – one that treats mentors as strategic partners and closes the loop on feedback.
- Structured mentor development (training, peer learning, facilitated meetups) strengthens quality and consistency.
- Better data and clearer definitions would improve matching, mentoring quality, and programme evaluation.
- Targeted, expert-led, practical support is what founders value most and what mentors are best placed to deliver.

Summary

The Techscaler mentor feedback demonstrates that the mentorship programme is highly valued and is delivering clear benefits to both mentees and mentors. Improvements in onboarding, communication, training, and matching could further strengthen effectiveness, while financial compensation remains a critical enabler of mentor commitment. More structured feedback loops, peer learning, and recognition of successes could unlock additional value from the mentor network, ensuring the programme continues to play a pivotal role in Scotland's entrepreneurial ecosystem.

Stakeholders and partners views

The stakeholder consultations undertaken as part of the early evaluation revealed a broad consensus that the Techscaler Programme has established itself as a significant intervention in Scotland's entrepreneurial ecosystem, though its role and impact are generally felt by stakeholders to be still evolving.

Awareness of the programme is improving

Stakeholders felt that awareness of the programme is improving, particularly among early-stage founders and those connected to CodeBase hubs, but some stakeholders noted ongoing confusion about the programme's distinct identity versus CodeBase itself.

Barriers to startup success were considered consistent with wider entrepreneurial challenges such as: access to later-stage funding, skills shortages, limited commercial knowledge, and cultural resistance to failure. Stakeholders noted that Scottish startups excel at product development but can often lack market awareness and customer focus. Within this context, the Techscaler Programme was seen by stakeholders as contributing positively, but they also acknowledged that attribution of outcomes remains difficult given the perceived 'cluttered' support landscape and 'overlapping' initiatives.

While stakeholders noted that the programme is widely recognised for its strong early-stage support, questions remained for some stakeholders about its reach into growth and scaling companies and its ability to deliver sector-specific expertise.

Varied views among stakeholder groups on what success looks like for the Techscaler Programme

Definitions of success for the Techscaler Programme varied across the different stakeholder groups interviewed as part of the early evaluation.

CodeBase emphasised the creation of investable, sustainable businesses and a cultural shift towards entrepreneurship as a career path. Government stakeholders prioritised growth, investment flows, and diversity in the tech sector, while investors highlighted the need for genuinely scaling companies valued at £100 million+, cautioning against equating fundraising alone with success. Public sector partners emphasised the importance of building a vibrant, supportive ecosystem that positions Scotland as a leading location to start and grow a tech business, including beyond the central belt.

Strategically, the programme is seen by stakeholders as filling a critical gap in infrastructure and support, widening the funnel of potential startups, and responding to drivers such as artificial intelligence (AI), medtech, and productivity challenges.

Physical hubs were valued for fostering community and peer-to-peer interaction, though their sustainability and effectiveness was considered to vary by geography. Some stakeholders suggested hybrid or digital models could complement the current hub approach, particularly in rural areas.

CodeBase a respected and well-connected delivery partner

CodeBase was generally regarded by stakeholders as a respected and well-connected delivery partner, bringing credibility through its founder-led team and private sector agility. However, some concerns were raised by stakeholders about governance, staffing costs, and whether the organisation has the right staffing complement and mentor pool to support growth and scaling companies.

Some stakeholders felt the “coolness” of CodeBase was diluted by the demands of public funding and scrutiny, while others welcomed its independence from traditional enterprise structures.

The programme’s contribution to the ecosystem was acknowledged, particularly in building awareness, engaging founders, and strengthening networks. Yet stakeholders highlighted the need for clearer communication of outcomes, stronger Key Performance Indicators (KPIs), and more visible evidence of impact beyond the published annual reports. Soft outcomes such as community building and confidence were noted, alongside harder metrics like business creation, survival rates, investment, and diversity.

Key success, enabling factors, and challenges

Key programme successes mentioned by stakeholders included scaling the team with experienced founders, establishing a national footprint, boosting awareness of entrepreneurship, and delivering inclusive early-stage support. Enabling factors were considered to be strong government backing, financial investment, and the involvement of credible leadership figures.

Challenges reported by stakeholders centred on branding confusion, ecosystem buy-in, and duplication of support.

Looking ahead

Looking ahead, some external stakeholders called for greater clarity of the programme’s offer, stronger relationship management, more sector-specific and investment-readiness support, and a sharper focus on growth and demonstrable impact. The programme is seen as having laid important foundations, but stakeholders said its long-term success will depend on its ability to evolve from widening the funnel to enabling genuine scaleups, while balancing inclusivity with a more selective approach to backing high-potential ventures.

The main lessons learned identified by stakeholders were around the importance of collaboration, clearer communication, focus on scaling, and tailoring support to sectoral and regional needs.

Lessons learned from the stakeholder feedback

- Collaboration could be deeper, earlier, and continuous.
- The programme could shift emphasis from widening the funnel to scaling the pipeline.
- Communication and visibility could continue to be improved.
- Physical hubs matter, but the model needs refinement.
- Focus and specialisation are required to deliver real value.
- Governance, management, and internal systems should continue to be strengthened.
- Evaluation and data sharing are essential for credibility.
- The ecosystem is cluttered – coordination is vitally important, and the programme has an important role to play as a connector.

Early indicative impact assessment

Consideration of soft and hard impacts

In line with the evaluation objectives, the research considered “softer” outcomes such as the enhancement of members’ capabilities and connections, alongside some early “hard” impacts such as investment, jobs and output, to help indicate whether the programme is on track to deliver longer-term results. Significant harder impacts are not necessarily anticipated at this still early stage of the programme but are expected further down the line as the softer impacts translate into business growth for some companies. Nevertheless, even an early evaluation provides an opportunity to assess the extent to which these outcomes are emerging.

An independent early indicative Economic Impact Assessment (EIA) was, therefore, also undertaken as part of the evaluation, which sought to quantify the economic benefits and impacts achieved as a direct result of supported members’ engagement with the Techscaler Programme. In line with the stated objective of this evaluation, the EIA focused on impacts that have been achieved to date. The main report also includes an appendix with forecasted impacts and benefits as well as a detailed technical note.

Softer impacts

As noted earlier, the feedback captured from engaged members of the Techscaler Programme highlighted high levels of satisfaction with the support accessed. This is further reflected in the wide range of softer impacts achieved as a direct result of engaging with the programme and accessing Techscaler support.

Confidence and motivation

Survey participants reported increased confidence and motivation through Techscaler Programme engagement.

Mentorship was also highlighted as valued programme support, providing reassurance, constructive challenge, and a trusted sounding board. While international programmes and peer interactions were seen as confidence-building, broadening ambition and mindset.

Skills development

Survey participants reported that Techscaler’s education programmes (Startup Basics, First Steps, Next Steps) and mentorship helped founders improve knowledge of startup fundamentals, business models, and growth strategies. Founders reported that skills development extended beyond technical know-how to include leadership, investor readiness, and organisational design.

Further, Techscaler Programme mentors who responded to the mentor survey confirmed mentees gained sharper focus on priorities and improved strategic thinking from the mentoring support they received.

Building networks and community and cultural and mindset shifts

The Techscaler members survey also found early signs of a shift toward a more entrepreneurial mindset, with founders reporting improved resilience and openness to learning. As an example, satisfaction with international programmes was high and the primary research intimates that exposure to global ecosystems (for example, Silicon Valley, Singapore) can encourage founders to think bigger and adopt best practices.

Partnership and ecosystem connectivity

The Techscaler members survey also found that engagement in the programme had helped founders to develop new working relationships, contacts, and networks. Being part of a 'community' was also valued (for members and mentors alike). Other impacts reported by members includes improved understanding of, and access to, ecosystem support. The primary research found that mentors play an important role in helping to connect mentees into other Techscaler Programme and wider ecosystem support.

Early indication Economic Impact Assessment (EIA)

Methodological limitations

The analysis is based on a standard economic impacts assessment model using a mix of data collected directly from supported beneficiaries and economic coefficient and metrics sourced from official government databases.

We note that while this method is well suited to assess impacts and benefits over a short to medium term, an assessment over a longer time horizon relying only on this methodology may fail to capture or not accurately reflect the specific nature of tech ecosystem growth.

Wider factors include power-law dynamics of typical of start-up ecosystems (whereby a small number of high-performing firms can drive overall success), agglomeration/clustering, and spillover effects such as talent recycling, investment attraction and secondary entrepreneurship.

This has the following implications for the results presented in this chapter and in the appendix in the main report:

- "to date" analysis: over a two-year period (start 2023-2024 to end 2024-2025), it is unlikely that these innovation ecosystem specific dynamics and spillover impacts would have already begun to occur.

- “forecast” analysis: projecting up to 10-years from the first instance of support, it becomes more likely that innovation ecosystem dynamics and spillover effects begin to accrue. As the model does not fully capture these potential effects, it is possible that the forecast analysis may underestimate economic impacts.

We would note that these types of impacts are difficult to quantify, and a mixed methods approach supplemented by case studies may be an appropriate way to capture agglomeration and spillover impacts.

EIA assessment

The impact assessment identifies that the Techscaler Programme has generated the following impacts and benefits to date against a real term cost (uprated to 2025) of £23.6 million:

Net additional economic impacts⁴:

- FTE jobs: 100 – 130.
- GVA: £16 million - £19 million.
- Turnover: £27 million - £33 million.

From the data, we would also note the following observations:

- additionality (considered as the net additional impact set against the gross impacts) is 23%. This is relatively low and reflects the early stage of the programme – not many companies have generated an impact so the absolute attribution to the Techscaler Programme is limited.
- level of engagement with the programme – almost four of every five companies (80%) in the survey sample were classified as engagement level 2 (some) or 3 (a lot). Only 2% of the sample were classified as level 4 (most engaged).
- stage of company – 69% were ideation/early-stage companies, which broadly reflects the membership base.
- this way of measuring additionality, while widely used, relies on members’ views of the contribution of Techscaler to their business growth and is, necessarily, subjective.

In recognition of the longer lead in times for support programmes of this nature to generate quantifiable benefits, using the [Scottish National Investment Bank](#) (SNIB) SNIB definition of a ‘scaleup’ company a) at least 10 employees initially, and b) growth in staff or turnover of $\geq 20\%$ per annum, on average. A total of 12 companies (17% of the survey sample) would meet the criteria for scaleup over the next ten years if they were to deliver against their forecast performance.

⁴ Chapter 7 of the main report notes the methodological limitations of Cost Benefit Analysis in the appraisal of similar interventions.

If future forecasts are realised, over ten years the support delivered to date could help raise (net additional) turnover in the tech sector by £250 million.⁵

Lessons learned

- Modest impacts to date – it is early in the programme’s delivery cycle, and this is not unexpected. This aligns with wider evaluation findings which suggest that there could be an increased focus on growth and scaling.
- Future evaluations of the programme should use a mixed-methods (quantitative and qualitative) approach to account for the specific nature of tech ecosystems.

⁵ Note methodological and sample size limitations outlined in Chapter 7 of the main evaluation report.

Recommendations

Introduction

The recommendations and actions for the Scottish Government are informed by the EKOS evaluation findings, including stakeholder and end-beneficiary feedback and the conclusions. We have offered guidance as to the future focus, targeting and positioning of the Techscaler Programme, alongside a set of practical actions to support and improve delivery.

EKOS has presented only the high-level recommendations. The suggested specific actions that underpin the recommendations which emerged from the supporting evidence base are presented separately in Appendix A of the main evaluation report.

Due to the time elapsed since the evaluation was commissioned in January 2025 and the reporting period (which covers activity up to the end of 2024 only), Scottish Government policy colleagues are currently engaged in 'live conversations' regarding the Techscaler Programme. Some of the recommendations and actions may have already been addressed, be in progress or may be under active consideration.

Strategic focus and direction

The original rationale for intervention to develop a targeted (end-to-end) responsive programme that supports entrepreneurship as a driver of more companies with scalable potential remains relevant and valid.

As the ecosystem starts to evolve (partly as a result of the Techscaler Programme intervention) and demand shifts towards growth and scaling businesses, it is timely to pose a set of strategic questions to the Scottish Government regarding the future direction and focus of the Techscaler Programme:

- given the breadth and complex nature of the ecosystem, should the Techscaler Programme continue operating across the spectrum, or is there a need to narrow the focus and prioritise resources?
- what is the appropriate role of other actors in the ecosystem in:
 - stimulating ideation and early-stage entrepreneurship.
 - driving high-volume, high-quality throughput into the funnel by identifying and attracting founders and companies looking to grow and scale at the right stage for support.
 - ensuring appropriate capital funding and other support is available for companies as they progress through and beyond the Techscaler Programme (access to the right support, at the right time, etc.)?

Our assessment is that the Techscaler Programme should continue to adapt and evolve to ensure that resources are deployed in the right way to focus more deliberately on:

- how they identify and select potential in early-stage companies and founders.
- the latter stages of the pipeline (the growth and scaling opportunities) that will have been catalysed through activities delivered during the initial two years of Techscaler Programme.

While supporting a broad portfolio of ideation and (very) early-stage support has played a role in building the pipeline and should continue to form part of the Techscaler offer, we would note two points.

While a larger pipeline might produce more opportunities in absolute terms, a sharper triage process⁶ is what reveals the real growth and scaling potential. The programme's true value lies in accelerating founders and companies that are genuinely positioned for growth and scale. This is where direct economic impact is most likely and where longer-term spillover and agglomeration effects can be seen. It is also where a clear gap in the current ecosystem remains.

With that in mind, many of the recommendations that follow are designed to realign focus and ensure the Techscaler Programme's delivers on its core purpose of creating, developing, and scaling tech startups within the Scottish ecosystem.

1. Priority recommendation: Targeting of support and resources

Given the scale of system change required to reach the 'tipping point' identified in the STER report, it is timely to ask whether an approach that supports a broad cross section of the ecosystem is realistic at this stage, or does it risk spreading resources too thin.

To maximise impact and better serve growth and scaling companies, CodeBase could sharpen how the Techscaler Programme identifies and supports these businesses and include factors such as leadership strength, team composition, investment readiness, and market potential as guiding factors.

The programme should ensure focus, including financial and people resources on those that offer the greatest potential to deliver the systematic step change required.

If this is the approach the Scottish Government and CodeBase plan to adopt in later years of delivery, it will be important to understand how we define a "growth" or "scaling" company in the context of public sector support. We also need clarity on the level of risk, flexibility, and experimentation the public sector is willing to accept in order to enable success.

⁶ This includes onward referral and signposting to other support providers that might be more appropriate.

2. Priority recommendation: Realign the Techscaler Programme brand and marketing strategy to support growth and scalable businesses

To reflect the shift toward supporting growth and scalable businesses, the Techscaler Programme's branding and messaging should evolve.

Operations and delivery

3. Priority recommendation: Develop the offer

As the Techscaler Programme shifts its focus toward supporting growth and scaling companies, the offer should continue to evolve to meet the specific needs of companies at these stages, who are often "time poor" and must-see tangible value from their engagement. These could be delivered either by partners or through CodeBase, however, it should be integrated into the existing programme, ensuring tailored support that accurately reflects each company's stage and trajectory.

4. Priority recommendation: Align staffing and recruitment with growth and scaling focus

To support the strategic shift toward growth and scaling support, staffing and mentor capacity should evolve accordingly.

5. Priority recommendation: Redesign the regional hub model

Feedback suggests the existing regional hub approach is not delivering as intended and changes in market dynamics means it is unlikely to be successful in its current form. A more flexible, user-centric model is needed.

6. Recommendation: Establish a Curation Board to identify and promote emerging talent

Identifying growth and scaling companies often hinges on intangibles – the founder's mindset, ambition, capability, and the team that powers them. While standard metrics are helpful, they do not tell the full story.

7. Recommendation: Establish a formal relationship or customer management structure

To deliver greater value and impact to high-potential companies and individuals, we recommend introducing dedicated relationship or customer managers to enable coordination across Techscaler and partners.

Management, governance, and administration

8. Priority recommendation: Stakeholder mapping and engagement

To improve reach, coordination/collaboration, and impact, CodeBase should adopt a more strategic and consistent approach to stakeholder engagement as part of the Techscaler Programme.

9. Recommendation: Clarify current logic model and theory of change

To strengthen alignment, the Techscaler Programme's current logic model and theory of change should be clearly defined – building on the work of Scottish Government and CodeBase. A well-articulated theory of change supports clearer messaging and better coordination across partners.

10. Priority recommendation: Develop a robust monitoring and evaluation framework

To support the refined logic model and ensure ongoing effectiveness, the Techscaler Programme needs a strengthened monitoring and evaluation (M&E) framework which will give the Scottish Government better visibility to: manage the contract more effectively; intervene early if performance drifts off course; and identify synergies or gaps with other initiatives.

11. Recommendation: Strengthen financial reporting

To improve transparency and oversight and to support informed decision-making, CodeBase should provide more detailed financial reporting on the Techscaler Programme to the Scottish Government

Appendix A: Study methodology

Table 1: Summary of primary research undertaken

Stakeholder group	Approach	Number completed/ responses
Funder, delivery partner and enterprise agencies	Remote in-depth interviews	14
Wider stakeholders and partners	Remote in-depth interviews	33
Techscaler Programme mentors	Online survey	43
Techscaler Programme mentors	Follow-on in-depth interviews	12
Techscaler members – engaged in formal support	Telephone interviews	140
Techscaler members – engaged in formal support	Online survey	34
Techscaler members – not engaged in formal support	Online survey	10



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