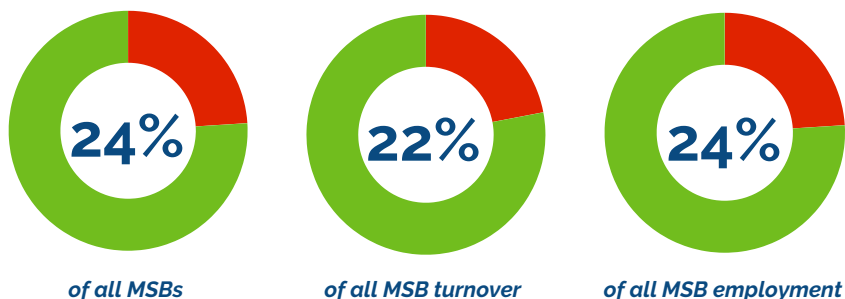


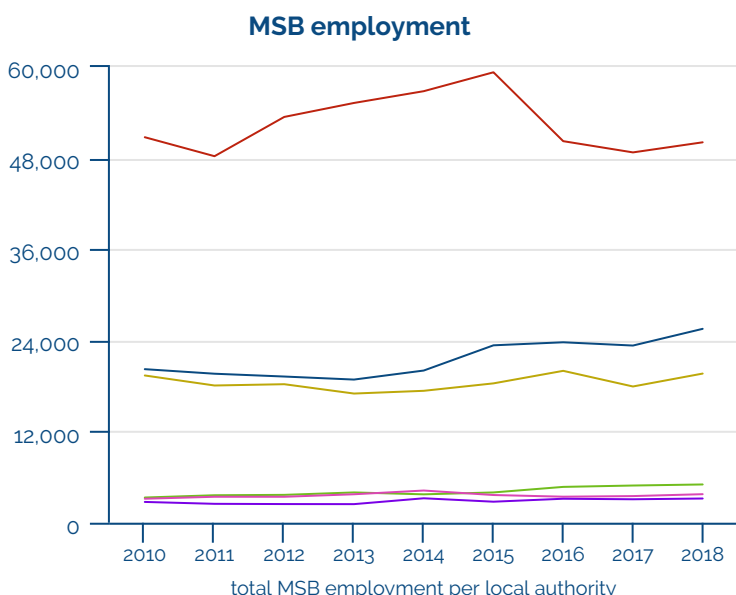
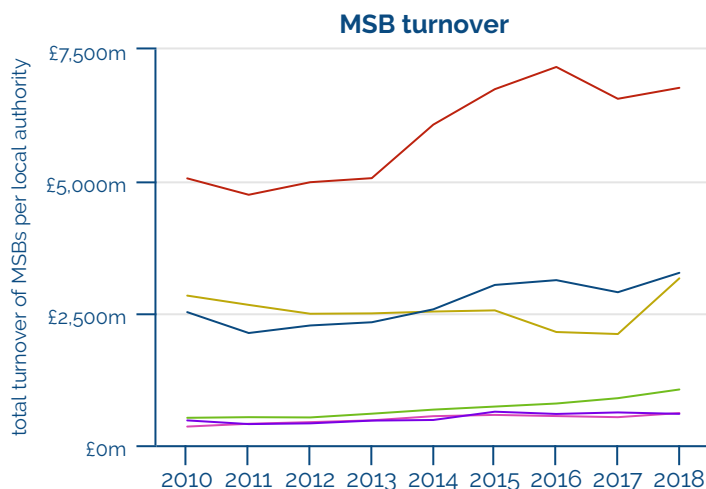
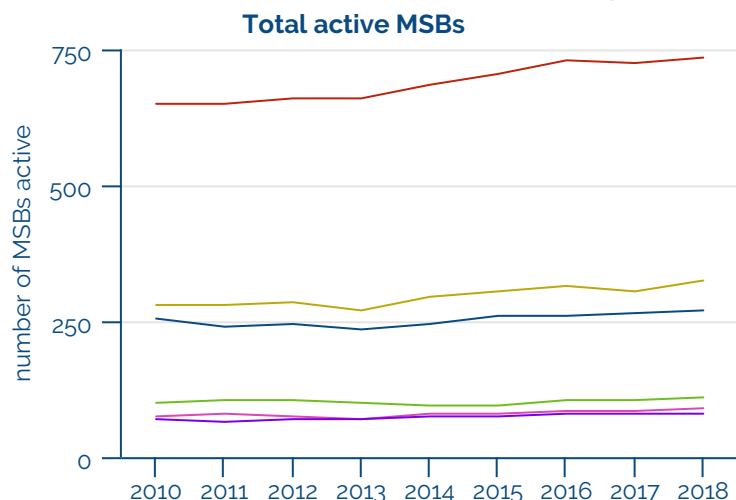
Mid-Sized Businesses (MSBs) are defined as those companies with turnover between £25m and £499m. They are recognised as companies who disproportionately contribute to economic growth; and are more likely to innovate, internationalise and have greater levels of employee engagement.

MSBs in summary



The region encompassing Edinburgh and the South East is home to 24% of Scotland's MSBs, generating 22% of total MSB turnover in Scotland and employing 24% of Scotland's total MSB workforce.

Change over time (2010-18)



Compared to the regions with the other major cities in Scotland, the performance of Edinburgh and the South East was the most consistent throughout the decade.

Performance of MSBs in the region highlights three 'tiers' which is also found in Glasgow.

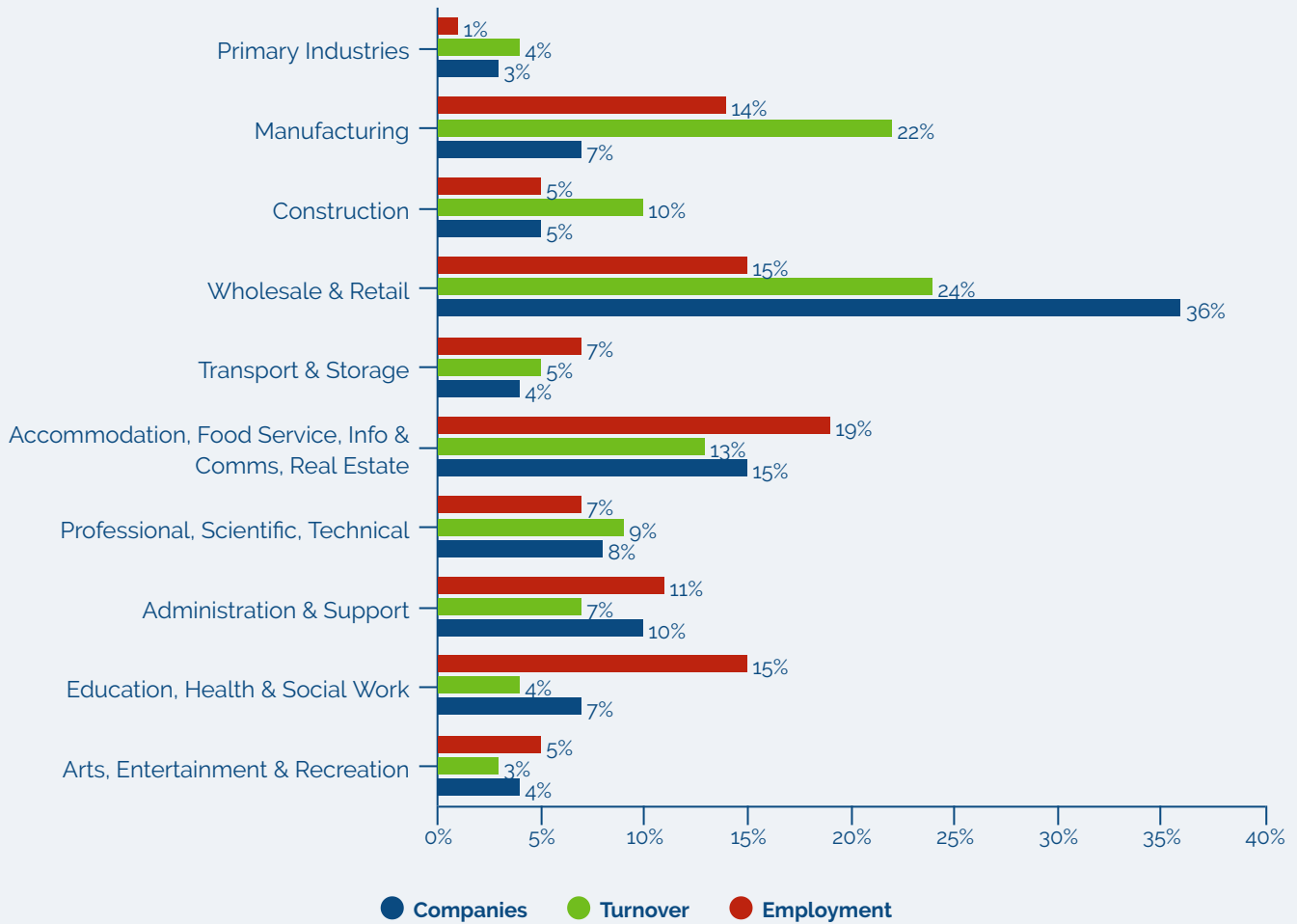
At the centre is the City of Edinburgh, which is where the greatest share of MSB activity, turnover and employment resides. There was a decline in performance through 2015 and 2016, but this has now plateaued. Whilst turnover of MSBs has rebounded, employment level in the City is only marginally higher in 2018 than in 2011.

Fife and West Lothian form the second tier, and their impact has increased over the decade, accelerating in particular since 2014.

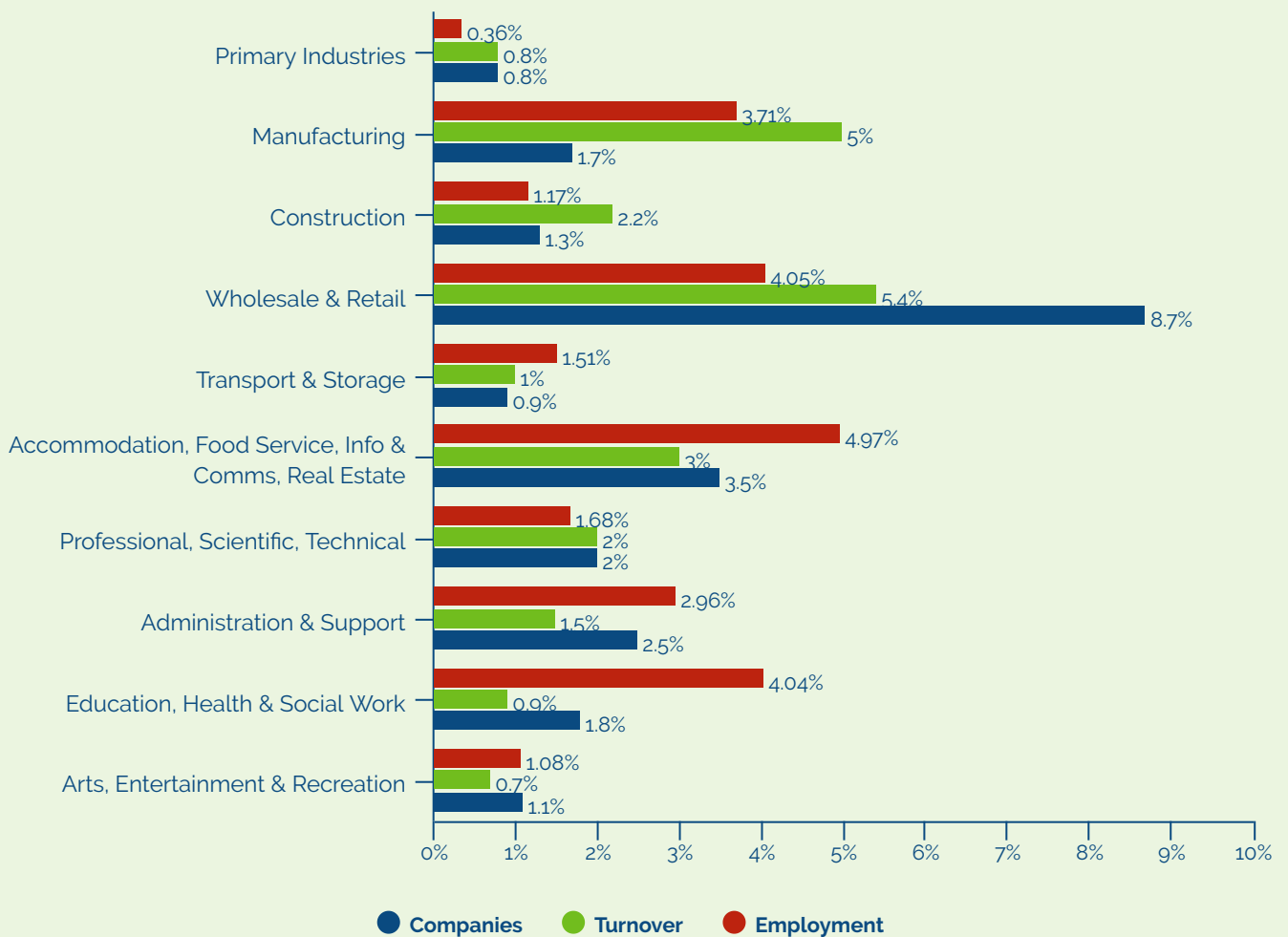
The Borders, Mid and East Lothian performance in MSBs has remained relatively constant, with significant proportions of locally traded sectors which would require bases close to populations.

Industry breakdown

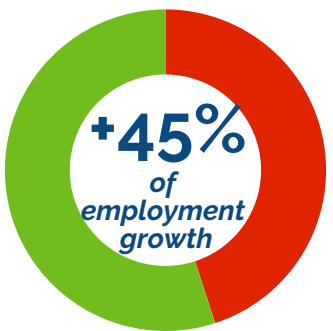
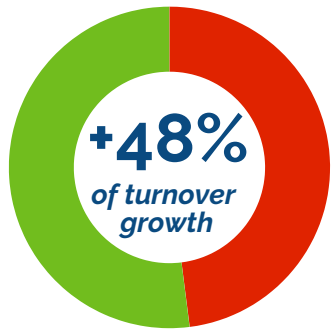
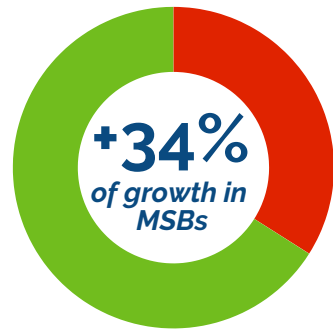
Performance of MSBs in Edinburgh and the South East (2018) By industry



Edinburgh and the South East's contribution to Scotland's MSBs (2018) By industry



Contribution to Scotland's overall MSB performance from 2010-18



The region is responsibly for a significant percentage of Scottish MSB growth since 2010, in large part due to Edinburgh, West Lothian and Fife - and from 2015-16, the Scottish Borders.

Turnover and employment growth has outpaced strong growth in the number of MSBs meaning that not only have new MSBs grown, but existing firms have also experienced growth.

Bucking the trend across Scotland, the region has seen a decline in turnover and employment among MSBs in Education, Health and Social Work, despite a substantial growth in the number of firms. This suggests that these MSBs in this region, are becoming smaller.

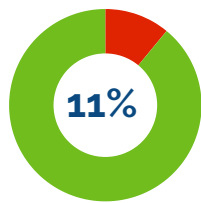
Conversely, Transport and Storage MSBs have consolidated into larger MSBs.

All other industries have seen increases in their total number of MSBs, total turnover and total employment, indicating a strength in the region (as a whole) for MSBs.

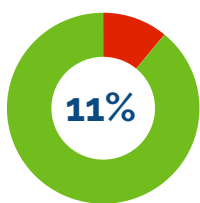
It should be noted however, that the strong growth is not uniform across the region. Disparities across local authority boundaries exist, reflecting size and the composition of the economy.

Change in performance of MSBs in Edinburgh and the South East (2010-2018) By industry

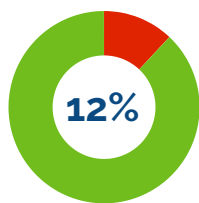
	Total MSBs	MSB turnover (£m)	MSB employment
Primary Industries	+25	+£505m	+1,460
Manufacturing	0	+£916m	+5,070
Construction	+15	+£905m	+1,320
Wholesale & Retail	+25	+£837m	+480
Transport & Storage	-10	+£133m	+1,570
Accomm, Food, Info & Comms, Real Estate	+35	+£755m	+1,790
Professional, Scientific, Technical	+20	+£344m	+1,220
Administration & Support	+10	+£144m	+1,520
Education, Health & Social Work	+35	-£12m	-2,580
Arts, Entertainment & Recreation	0	+£119m	+1,160



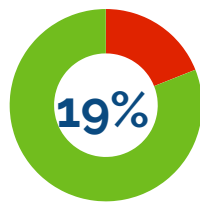
of all MSBs



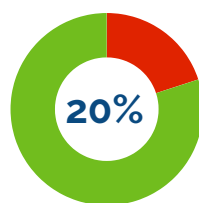
of all MSB turnover



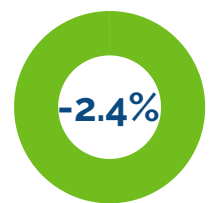
of all MSB employment



contribution to total growth
in MSBs from 2010-18



contribution to the
total MSB turnover
growth in Scotland
2010-18



contribution to total MSB
employment in Scotland
2010-18

Breakdown of MSBs in the City of Edinburgh (2018)

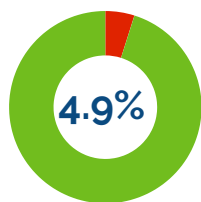
	Total MSBs	MSB turnover	MSB employment
Primary Industries	1%	4.3%	1%
Manufacturing	4%	8.6%	6%
Construction	5%	10.9%	2%
Wholesale & Retail	30%	14.6%	12%
Transport & Storage	5%	8.3%	10%
Accomm, Food, Info & Comms, Real Estate	18%	20.7%	23%
Professional, Scientific, Technical	14%	13.4%	11%
Administration & Support	12%	10.1%	14%
Education, Health & Social Work	5%	4.3%	15%
Arts, Entertainment & Recreation	5%	4.9%	7%

Contribution to Scotland's MSBs (2018)

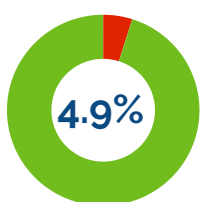
	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.2%	0.5%	0.14%
Manufacturing	0.5%	0.9%	0.70%
Construction	0.5%	1.2%	0.19%
Wholesale & Retail	3.3%	1.6%	1.44%
Transport & Storage	0.6%	0.9%	1.29%
Accomm, Food, Info & Comms, Real Estate	2.0%	2.2%	2.91%
Professional, Scientific, Technical	1.6%	1.4%	1.38%
Administration & Support	1.3%	1.1%	1.77%
Education, Health & Social Work	0.6%	0.5%	1.85%
Arts, Entertainment & Recreation	0.5%	0.5%	0.82%

Change between 2010-18

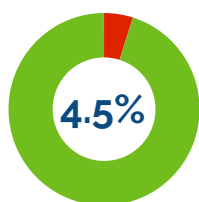
	Total MSBs	MSB turnover	MSB employment
Primary Industries	+5	+£291m	+570
Manufacturing	+5	+£241m	+540
Construction	+15	+£735m	+770
Wholesale & Retail	+25	+£49m	-820
Transport & Storage	-10	+£96m	+1,500
Accomm, Food, Info & Comms, Real Estate	+35	+£728m	+4,450
Professional, Scientific, Technical	+20	+£12m	+20
Administration & Support	+10	+£151m	-460
Education, Health & Social Work	+35	-£175m	-7,200
Arts, Entertainment & Recreation	0	+£93m	+1,380



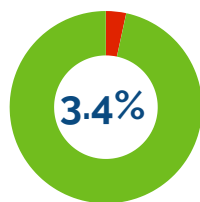
of all MSBs



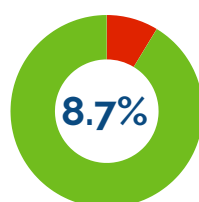
of all MSB turnover



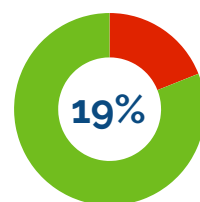
of all MSB employment



contribution to total growth in MSBs from 2010-18



contribution to the total MSB turnover growth in Scotland 2010-18

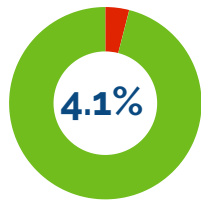


contribution to total MSB employment in Scotland 2010-18

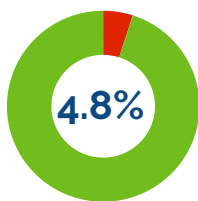
<u>Breakdown of MSBs in West Lothian (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	3%	0%	0%
Manufacturing	9%	33%	19%
Construction	6%	11%	10%
Wholesale & Retail	45%	28%	20%
Transport & Storage	5%	3%	4%
Accomm, Food, Info & Comms, Real Estate	9%	9%	23%
Professional, Scientific, Technical	3%	11%	6%
Administration & Support	11%	5%	12%
Education, Health & Social Work	6%	1%	5%
Arts, Entertainment & Recreation	3%	0%	0%

<u>Contribution to Scotland's MSBs (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.2%	0.0%	0.0%
Manufacturing	0.5%	1.6%	0.94%
Construction	0.3%	0.5%	0.47%
Wholesale & Retail	2.2%	1.4%	0.95%
Transport & Storage	0.2%	0.2%	0.21%
Accomm, Food, Info & Comms, Real Estate	0.5%	0.5%	1.13%
Professional, Scientific, Technical	0.2%	0.5%	0.30%
Administration & Support	0.5%	0.3%	0.58%
Education, Health & Social Work	0.3%	0.0%	0.23%
Arts, Entertainment & Recreation	0.2%	0.0%	0.0%

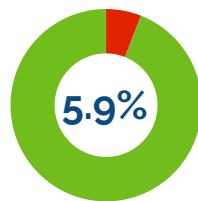
<u>Change between 2010-18</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	+5	£0m	0
Manufacturing	-5	+£176m	+300
Construction	+5	+£59m	+190
Wholesale & Retail	+20	+£92m	+130
Transport & Storage	0	+£37m	+70
Accomm, Food, Info & Comms, Real Estate	0	+£41m	-1,690
Professional, Scientific, Technical	0	+£332m	+1,200
Administration & Support	+10	+£86m	+770
Education, Health & Social Work	+10	+£11m	+500
Arts, Entertainment & Recreation	0	-£9m	-130



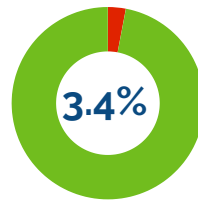
of all MSBs



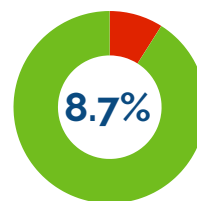
of all MSB turnover



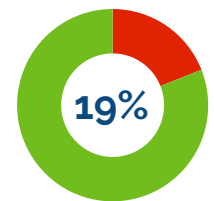
of all MSB employment



contribution to total growth
in MSBs from 2010-18



contribution to the
total MSB turnover
growth in Scotland
2010-18

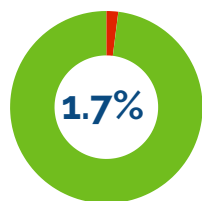


contribution to total MSB
employment in Scotland
2010-18

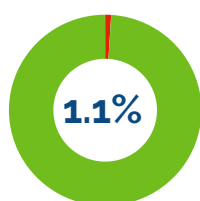
<u>Breakdown of MSBs in Fife (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	6%	7%	4%
Manufacturing	9%	33%	18%
Construction	7%	12%	8%
Wholesale & Retail	37%	30%	17%
Transport & Storage	2%	0	0%
Accomm, Food, Info & Comms, Real Estate	13%	5%	12%
Professional, Scientific, Technical	4%	0%	0%
Administration & Support	7%	3%	9%
Education, Health & Social Work	9%	7%	28%
Arts, Entertainment & Recreation	6%	4%	4%

<u>Contribution to Scotland's MSBs (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.2%	0.3%	0.22%
Manufacturing	0.4%	1.6%	1.10%
Construction	0.3%	0.6%	0.50%
Wholesale & Retail	1.5%	1.4%	1.04%
Transport & Storage	0.1%	0%	0.00%
Accomm, Food, Info & Comms, Real Estate	0.5%	0.2%	0.75%
Professional, Scientific, Technical	0.2%	0%	0.00%
Administration & Support	0.3%	0.1%	0.55%
Education, Health & Social Work	0.4%	0.3%	1.73%
Arts, Entertainment & Recreation	0.2%	0.2%	0.26%

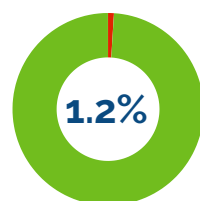
<u>Change between 2010-18</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	+10	+£214m	+890
Manufacturing	-5	-£110m	+370
Construction	+5	+£111m	+360
Wholesale & Retail	-10	+£413m	+570
Transport & Storage	0	£0m	0
Accomm, Food, Info & Comms, Real Estate	+5	-£34m	-1,320
Professional, Scientific, Technical	-5	£0m	0
Administration & Support	-5	-£93m	+1,000
Education, Health & Social Work	+10	+£132m	+3,420
Arts, Entertainment & Recreation	0	+£35m	-90



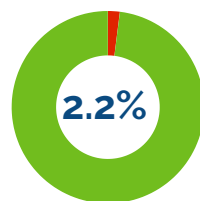
of all MSBs



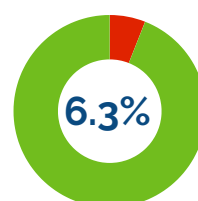
of all MSB turnover



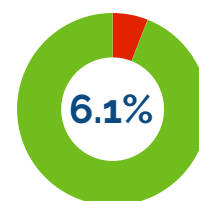
of all MSB employment



contribution to total growth
in MSBs from 2010-18



contribution to the
total MSB turnover
growth in Scotland
2010-18



contribution to total MSB
employment in Scotland
2010-18

Breakdown of MSBs in the Scottish Borders (2018)

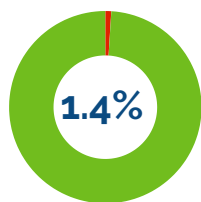
	Total MSBs	MSB turnover	MSB employment
Primary Industries	9%	0%	0%
Manufacturing	9%	54%	56%
Construction	0%	0	0%
Wholesale & Retail	41%	41%	27%
Transport & Storage	0%	0%	0%
Accomm, Food, Info & Comms, Real Estate	14%	4%	9%
Professional, Scientific, Technical	0%	0%	0%
Administration & Support	9%	0%	0%
Education, Health & Social Work	14%	2%	8%
Arts, Entertainment & Recreation	5%	0%	0%

Contribution to Scotland's MSBs (2018)

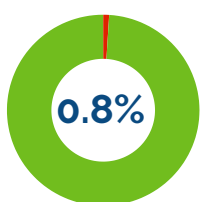
	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.2%	0.0%	0.0%
Manufacturing	0.2%	0.6%	0.56%
Construction	0.0%	0.0%	0.0%
Wholesale & Retail	0.7%	0.4%	0.26%
Transport & Storage	0.0%	0.0%	0.0%
Accomm, Food, Info & Comms, Real Estate	0.2%	0.0%	0.09%
Professional, Scientific, Technical	0.0%	0.0%	0.0%
Administration & Support	0.2%	0.0%	0.0%
Education, Health & Social Work	0.2%	0.0%	0.8%
Arts, Entertainment & Recreation	0.1%	0.0%	0.0%

Change between 2010-18

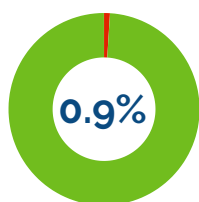
	Total MSBs	MSB turnover	MSB employment
Primary Industries	+5	£0m	0
Manufacturing	0	+£361m	+2,230
Construction	0	£0m	0
Wholesale & Retail	0	+£107m	+270
Transport & Storage	0	£0m	0
Accomm, Food, Info & Comms, Real Estate	0	£0m	+20
Professional, Scientific, Technical	0	£0m	0
Administration & Support	0	£0m	0
Education, Health & Social Work	+5	+£7m	+130
Arts, Entertainment & Recreation	0	£0m	0



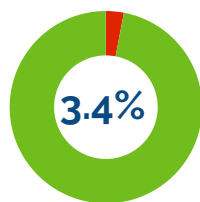
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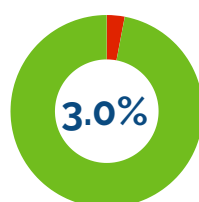
of all MSB turnover



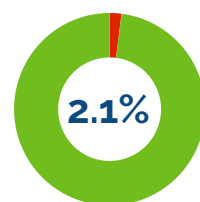
of all MSB employment



contribution to total growth
in MSBs from 2010-18



contribution to the
total MSB turnover
growth in Scotland
2010-18



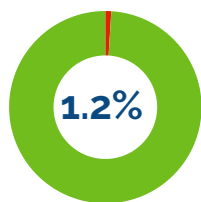
contribution to total MSB
employment in Scotland
2010-18

<u>Breakdown of MSBs in Midlothian (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	5%	0%	0%
Manufacturing	11%	47%	55%
Construction	5%	0%	0%
Wholesale & Retail	47%	53%	38%
Transport & Storage	0%	0%	0%
Accomm, Food, Info & Comms, Real Estate	11%	0%	0%
Professional, Scientific, Technical	5%	0%	0%
Administration & Support	11%	0%	7%
Education, Health & Social Work	5%	0%	0%
Arts, Entertainment & Recreation	0%	0%	0%

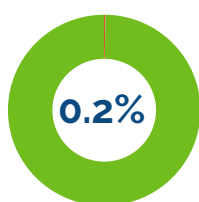
<u>Contribution to Scotland's MSBs (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.1%	0.0%	0.0%
Manufacturing	0.2%	0.4%	0.41%
Construction	0.1%	0.0%	0.0%
Wholesale & Retail	0.7%	0.4%	0.28%
Transport & Storage	0.0%	0.0%	0.0%
Accomm, Food, Info & Comms, Real Estate	0.2%	0.0%	0.0%
Professional, Scientific, Technical	0.1%	0.0%	0.0%
Administration & Support	0.2%	0.0%	0.05%
Education, Health & Social Work	0.1	0.0%	0.0%
Arts, Entertainment & Recreation	0.0%	0.0%	0.0%

<u>Change between 2010-18</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0	£0m	0
Manufacturing	+5	+£248m	+1,630
Construction	0	£0m	0
Wholesale & Retail	+10	+£146m	+320
Transport & Storage	-5	£0m	0
Accomm, Food, Info & Comms, Real Estate	0	£0m	0
Professional, Scientific, Technical	0	£0m	0
Administration & Support	+5	£0m	+210
Education, Health & Social Work	0	£0m	0
Arts, Entertainment & Recreation	-5	£0m	0

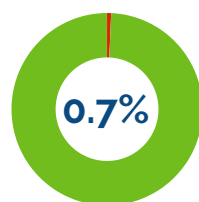
Mid-Sized Businesses in East Lothian 2010-18



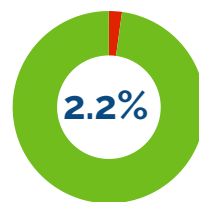
of all MSBs



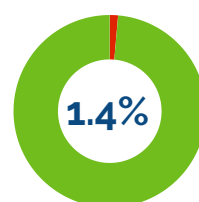
of all MSB turnover



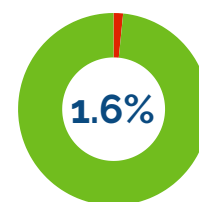
of all MSB employment



contribution to total growth
in MSBs from 2010-18



contribution to the
total MSB turnover
growth in Scotland
2010-18



contribution to total MSB
employment in Scotland
2010-18

<u>Breakdown of MSBs in East Lothian (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	6%	0%	0%
Manufacturing	6%	0%	0%
Construction	6%	0%	0%
Wholesale & Retail	25%	78%	24%
Transport & Storage	0%	0%	0%
Accomm, Food, Info & Comms, Real Estate	19%	13%	28%
Professional, Scientific, Technical	6%	0%	0%
Administration & Support	6%	0%	0%
Education, Health & Social Work	19%	9%	48%
Arts, Entertainment & Recreation	6%	0%	0%

<u>Contribution to Scotland's MSBs (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.1%	0%	0%
Manufacturing	0.1%	0%	0%
Construction	0.1%	0%	0%
Wholesale & Retail	0.3%	0.2%	0.07%
Transport & Storage	0.0%	0%	0%
Accomm, Food, Info & Comms, Real Estate	0.2%	0%	0.08%
Professional, Scientific, Technical	0.1%	0%	0%
Administration & Support	0.1%	0%	0%
Education, Health & Social Work	0.2%	0%	0.14%
Arts, Entertainment & Recreation	0.1%	0%	0%

<u>Change between 2010-18</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0	£0m	0
Manufacturing	0	£0m	0
Construction	0	£0m	0
Wholesale & Retail	0	+£30m	+10
Transport & Storage	-5	£0m	0
Accomm, Food, Info & Comms, Real Estate	+5	+£20m	+330
Professional, Scientific, Technical	0	£0m	0
Administration & Support	0	£0m	0
Education, Health & Social Work	+5	+£13m	+570
Arts, Entertainment & Recreation	0	£0m	0