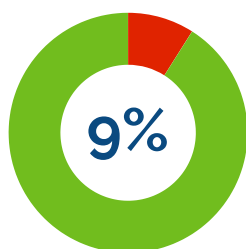
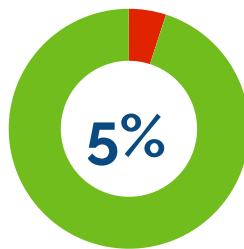


Mid-Sized Businesses (MSBs) are defined as those companies with turnover between £25m and £499m. They are recognised as companies who disproportionately contribute to economic growth; and are more likely to innovate, internationalise and have greater levels of employee engagement.

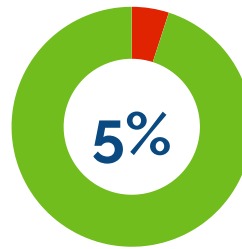
MSBs in summary



of all MSBs



of all MSB turnover

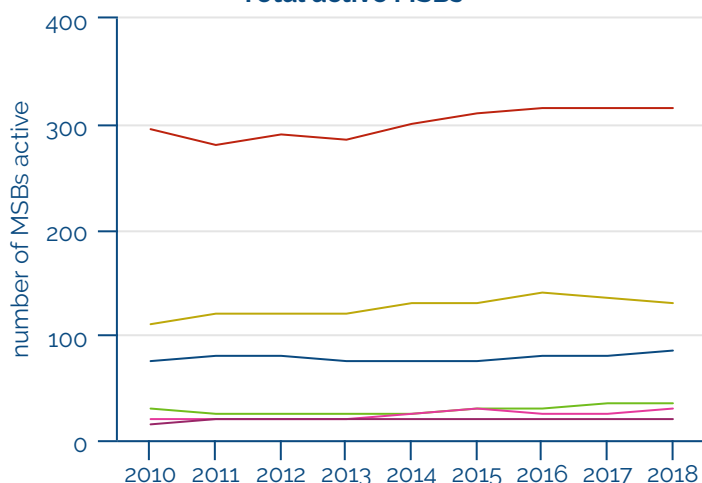


of all MSB employment

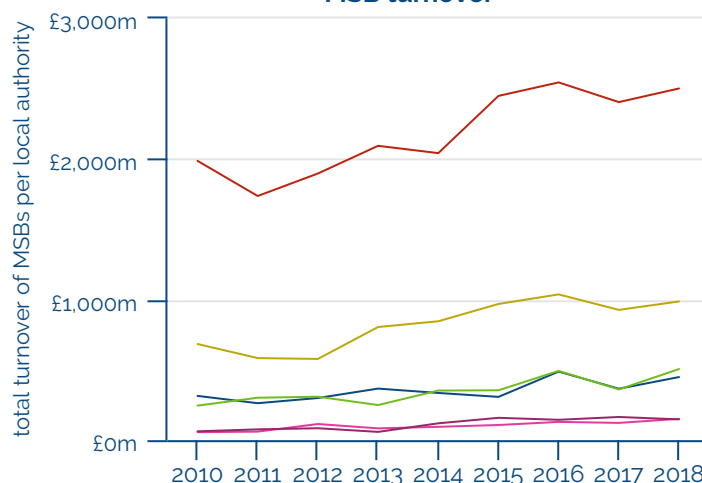
The Highlands and Islands are home to 9% of Scotland's MSBs, generating 5% of total MSB turnover in Scotland and employing 5% of Scotland's total MSB workforce.

Change over time (2010-18)

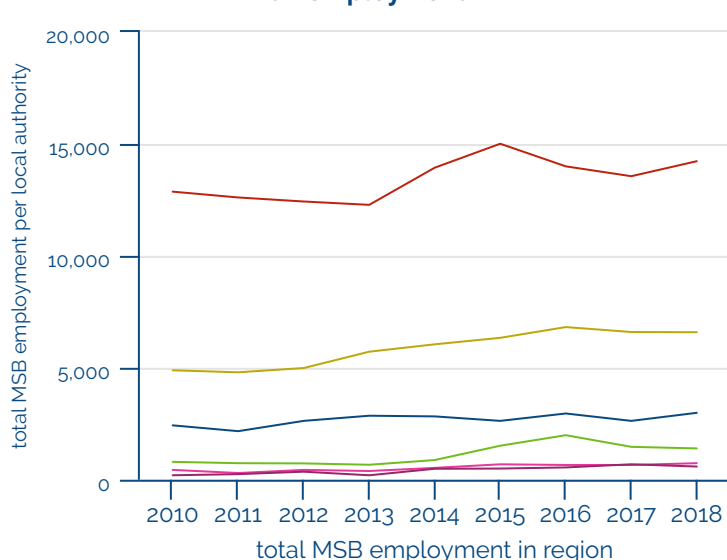
Total active MSBs



MSB turnover



MSB employment



The biggest MSB contribution came in the Highlands and in Moray.

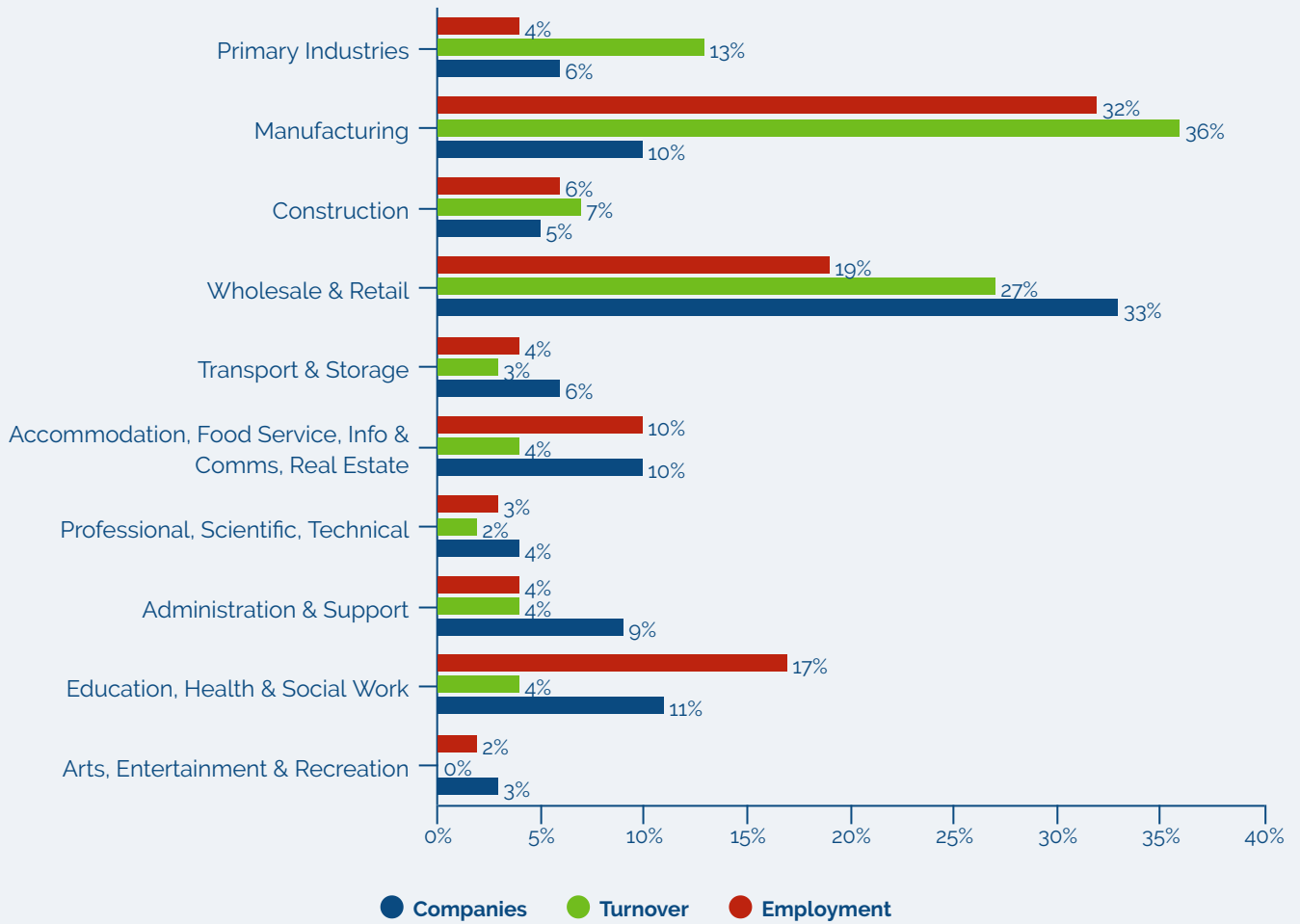
Perhaps unsurprisingly, there is minimal contributions from the Islands and Eilean Siar.

Highland Moray Argyll & Bute Shetland Isl.
Eilean Siar Orkney Isl.

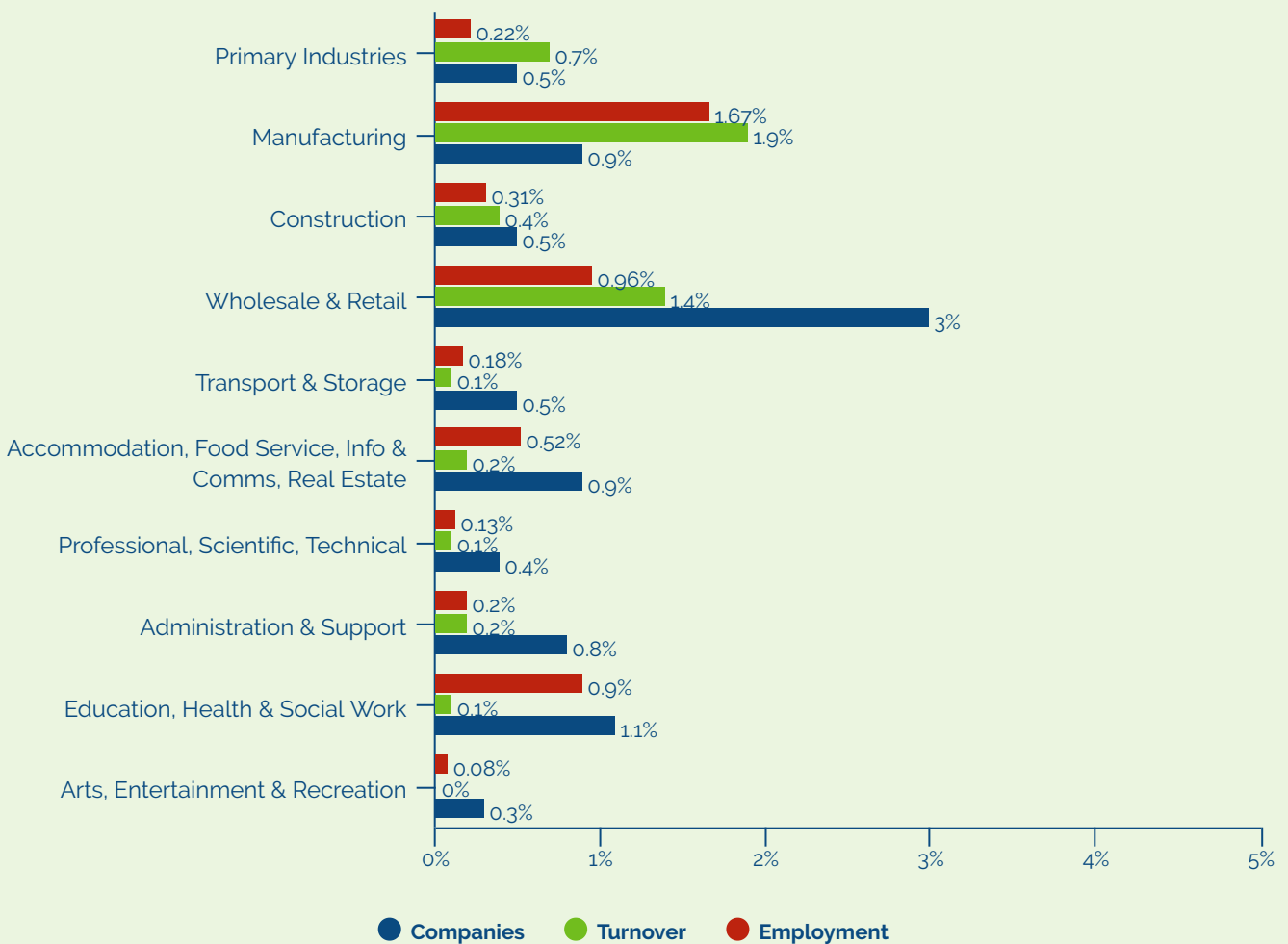
Please note figures are rounded. Therefore, as the analysis breaks into region, local authority and industry (and a combination of these), results may not round to 100%. Each enterprise is counted once in each local authority it operates in. The sum of the local authority enterprises do not therefore equal the total of 2,245 individual MSBs in Scotland. Only enterprises are double-counted. Each enterprise's employment and turnover are assigned to the local authority it is generated and operated in.

Industry breakdown

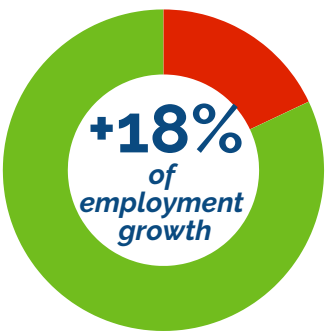
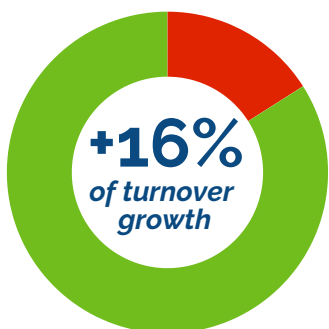
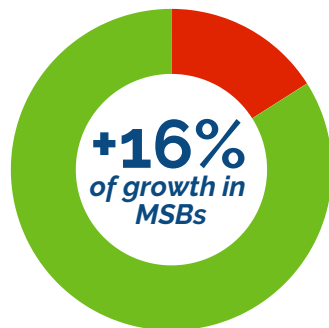
Performance of MSBs in the Highlands and Islands (2018) By industry



Highlands and Islands contribution to Scotland's MSBs (2018) By industry



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

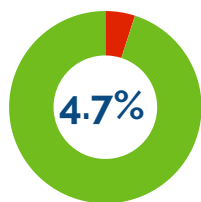


Relative to its total number and share of Scotland's MSBs, the performance in the region exceeded what would have been expected, and this growth was consistent across both turnover and employment.

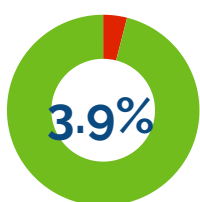
However, looking across industries we can see in turnover, growth came primarily in Primary Industries and Manufacturing which slowed, but did not decline once the recession in oil and gas took hold in 2015-16.

Change in performance of MSBs in the Highlands and Islands (2010-2018) By industry

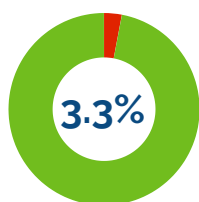
	Total MSBs	MSB turnover (£m)	MSB employment
Primary Industries	+15	+£434m	+890
Manufacturing	+10	+£223m	+1,030
Construction	+5	+£103m	+620
Wholesale & Retail	-5	+£55m	+380
Transport & Storage	0	+£46m	+470
Accomm, Food, Info & Comms, Real Estate	0	-£6m	-490
Professional, Scientific, Technical	-5	+£9m	0
Administration & Support	0	-£32m	-750
Education, Health & Social Work	+20	+£55m	+1,770
Arts, Entertainment & Recreation	0	+£10m	+310



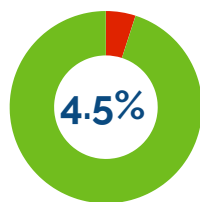
of all MSBs



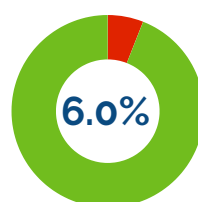
of all MSB turnover



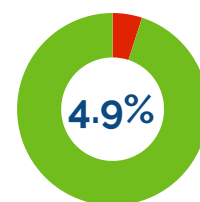
of all MSB employment



contribution to total growth
in MSBs from 2010-18



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

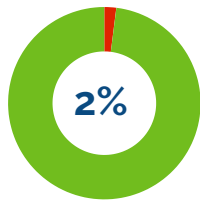


contribution to total MSB
employment in Scotland
2010-18

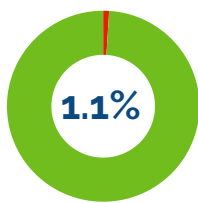
<u>Breakdown of MSBs in the Highlands (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	5%	17%	6%
Manufacturing	10%	27%	23%
Construction	5%	10%	9%
Wholesale & Retail	39%	27%	20%
Transport & Storage	5%	4%	5%
Accomm, Food, Info & Comms, Real Estate	11%	4%	10%
Professional, Scientific, Technical	5%	2%	4%
Administration & Support	10%	6%	6%
Education, Health & Social Work	8%	4%	16%
Arts, Entertainment & Recreation	3%	0.4%	2%

<u>Contribution to Scotland's MSBs (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.2%	0.7%	0.22%
Manufacturing	0.5%	1.1%	0.80%
Construction	0.2%	0.4%	0.31%
Wholesale & Retail	1.8%	1.0%	0.70%
Transport & Storage	0.2%	0.1%	0.18%
Accomm, Food, Info & Comms, Real Estate	0.5%	0.2%	0.36%
Professional, Scientific, Technical	0.2%	0.1%	0.13%
Administration & Support	0.5%	0.2%	0.20%
Education, Health & Social Work	0.4%	0.1%	0.56%
Arts, Entertainment & Recreation	0.2%	0.0%	0.08%

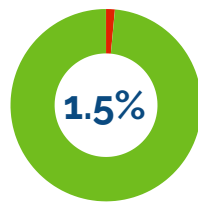
<u>Change between 2010-18</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	+5	+£434m	+890
Manufacturing	+5	+£129m	+560
Construction	0	+£103m	+620
Wholesale & Retail	0	+£5m	+190
Transport & Storage	0	+£46m	+470
Accomm, Food, Info & Comms, Real Estate	0	+£4m	-350
Professional, Scientific, Technical	-5	+£9m	0
Administration & Support	-5	+£6m	-500
Education, Health & Social Work	+10	+£26m	+730
Arts, Entertainment & Recreation	0	+£10m	+310



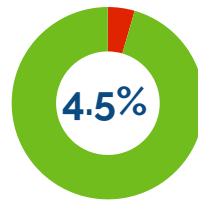
of all MSBs



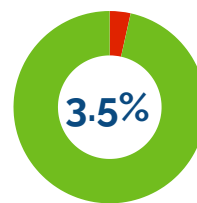
of all MSB turnover



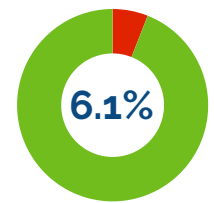
of all MSB employment



contribution to total growth
in MSBs from 2010-18



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

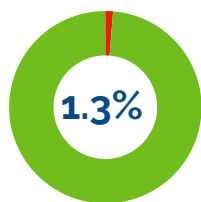


contribution to total MSB
employment in Scotland
2010-18

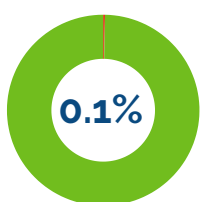
<u>Breakdown of MSBs in Moray (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	4%	0%	0%
Manufacturing	12%	70%	68%
Construction	8%	0%	0%
Wholesale & Retail	36%	24%	16%
Transport & Storage	4%	0%	0%
Accomm, Food, Info & Comms, Real Estate	8%	3%	7%
Professional, Scientific, Technical	4%	0%	0%
Administration & Support	8%	0%	0%
Education, Health & Social Work	12%	3%	10%
Arts, Entertainment & Recreation	4%	0%	0%

<u>Contribution to Scotland's MSBs (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.1%	0%	0%
Manufacturing	0.2%	0.8%	0.86%
Construction	0.2%	0%	0%
Wholesale & Retail	0.7%	0.3%	0.20%
Transport & Storage	0.1%	0%	0%
Accomm, Food, Info & Comms, Real Estate	0.2%	0%	0.08%
Professional, Scientific, Technical	0.1%	0%	0%
Administration & Support	0.2%	0%	0%
Education, Health & Social Work	0.2%	0%	0.12%
Arts, Entertainment & Recreation	0.1%	0%	0%

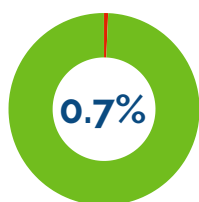
<u>Change between 2010-18</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0	£0m	0
Manufacturing	0	+£94m	+470
Construction	+5	+£0m	0
Wholesale & Retail	0	+£59m	+200
Transport & Storage	+5	£0m	0
Accomm, Food, Info & Comms, Real Estate	-5	-£1m	+60
Professional, Scientific, Technical	0	£0m	0
Administration & Support	0	-£38m	-250
Education, Health & Social Work	+5	+£7m	+170
Arts, Entertainment & Recreation	0	£0m	0



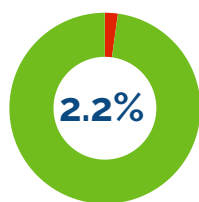
of all MSBs



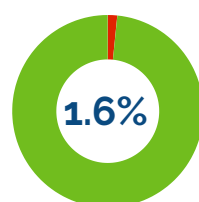
of all MSB turnover



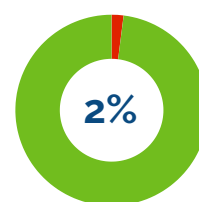
of all MSB employment



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 Argyll & Bute (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	6%	0%	0%
Manufacturing	12%	0%	0%
Construction	6%	0%	0%
Wholesale & Retail	24%	63%	19%
Transport & Storage	6%	0%	0%
Accomm, Food, Info & Comms, Real Estate	12%	14%	21%
Professional, Scientific, Technical	0%	0%	0%
Administration & Support	12%	0%	0%
Education, Health & Social Work	18%	23%	60%
Arts, Entertainment & Recreation	6%	0%	0%

<u>Contribution to Scotland's MSBs (2018)</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0.5%	6.3%	2.6%
Manufacturing	0.7%	2%	1.3%
Construction	0.4%	0.6%	0.5%
Wholesale & Retail	2.6%	1.3%	0.9%
Transport & Storage	0.8%	2.2%	1%
Accomm, Food, Info & Comms, Real Estate	0.8%	0.4%	0.9%
Professional, Scientific, Technical	1%	2%	1.2%
Administration & Support	0.9%	1%	0.7%
Education, Health & Social Work	0.5%	0.5%	1.7%
Arts, Entertainment & Recreation	0.2%	0.01%	0.1%

<u>Change between 2010-18</u>	Total MSBs	MSB turnover	MSB employment
Primary Industries	0	£0m	0
Manufacturing	+5	£0m	0
Construction	0	£0m	0
Wholesale & Retail	-5	-£9m	-10
Transport & Storage	0	£0m	0
Accomm, Food, Info & Comms, Real Estate	0	-£9m	-200
Professional, Scientific, Technical	0	£0m	0
Administration & Support	0	£0m	0
Education, Health & Social Work	+5	+£22m	+870
Arts, Entertainment & Recreation	0	£0m	0