

BUSINESS AND ENERGY

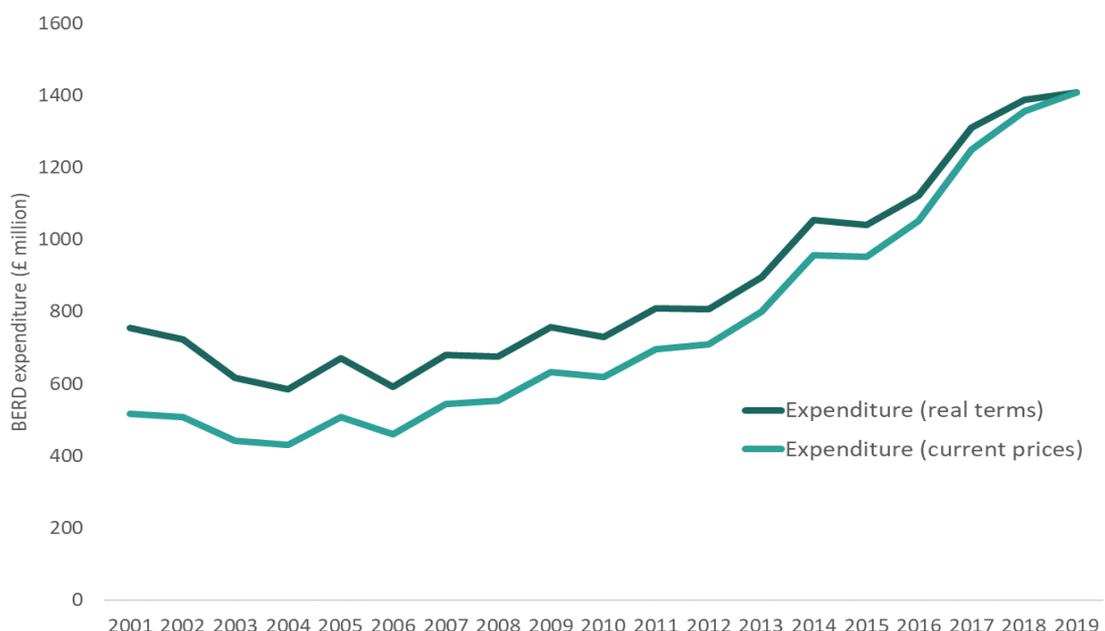
Business Enterprise Research and Development Scotland 2019

Release Date: 16 December 2020

Key Points

- Business Enterprise Research and Development (BERD) expenditure in Scotland reached £1.409 billion in 2019, which is the highest in the series.
- Between 2018 and 2019, BERD expenditure in Scotland increased by 1.5% in real terms, which was greater than the 0.8% increase for the UK as a whole.
- Since 2007, BERD expenditure in Scotland has increased by 107.4% in real terms, more than three times the rate of growth for the UK as whole (up 32.2% since 2007).
- BERD expenditure represented 0.84% of Scottish GDP in 2019; the comparable figure was 1.17% for the UK.
- Over the latest year, R&D spending on Service products increased by 10.0%, whereas for Manufacturing and Other products, R&D spending decreased by 4.9% and 8.6% respectively, in real terms.
- In 2019, businesses in Scotland employed 14,646 R&D staff, 1.0% less than in 2018.

Figure 1. BERD expenditure in Scotland has increased each year since 2015



About this publication

This publication presents estimates of business expenditure and employment relating to research and development (R&D) performed by businesses operating in Scotland in 2019, as well as revisions to previously published data for 2017 and 2018. The data in this release are sourced from the Business Enterprise Research and Development (BERD) survey conducted by the Office for National Statistics (ONS).

In this publication, BERD is measured by the expenditure on R&D carried out by the business. This is regarded as a more accurate measure of R&D than the funding received by a business for R&D work, as not all of these funds received may be used for R&D.

This publication reports on R&D expenditure in businesses in Scotland irrespective of the country of residence of the ultimate owner or users of the R&D produced.

The BERD survey follows the definition of research and development proposed by the Organisation for Economic Cooperation and Development (OECD) and published in the ‘Frascati’ Manual. According to the manual, R&D is defined as:

“creative and systematic work undertaken in order to increase the stock of knowledge - including knowledge of humankind, culture and society - and to devise new applications of available knowledge”. R&D must contain an appreciable amount of novelty.

BERD contributes to Scotland’s Gross Expenditure on Research and Development (GERD), which forms the basis of the National Indicator: ‘Spend on Research and Development’. Gross Expenditure on Research and Development (GERD) comprises R&D undertaken by the Business Enterprise (BERD), Higher Education (HERD), Government (GoveRD) and Private-Non-Profit (PNP) sectors. The figures for GERD will become available in Spring 2021.¹

Further information on Scottish R&D activity and the full set of tables are available at: <https://www.gov.scot/collections/business-and-innovation-statistics/>

Further details of definitions, coverage and methodology can be found in the [Background Notes](#)

¹ Information on the range of targets and indicators which comprise the National Performance Framework can be found on at: <https://nationalperformance.gov.scot>

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BERD expenditure increased over the latest year

Business Enterprise Research and Development (BERD) expenditure in Scotland reached £1.409 billion in 2019, up 1.5% (+£21 million) in real terms from 2018, making it the highest in the series (which began in 2001). Over the longer term, BERD expenditure in Scotland has increased by 107.4% in real terms since 2007.

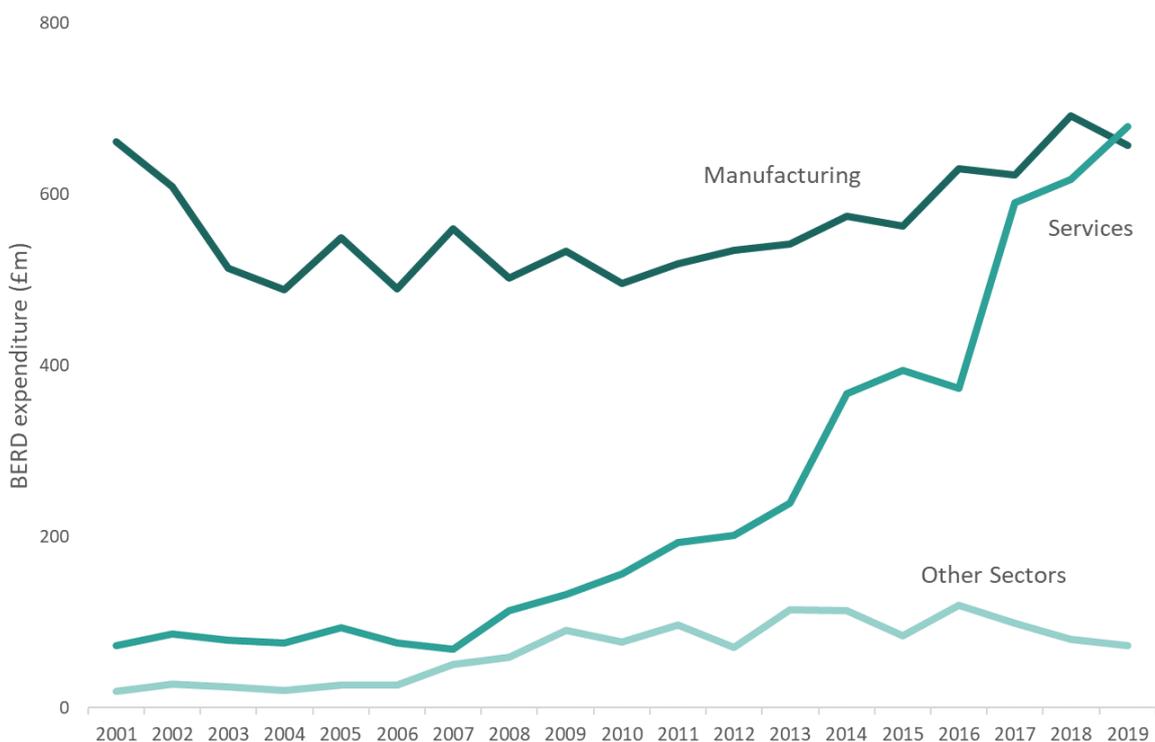
In 2019, BERD spending represented 0.84% of GDP in Scotland, which was a slight increase from 0.83% in 2018 and up from 0.45% in 2007.

R&D spending in Scotland can fluctuate considerably year on year, especially given that it is concentrated in a small number of large businesses. In 2019, five businesses accounted for over a third of all Scottish BERD spending (36.8%). This is a sizeable share of the total R&D expenditure and is higher than in 2018 (35.5%) but represents a fall in dominance of the top businesses since 2001, when the top five businesses accounted for just over half of Scottish BERD expenditure.

BERD expenditure was highest on Services and Manufacturing products

In 2019, as in recent years, BERD expenditure in Scotland was split mainly between Services products (48.2%) and Manufacturing products (46.7%). Since 2007, R&D spending on Services products has increased rapidly, and in 2019 exceeded R&D expenditure on Manufacturing products for the first time since the series began in 2001 (Figure 2). Over the latest year, R&D spending on Service product groups increased by 10.0% (+£62 million), whereas for Manufacturing and Other product groups, R&D spending decreased by 4.9% (-£34 million) and 8.6% (-£7 million) in real terms.

Figure 2. BERD spending on Service products exceeded spending on Manufacturing products in Scotland in 2019



Among Services products, ‘Software Development’ and ‘Miscellaneous business activities; Technical testing and analysis’ contributed considerably to the real terms increase, with £24 million and £21 million more respectively being spent on R&D in 2019 than in 2018 (+29.4% and +6.1%).

The fall in spending on Manufacturing products was driven by reduced spending on ‘Consumer electronics and communication equipment’ (-£23 million) and ‘Food products and beverages; Tobacco products’ (-£11 million).

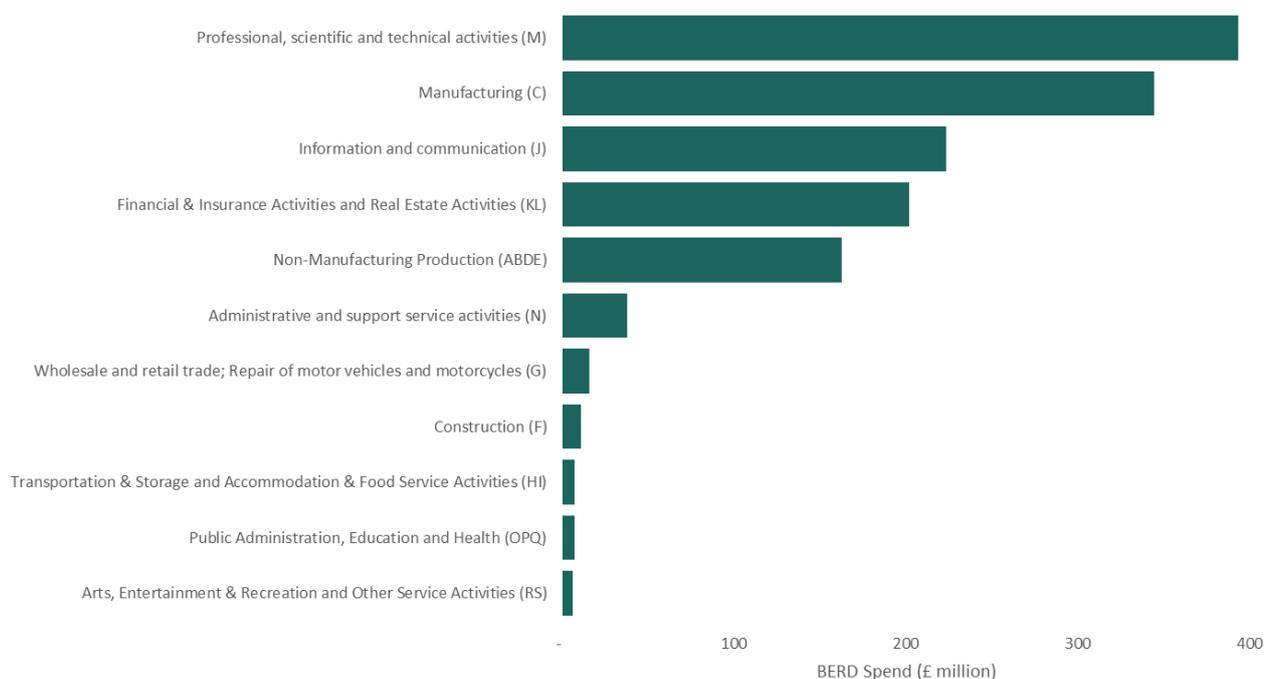
The recent decline in BERD spending in real terms on Other products was driven by a decrease for ‘Extractive Industries’ (-£9 million) between 2018 and 2019.

BERD spend was highest in the Professional, scientific and technical activities industry sector

Note that estimates of research and development (R&D) expenditure by industry and product group are not the same. Businesses may report significant R&D in product groups that are different to the main classification of their business according to the [Standard Industrial Classification \(SIC\)](#). More information about the concepts of product groups and SIC codes can be found in the [UK Business Enterprise Research and Development Quality and Methodology Information \(QMI\)](#) report.

In 2019, BERD expenditure in the Professional, scientific and technical activities sector (Section M) (£394 million) accounted for over a quarter (27.9%) of the Scottish total. Manufacturing (Section C) ranked second (£344 million) and accounted for almost a quarter of the Scottish total (24.4%) (Figure 3).

Figure 3. Professional, scientific and technical activities and Manufacturing had the highest BERD spend in Scotland in 2019



In 2019, Scientific Research and Development (within Section M) was by far the most research intensive division in Scotland with BERD spending accounting for 19.25% of turnover. Manufacture of Computer, Electronic and Optical Products and Information Service Activities (within Sections C and J respectively) were the next most research intensive divisions, with BERD spend accounting for 7.03% and 6.01% of turnover respectively.

The growth sectors accounted for over 70% of Scottish BERD spending

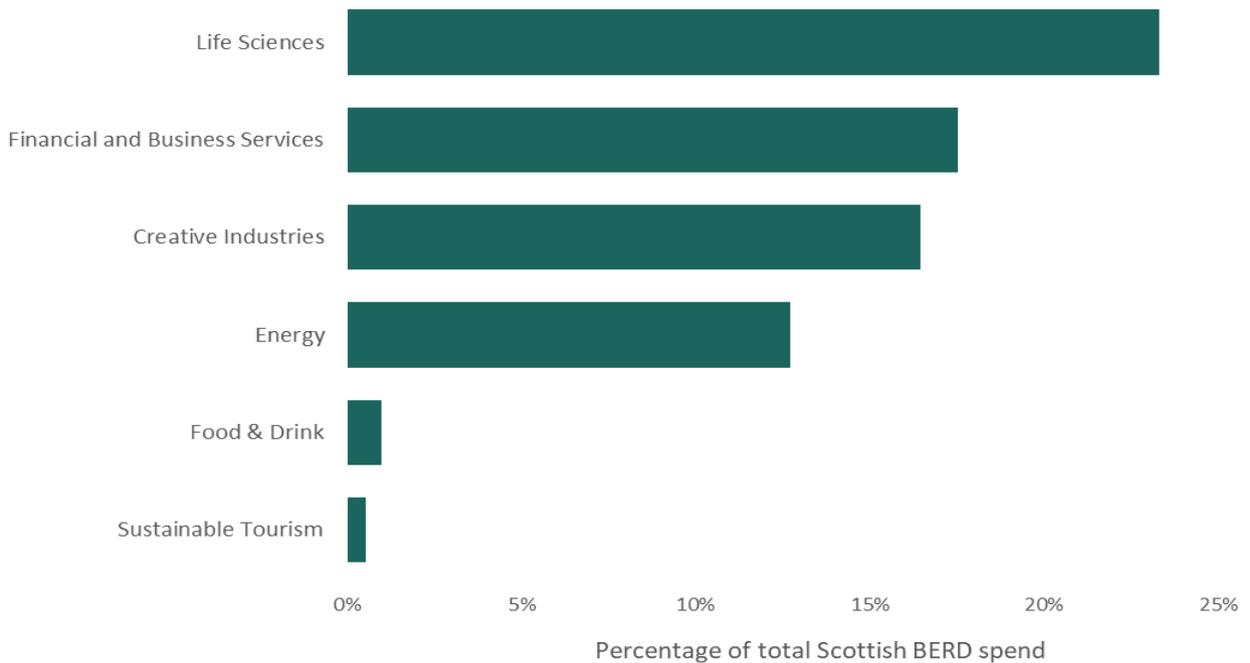
[Scotland's Economic Strategy](#) identified the following industry groups as key growth sectors where Scotland has a distinct comparative advantage:

- Food & Drink (including agriculture & fisheries)
- Creative Industries (including digital)
- Sustainable Tourism
- Energy (including renewables)
- Financial & Business Services
- Life Sciences

The growth sectors accounted for a large proportion of total BERD expenditure in Scotland in 2019 (71.5%). In 2019, Life Sciences had the highest BERD expenditure of the six Growth Sectors (£328 million), as it has since 2009 when the series began (Figure 4). Financial and Business Services (£247 million) ranked second among the Growth Sectors in terms of BERD expenditure. The Energy growth sector experienced the largest increase between 2018 and 2019, with BERD expenditure increasing by 138.8% (£104 million). In 2019, Life Sciences accounted for nearly a quarter (23.3%) of total Scottish BERD spend, and Financial and Business Services accounted for 17.5%.

Life Sciences also had the highest number of BERD employees, accounting for over a fifth of all Scottish BERD employees (23.0%). Despite a 46.3% increase in the BERD employment between 2018 and 2019, Sustainable Tourism ranked lowest among the Growth Sectors in terms of BERD jobs. Creative Industries had the second highest level of BERD employment (20.4%) in 2019.

Figure 4. Life Sciences accounted for the highest proportion of BERD spending among the six Scottish Growth Sectors

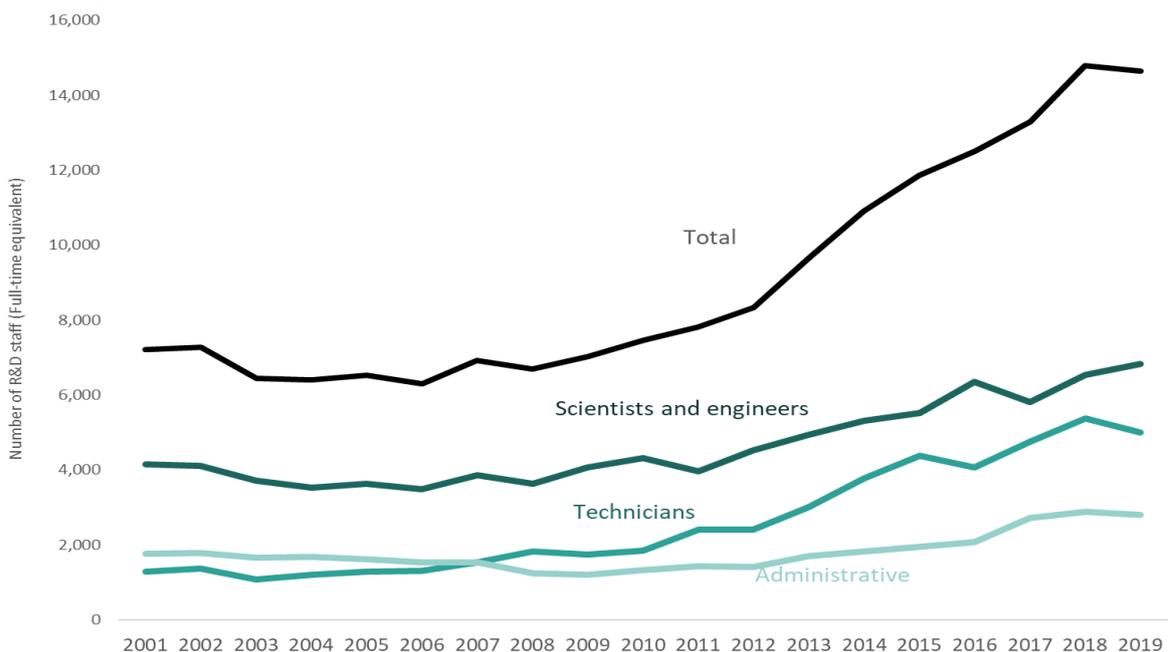


Scottish BERD employment decreased slightly over the year

In 2019, businesses in Scotland employed 14,646 R&D staff, 1.0% less than in 2018. However, there were more than twice as many R&D employees in 2019 as there were in 2001 in Scotland.

The relative proportions of the three types of R&D staff have changed since 2001. In 2001, over half of all R&D staff were Scientists and engineers (58%) and less than a fifth (18%) were Technicians, laboratory assistants and draughtsmen. Between 2001 and 2019, the number of technicians increased the most (287%), so that in 2019 over a third of all R&D staff in Scotland were technicians.

Figure 5. The number of Scientists and Engineers increased in Scotland over the latest year



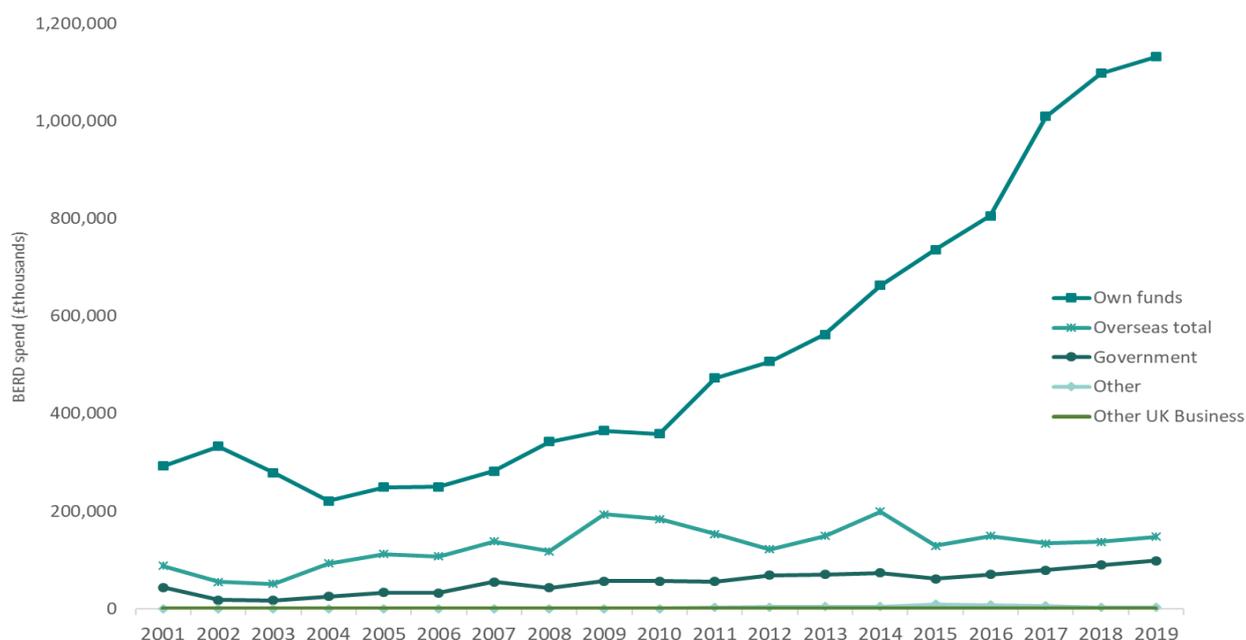
In 2019, there were more BERD staff working on Services products (51.6%) than on Manufacturing (43.7%) or Other products (4.7%). Similar to the pattern seen for BERD expenditure, only the Services product group experienced an increase in BERD staff between 2018 and 2019 (up 5.5%), whereas BERD employment decreased over the latest year for Manufacturing and 'Other' product groups (-7.0% and -8.8% respectively).

Businesses' own funds represented the largest source of BERD funding

Since the series began in 2001, businesses' own funds have always represented the largest source of funding for R&D in businesses in Scotland. However since 2010, this has greatly increased – in 2010 businesses' own funds represented 58% of funds, growing to 80% in 2019 (Figure 6).

The proportion of overseas funding for R&D in businesses, which was the second largest source of funding for R&D in businesses in Scotland in 2019, has shown a general downward trend over recent years. In 2009, overseas funding accounted for 31% of all BERD expenditure in Scotland, whereas by 2019 it had decreased to 10% (Figure 6).

Figure 6. Businesses' own funds has been the fastest growing source of funds for BERD in Scotland

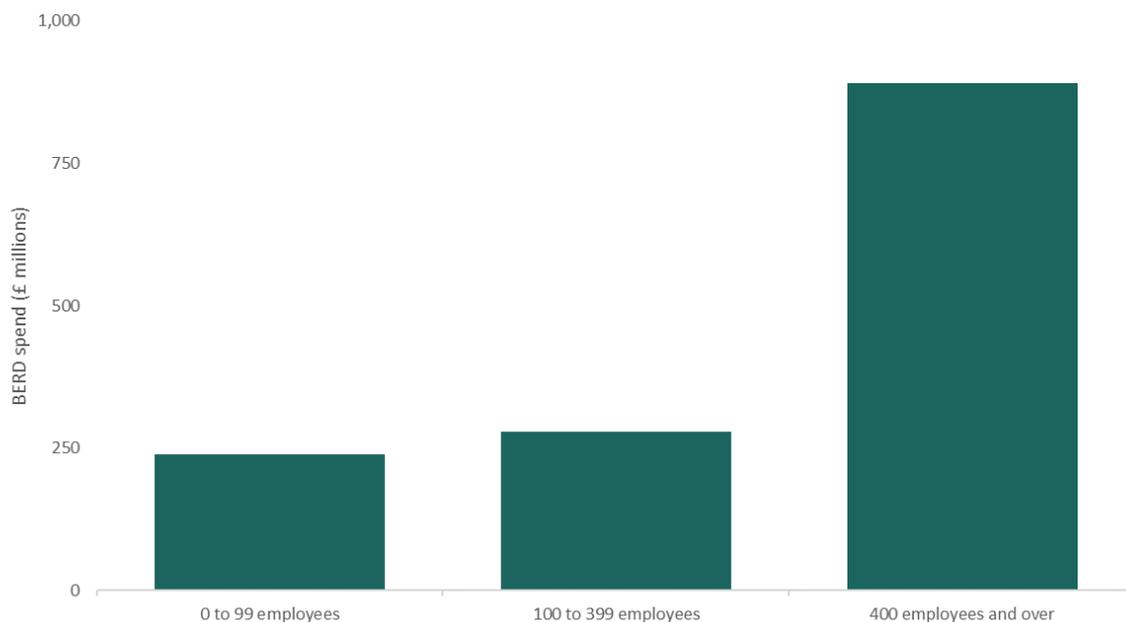


Average expenditure on R&D was highest within large businesses

In 2019, as in the previous years, there were fewer large businesses performing R&D, but they spent more: approximately 115 businesses with 400 or more employees performed R&D in Scotland, compared to 3,200 businesses with less than 100 employees. Businesses with 400 or more employees accounted for nearly two thirds of BERD expenditure (63.2%), whereas the more numerous smaller

businesses (less than 100 employees) accounted for just 17.0% (Figure 7). As follows, businesses with 400 or more employees had a much higher average expenditure on R&D (£7.7 million per business) than businesses with less than 100 employees (£75 thousand per business).

Figure 7. Large businesses (400+ employees) accounted for almost two thirds of BERD expenditure in Scotland



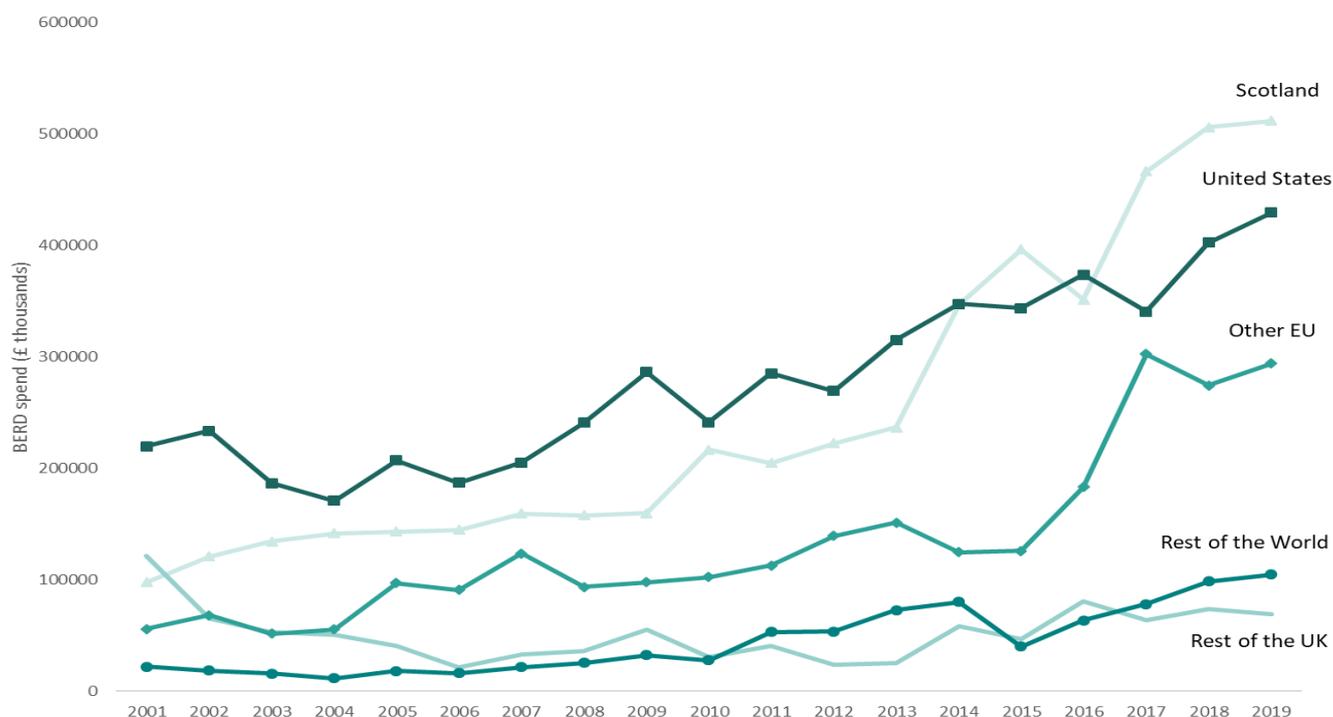
Spending on each of the broad product groups also varied between businesses of different sizes: the largest share of R&D spending in the smaller businesses (less than 100 employees) was on Services products (69.2%), whereas in businesses with 100-399 employees it was on Manufacturing products (67.5%).

Over half of R&D expenditure in Scotland was by foreign-owned businesses

Over half of R&D expenditure in Scotland was by foreign-owned business (58.8%) in 2019. Over the latest year BERD spending increased for all business ownership regions except Rest of the UK, which experienced a decline (Figure 8).

Scottish-owned businesses accounted for 36.3% of Scottish BERD spending in 2019. United States-owned businesses accounted for the second highest proportion of Scottish BERD spending in 2019 (30.5%) (Figure 8).

Figure 8. United States-owned businesses accounted for the second largest proportion of BERD expenditure in Scotland in 2019

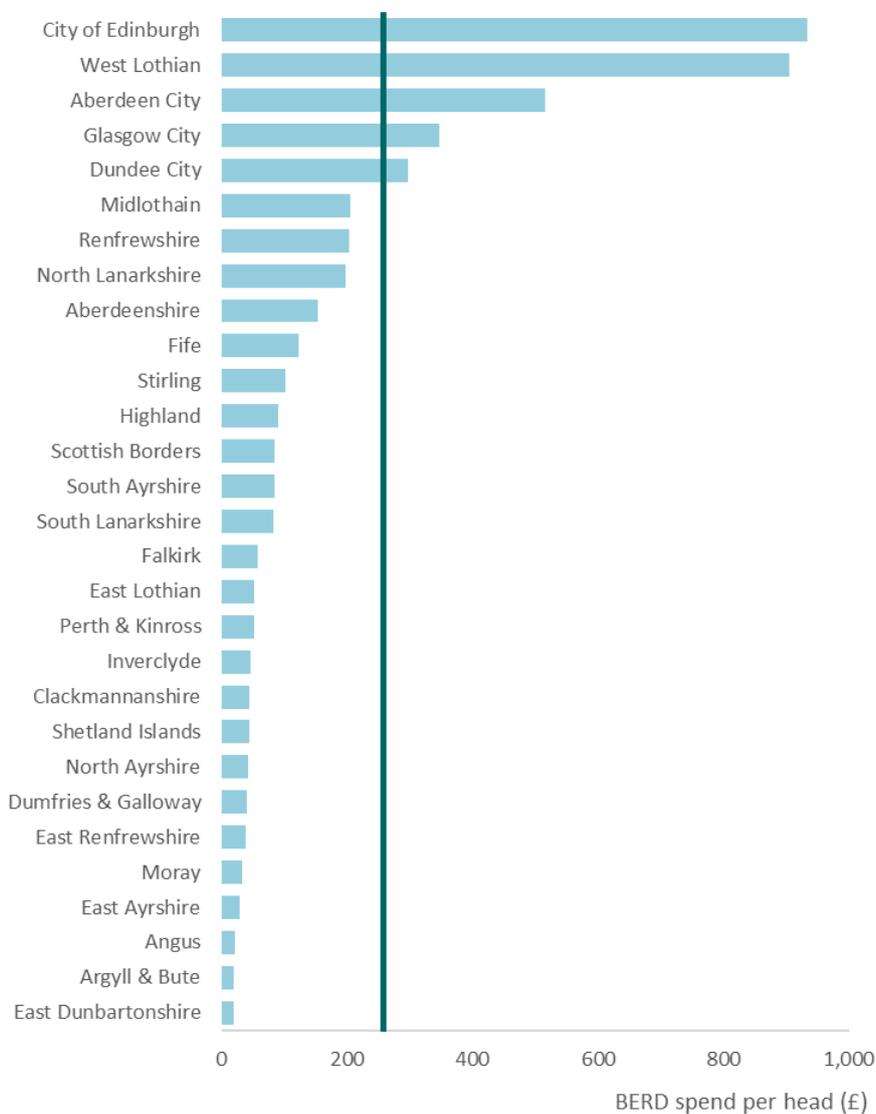


Businesses located in the City of Edinburgh accounted for more than a third of all Scottish BERD spending

Business spending on R&D in Scotland is not evenly distributed across the country: among the 32 local authority areas, City of Edinburgh was top, accounting for over a third of BERD expenditure in 2019 (34.8%). Businesses in Glasgow City and West Lothian accounted for a further 15.6% and 11.8% respectively. Together businesses in these three local authority areas comprised nearly two thirds of the total Scottish BERD expenditure (62.1%).

An alternative way of comparing BERD spending across local authority areas is to calculate BERD spend per person. In 2019, businesses in the City of Edinburgh spent more per person than any other local authority area (£933) and West Lothian was a close second (£904) (Figure 10).

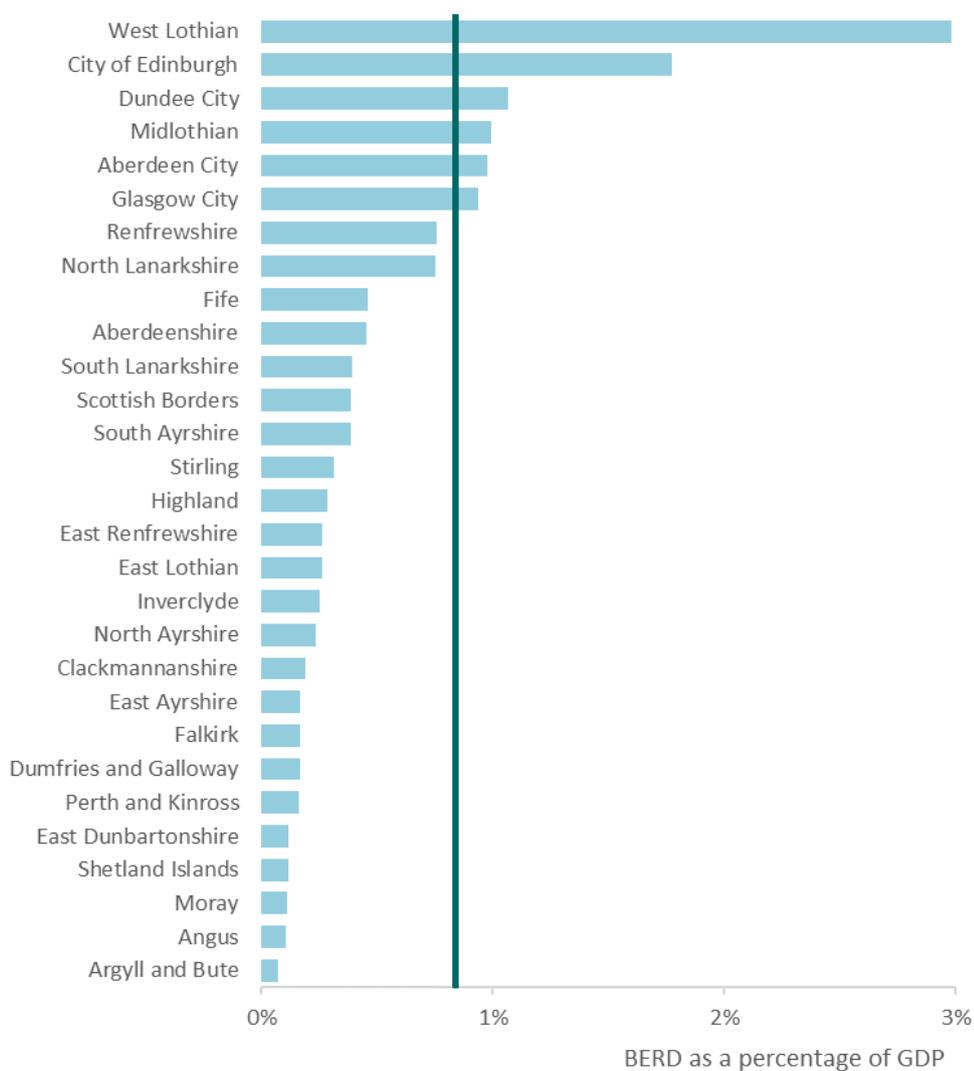
Figure 10. City of Edinburgh and West Lothian are top in terms of BERD spend per head of population in 2019



In 2019, BERD expenditure as a percentage of GDP was highest in West Lothian, where BERD spend accounted for 2.98% of GDP. City of Edinburgh ranked second among the local authority areas in terms of BERD spend as a percentage of GDP (1.77%). Dundee City, Midlothian, Aberdeen City and Glasgow City were the only other Scottish local authority areas where BERD spend as a percentage of GDP was higher than the Scottish average (0.84%; Figure 11).

In terms of BERD employment, City of Edinburgh accounted for 29.5% of the Scottish total and Glasgow City ranked second among the local authority areas with 10.6%.

Figure 11. BERD expenditure as a percentage of GDP was higher than the Scottish average in six local authority areas



BERD expenditure in Scotland has increased faster than in the UK

Scottish BERD expenditure makes up a relatively small proportion of the total UK BERD expenditure: in 2019, it accounted for 5.4%.

Over the latest year, BERD spend in Scotland experienced a greater increase than in the UK: 1.5% increase in real terms in Scotland vs 0.8% in the UK. Over the longer term, R&D spending by businesses in Scotland has also increased more rapidly than in the UK: in real terms Scottish BERD spend increased by 107.4% between 2007 and 2019, whereas in the UK BERD spending increased by 32.2%.

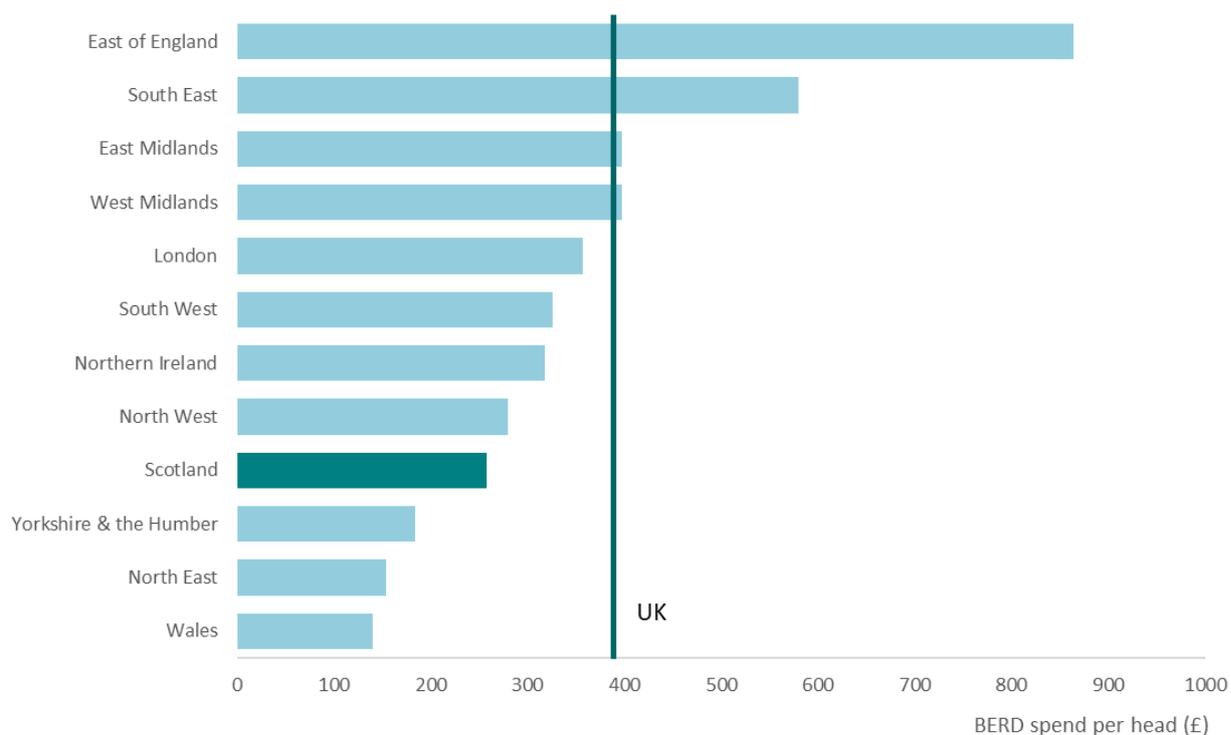
In 2019, BERD spend per person in Scotland was lower than for the UK (£258 vs £388). Similarly, BERD expenditure as a share of GDP in Scotland was lower than for the UK (0.84% vs 1.17%).

Scotland ranked eighth out of the twelve UK regions for BERD expenditure as a share of GDP in 2019

A large proportion of the UK's business spending on R&D occurs in the East of England and the South East: these two regions had the highest BERD expenditure and the highest BERD spend per person in 2019. As in 2018, Scotland ranked eighth out of the twelve UK regions in terms of BERD spending as a share of GDP in 2019.

R&D spending per person was over three times higher in the East of England than in Scotland (£863 vs £258). Only Yorkshire and the Humber, North East and Wales had a lower spend per person than Scotland in 2019 (Figure 12).

Figure 12. Scotland ranked ninth out of the twelve UK regions for BERD spend per head of population in 2019



Background Notes

Definition of R&D

1. While R&D is often thought of as synonymous with high-tech firms that are on the cutting edge of new technology, many established consumer goods companies spend large sums of money, on a systematic basis, improving existing products.
2. The activities that are classified as R&D differ from company to company, but there are two basic models. In one model, the primary function of R&D is to develop new products. In the second model, the primary function of R&D is to discover and create new knowledge about scientific and technological topics with the purpose of uncovering and enabling development of new products, processes, and services.
3. The majority of the data presented in this release are sourced from the Business Enterprise R&D (BERD) survey conducted by the Office for National Statistics (ONS).
4. The ONS BERD survey follows the definition of research and development proposed by the Organisation for Economic Cooperation and Development (OECD) and published in the 'Frascati' Manual. According to the manual, R&D is defined as:
5. "creative and systematic work undertaken in order to increase the stock of knowledge - including knowledge of humankind, culture and society - and to devise new applications of available knowledge". R&D must contain an appreciable amount of novelty.
6. The Frascati Manual was originally written by, and for, the experts in OECD member countries that collect and issue national data on R&D. The definitions provided in this manual are internationally accepted and now serve as a common language for designing, collecting and using R&D data.

Sampling and Regional Estimates

7. The ONS BERD survey is an annual sample survey based on a continually updated register of R&D performers. The ONS 2019 BERD Statistical Bulletin is available at:

<https://www.ons.gov.uk/economy/governmentpublicsectorandtaxes/researchanddevelopmentexpenditure/bulletins/businessenterpriseanddevelopment/latest>

8. The Northern Ireland Research and Development 2019 statistics are published at:

<https://www.nisra.gov.uk/statistics/business-statistics/research-and-development>

9. The UK sample size is approximately 5,400 businesses (4,000 in GB and 1,400 in NI). The response rate for the 2019 BERD survey in Great Britain was 56%, which was lower than usual because of the coronavirus (COVID-19) pandemic. The rate for 2018 was 84%. This means that these estimates are subject to more uncertainty than usual because of fewer responders on which to base the survey results.
10. For Great Britain, a stratified random sample is used where the strata are defined as:
 - businesses that have previously reported R&D expenditure above a threshold (greater than around £5.7 million (referred to as “large R&D performers”)).
 - the remaining businesses identified as (or potential) R&D performers (referred to as “smaller R&D performers”) are allocated into strata using their employment and industry product group
11. The large R&D performers account for around 80% of total expenditure. Each of these large R&D performers is asked to name all the sites at which the business performed R&D and to estimate the R&D spend at that site, this expenditure is then allocated to the appropriate region. Regional data for the smaller R&D performers are estimated from sample returns.
12. A summary quality report for the ONS BERD survey is available at: <https://www.ons.gov.uk/economy/governmentpublicsectorandtaxes/researchanddevelopmentexpenditure/methodologies/ukbusinessenterpriseandresearchanddevelopmentssurveyqmi>

Coverage

13. BERD includes business enterprise R&D performed in Scotland irrespective of the residence of the ultimate owner. BERD excludes R&D funded by Scottish businesses that is performed overseas.
14. BERD excludes R&D carried out by higher education or government (including government departments, agencies and non-departmental public bodies; local authorities; and private non-profit organisations). Public corporations are counted as business enterprises.
15. Gross expenditure on R&D in Scotland in 2019 performed by all sectors of the economy (i.e. business, higher education and government) will be reported separately in Spring 2021.

Product groups

16. The 400 large R&D performers are asked to select the industry product groups that best describe the type of R&D activities they undertake. In 2009, these product groups were updated to better reflect the new Standard Industrial Classification (SIC 2007) codes. For the smaller R&D performers, no product group data are collected in the BERD survey. However, the business’ Standard Industrial Classification (SIC) codes are

known from the Inter-Departmental Business Register (IDBR) and the assumption is made that the R&D expenditure is for the detailed product group corresponding to that SIC. This approach must be regarded as approximate since, in practice, an individual business can perform R&D for a range of product groups.

17. The introduction of SIC 2007 in the 2009 survey resulted in some businesses' R&D moving to a different product group than previously published. The largest impact was for businesses with Publishing activities, as these moved out of the manufacturing sector to be included under Miscellaneous business activities. There was an increase in the Other manufactured goods product group due to businesses being reclassified from Textiles, clothing and leather products, Pulp and paper products, Rubber and plastic products, Fabricated metal products, Machinery and equipment and Precision instruments and optical products.
18. The broad product groups, which consist of aggregations of the detailed product groups, were refined and expanded in 2002 in order to more accurately categorise the data within the manufacturing and services. Since 2011, sewerage and waste management is included in the Other total, when previously it was included in manufacturing.

Discontinuities in the data

19. The BERD survey questionnaire was redesigned from the 2007 survey to better reflect user needs and to address concerns about data quality and difficulty in completion. While the changes are an improvement, they could have an impact on the comparability of the data returned. Unfortunately, it is not possible to measure this impact.

Employment

20. Employment is calculated by respondents to the ONS BERD survey on the basis of 'full-time equivalent' staff average over the year. The categories of employment used are:
 - Researchers (scientists and engineers) – engaged in the conception or creation of new knowledge, products, methods and systems
 - Technicians – perform scientific and technical tasks normally under the supervision of researchers
 - Other (administrative) – support staff including skilled and unskilled craftsmen, secretarial and clerical staff participating in R&D projects

Real terms

21. The cash values are converted to real terms using Treasury GDP deflators. The deflators are available at:

GDP deflators at market prices, and money GDP September 2020
(Quarterly National Accounts) - GOV.UK (www.gov.uk)

Time period for which the results relate

22. Respondents to the ONS BERD survey were asked to make a return for the calendar year 2019 or the nearest 12 month period for which figures were available. Data for all years published were collected on the same basis.

Revisions Policy

23. BERD Scotland follows the Revisions Policy for the ONS BERD results – the latest (year t) results are provisional until two years later (year t+2).

Latest Revisions

24. The 2017 and 2018 data have been revised to take account of company misreporting and late returns.
25. One indication of the reliability of the main indicators in this release can be obtained by monitoring the size of revisions. Table 1 records the size and pattern of revisions that have occurred since 2012.

Table 1: Revisions between first publication and most recent estimate, figures in thousands

		Year in which data was published							Change in expenditure between first and latest estimate
		2012	2013	2014	2015	2016	2017	2018	
Year the data relates to	Year								
	2012	£706,804	£709,047	£708,662					£1,858
	2013		£797,704	£896,528	£801,043				£3,339
	2014			£905,193	£874,020	£957,080			£51,887
	2015				£870,863	£952,626	£952,625		£81,762
	2016					£1,072,134	£1,074,544	£1,052,052	£20,082
	2017						£1,247,278	£1,250,453	£3,175
	2018							£1,355,924	£795
	2019								£1,408,905

26. There was a large revision in the 2015 data between the 2015 publication and the 2016 publication, which was partly due to a large increase in expenditure in the 'Miscellaneous business activities; Technical testing and analysis' Service product group.

Sampling variability

27. The estimates in this publication are based on a stratified sample drawn from the population of businesses known to actually perform R&D or are likely to be R&D performers. As with any sample survey, the R&D survey is subject to two types of possible errors:
- Sampling errors, due to only a sample of the population being surveyed. The difference between the estimates derived from the sample and value that would be obtained from a census is referred to as the sampling error. The Business Enterprise Research and Development Survey has provided standard errors information in the past but the

methodology for estimation of the standard errors used to measure these is currently under review.

- Non-sampling errors – these include factors such as population coverage misreporting and non-response bias; these errors are generally hard to quantify, because of the problems ensuring that businesses adhere to Frascati R&D definitions.

Analysis of R&D expenditure by SMEs (small and medium sized enterprises)

28. A table giving estimates of R&D expenditure by SMEs has been included. The SME definition used is that under European Commission Recommendation (2003/361/EC) of 1 January 2003, in which SMEs are defined as enterprises with less than 250 employees. In addition, a criterion of independence is used to exclude enterprises that are part of a larger enterprise group, so that only true SMEs are evaluated. This criterion is important in the context of R&D estimates, given that R&D activity is often carried out by smaller businesses which form part of larger, sometimes multinational businesses.
29. To apply the SME definition, historic information on business ownership has been obtained using that currently held on the IDBR. Caution should therefore be used in making comparisons over time.

Code of Practice for Official Statistics

30. This is a National Statistics publication. It has been produced to the high professional standards set out in the Code of Practice for Official Statistics.
31. In 2012, the Scottish Government Research and Development statistical publications were assessed by the United Kingdom Statistics Authority (UKSA) for compliance against the Code of Practice for Official Statistics. Details of the assessment are available at:

[Assessment Report 189 - Statistics on Scottish Businesses and Research and Development \(statisticsauthority.gov.uk\)](http://statisticsauthority.gov.uk)

32. The United Kingdom Statistics Authority has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Official Statistics.

Designation can be broadly interpreted to mean that the statistics:

- meet identified user needs
- are well explained and readily accessible
- are produced according to sound methods, and
- are managed impartially and objectively in the public interest

Once statistics have been designated as National Statistics it is a statutory requirement that the Code of Practice shall continue to be observed.

33. A UKSA assessment was also carried out for the ONS Research and Development statistical publications in 2012. Details of the assessment are available at:
34. [Assessment Report 218 - Statistics on Research and Development \(statisticsauthority.gov.uk\)](https://www.statistics.gov.uk/assessment-report-218)

Uses

35. Information from the Scottish BERD publication is used by the Scottish Government to monitor performance and inform economic policy. Some of the external users of R&D statistics published by the Scottish Government include the Enterprise Networks and Local Authorities. More information on uses can be found in the on-line [Research and Development Data Sources, Suitability and Uses Note](#).

User Engagement

36. If you would like to be kept informed about on-going developments with regards to the Scottish BERD publication and future releases of R&D data, please register to receive updates via [ScotStat](#) (under Economy topic pick R&D and Innovation).
37. There is also the ScotStat Scottish Economic Statistics Consultation Group (SESCG) – more information on the group is available at:

<https://www.gov.scot/groups/scottish-economic-statistics-consultation-group/>

If you would like to join SESC or provide feedback on the Scottish BERD publication, please contact us at:

Business and Innovation Statistics, Office of the Chief Economic Adviser, 5 Atlantic Quay, 150 Broomielaw, Glasgow, G2 8LU

Telephone: 0131 244 6813

Email: industrystatistics@gov.scot

38. There is also an ONS-led user community that may be of interest to R&D users. Details of this are available at the Business and Trade Statistics Community on the [StatsUserNet](#) website.

A National Statistics publication for Scotland

The United Kingdom Statistics Authority has designated these statistics as National Statistics, in accordance with the Statistics and Registration Service Act 2007 and signifying compliance with the Code of Practice for Official Statistics.

Designation can be interpreted to mean that the statistics: meet identified user needs; are produced, managed and disseminated to high standards; and are explained well.

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For general enquiries about Scottish Government statistics please contact:

Office of the Chief Statistician, Telephone: 0131 244 0442,
e-mail: statistics.enquiries@gov.scot

How to access background or source data

The data collected for this statistical bulletin:

- are available in more detail through Statistics.gov.scot
- may be made available on request, subject to consideration of legal and ethical factors. Please contact industrystatistics@gov.scot for further information.
- cannot be made available by Scottish Government for further analysis as Scottish Government is not the data controller.

Complaints and suggestions

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