

Evaluation of the Scottish Government's Inward Investment Support

July 2023

Methodology Note

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1. Introduction

- 1.1. Enterprise Research Centre (ERC) and Centre for Business Prosperity (CBP) at Aston University were commissioned by the Scottish Government to undertake the evaluation of Scotland's inward investment support over the period of 2018/19 – 2020/21 (three financial years). This covers 310 supported investment projects to 282 businesses.
- 1.2. ERC was also commissioned to undertake a review of Management Information held by Scottish Development International (SDI), Scotland's trade and inward investment agency, who operate as an arm of Scottish Enterprise (SE), and analysis of inward investment activities over six financial years from 2016/17 to 2021/22 which covers 688 inward investment projects. SE analysts support SDI work hence subsequent references to SE providing data/input.
- 1.3. This report is a technical Methodology Note of the inward investment evaluation and Management Information review. It provides an outline of the methodological approach to the beneficiary evaluation process and field work, the final beneficiary survey and interview questionnaires, and the assessment of beneficiary survey representativeness and analyses.

2. Questionnaires

- 2.1. The beneficiary survey questionnaire was designed through a collaborative and iterative process with the Scottish Government, its delivery partners¹ and ERC/CBP. At the late stages of survey design, ERC/CBP approached a number of supported businesses suggested by SE to pilot the questionnaire.
- 2.2. Four companies took part in the pilot. ERC/CBP administered the questionnaire to them by a video conference call. The pilot included firms that received support for every type of inward investment project: new, expansion, safeguarding and multiple project types. The questionnaire was then updated based on pilot feedback.
- 2.3. The inward investment beneficiary questionnaire can be found in Appendix 1.
- 2.4. The Interview guide, like the survey questionnaire, was agreed with the stakeholders. It was designed to contextualise survey findings. Its latest version was piloted with three interviewees and modified based on feedback. The final interview guide can be found in Appendix 2.

3. Fieldwork

- 3.1. The evaluation covered businesses that received inward investment support in the financial years of 2018/19 – 2020/21 and that were classified as “validated successes” as determined by SDI. These were involved (public sector support) projects that landed in Scotland as recorded by SDI in annual “Validated Success Reports” within each financial year.
- 3.2. The Scottish Government and delivery partners supported 310 inward investment projects for 282 companies in 2018/19 – 2020/21. 174 of these companies opted into the

¹ Scottish Development International, Scottish Enterprise, Highlands and Islands Enterprise, South of Scotland Enterprise, and Skills Development Scotland

evaluation (62%). In addition to opting out, some firms were excluded from the evaluation by SDI operational decision, for example, when a company was subject to legal sanctions.

- 3.3. Business contact details, investment project information, and businesses data necessary for the evaluation of firms that opted in were provided by SE. These were checked and deduplicated by ERC/CBP – any issues or questions on the contact list were clarified by SE.
- 3.4. Participation in the survey was voluntary. The survey fieldwork took place in September – November 2022. In order to maximise the response rate and be inclusive, the questionnaire was administered in a mixed mode: firstly, the online survey, and then by computer assisted telephone interview (CATI) to those firms that did not respond, could not be reached by email, or those that responded partially, in order to obtain a complete survey response.
- 3.5. Business contact information provided by the delivery partners contained both an email and a phone number for 81% of firms, 19% had an email only, and 0.6% per cent (one firm) had a phone number. This indicates that nearly one-fifth of the sample would not have been reached with a standard single-mode CATI survey.
- 3.6. The online survey consisted of the invitation and three reminders to non-responding/partially responding firms. During the CATI stage, multiple contacts attempts were made to obtain a response (up to 10). Businesses had the option of scheduling their CATI for a later date. The online survey remained open during the CATI stage.
- 3.7. Three per cent of all firms (six) could not be reached via the online survey; in every case but one, this was because all emails bounced². Thirty-five per cent of firms could not be reached by CATI: 19% because contact information did not include a phone number, while for 16% associated phone numbers were unobtainable or incorrect (e.g., did not connect, reached a different business etc.). Using a mixed-mode survey, on the other hand, resulted in a complete no contact of only 0.6% of all firms (see Table 1).

Table 1. Count and share of firms that could not be reached, N=174

No contact	Count	%
By email	6	3.4%
By phone	60	34.5%
By phone and email (no contact)	1	0.6%

- 3.8. Respondents were provided with the opportunity to opt out of the evaluation through a “warm-up” email sent out by delivery partners, through the survey, by contacting ERC/CBP or when called during the CATI stage. If the firm opted out, it was not contacted again. For instance, if they opted out during the online stage, they were excluded from the CATI stage. In total, six per cent of firms (eleven) opted out during the survey fieldwork.
- 3.9. Fieldwork concluded with 49 responses³. Of them, 80% (39) were online survey responses and 20% (10) were CATI responses. Of the 174 firms that were approached for the survey, two were removed in post-survey analysis: one because it was no longer trading making it ineligible, and one because it could not be reached by any means,

² This only includes bounces for all four contact attempts. This does not mean that each inbox was monitored or that respondents saw the survey invites, only that at least one survey email was delivered.

³ Additionally, ten respondents reported that they did not receive any inward investment support in the financial years of 2018/19-2020/21

counting towards non-coverage. The response rate was thus 28% (response rate is calculated as a share of firms that could be contacted for the survey, see Table 2 for details on the entire sample size).

Table 2. Sample size and share in each stage of the evaluation and reasons for their reduction.

Evaluation stage	Sample size	Sample share	Reason for a reduction in sample size
All (unique) firms supported in 2018/21 that are “validated successes”	282	100%	
Firms that opted into the evaluation survey	174	62%	Non-coverage: opt-out prior to the evaluation survey, removal by SDI operational decision
Post-survey adjustment	172	61%	Ineligible (no longer trading); cannot be contacted (non-coverage)
Firms that responded to the survey	49	17%	Non-response

- 3.10. This corresponds to the survey’s margin of error of 12%⁴. The response rate can be considered good for such a small population of businesses. Its margin of error indicates that the survey findings can be used to draw broader conclusions about the impact of the support (e.g., if majority of businesses report impact).
- 3.11. Sub-group analysis is descriptive due to the sample size with the exception of firms that were offered financial support and businesses that received support by SE. They made up the majority of survey respondents and the margin of error for them is the same as the survey’s (12%).
- 3.12. Each survey question was optional. Hence, 90% of respondents completed the whole survey and 10% responded partially. The latter were all online survey respondents. Note that this excludes partial responses with only a few completed questions: such responses were counted as non-response.
- 3.13. Businesses in the survey were asked for permission to be approached for an in-depth qualitative interview. Sixty per cent of respondents agreed. All these businesses were followed up by ERC/CBP, typically using up to five contact attempts by email and phone. This resulted in 10 qualitative interviews that covered a diverse range of investment project types, businesses, and investment journeys.

4. Survey representativeness assessment

- 4.1. This section provides assessment of representativeness between all 282 supported businesses, 174 firms that opted into the evaluation and 49 survey respondents.
- 4.2. Based on characteristics data collected by SDI, the profile of all supported firms was very similar to that of firms that opted into the evaluation, which indicated that 174 firms that opted-in were largely similar of all supported firms. This was also true of companies that

⁴ Survey’s MOE varies slightly by question because the number of respondents providing a response varies slightly. When the analysis used inference to all 172 supported businesses, it used a specific MOE for that question.

responded with certain characteristics. For instance, the majority of 282 companies were supported by SE (90%), followed by HIE (6%) and SOSE (4%), which was roughly the same in firms that opted in and that responded (Figure 1).

4.3. The Inward Investment Plan (IIP) identifies nine business sectors as opportunity areas for inward investment. This business sector profile was also roughly the same between the sample's stages, mostly varying by 1-2 percentage points, with the exception of Digital Financial Services sector (its share among the survey responders was lower by 5.1 percentage points compared to all supported businesses, Digital Business Services sector (its share among the survey responders was lower by 4.4 percentage points compared to all supported businesses), and Space sector (4.3 percentage points higher⁵) (see Table 3 for more detail). This did not necessarily represent a sector bias as breaking down 49 survey responses by multiple categories resulted in small sample sizes.

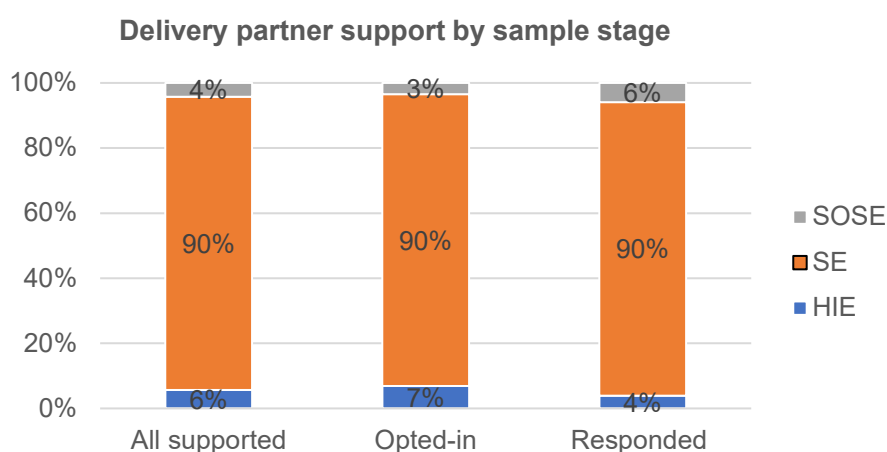


Figure 1. Percentage of companies

Table 3. Business sector by IIP opportunity area comparison of all supported, all opted-in and all responding companies, percentage

IIP opportunity area	All	Opted-in	Responded
Digital Business Services	6.4%	6.9%	2.0%
Decarbonisation of Transport	1.1%	1.1%	2.0%
Digital Financial Services	9.2%	10.3%	4.1%
Energy transition	11.3%	12.6%	14.3%
Food & Drink Innovation	6.7%	6.9%	6.1%
Healthtech	12.1%	12.1%	12.2%
Other	37.6%	35.1%	40.8%
Software & IT	9.9%	9.2%	8.2%
Space	1.8%	1.7%	6.1%
Transformation of Chemical Industries	3.5%	3.4%	2.0%
Unknown	0.4%	0.6%	2.0%

⁵ This is due to a small number of all supported firms in this sector (five)

4.4. There were a few notable differences between the companies that opted into the evaluation (and by extension, all supported companies) and those that responded, which indicated some non-response bias. First, companies that were supported in 2019-2021 were more likely to respond making up 75% of the survey sample compared to 66% of all supported firms (Figure 2). Second, companies that received support for safeguarding were more likely to respond than those that received support for new projects (Figure 3). Lastly, companies that received Skills Development Scotland (SDS) support were more likely to respond (making up 31% of responses compared to 20% of all supported firms).

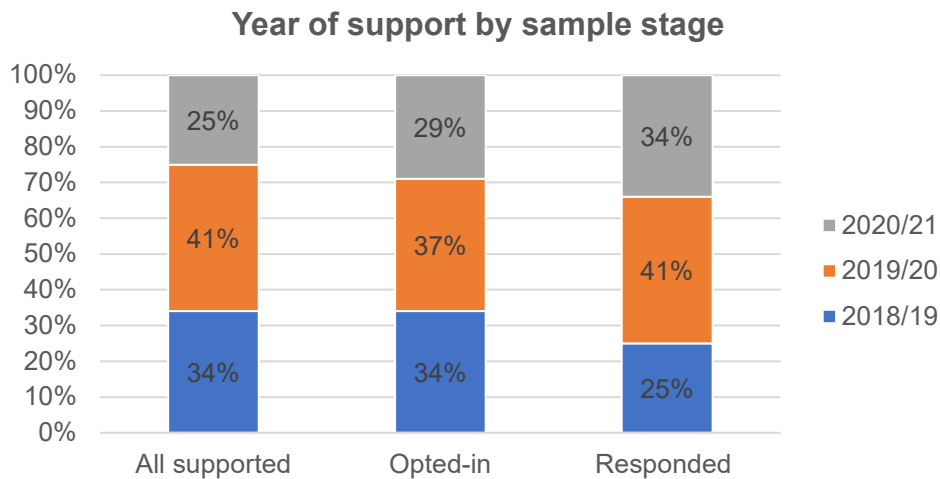


Figure 2. Percentage of companies, excl. 23 companies with multiple projects supported across different years

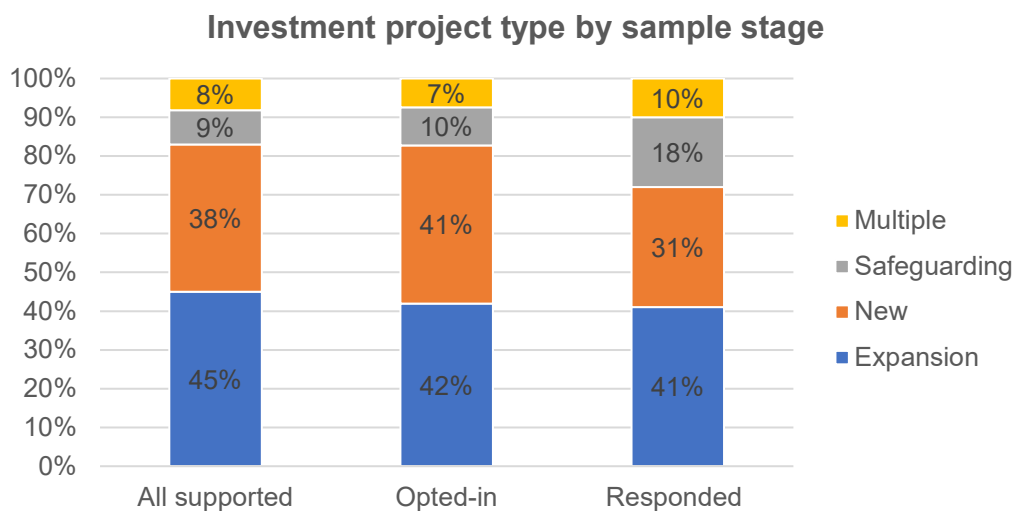


Figure 3. Percentage of companies

4.5. These differences appear to be related to the support type: companies that were offered financial support⁶ were more likely to respond to the survey making up 76% of all respondents compared to 57% of all supported firms. Companies that received support for new projects were less likely to have been offered financial support: 36% compared to 92% of safeguarded projects and 68% of expansion projects. Similarly, the projects were more likely to be offered financial support in later years than in 2018/19 (46% vs 66% in

⁶ For at least one of the projects in case of multiple supported projects; following the offer, firms received financial support contingent on achievement of planned job outcomes.

2019/20 and 55% in 2020/21) and firms that received SDS support were also more likely to be offered financial support (74% vs 52%).

- 4.6. This indicates that the survey results were somewhat skewed towards companies that were offered financial support, albeit not massively. Because of limitations on the subgroup analyses⁷, we cannot estimate whether the impact of support was overestimated or underestimated by the survey. While typically survey weights can be deployed to account for non-response bias, using them on a sample of such size would have introduced more errors. Therefore, survey findings are the best available evidence on the supported businesses that opted into the evaluation.
- 4.7. Meanwhile, the difference between 282 and 174 firms constitutes non-coverage. As 108 firms were not approached for the survey, inference should not be made about them. Surveys might mitigate non-coverage by deploying survey weights, however based on collected data firms in both groups are very similar (i.e., there are no major differences weights could adjust); meanwhile data on other business characteristics, such as size and age, was not collected, so the full extent of differences between both groups could not be assessed. We did not evaluate reasons for firms opting out of the evaluation (nor were they collected by the monitoring system), so it is not clear whether the impact of support was overestimated or underestimated by the survey, if at all.

5. Analyses

- 5.1. Beneficiary survey data was analysed quantitatively using descriptive and inferential statistics where relevant (e.g., outcome assessment). Survey comments from open-ended questions and in-depth interviews with beneficiaries were analysed thematically. The beneficiary evaluation was supplemented by quantitative analysis of data on respondents from the Management Information where relevant, e.g., in assessment of actual jobs created against the planned jobs to be created in investment plans.
- 5.2. For the Management Information review, data was analysed quantitatively by points of interest as agreed with the delivery partners, e.g., by the number of supported investment projects, number of planned jobs associated with projects, geographic locations, business sectors, assistance type, etc.

⁷ Margin of error for non-financially supported firms is 25%

Appendix 1

Beneficiary Survey Questionnaire

Investment characteristics

1. We understand that you received inward investment support in the period of 2018-2021 from one or more of the following delivery partners:

- Scottish Development International (SDI)
- Scottish Enterprise (SE)
- Highlands and Islands Enterprise (HIE)
- South of Scotland Enterprise (SOSE)
- Skills Development Scotland (SDS)

Could you confirm that this is correct?

- 1.1. Yes
- 1.2. No **[End of Survey]**

2. Has the investment project for which you received public sector support in 2018-2021 been completed? If you received support for several projects, please respond with regards to the latest project.

- 2.1. Yes, completed in 2018
- 2.2. Yes, completed in 2019
- 2.3. Yes, completed in 2020
- 2.4. Yes, completed in 2021
- 2.5. Yes, completed in 2022
- 2.6. No

3. How much did your company invest of its own funds into this project (or projects) in the period of 2018-21 (£)?

- 3.1. £0
- 3.2. £1 - £250,000
- 3.3. £250,000 - £499,999
- 3.4. £500,000 - £999,999
- 3.5. £1m - £4.99m
- 3.6. £5m or more
- 3.7. Don't know
- 3.8. Prefer not to say
 - 3.8.1.

4. In what year was your Scottish business established?

5. Thinking about how your company in Scotland operates, would you describe it as making goods, delivering services or a combination of both?

- 5.1. Goods
- 5.2. Services
- 5.3. Both
- 5.4. Don't know

6. [if Q5 = Both] **What is the main activity of this company?**

- 6.1. Goods
- 6.2. Services
- 6.3. Equally split

7. [if Q5 = Goods or Both] **What type of goods does this company in Scotland produce: is it...**

	Yes	No
7.1. Raw materials (e.g., copper, oil, grain)?		
7.2. Intermediate goods (used as parts to produce other goods, e.g., car parts)		
7.3. Consumer goods (end-use product, e.g., whiskey, laptops)?		
7.4. Capital goods (used in the production, e.g., machinery, tools, equipment)?		

8. **Does the company in Scotland (or any of its Scottish sites) operate as a centre, office or headquarters of any type for the whole company group (e.g., R&D centre, Technical support)?**

- 8.1. Yes
- 8.2. No
- 8.3. Not applicable – there is no company group

9. [if Q8= Yes] **And what type of office, centre or headquarters is it?**

- 9.1. Customer Contact Centre
- 9.2. Data Centre
- 9.3. R&D Centre
- 9.4. Global Headquarters
- 9.5. Regional Headquarters
- 9.6. Logistics Centre
- 9.7. Sales Office
- 9.8. Shared Service Centre
- 9.9. Software Development Centre
- 9.10. Technical Support
- 9.11. Testing Centre
- 9.12. Other (please specify):

10. **Has the company in Scotland sold its goods and/or services to the following markets in the last 12 months?**

	Yes	No
Scotland		
Rest of UK		
EMEA (Europe, Middle East, Africa)		

Americas		
Asia Pacific		

11. [if multiple markets] **And which market has been the company's in Scotland largest market by value of sales in the last 12 months?**

{displayed as applies}
Scotland
Rest of UK
EMEA (Europe, Middle East, Africa)
Americas
Asia Pacific
Don't know

12. **How many employees does the company in Scotland have in 2022?**

- 12.1. No employees
- 12.2. 1 – 9
- 12.3. 10 – 49
- 12.4. 50 – 249
- 12.5. 250 or more
- 12.6. Prefer not to say
- 12.7. Don't know

13. [Expansion or Safeguarding only] **Comparing the number of employees the company had in Scotland before receiving the investment support to the number of employees in 2022, how did it change?**

- 13.1. It increased
- 13.2. It decreased
- 13.3. It stayed the same
- 13.4. Don't know

14. [if Q4<2022] **What was the company's turnover in Scotland in 2021 (£)?**

- 14.1. Less than £85,000
- 14.2. £85,000 - £249,999
- 14.3. £250,000 - £499,999
- 14.4. £500,000 - £999,999
- 14.5. £1m – £1.99m
- 14.6. £2m - £4.99m
- 14.7. £5m - £9.99m
- 14.8. £10m - £14.99m
- 14.9. £15m - £24.99m
- 14.10. £25m - £49.99m
- 14.11. £50m or more
- 14.12. Don't know
- 14.13. Prefer not to say

15. **[if Q4<2022] [Expansion or Safeguarding only] Comparing the company's turnover in Scotland before receiving the investment support to the turnover in 2021, how did it change?**
- 15.1. It increased
 - 15.2. It decreased
 - 15.3. It stayed the same
 - 15.4. Don't know

Supports and its activities

1. **Did your company receive any of the following types of support from delivery partners as part of the supported project(s) ?**

	Yes	No
1.1. Guidance on other sources of public or private sector finance		
1.2. Market intelligence		
1.3. Labour market information		
1.4. Signposting to existing training (e.g., apprenticeships, further/higher education)		
1.5. Signposting to supply chain partners		
1.6. Signposting to specialist advice (e.g., recruitment agencies, industry bodies, industry networks)		
1.7. Signposting to financial assistance (e.g., Regional Selective Assistance (RSA), R&D grants and tax credits, Training Plus)		
1.8. Financial support (e.g., Grant, Loan, Investment, Intervention Frameworks, Property or Skills/Training support)		
1.9. Project support & consultation		
1.10. Organised visit to Scotland (physical or virtual)		
1.11. Property/site search or appraisal		
1.12. Event / Activity promoting Scotland		
1.13. Other (please specify):		

Outcomes

We are now going to ask some questions about the impact of the delivery partner support. Please consider only the support you received in 2018-2021 through the delivery partners (SDI, SE, SOSE, HIE or SDS). Consider any direct impacts of the delivery partner support as well as impacts of actions that your business subsequently took as a result of the delivery partner support.

1. **[New or Expansion projects only] If you had not received the support in 2018-21, would you have carried out the new/expansion project(s)*?**

*New projects aimed to establish a new company in Scotland. Expansion projects aimed to expand an already existing company in Scotland (e.g., by increasing the number of staff).

- 1.1. Yes – definitely
- 1.2. Yes - but not as quickly
- 1.3. Probably not
- 1.4. Definitely not
- 1.5. Don't know

2. [if Q1 = No] **When would you have carried out the new/expansion project(s) without the support in 2018-21?**

- 2.1. Up to 1 year later
- 2.2. 1 - up to 2 years later
- 2.3. 2 – up to 3 years later
- 2.4. 3 – up to 4 years later
- 2.5. 4 – up to 5 years later
- 2.6. 5 years and more later
- 2.7. Never
- 2.8. Don't know

3. [Safeguarding projects only] **If you had not received the support in 2018-21 for safeguarding*, would your company have continued to operate in Scotland?**

*Safeguarding support aimed to ensure the company in Scotland continues to operate at the same level (e.g., by safeguarding the number of staff).

- 3.1. No, it would have closed down
- 3.2. Yes, but on a smaller scale
- 3.3. Yes
- 3.4. Don't know

4. [if Q3= Smaller Scale] **What percentage of the total turnover from your company in Scotland would you have achieved in 2021 without the support for safeguarding?**

- 4.1. Percentage
- 4.2. Don't know - > Bands

5. [those that invested own funds only] **If you had not received the support in 2018-21, would you have invested as much as you did or not as much?**

- 5.1. Just as much
- 5.2. Not as much
- 5.3. Don't know

6. [if Q5 = not as much] **Assuming your investment is 100%, what percentage would you have invested without the support in 2018-21?**

- 6.1. Percentage
- 6.2. Don't know -> Bands

7. [if multiple projects] **If you had not received the support in 2018-21, would you have invested into the same number of projects?**

- 7.1. Yes – definitely
 - 7.2. Yes – probably
 - 7.3. Probably not
 - 7.4. Definitely not
 - 7.5. Don't know
8. [if Q7 = No] **How many projects would you have not gone ahead with without the support in 2018-21?**
- 8.1. Number
 - 8.2. Don't know
9. **As a result of the support in 2018-21, have you increased the number of people employed in your company in Scotland or safeguarded any existing jobs, if at all?**
- 9.1. Yes – increased number of people employed
 - 9.2. Yes – safeguarded existing jobs
 - 9.3. Yes – both
 - 9.4. No
 - 9.5. Don't know
10. [if Q9 = jobs increased] **As a result of the support in 2018-21, how many new people have you employed?**
- 10.1. Number
 - 10.2. Don't know -> Bands
11. [if Q9 = jobs increased] **How many of these new people are still employed today?**
- 11.1. All (100%)
 - 11.2. Most (51% – 99%)
 - 11.3. Some (25% - 50%)
 - 11.4. Few (1% - 24%)
 - 11.5. None (0%)
 - 11.6. Don't know
12. [if Q9 = jobs increased] **How many of the new people still employed today are paid at or above the real living wage (£9.90 per hour)?**
- 12.1.1. All (100%)
 - 12.1.2. Most (51% – 99%)
 - 12.1.3. Some (25% - 50%)
 - 12.1.4. Few (1% - 24%)
 - 12.1.5. None (0%)
 - 12.1.6. Don't know
13. [if Q9 = jobs increased] **To the best of your knowledge, were the majority of the new employees recruited from the local area (i.e., living within a reasonable travelling distance to work) ?**
- 13.1. Yes
 - 13.2. No

- 13.3. Don't know
14. **[if Q13=No] Where were most of these new employees recruited from?**
- 14.1. Rest of Scotland
 - 14.2. Rest of UK
 - 14.3. Outside of UK
 - 14.4. Don't know
15. **[if Q9 = Jobs safeguarded] How many existing jobs were safeguarded as a result of the support?**
- 15.1. Number
 - 15.2. Don't know -> bands
16. **How many people on these safeguarded jobs are paid at or above the real living wage (£9.90 per hour)?**
- 16.1.1. All (100%)
 - 16.1.2. Most (51% – 99%)
 - 16.1.3. Some (25% - 50%)
 - 16.1.4. Few (1% - 24%)
 - 16.1.5. None (0%)
 - 16.1.6. Don't know
17. **[if Q9 jobs safeguarded] To the best of your knowledge, were the majority of safeguarded jobs filled by people recruited from the local area (i.e., living within a reasonable travelling distance to work)?**
- 17.1. Yes
 - 17.2. No
 - 17.3. Don't know
18. **As a result of the support in 2018-21, do you anticipate the number of people employed by the company in Scotland to increase over the next three years?**
- 18.1. Yes
 - 18.2. No
 - 18.3. Don't know
19. **[if Q18 = Yes] By how many more over the next three years?**
- 19.1. 1-4 employees
 - 19.2. 5-9
 - 19.3. 10-19
 - 19.4. 20-49
 - 19.5. 50-99
 - 19.6. 100-199
 - 19.7. 200-249
 - 19.8. 250-499
 - 19.9. 500 or more
 - 19.10. Don't know

20. **What other benefits, if any, has the support in 2018-21 provided?**

21. **Overall, in the period 2018-21 has the company started to export to any new countries?**

21.1. Yes

21.2. No

21.3. N/A – was not interested in exporting to new countries

21.4. Don't know

22. [if Q21 = Yes] **Which ones? (Tick all that apply)**

22.1. {List of top 15 exporting countries as per ATN

22.2. Other (please specify):

Outcomes x Support

1. [New or Expansion projects only] **Were any of the following support activities useful in helping you to deliver your supported new/expansion project?**

	Yes	No
1.1. Guidance on other sources of public or private sector finance		
1.2. Market intelligence		
1.3. Labour market information		
1.4. Signposting to existing training (e.g., apprenticeships, further/higher education)		
1.5. Signposting to supply chain partners		
1.6. Signposting to specialist advice (e.g., recruitment agencies, industry bodies, industry networks)		
1.7. Signposting to financial assistance (e.g., Regional Selective Assistance (RSA), R&D grants and tax credits, Training Plus)		
1.8. Financial support (e.g., Grant, Loan, Investment, Intervention Frameworks, Property or Skills/Training support)		
1.9. Project support & consultation		
1.10. Organised visit to Scotland (physical or virtual)		
1.11. Property/site search or appraisal		
1.12. Event / Activity promoting Scotland		
1.13. Other (please specify):		

2. [if Q1 = multiple Useful] **And which one was the most useful in helping you to deliver your supported new / expansion project?**

2.1. { List of Useful selections }

2.2. Don't know

3. [if C - Q5=Not as much] **Were any of the following support activities useful in helping you to invest as much as you did?**

	Yes	No
3.1. Guidance on other sources of public or private sector finance		
3.2. Market intelligence		
3.3.		
3.4. ...		
3.5.		
3.6.		
3.7.		
3.8.		
3.9.		
3.10.		

4. [if Q3 = multiple Useful] **And which one was the most useful in helping you to invest as much as you did?**

4.1. { List of Useful selections }

4.2. Don't know

5. [if multiple projects AND C - Q7=not] **Were any of the following support activities useful in helping you to invest in as many projects as you did?**

	Yes	No
5.1. Guidance on other sources of public or private sector finance		
5.2. Market intelligence		
5.3.		
5.4.		
5.5.		
5.6.		
5.7.		
5.8.		
5.9.		
5.10.		

6. [if Q5 = multiple Useful] **And which one was the most useful in helping you to invest in as many projects as you did?**

6.1. { List of Useful selections }

6.2. Don't know

7. **Were any of the following support activities useful in helping you to increase the number of people employed or safeguarded within the company in Scotland?**

	Yes	No
7.1. Guidance on other sources of public or private sector finance		
7.2. Market intelligence		

7.3.		
7.4.		
7.5.		
7.6.		
7.7.		
7.8.		
7.9.		
7.10.		

8. [if Q7 = multiple Useful] **And which one was the most useful in helping you to increase the number of people employed or safeguarded within the company in Scotland?**
- 8.1. { List of Useful selections }
- 8.2. Don't know

Supply chains and spillovers

Suppliers

1. **Does the company in Scotland have any suppliers in Scotland?**
- 1.1. Yes
- 1.2. No [go to Q9]
- 1.3. Don't know [go to Q9]
2. **What share do the suppliers in Scotland make up of all suppliers to your company in Scotland ?**

2.1. %
2.2. Don't know -> bands

3. **Does your company in Scotland have suppliers in any of the following Scottish regions?**

	Yes	No	Don't know
3.1. Aberdeen City Region: Aberdeen City & Aberdeenshire			
3.2. Glasgow City Region: Glasgow City, North Lanarkshire, South Lanarkshire, East Dunbartonshire, West Dunbartonshire, Renfrewshire, East Renfrewshire, Inverclyde			
3.3. Edinburgh and South East Scotland City Region: Edinburgh, East Lothian, Mid Lothian, West Lothian			
3.4. Forth Valley Region: Stirling, Clackmannanshire & Falkirk			
3.5. Tay Cities Region: Dundee, Angus, Perth & Kinross, Fife			

3.6. Highlands and Islands: Highland, Moray, Argyll & Bute [not Helensburgh or Lomond but incl. Arran], Na h-Eileanan Siar, Shetland Islands & Orkney Islands			
3.7. Ayrshires: East Ayrshire, North Ayrshire & South Ayrshire			
3.8. South of Scotland: Scottish Borders & Dumfries & Galloway			

4. **As a result of the support, has the company in Scotland started buying and/or started buying more from Scottish suppliers?**

- 4.1. Yes, started buying
- 4.2. Yes, started buying more
- 4.3. Yes, both
- 4.4. No
- 4.5. Don't know

5. **Does the company in Scotland buy the following products from Scottish supplier(s)?**

	Yes	No
Raw materials (e.g., copper, oil, grain)		
Intermediate goods (used as parts to produce other goods , e.g., car parts)		
Capital goods (used in the production, e.g., machinery, tools, equipment)		
Consumer goods (end-use products e.g., whiskey, laptops)		
Services		

6. **What proportion of all goods and /or services are supplied by the Scottish suppliers to the company?**

{display based on product type bought}	%
Goods	
Services	
Don't know	

7. **In the period of 2018-2021 did any knowledge /expertise transfer activities occur between your company in Scotland and any of your Scottish suppliers?**

- 7.1. Yes
- 7.2. No
- 7.3. Don't know

8. [if Q7 = Yes] **What was the outcome of this knowledge transfer?**

- 8.1. Reduced product cost
- 8.2. Improved product quality
- 8.3. Both

8.4. Other (please specify):

8.5. Don't know

Customers

9. **Does the company in Scotland sell any of its product(s) (goods and/or services) to the Scottish market?**

9.1. Yes

9.2. No [go to universities]

9.3. Don't know [go to universities]

10. **Does your company in Scotland sell to any of the following Scottish regions?**

	Yes	No	Don't know
4.1. Aberdeen City Region: Aberdeen City & Aberdeenshire			
4.2. Glasgow City Region: Glasgow City, North Lanarkshire, South Lanarkshire, East Dunbartonshire, West Dunbartonshire, Renfrewshire, East Renfrewshire, Inverclyde			
4.3. Edinburgh and South East Scotland City Region: Edinburgh, East Lothian, Mid Lothian, West Lothian			
4.4. Forth Valley Region: Stirling, Clackmannanshire & Falkirk			
4.5. Tay Cities Region: Dundee, Angus, Perth & Kinross, Fife			
4.6. Highlands and Islands: Highland, Moray, Argyll & Bute [not Helensburgh or Lomond but incl. Arran], Na h-Eileanan Siar, Shetland Islands & Orkney Islands			
4.7. Ayrshires: East Ayrshire, North Ayrshire & South Ayrshire			
4.8. South of Scotland: Scottish Borders & Dumfries & Galloway			

11. [customised based on section A – only display if more than 1 category] **Does the company in Scotland sell any of the following products in the Scottish market?**

	Yes	No
Raw materials (e.g., copper, oil, grain)?		
Intermediate goods (used as parts to produce other goods, e.g., car parts)		
Capital goods (used in the production, e.g., machinery, tools, equipment)		
Consumer goods (end-use product e.g., whiskey, laptops)		

Services		
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12. **What proportion do the goods/and or services sold to the Scottish market comprise of total sales of goods and /or services sold?**

{display based on product type sold}	%
Goods	
Services	
Don't know	

13. **As a result of the support in 2018-2021, did any knowledge /expertise transfer activities occur between your company in Scotland and any of your Scottish business customers?**

- 13.1. Yes
- 13.2. No
- 13.3. N/A – do not sell to Scottish businesses
- 13.4. Don't know

14. [if Q13 = Yes] **What was the outcome of this knowledge transfer?**

- 14.1. Better management processes
- 14.2. New products and/or services
- 14.3. Both
- 14.4. Other (please specify):
- 14.5. Don't know

15. **In the Scottish markets that you sell to, did you...**

	Yes	No	Don't know
Reduce product cost?			
Increase product variety?			
Improve product quality?			
Introduce new products?			
Introduce new processes and/or improve existing processes?			
Make local businesses more productive?			
Have other impact (please specify)?			

Universities

16. **As a result of the support in 2018-21, have you developed any partnerships or relationships with any of Scotland's universities and/or colleges?**

- 16.1. Yes
- 16.2. No [move to other business]
- 16.3. Don't know [move to other business]

17. [if Q16 - YES] **Which one(s)? open text**

18. [if Q16 - YES] **What benefit does this partnership / relationship bring? (Tick all that apply)**
- 18.1. Business product innovation
 - 18.2. Business process innovation
 - 18.3. R&D
 - 18.4. Research study or studies
 - 18.5. Other please specify):

Other businesses

19. **As a result of the support in 2018-21 and aside from the buyer/supplier relationship (i.e., transactional), have you developed any partnerships with other Scottish businesses?**
- 19.1. Yes
 - 19.2. No
 - 19.3. Don't know

20. [if Q19 = Yes] **What benefit does this partnership bring?**

Investment Decision in Scotland [not displayed to Safeguarding projects]

1. **For the investment during the period of 2018 - 2021, were you considering the option of investing elsewhere instead of Scotland?**
- 1.1. Yes
 - 1.2. No [go to Q5]
 - 1.3. Don't know [go to Q5]
2. [if Q1=Yes] **Were you considering investment into another part of the UK, another country or both?**
- 2.1. Another part of the UK
 - 2.2. Another country
 - 2.3. Both
3. [if Q2= UK] **Which UK nation or region were you looking to invest in instead of Scotland? (Tick all that apply)**
- 3.1. List of other UK nations and regions
4. [if Q2= Country] **Which country or countries were you looking to invest in instead of Scotland?**
5. **For this investment project during the period of 2018 - 2021, were you looking to invest into another region within Scotland instead of the one you invested in?**
- 5.1. Yes
 - 5.2. No
 - 5.3. Don't know
6. [if Q6 = Yes] **Which one(s)? (Tick all that apply)**

- 6.1. **Aberdeen City Region:** Aberdeen City & Aberdeenshire
- 6.2. **Glasgow City Region:** Glasgow City, North Lanarkshire, South Lanarkshire, East Dunbartonshire, West Dunbartonshire, Renfrewshire, East Renfrewshire, Inverclyde
- 6.3. **Edinburgh and South East Scotland City Region:** Edinburgh, East Lothian, Mid Lothian, West Lothian
- 6.4. **Forth Valley Region:** Stirling, Clackmannanshire & Falkirk
- 6.5. **Tay Cities Region:** Dundee, Angus, Perth & Kinross, Fife
- 6.6. **Highlands and Islands:** Highland, Moray, Argyll & Bute [not Helensburgh or Lomond but incl. Arran], Na h-Eileanan Siar, Shetland Islands & Orkney Islands
- 6.7. **Ayrshires:** East Ayrshire, North Ayrshire & South Ayrshire
- 6.8. **South of Scotland:** Scottish Borders & Dumfries & Galloway
- 6.9. Don't know

7. **Were the following factors important to your decision to invest in Scotland in the period of 2018-2021?**

{ order of options to be randomised }	Yes	No
7.1. Access to finance		
7.2. Business environment		
7.3. Domestic market potential		
7.4. Scottish Government support		
7.5. ICT infrastructure		
7.6. Industry clustering		
7.7. Language		
7.8. Lower costs		
7.9. Market access		
7.10. Natural resources		
7.11. Real Estate availability		
7.12. Skilled workforce availability		
7.13. Social/personal connections		
7.14. Supply chain		
7.15. Taxation		
7.16. Technology & innovation		
7.17. Transport & utility infrastructure		
7.18. Universities or researchers		
7.19. Skills support		
7.20. Other (please specify):		

8. [if Q7 = multiple factors important] **And which of these important factors was the most important?**

- 8.1. {Choose a factor}
- 8.2. Don't know

9. **Would the following factors incentivise you to invest in Scotland again?**

{ order of options to be randomised }	Yes	No

9.1. Grants/ subsidies		
9.2. Job creation tax credits		
9.3. Loan / credit		
9.4. Tax holiday		
9.5. Tax refund / rebate		
9.6. Other financial incentives (please specify):		
9.7. Non-financial incentives (please specify):		

10. [if Q9 = multiple factors incentivise] **And which of these factors would incentivise you the most?**

- 10.1. {Choose a factor}
- 10.2. Don't know

Process

- 1. **How do you rate your satisfaction with the way the support was delivered on a scale from 0 (extremely dissatisfied) to 10 (extremely satisfied)?**
 - 1.1. Scale 0 - 10
- 2. [if < 8] **What could have been improved?**
- 3. **Is there any other type of support you wish you would have received that would have been useful in helping you to deliver your project(s)?**

External Factors

1. **How did the following factors affect your investment project in 2018-2021, if at all?**

	Positively	Negatively	Did not affect	Not sure
1.1. The coronavirus (COVID-19) pandemic				
1.2. End of the EU-exit transition period (31 Dec 2020)				
1.3. Other factor(s) (please specify):				

- 2. [if Q1 = Positive] **Overall, how did these factors ({selected choices}) positively affect your investment project? Did they help you to:**
 - 2.1. Increase the number of people employed?
 - 2.2. Deliver the investment project sooner?
 - 2.3. Both?
 - 2.4. Other (please specify):
- 3. [if Q1 = Negative] **Overall, how did these factors ({selected choices}) negatively affect your investment project? Did they:**
 - 3.1. Decrease the number of people employed?

3.2. Result in delays to the investment project?

3.3. Both?

3.4. Other (please specify):

4. [if Q1 = Negative] **How useful, if at all, was the support you received from delivery partners in 2018-2021 in helping you to overcome these negative effects?**

4.1. Very useful

4.2. Fairly useful

4.3. Somewhat useful

4.4. A little useful

4.5. Not at all useful

Business characteristics

1. **What is the main activity of your Scottish business (i.e., business sector)?**

1.1. Agriculture, forestry, or hunting

1.2. Fishing

1.3. Mining & quarrying

1.4. Manufacturing

1.5. Electricity, gas & water supply

1.6. Construction

1.7. Wholesale, retail & certain repair

1.8. Hotels & restaurants

1.9. Transport, storage, or communication

1.10. Finance

1.11. Real estate, renting or business activities

1.12. Public administration & defence

1.13. Education

1.14. Health & social work

1.15. Community, social & personal services

1.16. Other (please specify):

2. **How many sites or premises does your company have in Scotland?**

2.1. Number

2.2. Don't know -> bands

2.3. Prefer not to say

3. [if A Q8 not equal to "there is no company group"] **And does your company group have sites or premises in the following areas?**

	Yes	No	Don't know
Rest of UK			
EMEA (Europe, the Middle East, Africa)			
Americas			
Asia Pacific			

4. **What is the role of your global business in the global value chain (GVC) (i.e., when different stages of the production process are located across different countries)? Are you a:**
 - 4.1. Lead firm in the global value chains
 - 4.2. GVC partner (not lead firm) – B2B (business to business)
 - 4.3. GVC partner (not lead firm) – B2C (business to consumer)
 - 4.4. GVC partner (not lead firm) – B2G (business to government)
 - 4.5. Other (please specify):
 - 4.6. Don't know
 - 4.7. Prefer not to say

Outro

1. **Would you be willing to take part in potential future Scottish Government/ delivery partner research on this topic (e.g., short interview, follow-up survey)?**
 - 1.1. Yes
 - 1.2. No
2. **Would you be happy for us to link the data you provided with other government surveys or datasets to enable further confidential statistical analysis?**
 - 2.1. Yes
 - 2.2. No

Appendix 2

Beneficiary Qualitative Interview Guide

1. Can we start with you telling me what your company does? How does your Scottish company fit with what your global company does?
2. Thinking back to before you received delivery partner support, how did you come to consider Scotland for the investment? [based on survey responses] Why did you to decide to invest in Scotland instead of another country/region in UK?
3. What were the key objectives of your investment project?
4. [Based on database info & survey responses, validate support received] Why did you seek to access the delivery partner support?
5. Aside from the delivery partners, did you receive support from other public sources for this investment project? [IF YES] From where? What impact, if any, did this support have on your investment project / on your job safeguarding [as applies]?
6. How relevant was the support to your investment project?
7. What do you think of the quality of the support provided?
8. [if multiple support activities] How did different support activities work together, if at all (clarify if needed: did they complement or hinder each other, or did not interact at all)? Why?
9. How did the support help you, if at all, to achieve your investment objectives? [if multiple activities] Which support activity was the most useful? Why?
10. [based on comparison between planned jobs and achieved jobs as per survey] A. Comparing the jobs you planned to achieve with the ones you reported achieving, the number is [higher / lower] - what are the reasons for this difference? [N/A if the comparison is the same] B. [based on survey response on future job creation] How will the support help you to create jobs in the future? / Why do you anticipate that you won't be able to create jobs in the future?
11. If you had not received the support, what do you think would have happened to your investment project [if new/expansion] or the company in Scotland [if safeguarding]? Why?
12. You mentioned that [survey response] would have been useful in helping your project - not having this support, how did it affect your investment project?

<p>13. Since receiving the support, has your firm in Scotland had impact on any of the following stakeholders: suppliers, competitors, Government (national and/or local), business networks and organisations, or other?</p> <ul style="list-style-type: none"> - [if YES] Which companies/organisations specifically? [go through by each group if needed] - How did this impact happen? [prompt as needed: through what channels, what did you do?] - Did the delivery partner support contribute to bringing about this impact, if at all, and how?
<p>14. A. [Yes to partnerships / knowledge transfer] You mentioned the partnerships between your company and [reference survey response] – how did the delivery partner support help you to develop them? What other impacts [to those already mentioned] these partnerships bring or will bring?</p> <p>B. [No to partnerships / knowledge transfer] Do you expect to develop any partnerships or engage in knowledge/expertise transfer as a result of the delivery partner support in the future? Why yes, why not? [if yes] What impact do you expect them to have on your company?</p>
<p>15. Since receiving the delivery partner support, did your company in Scotland receive further new external investment from other financial organisations? [If YES] Did the delivery partner support contribute to receiving this investment at all? [If YES] To what extent and how?</p>
<p>16. Generally speaking, what do you think will happen to your Scottish company in the near future? How can SG and/or delivery partners support you with this, if at all?</p>
<p>17. Would you invest in Scotland again? Why yes, why not? [if YES] How do you think SG and/or delivery partners could support you with this investment?</p>
<p>18. This is the end of the interview, is there anything else you'd like to add or anything to ask me?</p>