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Scottish Technology Industry Survey 2007

Acknowledgements

ScotlandIS would like to thank everyone who took part in the survey, providing a measure of the industry's health at the beginning of 2007.

This report analyses the survey data regarding industry dynamics, business confidence, growth markets, and employment and skills factors.

The value of the ICT sector to the Scottish economy cannot be overstated. It is extremely important in its own right, and underpins innovation, competitiveness and service throughout the Scottish economy. Software and ICT services employ more than 48,000 people in Scotland; approximately 25,000 are employed directly in the supply side of the industry, and the balance undertake ICT functions within other industries.

There are more than one thousand Scottish based businesses supplying software, telecomms and IT services, at home and abroad, from world class solutions for major corporations to specialist products enabling smaller businesses to improve productivity and reach global markets.

It is therefore very encouraging to see that respondents to this survey reflect continuing confidence in the business environment and predict considerable growth for the year to come.

The annual Scottish technology industry survey provides valuable industry insights, including a view of trends. It also raises issues which companies need to be aware of in developing their strategies for 2007 and beyond.

I would like to thank Ogam Marketing Limited for undertaking the survey and analysis on our behalf, ensuring its independence. Particular thanks go to 9-20 recruitment for sponsoring the survey and the production of this report.

I very much hope you find the report useful. Please do contact us if you have any questions or would like further information.

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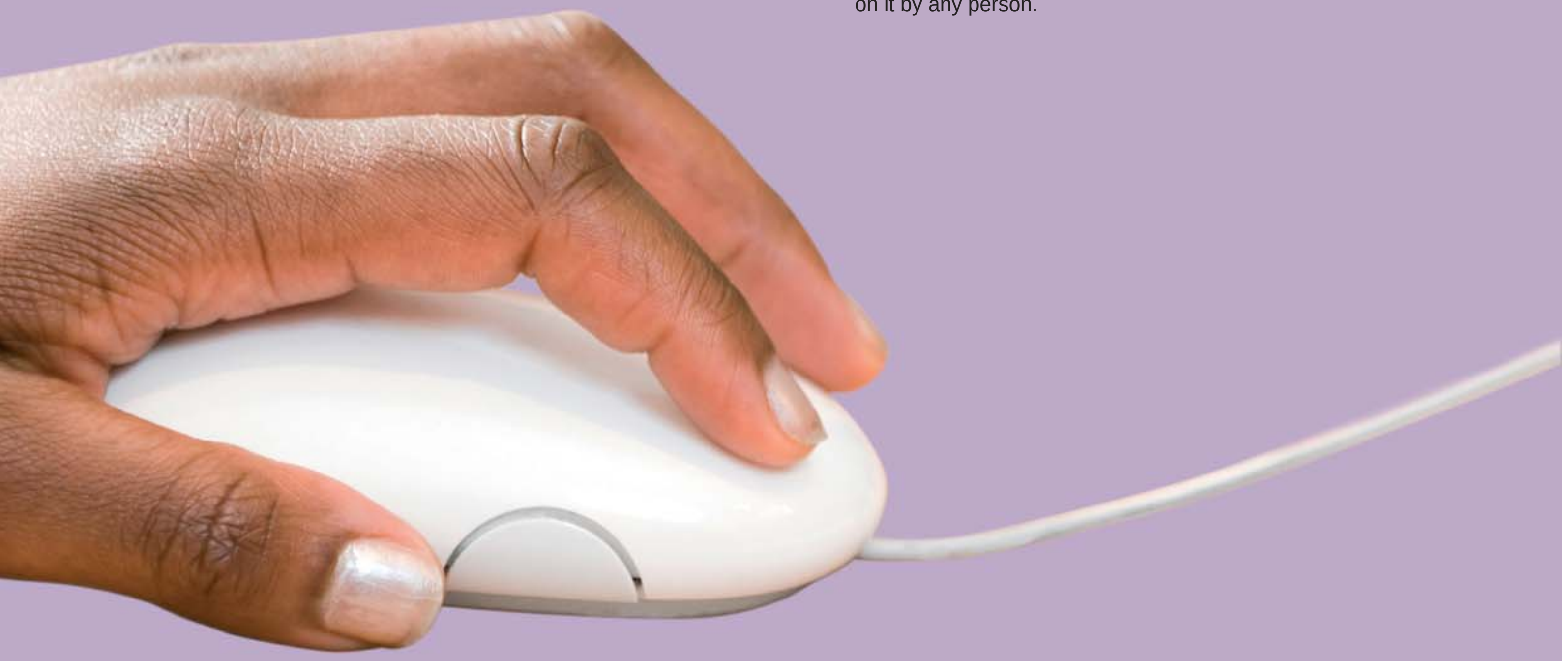

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Executive summary

This is the second annual survey of the Scottish technology sector commissioned by ScotlandIS. It was completed in February 2007[1].

[2]The majority of respondents are small companies (up to 65 employees) though a significant proportion are medium-sized and large organisations.

Respondents were asked to record their predictions for growth in 2007, how they planned to resource any growth, what constraints they anticipated, if any, and to answer specific questions around their remuneration policies, both financial and non financial.

Business trends

Overall the results reflect a buoyant industry with a high degree of business confidence for 2007 with:

- 90% of respondents predicting growth
- 40% of these forecasting growth of at least 20%

New business is expected to come from a wide range of sectors; however as in 2006, energy and utilities, financial services, professional services and the public sector are identified as providing the greatest opportunities. Given the predominance of these sectors in Scotland this is not surprising, but the results suggest that respondents are also concentrating on these sectors when selling to the rest of the UK.

Staffing

To underpin this growth most companies expect their staff numbers to increase. Predictions on headcount are very similar across 2006 and 2007; last year 79% of respondents predicted an increase in employee numbers, compared with 75% in 2007. The view of respondents is that headcount will need to grow by an average of 10% this year to support the expected increase in sales turnover.

In such a competitive employment market reliance on contractors is increasing, with 70% of respondents citing use of contractors compared with just 52% last year.

Interestingly the greatest expectation around headcount growth comes from the medium and very large organisations.

Skills

The areas of greatest demand for skills are expected to be:

- bespoke software development
- systems integration
- project management and planning
- sales and marketing

Respondents are cautious, however, about where they will find the appropriate skills in these areas.

Constraints

Significantly the technology job market in Scotland appears to be more competitive than last year, with 58% of respondents citing access to suitably qualified candidates as the factor most likely to hold back their growth. In 2006 the most commonly cited constraint to growth was access to target markets (47% of respondents).

Almost half of respondents this year say that access to finance is not currently an issue, and 15% said they were not aware of any constraints to growth.

Summary

All in all the report indicates a very positive outlook for 2007 for the Scottish ICT industry, but with an increasing issue around the availability of skills.

[1] The survey was commissioned by ScotlandIS in partnership with 9-20 recruitment and independently produced by Ogam Marketing

[2] Small = 1–65 employees, Medium = 66–200 employees, Large = 201–1000 employees, Very large = 1000+ employees

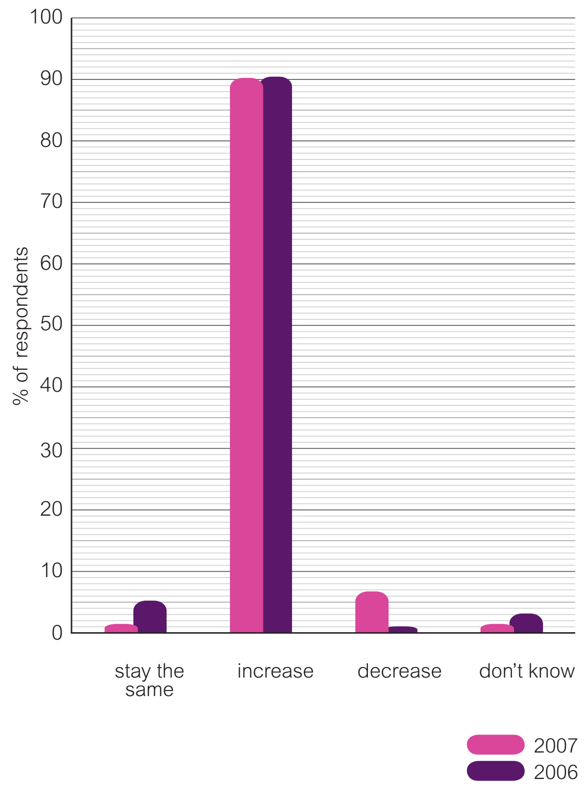
Comparisons with 2006

There are number of similarities between the data generated from this survey in 2006 and that derived in 2007.

For the second consecutive year predictions for growth are extremely positive. That said, 2007 estimates are slightly more conservative with two fifths predicting 20% or higher sales growth in 2007 compared with half of all respondents in 2006.

When you plot the sales growth forecasts for 2007 versus 2006, the results are strikingly similar, except that a slightly higher proportion of respondents predict a decrease in sales growth this year (7% in 2007 versus 1% in 2006).

Sales growth forecasts 2007 versus 2006



As in 2006, respondents consider a range of markets provide growth opportunities.

To underpin this growth most companies predict an increase in headcount.

Predicted growth in headcount is consistent across both years; last year 79% of respondents predicted an increase in employee numbers compared with 75% in 2007.

Once again project management and lead generation skills are in high demand, however there is less demand for business analysis skills in 2007 compared with 2006.

The most significant change over the two years, is the perception of what is most likely to constrain growth. In 2006 access to target markets was seen as a major challenge, cited as a constraint by 47% of respondents, but in 2007 58% of respondents have the view that access to suitably-qualified local staff will be most likely to hold them back. This may well be the sign of an increasingly competitive marketplace for talent in Scotland.

Many technology companies use contractors, often as a flexible short-term staffing solution where projects are for a fixed period or permanent skills are scarce. However it seems that the sector's reliance on contractors may be increasing, understandably so in such a tight market; last year only 52% said they used contractors versus 70% this year.

Salaries for Scottish technology jobs remain below the UK averages (source: Itjobswatch.co.uk), however there are clear signs that this differential may be shrinking (see Employment market viewpoint) and it will be interesting to see if this trend is borne out in next year's survey.

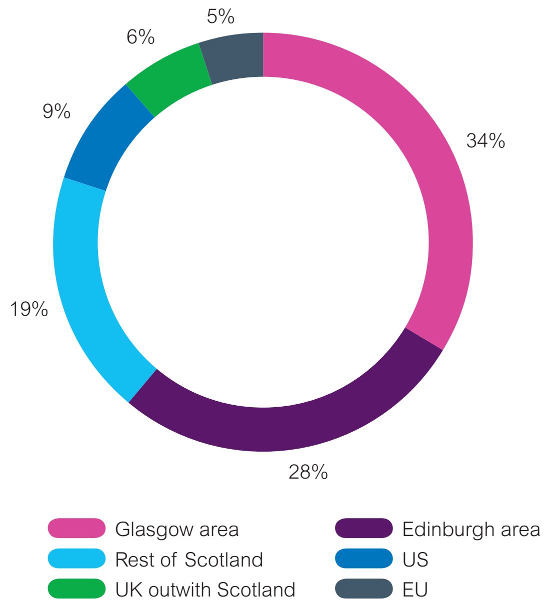
1 About the sample

Respondents provided information about themselves which included the location of their company headquarters; company size; year of formation; source of capital; and type of work undertaken within the sector.

1.1 Company headquarters

The majority of our respondent companies (80%) have their headquarters in Scotland, with concentrations centred around Edinburgh (28%) and Glasgow (34%). A full breakdown of the locations of our respondent companies' headquarters is shown here:

Location of headquarters

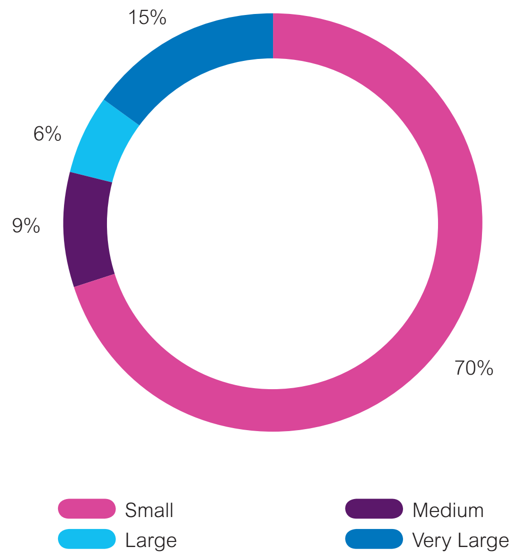


1.2 Company size

The majority (70%) of our sample were small companies, and a significant proportion (21%) were large or very large organisations. Almost half of our sample (42%) comprised companies with 10 employees or less.

The split of our sample by company size is displayed here:

Company size

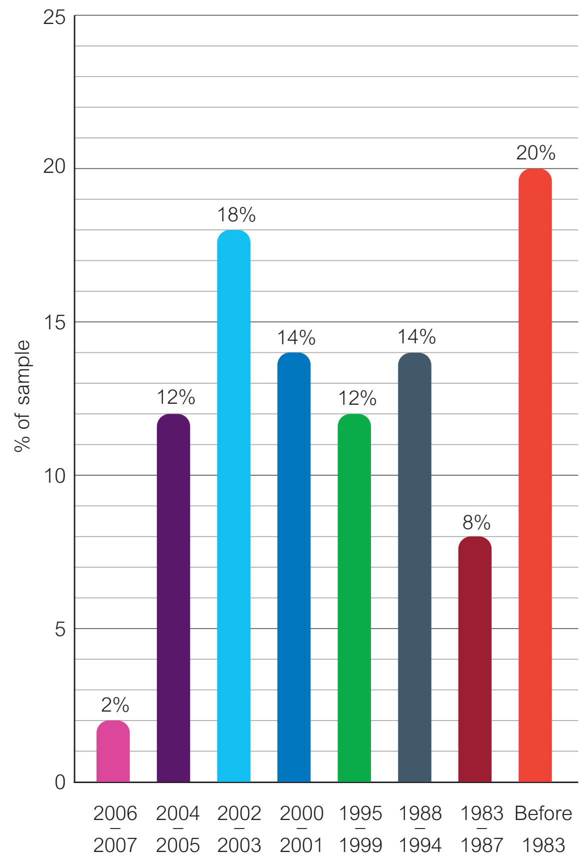


1.3 Year company was formed

The ages of the organisations in our sample ranged from start-ups to well-established organisations of more than 20 years.

A full breakdown of sample company ages is given here:

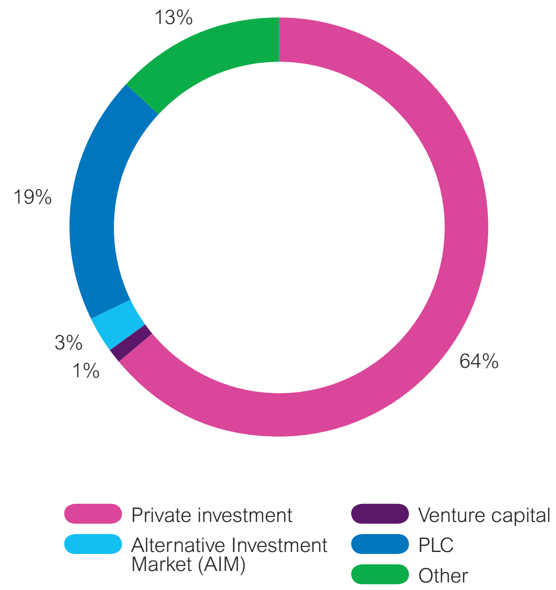
Year company was formed



1.4 Sources of capital

The majority of our respondents are privately-owned and financed. A breakdown of capital sources for our sample companies is shown here:

Sources of capital



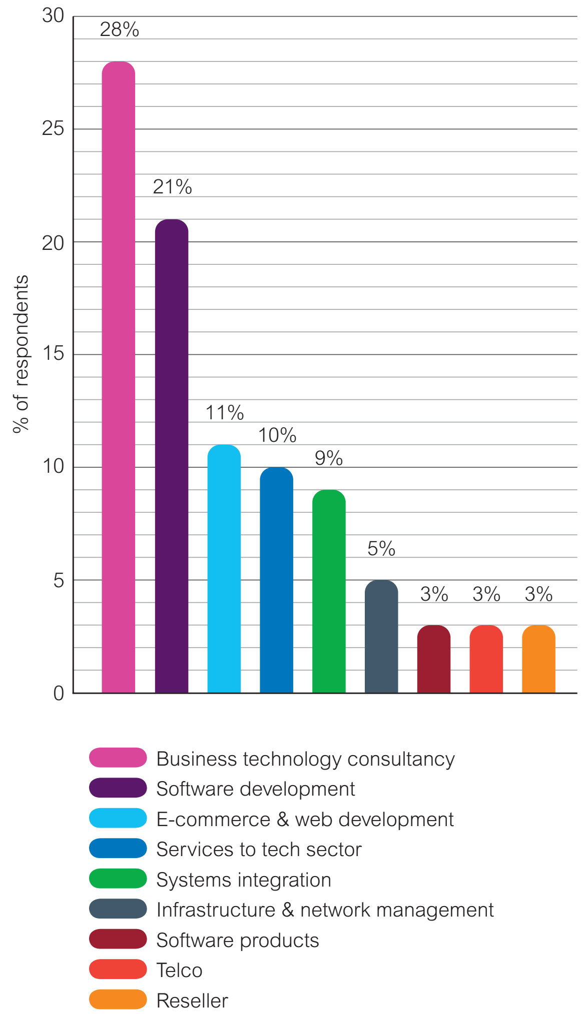
1.5 Specialism

The majority of our sample operates across four main specialisms:

1 Business technology consultancy
2 Software development
3 E-commerce and web development
4 Systems integration

The main specialisms of the majority of respondents are shown here:

Main area of business



1.6 Core business

More than half of respondents (55%) say their core business currently lies with large organisations, however most are aiming to broaden their customer base in the future (see Section 2. Growth predictions).

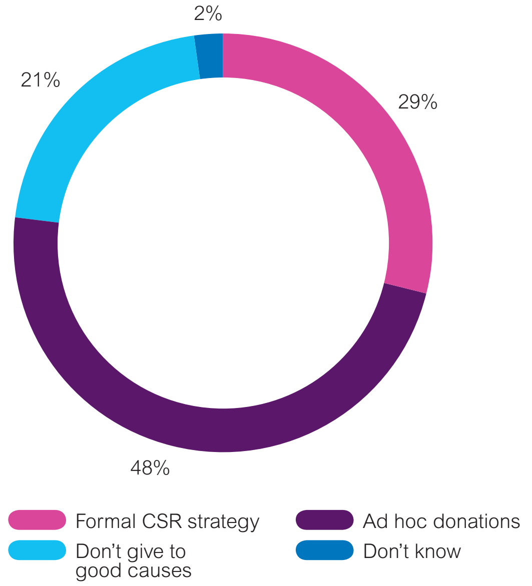
1.7 Organisational culture

The survey paints a picture of a relaxed and flexible organisational culture amongst Scottish technology companies, with the majority operating a dress down policy (67%), and allowing working from home (64%), and flexitime (41%). These benefits are actively used to attract and retain staff (see Section 7. Recruitment and Retention for all benefits offered by Scottish technology companies).

1.8 Corporate social responsibility

Respondents were asked to comment on their company's policy on corporate social responsibility; approximately 30% of respondents have a formal policy with a further 48% giving to charity on an ad hoc basis.

Corporate social responsibility of respondents



1.9 Representativeness of sample

The sizes and types of companies who responded to this survey are similar to those in the technology sector as a whole, therefore our sample is broadly representative.

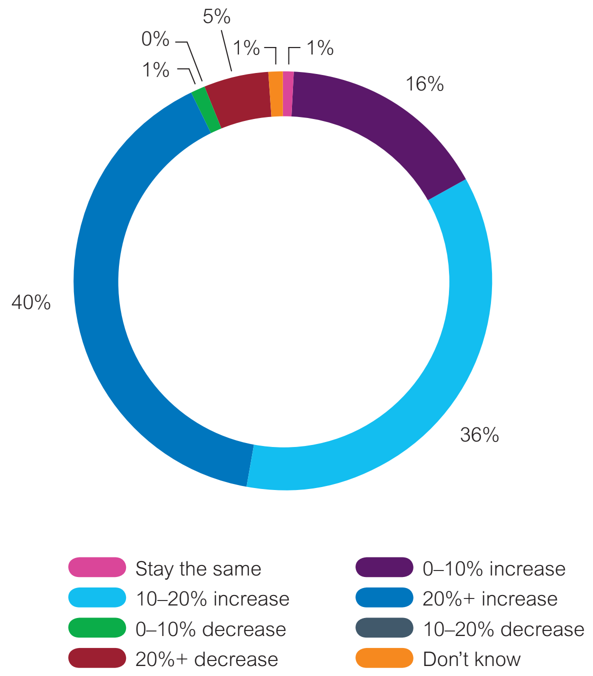
2 Growth predictions

The outlook for business growth in the Scottish technology sector, according to our sample, is extremely positive, though forecasts are slightly more conservative than this time last year with:

- 90% of all respondents predicting sales growth during 2007
- 75% predicting at least 10% sales growth
- 40% predicting at least a 20% increase in sales during 2007

Respondents' answers are summarised here:

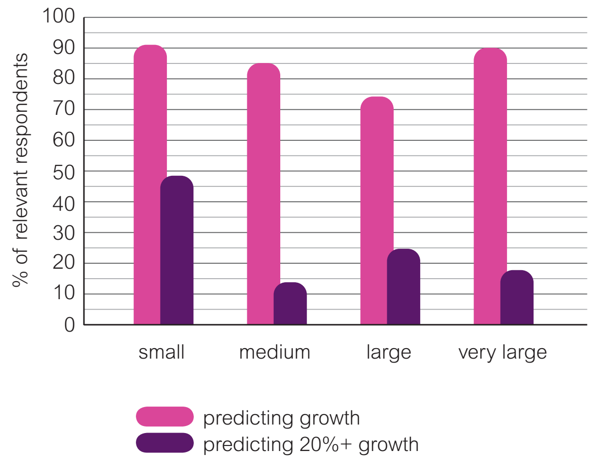
Predicted change in sales for 2007



2.1 Growth forecasts by company size

If we consider the sales forecasts for 2007 by company size, the results suggest that a higher level of optimism exists amongst small companies than in the other two groups, with 94% predicting growth of some kind against a response of 90% for the whole sample. A significantly higher proportion of the small companies in our sample predicted 20% or more growth compared with the other company size categories.

Sales growth forecasts by company size

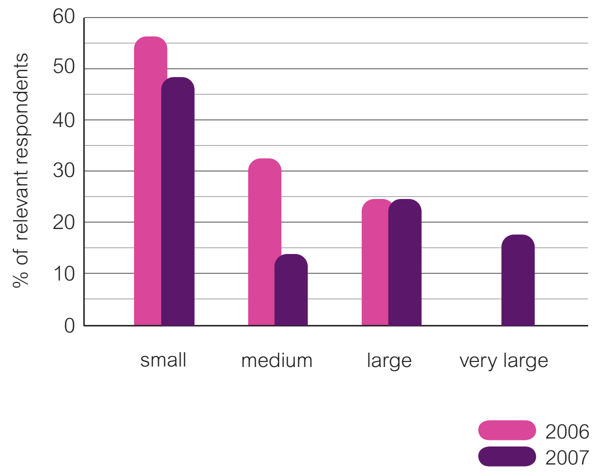


2.2 High (20%+) growth forecasts 2006 versus 2007

Further dissection of the data across the two years, specifically comparing the types of respondents who predicted 20%+ growth, is revealing.

The optimism demonstrated by smaller companies in 2006 continues in the 2007 survey, with many predicting 20%+ growth. The 2007 survey also reflects increasing optimism amongst the very large organisations with 18% predicting 20%+ growth, compared with none in the 2006 survey.

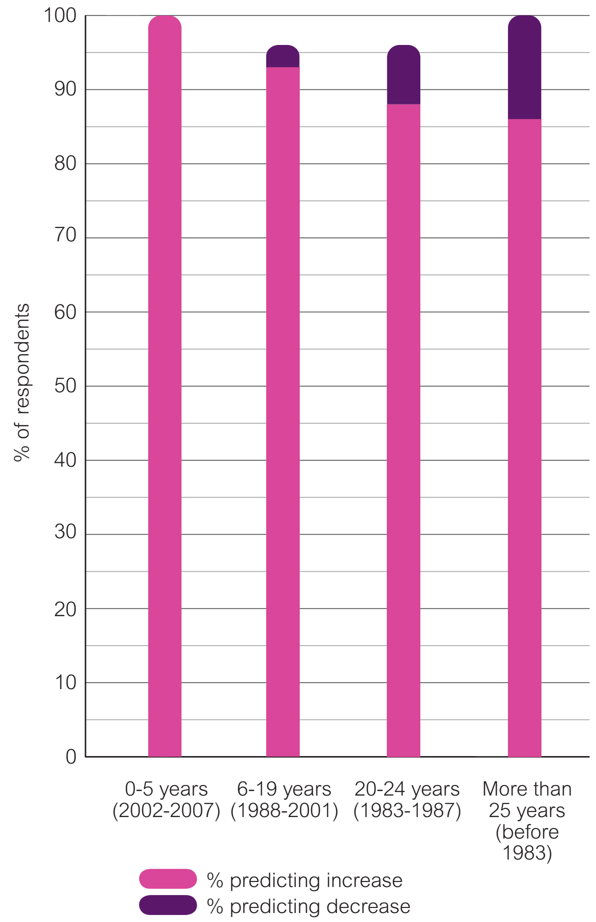
High growth predictions 2006 versus 2007



2.3 Growth forecasts by company age

If we consider the sales growth forecasts by company age, the youngest companies (0-5 years old) appear to be the most optimistic about growth for 2007, with all of them citing an expected increase.

Sales growth predictions by company age



2.4 Growth sectors

Respondents predict growth across all industry sectors, however energy and utilities, financial services, professional services and the public sector are all expected to be fruitful grounds for growth this year, with more than 80% of respondents predicting growth in this areas.

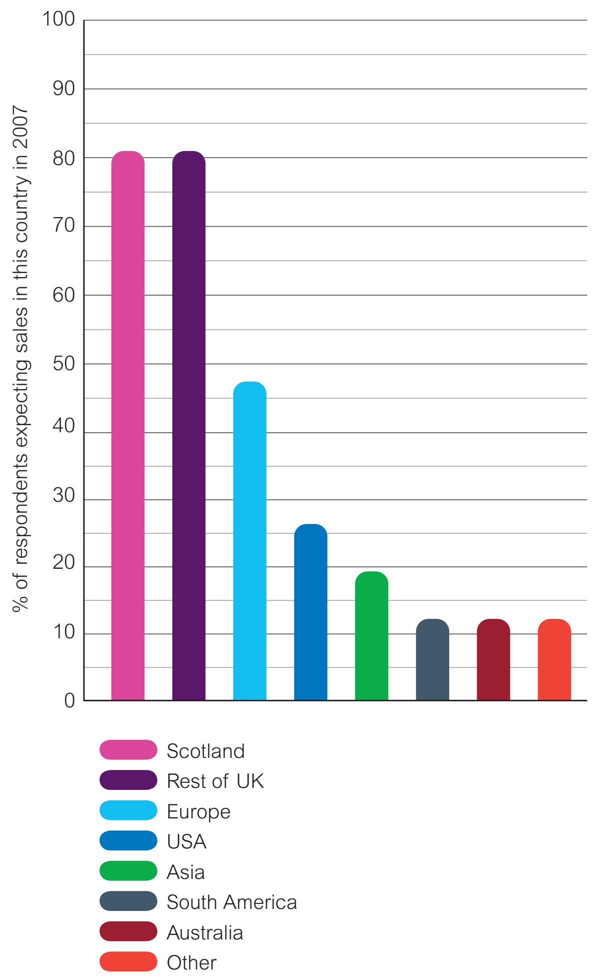
Less than 20% of respondents predicted a decrease in business with any one sector, however those considered most likely to offer fewer opportunities for growth were manufacturing and logistics and food and drink.

2.5 Growth forecasts by geography

Respondents were asked to predict in which geographies their 2007 sales would be. The chart of responses show that the vast majority do the greatest proportion of their business with Scotland and other parts of the UK.

What these results clearly show is the breadth of geographical markets that Scottish technology companies sell into, and that the first export market is the ‘rest of the UK’, with 80% of respondents selling south of the border. The European market is significant for our respondents, with more than 45% expecting to do business in Europe this year. Some 25% also do business with the USA.

Geographical split of sales by country



2.6 Target companies

Whilst 55% of respondents say their core business lies with very large organisations, most are aiming to broaden their customer base; 41% will target small companies in 2007, 62% medium-sized organisations and 60% large enterprises.

3 Resourcing growth

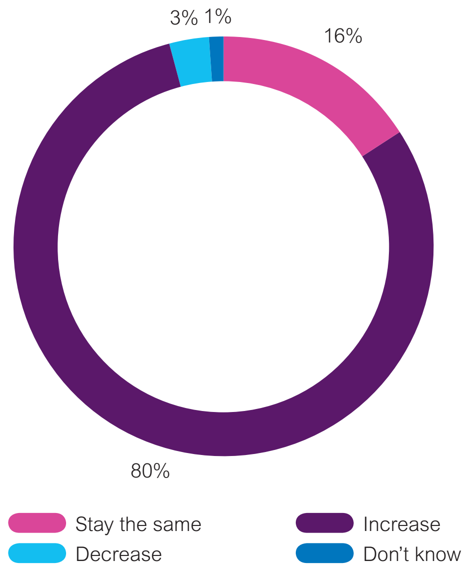
3.1 Headcount changes

Respondents were asked how they expected their employee numbers to change over the coming 12 months.

Almost 80% of respondents expect the number of permanent employees in their company to increase during 2007, and more than half (54%) expect it to increase by at least 10%. These predictions tie in with the positive outlook for sales growth, where 75% predicted at least 10% growth in turnover.

Only 2.8% of the sample predicted a decrease in headcount, another very positive indicator of sector health and optimism for the future.

Predicted change in headcount during 2007

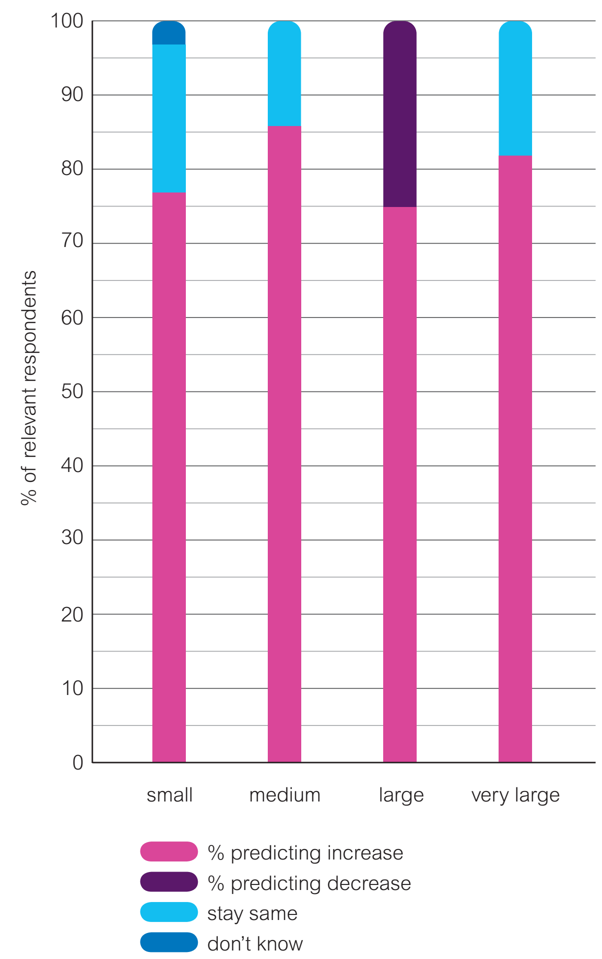


3.2 Headcount changes by company size

When we analyse the headcount change predictions by company size, we can see a similar pattern for small, medium and very large companies; more than three quarters predict a headcount increase for 2007.

Large companies (201-1000 employees) are slightly less optimistic, however, with one in four predicting a decrease in headcount this year.

Headcount change forecasts by company size

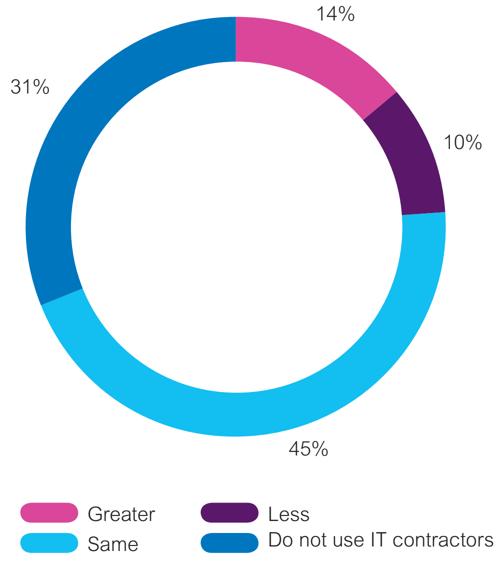


3.3 Use of contractors

Respondents were asked to estimate how their use of IT contractors will change, if at all, this year compared with the previous 12 months.

Of the 70% of respondents who use IT contractors, 67% expect to continue using them at the same level in 2007 as in the previous year and 20% expect to increase their use of contractors. A breakdown of responses to this question is given here:

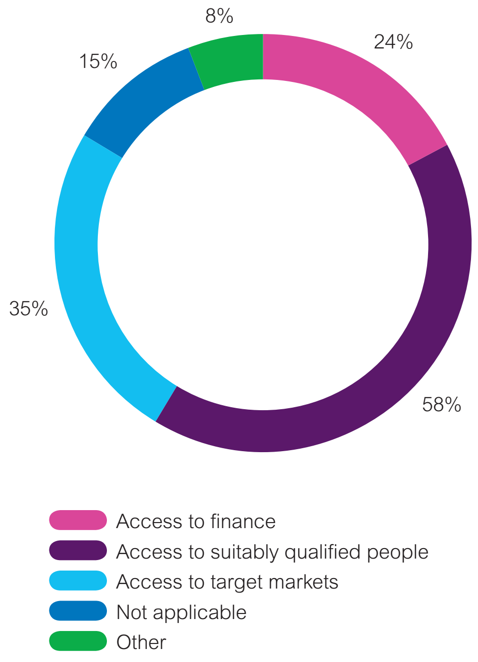
Predicted change in use of IT contractors in 2007



4 Constraints

Respondents were asked what they thought might constrain their growth this year, if anything. They cited that the biggest constraint would be **access to suitably-qualified people (58%)**, followed by access to target markets (35%) and then finance (24%):

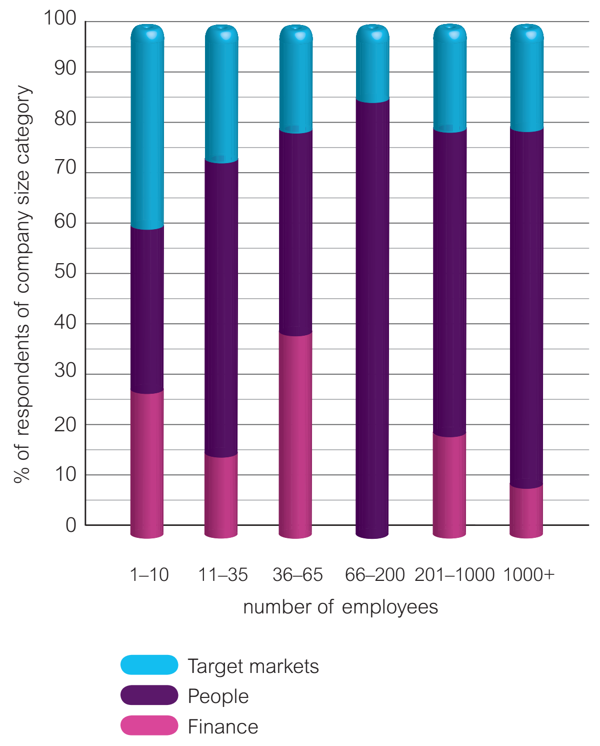
Perceived constraints to growth



Almost half (44%) of respondents say access to finance is not currently an issue for them, and 15% said they were not aware of any constraints to growth, an indication of the positive health of the Scottish technology sector.

The following graph gives a breakdown of the perceived constraints to growth by company size, and reveals that access to suitably-qualified people is a more significant issue for the larger organisations, and particularly critical for medium-sized organisations (66-200 employees). For the smallest companies (up to 65 employees), access to people, finance and target markets appear to be of equal concern.

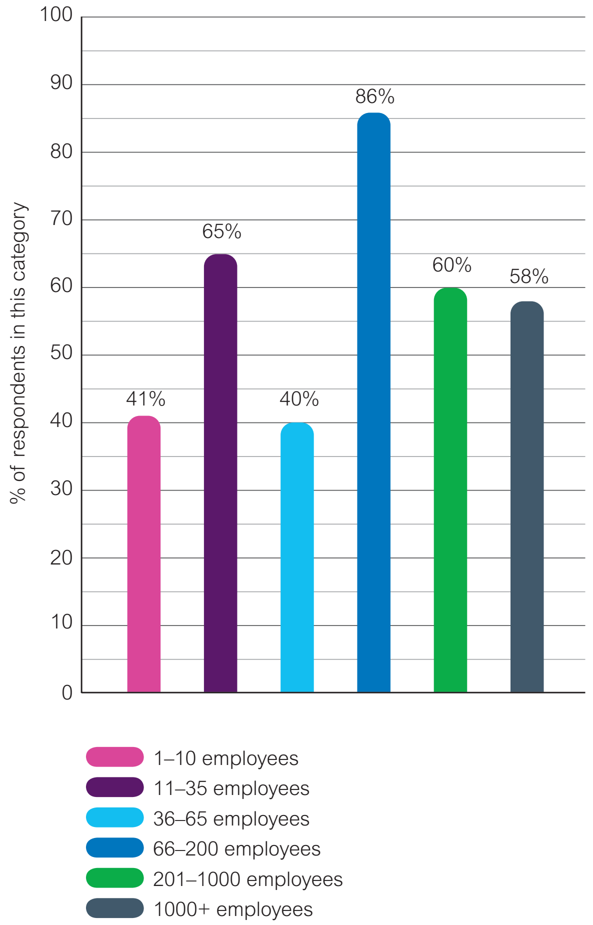
Perceived constraints to growth by company size



4.1 People constraints

58% of our sample cited access to suitably qualified staff as a constraint to sales growth, and an analysis of the types of companies giving this answer showed an ‘across the board’ view. The graph for this answer by company size indicates the breadth of this concern, which is particularly prevalent amongst medium-sized enterprises.

Access to suitably qualified people – % of sample who perceive this as a constraint to growth, split by company size



Respondents were also asked what they considered to be the main challenge to taking on new employees, and almost 60% said that access to suitably-qualified local candidates was likely to hold them back. Other constraints included employee retention, competition for staff and the cost of employment.

When looking for suitably-qualified candidates the main challenges appear not just to be around finding the right candidates, but being able to afford the salaries they command and then retaining them in a highly competitive technology marketplace.

This statement is backed by the fact that whilst 20% of our sample claimed not to have any trouble finding suitable candidates, a further 30% can find quality candidates but can’t afford to take them on, and 11% can’t retain staff because they are attracted by other companies.

Quality of local candidates is clearly an issue, however, with 16% of respondents saying they have trouble finding the right quality of candidate, and some saying they use contractors, freelancers or consultancies as an interim solution until they find the right permanent candidate.

What is clear is that Scottish technology companies are doing much to try and retain staff, with almost 60% offering greater than the statutory 20 days holiday, 54% offering a company pension, 43% a company bonus, 46% private healthcare and 40% a car or car allowance (see Section 7. Recruitment and retention for more information).

5 Demand areas

Respondents were asked which service or product areas they are currently experiencing the greatest demand for.

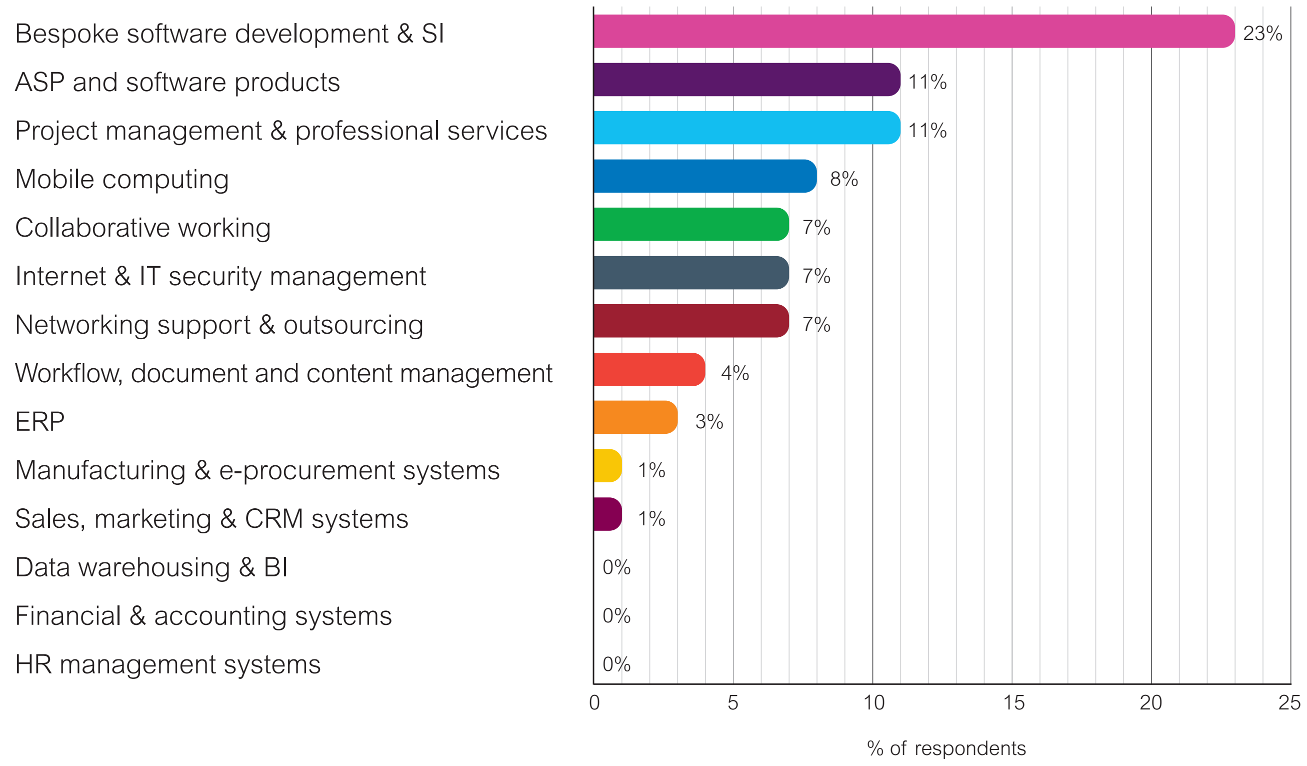
5.1 Business areas in demand

This survey found the greatest demand areas to be:

- Bespoke software development and systems integration (ranked first by 23% of sample)
- Project management and professional services (ranked first by 11% of sample)
- Application service provision and software products (ranked first by 11% of sample)

The chart below shows the breakdown of demand by product / service area:

Service / product in greatest demand



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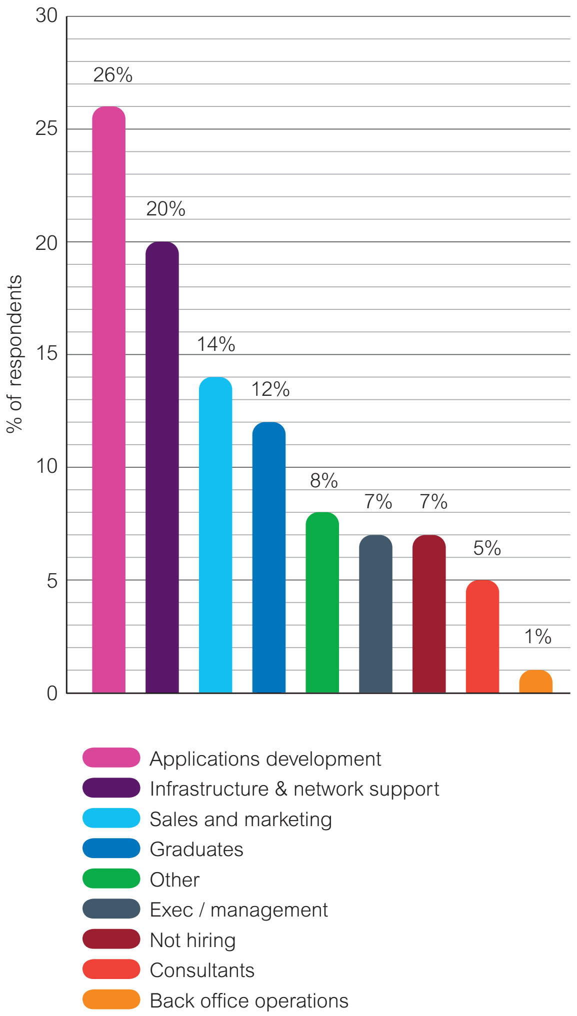
5.2 Skills in demand

Respondents were asked where they expect to have the greatest demand for staff in the coming year. A breakdown of responses per job type shows that respondents expect the biggest areas of demand to be for skills in applications development (26%), infrastructure and network support (21%) and sales and marketing (14%).

Demand for new hires



5.3 Technical skills in demand

Respondents were asked to select the technical skills they believe will be in the greatest demand in 2007, across six different categories.

The top two skills cited in each category are summarised here:

Skill category	Most in-demand skill 2007	Second most in-demand skill 2007
Software and web development	Java (16%): ASP.net (16%): NET2 (16%)	
Database	SQL (48%)	Oracle (16%)
ERP / CRM	SAP (23%)	Oracle (10%)
Infrastructure and support	Microsoft Vista (22%)	Small Business Server (15%)
Sales and marketing	Lead generation (33%)	Account management (29%)
Business skills	Project planning (41%)	Business analysis (27%)

It is interesting to note the demand for SAP skills in ERP / CRM, and for Microsoft Vista skills in the area of infrastructure and support.

In terms of sales and marketing skills, lead generation is increasingly recognised as a skill in its own right, with 33% of respondents ranking this skill as the one they expect to need most this year, above account management.

The seriousness with which Scottish technology companies treat project planning is highlighted, with almost half (41%) expecting to need project management skills this year, significantly above any other type of business skill.

6 Salary trends

Respondents were asked to assess the salaries for 28 job roles in their organisations against the UK averages[3], grouped in five business areas: (1) IT management; (2) Software development; (3) Infrastructure support; (4) Project and business consultancy and (5) Sales and marketing.

Respondents were asked to assess whether they thought the salaries in their organisations were lower than the UK average (10 or 25%), higher than the UK average (10 or 25%) or about the same.

The results of this part of the survey are summarised in the table opposite, with mean scores[4] calculated for the responses for each job role.

Respondents rated the salaries of 21 out of the 28 (75%) of the technology job roles listed as lower than the UK average, and four roles as higher than the UK average. The majority of jobs were rated as being paid between + or – 10% of the UK benchmark.

Job category	Job title	UK salary	Mean score	Rating
5	IT sales consultant	£30,355	0.86	Higher
5	Marketing analyst	£33,698	0.25	Higher
3	Graduate-infrastructure	£18,000	0.18	Higher
5	Sales manager	£52,791	0.1	Higher
5	Junior account manager	£24,500	0	Same
4	Senior ERP consultant (5 yrs+)	£70,000	0	Same
5	Marketing manager	£44,379	0	Same
3	Server support	£32,321	-0.13	Lower
2	Graduate software developer	£22,796	-0.17	Lower
3	Network support	£33,442	-0.17	Lower
4	IT business analyst	£38,380	-0.2	Lower
2	Web developer	£31,156	-0.22	Lower
3	Security specialist	£52,077	-0.29	Lower
3	Helpdesk support	£22,135	-0.31	Lower
1	IT director	£74,465	-0.34	Lower
3	Desktop support	£27,041	-0.42	Lower
4	Tester	£32,251	-0.42	Lower
4	Trainer	£33,293	-0.45	Lower
2	Applications developer	£35,939	-0.53	Lower
3	Technical architect	£61,068	-0.65	Lower
4	IT project manager	£54,663	-0.7	Lower
2	Database administrator	£43,766	-0.76	Lower
4	IT programme manager	£78,375	-0.78	Lower
1	IT manager	£51,557	-0.85	Lower
1	Infrastructure manager	£54,392	-0.88	Lower
1	Applications manager	£57,447	-1	Lower
1	Head of IT	£68,067	-1.06	Lower
2	Solutions architect	£65,890	-1.19	Lower

[3] source: Itjobswatch.co.uk, Jan 2007.

[4] '25% lower' scores = -2; '10% lower' scores = -1; 'same' scores = 0; '10% higher' scores = 1; '25% higher' scores = 2. A score of +1.0 is taken as a consensus that the salary of that job role is higher in Scotland compared with the UK, and a score of -1.0 is taken as consensus that the salary is lower in Scotland than the UK average. The further away the mean scores are from the central point of zero (the benchmark), in either a positive or negative direction, the greater the consensus across the sample.

7 Recruitment and retention

This section of the survey asked for respondents' views on recruiting employees; how they aim to attract and retain them, and what processes and channels they use for finding the best candidates.

7.1 Recruitment and selection process

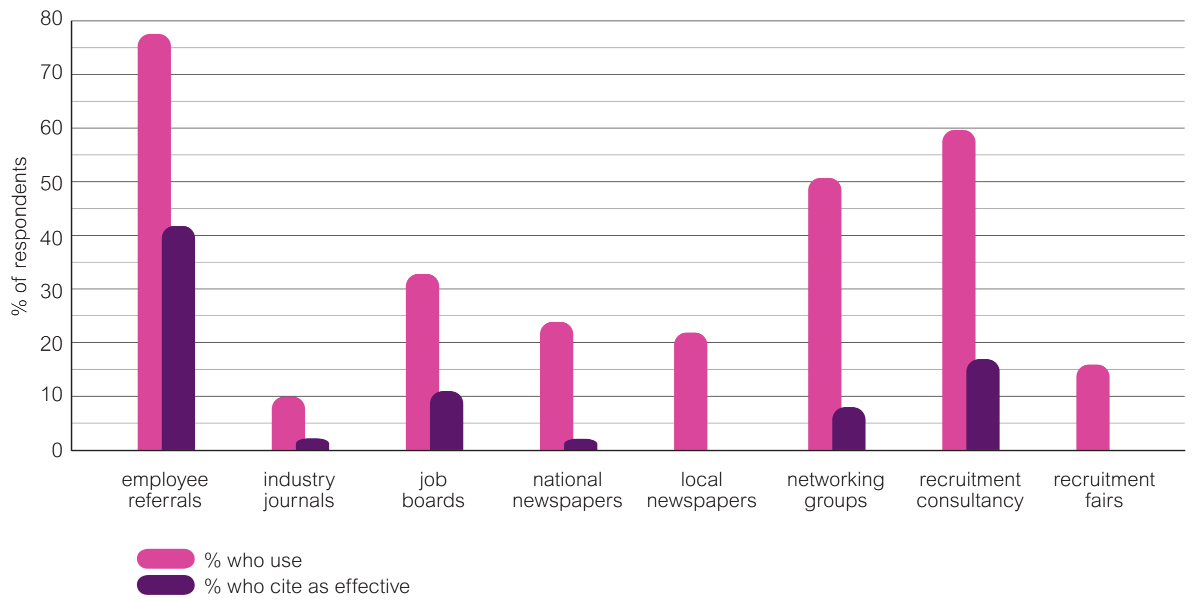
The majority of companies (83%) who responded spend at least 1-3 days recruiting and selecting per role. Almost one quarter (22%) spend at least five days recruiting and selecting per role, indicating a strong commitment to finding the right candidate. 15% read at least 20 CVs before interviewing, and a further 36% of respondents read 10-20 CVs prior to selecting interviewees.

7.2 Interaction with job market

The top methods for finding suitable candidates are employee referrals (78%), using recruitment consultants (60%) and networking groups (51%).

Respondents were also asked about the effectiveness of these channels, and the following graph shows channels used versus their perceived effectiveness.

Recruitment channel versus effectiveness

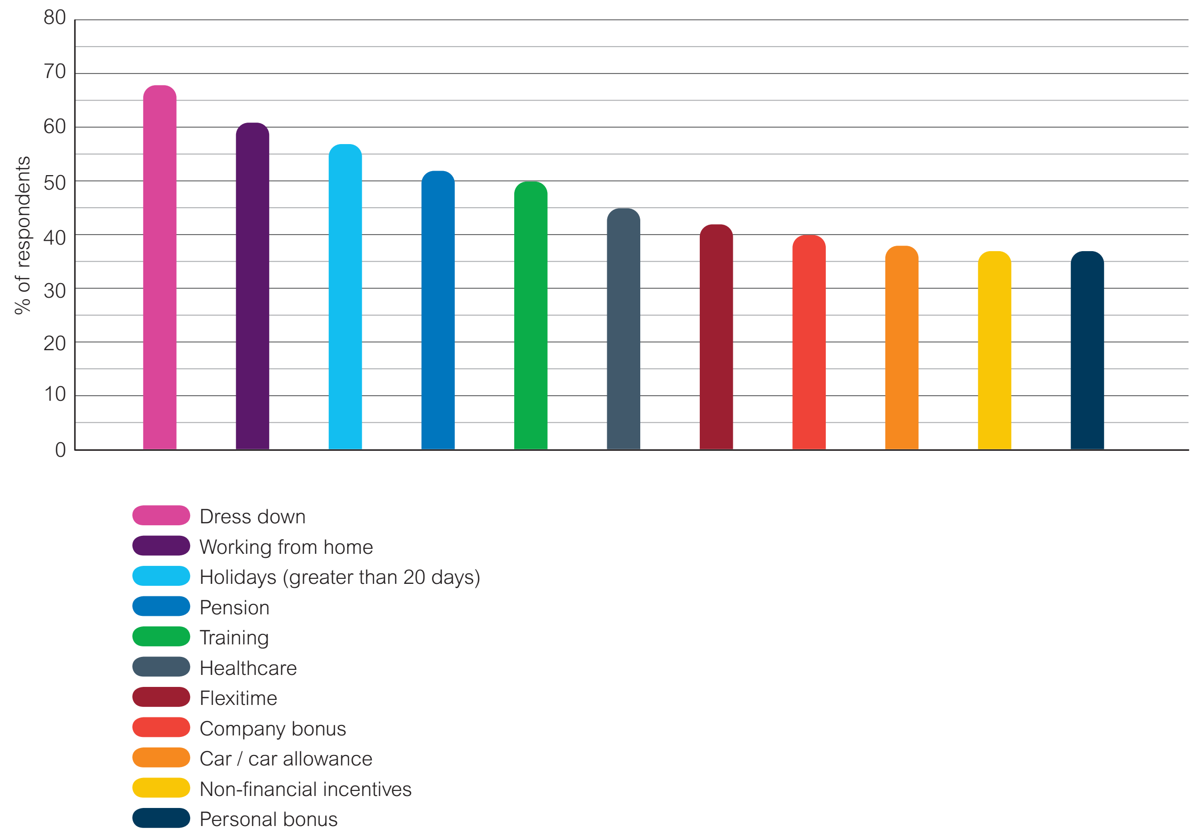


This graph shows that employee referrals are not only the most popular recruitment channels, but also perceived as the most effective. They are followed in perceived effectiveness by recruitment consultants and job boards.

7.3 Retention of employees

As discussed in 1.7, respondents cited a wide range of benefits used to attract and retain staff. The graph below indicates the most popular benefits:

Benefits offered to attract and retain staff



Technology market viewpoint

It is very encouraging to see Scottish technology companies so positive about their prospects for the future.

Overall, projections for sales growth in 2007 are on a par with 2006, with nine out of ten companies predicting growth this year, and a significant four out of ten companies predicting sales growth of at least 20%.

Interestingly respondents are slightly more conservative in their predictions than last year; in 2006 half of surveyed companies predicted 20% or more growth.

If these predictions turn out to be robust the Scottish technology sector will again outperform analyst predictions this year. David Mitchell, Head of software industry research at Ovum[5] forecasts a 6% increase in the UK software and IT services market, and a probable 8-10% growth for software products. In contrast 75% of respondents in this survey expect growth of at least 10%.

This impressive sales growth is expected to come from the energy and utilities markets, financial services, professional services and the public sector. Mitchell predicts that the public sector will account for 33% of the UK technology market, with Scotland attracting a significant share of this spend. Mitchell also confirms the opportunities in financial services: "With regulatory change in both the retail and wholesale banking markets, we can expect to see above 6% growth with these companies this year and next."

The difficulty for Scottish technology companies is how they resource this growth. Whilst competition for IT talent in Scotland to date has been strong, this year it appears to have become a critical issue; 58% of respondents cited access to suitably-qualified local candidates as the biggest constraint they expect for 2007.

Industry reports of a tightening labour market are supported by a recent Bank of Scotland Labour report[6] which confirms that permanent IT and computing staff are more in demand than any other type of employee. Whilst this level of demand is great news for the individual candidate, it is clearly not the best news for companies who rely on talent and specialised skills to help them achieve their ambitious growth plans.

Salaries are on average a little below the UK benchmarks (cf Itjobswatch.co.uk), but the differential is reducing, and with the lower cost of living and higher quality of life, Scotland continues to be an excellent place to live and work.

Access to finance is still an issue for many smaller companies, although it is definitely considered less of a constraint than last year.

In the meantime we can expect to see Scottish technology companies doing well again in 2007, in spite of a fiercely competitive market.

Polly Purvis
Executive Director, ScotlandIS

[5] (Ovum Market Trends 2006)

[6] (Bank of Scotland Labour Market Report January 2007)

Employment market viewpoint

There is little doubt that the labour market in Scotland is tight – according to a recent Bank of Scotland report[6], availability of both permanent and temporary candidates fell again in the first quarter.

Some believe the problem will only get more acute. For example the British Computer Society says the intake for full-time undergraduate computer science degrees has fallen by one third since 2001 and this development, coupled with a technology industry increasingly hungry for skills, could have a major impact on the UK economy[7].

Furthermore, whilst Scottish salaries remain on the whole slightly below the UK benchmark, this gap looks set to narrow as firms respond to job market pressures. This view is backed by the Bank of Scotland's January Labour Market Report, which reported that salaries rose again in January.

So our predictions last year of a move to a candidate-driven market have become a reality, but what can Scottish companies do to make themselves attractive to candidates, particularly when they are in such short supply?

In such a competitive marketplace it is important that companies remain focused – offering training opportunities, flexible working and competitive benefits, all of which appear from the survey response as a high priority within the technology sector. These factors combined will help to ensure positive promotion of the employer brand, and strong foundations for staff retention.

What is certain is that doing nothing is not an option. This year access to good local candidates has overtaken both access to finance and target markets as the major constraint to growth. Therefore optimising all available resource channels, and adopting a 'constantly hiring' approach, will allow you to secure the best talent.

Among the candidates likely to be in the highest demand this year are software developers and systems integrators. This view is backed by David Mitchell, head of software industry research at Ovum, who expects growth in the UK software market to outperform other areas of the ITC sector this year[5]. However, high demands for systems integration skills are not expected to be sustained going forward, as software products continue to become easier to integrate with other applications.

Reflecting on last year's technology survey the main issue highlighted was access to good sales and marketing individuals. Although this issue remains unresolved it does seem to have diminished slightly. Looking at the survey responses, and recent market demand, companies appear to be favouring attracting talent to perform a certain sales task, for example lead generation, account management or pre and post sales roles, instead of the traditional 'one size fits all' sales executive . This in turn is allowing the available talent pool to widen and attract more commercially-minded individuals into the sector as a whole, which in the long term can only be looked upon as a positive.

Finally the technology sector appears to be becoming increasingly sophisticated at project planning, with over 40% of our respondents citing it as the leading business skill they require. This is significant, because the companies which in my view are most likely to gain a competitive advantage this year, are those which are not only able to access and retain the in-demand skills, but have well-rounded business skills – to ensure projects are delivered on time and to budget.

Wendy McDougall
Managing Director, 9-20 recruitment

[7] (ZDNet.co.uk, January 2007)

About this survey

For the second consecutive year we explore the technology sector in Scotland, looking at factors such as predictions for growth, skills in demand, types of customers, dominant markets, recruitment and retention, and constraints for growth.

The 2007 Scottish technology survey, commissioned by ScotlandIS, sponsored by 9-20 recruitment and independently produced by Ogam Marketing, was sent to senior representatives, mainly CEOs, of technology companies in Scotland. It ran for a period of three weeks in February. Respondents were asked to record and submit their answers to 38 questions online, and were incentivised to complete the survey through entry into a prize draw, and the opportunity to receive a copy of the final report.

The companies who completed this survey are described in Section 1. About the sample.

This report was independently produced on behalf of ScotlandIS and 9-20 recruitment by Ogam Marketing Ltd. Design by one shoop, Edinburgh

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