

Key Note Market Research

FILE DESCRIPTION

Key Note Market Research contains the full text of corporate and industry reports from the "Key Note" series of market research overviews, covering both continental Europe and the U.K., published by Key Note Publications, an ICC Group company.

Reports in this file are classified either as "company" or "industry", depending on the primary focus of the document. Indexing of each report gives details of coverage by company, industry, product, U.K. SIC code, subject, and geographical area. The Euroview series on selected market sectors covers the major Western European countries.

Key Note Market Research draws together fundamental primary data with expert commentary and analysis on companies and industry or market sectors, with British and European coverage. Major subject areas covered include: company financial data, competitive analysis, company performance analysis and commentary, product information, market and industry analysis, and research and development.

SUBJECT COVERAGE

Key Note Market Research draws together fundamental primary data with expert commentary and analysis on companies and industry or market sectors, with British and European coverage. Major subject areas covered include:

- Company Financial Data
- Company Performance Analysis and Commentary
- Competitive Analysis
- Market and Industry Analysis
- Product Information
- Research and Development

TIPS

USE FILE 563

to get Key Note market research reports on leading British and European companies and industries.

USE /CONTENTS

to view only the Table of Contents records.

SELECT S2/CONTENTS

USE CO=

to locate reports that discuss a company.

EXPAND CO=CRH PLC

USE REPORT/TITLES

to browse reports, their tables of contents and display individual pages.

REPORT S4/TITLES

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Table of Contents Record

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DT=, IN= This is a KEYNOTE report and a INDUSTRY report

SYNOPSIS

/TX Key Note estimates that at the end of 1997, the core employment agency industry comprised around 8,200 businesses, which together operated 11,800 offices or branches. Their combined turnover for 1997 was L11.9bn, up from L10.2bn in 1996, although some industry estimates are higher. 94% of turnover was derived from invoiced sales for placing temporary and contract workers. The remainder came from fees charged for placing permanent workers.

The employment agency business has boomed since 1993 and reached unprecedented heights in 1997. Most firms enjoyed a bonanza in sales and profits. However, at mid-1998, there are indications that the global boom is over. Growth in some recruitment sectors has been reduced to a trickle and in others, it has reversed into a decline.

Nevertheless, even if the economy returns to recession by the end of 1998, employers will continue to experience a shortage of good, qualified personnel at all levels. This will ensure the industry against a sudden decline in business.

While the industry continues to be regulated with lenience, external threats from political and legal sources are growing. The costs of making a mistake in the recruitment process, even unwittingly, can be fatal. Agency managements are having to devote increasingly more time to ensuring that they remain on the right side of legislation.

The industry remains highly fragmented, although consolidation proceeds apace. In particular, major US agencies are showing growing interest in making acquisitions in the UK.

However, the UK market also remains oversupplied by a large and still growing number of employment agency

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branches. A downturn will mean office closures and competition on price.
Key Note estimates that, between 1998 and 2000, total turnover of UK employment agencies will increase by 6.9% to reach L14bn.

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COMPANY COVERAGE:

/CO, CO=
 Brook Street (UK) Ltd
 Delphi Group PLC
 Hays PLC
 Initial Personnel Services Ltd
 Kelly Services (UK) Ltd
 Manpower PLC
 Nestor Healthcare Group PLC
 Office Angels Ltd
 Pertemps Group Ltd
 Randstad Employment Bureau Ltd
 Reed Executive PLC
 Select Appointments (Holdings) PLC
 The Corporate Services Group PLC

CL= SIC Codes: 74500 Labour recruitment and provision of personnel
 74600 Investigation and security activities
 74830 Secretarial and translation activities

SUBJECT DESCRIPTORS:

/DE	Market Definition	PG 1
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/SH SECTION HEADINGS:
 4.COMPETITOR ANALYSIS CONTINUED
 MSL SEARCH AND SELECTION
 FINANCIAL RESULTS
 RANDSTAD EMPLOYMENT BUREAU LTD
 FINANCIAL RESULTS
 NESTOR HEALTHCARE GROUP PLC
 FINANCIAL RESULTS
 LORIEN PLC
 FINANCIAL RESULTS
 INFORMATION TECHNOLOGY SPECIALISTS

TEXT
 4.COMPETITOR ANALYSIS CONTINUED

/TX MSL SEARCH AND SELECTION

MSL Search and Selection was formed early in 1998, from the merger of MSL International and Austin Knight. Its parent company is TMP Worldwide. In addition to the UK, the company has offices in France, Netherlands and Switzerland and is shortly to acquire search and selection businesses in Germany, Italy and Spain. (. . .)

INFORMATION TECHNOLOGY SPECIALISTS
 Growing demand for suitably skilled personnel has fuelled the recent rapid growth in the IT sector. Leading companies are as follows:

Spring IT Personnel Delphi Group PLC Hays IT MSB International PLC Lorien PLC Parity Resources Ltd Anite Systems Ltd Elan Computing Ltd Manpower IT Services Hunterskil Howard PLC Computer Futures Abraxas PLC Glotel PLC Eurolink Consulting QA Myriad Computer Team Group Harvey Nash PLC Best International Group Diagonal PLC PSD Group.

/CO, CO= Company: Select Appointments (Holdings) PLC; Select Appointments

CL= SIC Codes: 74500 Labour recruitment and provision of personnel
 74600 Investigation and security activities
 74830 Secretarial and translation activities

/DE SUBJECT DESCRIPTORS:
 Competitor Analysis

Text Record (cont'd)

Financial Results

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SEARCH OPTIONS

BASIC INDEX

SEARCH SUFFIX	DISPLAY CODE	FIELD NAME	INDEXING	SELECT EXAMPLES
—	—	All Basic Index Fields	Word	S EMPLOYMENT(W)INDUSTRY
/CO	CO	Company Name ¹	Word	S MANPOWER/CO
/DE	DE	Descriptor	Word	S MARKET(W)DEFINITION/DE
/NT	NT	Industry	Word	S FOOD(W)MANUFACTURERS/NT
/SH	SH	Section/Chapter/Table Heading	Word	S FINANCIAL(W)RESULTS/SH
/TI	TI	Title	Word	S EMPLOYMENT(W)AGENCIES/TI
/TX	TX	Text and Abstract	Word	S TEMPORARY(W)WORKER?/TX

¹ Searchable in the Basic Index and in the Additional Indexes.

ADDITIONAL INDEXES

SEARCH PREFIX	DISPLAY CODE	FIELD NAME	INDEXING	SELECT EXAMPLES
—	A3	Corporate Source Address		
—	AN	DIALOG Accession Number		
AU=	AU	Analyst	Phrase	S AU=JONES, A?
—	BN	International Standard Book Number (ISBN)		
CL=	CL	U.K. Standard Industrial Classification (SIC) Code	Phrase	S CL=74500
CN=	CN	Country	Phrase	S CN=UNITED KINGDOM
CO=	CO	Company Name ¹	Phrase	S CO=KELLY SERVICES
CP=	CP	Country of Publication	Phrase	S CP=UNITED KINGDOM
CS=	CS	Corporate Source	Phrase	S CS=KEY NOTE?
—	CV	Company Coverage in Table of Contents Record		
DT=	DT	Document Type ²	Phrase	S DT=CONTENTS
—	EX	Exchange		
NO=	NO	Registered Company Number	Phrase	S NO=10038499
NT=	NT	Industry	Phrase	S NT=FOOD MANUFACTURERS
PD=	PD	Publication Date	Phrase	S PD=19980810
PG=	PG	Page Number	Numeric	S PG=11
PY=	PY	Publication Year	Phrase	S PY=1998
RN=	RN	ICC Report Number	Phrase	S RN=100384
SF=	SF	Subfile ³	Phrase	S SF=INDUSTRY
—	TC	Section/Table/Industry/Product Headings for Table of Contents		
TS=	TS	Ticker Symbol	Phrase	S TS=GLYNU
UD=	—	Update	Phrase	S UD=9999

² Document type entries include: KEYNOTE, CONTENTS, and TEXT.

³ Subfile entries include: SF=COMPANY, SF=INDUSTRY, and SF=ECONOMIC.

SPECIAL FEATURES

For command descriptions, enter HELP LIMIT, HELP SORT, HELP RANK, HELP MAP online.

LIMIT	/TEXT -- Text Records /TEXT OF SECTION -- Table of Contents Record /YYYY -- Publication Year	S S3/TEXT S S3/CONTENTS S S2/1998
SORT	AU, CL, CN, CO, CP, CS, NO, NT, PD, PG, PY, RN, TI	SORT S3/ALL/AU PRINT S2/5/1-5/CO
RANK	All phrase- and numeric-indexed fields in the Additional Indexes can be ranked.	RANK AU S3
MAP	NO, RN	MAP RN TEMP S1

PREDEFINED FORMAT OPTIONS

NO.	DIALOGWEB FORMAT	RECORD CONTENT
1	--	DIALOG Accession Number
2	Medium	Full Record except Text (Full Table of Contents Record)
3	--	Bibliographic Citation
4	--	Title, Publication Date, Report Number, Country of Origin, Pagination, Section and Table Headings, and Company Coverage
5	--	Full Record
6	Free	Title, Publication Date, Country of Origin, Report Number, and Page Number
7	Long	Bibliographic Citation, Section and Table Headings, and Text
8	Short	Title, Report Number, Page Number, Country of Origin, Company Name or Industry, U.K. SIC Codes, and Descriptors
9	Full	Full Record
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TAG	TAG may be used for tagged fields.	TYPE S3/3/1-5 TAG
DIRECT RECORD ACCESS	DIALOG Accession Number	TYPE 00356799/5 DISPLAY 00355231/CO,CL PRINT 00345233/9

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