

Quarterly Research Summary

It's been building up to a very busy time for the analyst team at TechMarketView culminating in the release of one of our most hotly anticipated reports of the year: **The UK Software & IT Services Supplier Rankings 2014 report.**

Always a crowd pleaser, read an overview of the report below or TechMarketView subscribers can download the full report [here](#) to find out who are the key 'movers & shakers' making headlines in 2014. This report came out ahead of sister report **The UK Software & IT Services Market Trends and Forecasts 2014**, also out now, click [here](#)!

Aside from these key reports our research directors have been very busy keeping abreast of the latest developments in the SITS market within their individual streams. In *PublicSectorViews* (PSV), research director Georgina O'Toole drills into the Cyber Security space and goes onto cover one of the hot topics of the moment, G-Cloud. Also in *PublicSectorViews* fellow research director, Tola Sargeant, gave us her views on the lessons to be learned from the NHS' electronic appointment booking system, 'Choose & Book'.

BusinessProcessViews research director, John O'Brien, reports on the impact of outsourced analytics on the Business Process Services market. While in *InfrastructureViews* research director, Kate Hanaghan, caught up with two of the big payers, Vodafone and Computacenter. In her Vodafone piece Kate gives us her views on their growth into hosting services. While at Computacenter she met up with CEO Mike Norris - read her report to find out how they intend to cover target investments, growth and prospects.

Angela Eager, research director for *ESASViews* outlines how the SaaS commercial model is evolving in her latest report *Evolving the SaaS Commercial Model*. Angela also covers ESAS hot topic Big Data, picking up on her earlier predictions for 2014 and the emerging Data Driven Applications (DDA) market.

Managing partner, Anthony Miller, gives us his invaluable Foundation Service quarterly round-ups as well as an extended version of the popular *BrazilViews* (anything to do with a certain World Cup perhaps?!).

It's been a busy quarter for *FinancialServicesViews* research director, Peter Roe. Firstly Peter reports on the UK payments system, exploring the changes ahead for this rapidly expanding market. This report follows on from his analysis of the banking sector, in which he identifies key opportunities for growth.

Finally there was further excitement in *PublicSectorViews* with new principal analyst, Michael Larner, joining the team. Look out for Michael's reports and analysis in Q3 and check out his profile on our website. Welcome Michael!

For more information on any of the reports highlighted below just click the title.

UK SITS Rankings 2014

TechMarketView Team

Report

Tuesday 24 June 2014

TechMarketView's authoritative annual report ranking the leading suppliers of software, IT and business process services to the UK market.

IndustryViews Venture Capital Q1 2014

Anthony Miller

Report

Tuesday 24 June 2014

In this latest edition of *IndustryViews* Venture Capital we meet up with Richard Moore, Investment Director at Calculus Capital. We also expand our discussion on 'what is a tech company?', as well as including the usual highlights of recent venture capital funding rounds for UK-owned software and IT services companies.

OffshoreViews Q1 2014

Anthony Miller

Report

Wednesday 11 June 2014

Our regular quarterly review of the Indian offshore services scene.

IndustryViews Quoted Sector Q1 2014**Anthony Miller**

Report

Tuesday 06 May 2014

Our quarterly review of the UK software and IT services quoted sector scene.

Outsourced analytics - an emerging opportunity for BPS providers**John O'Brien**

Report

Tuesday 06 May 2014

Outsourced analytics is an emerging area of the BPS market. The use of SMAC (social, mobile, analytics and cloud) technologies is generating valuable, yet largely untapped data on the customer. It is also creating complexity in terms of underlying business processes, and how to make sense of and exploit it for business advantage.

IndustryViews Corporate Activity - Q1 2014**Anthony Miller**

Report

Monday 21 April 2014

Our quarterly summary of corporate activity in the UK software and IT services market, including both 'trade' M&A and private equity deals.

Finding the winners in UK payments**Peter Roe**

Report

Monday 14 April 2014

In this FinancialServicesViews report on the payments business Peter considers various elements of the payments value chain. He focuses on five potential winners in this space. This market segment is likely to undergo many changes and software and IT services vendors need to be aware of what drives success to benefit from the rapid growth that this will generate.

UK Public Sector SITS Suppliers: Cyber Security Offerings**Georgina O'Toole**

Report

Wednesday 09 April 2014

This PublicSectorViews report seeks to determine how the major SITS suppliers are reacting to current buying trends around cyber security across the UK public sector, how they are investing in their cyber security offerings to market, and how they intend to package and sell those offerings to UK public sector organisations.

Vodafone powers up its cloud and hosting business**Kate Hanaghan**

AnalystViews

Friday 30 May 2014

Vodafone is a very sizable and well-known UK brand but like many of its telco peers, its topline and profits have been under pressure. It has refocused around growth areas through a significant investment programme to improve network infrastructure and build out new capabilities. One strategic growth area is hosting services. So what are its next steps and is it becoming a force to be reckoned with?

Hot Topics and Opportunities in the Banking Sector**Peter Roe**

AnalystViews

Thursday 29 May 2014

This report presents an overview of the Banking Sector and highlights areas where the banks are focusing their attention and where suppliers can build opportunities for further growth. We consider that there is change emerging in the area of legacy systems and that the established banks are now beginning to make progress in the renewal of their core IT estate.

Evolving the SaaS commercial model**Angela Eager**

AnalystViews

Thursday 29 May 2014

As SaaS adoption continues at a rapid pace, more attention is being paid to the unanswered questions of profitability timelines, likely margins and how the SaaS model will evolve. This research note outlines the criteria we believe are important for assessing SaaS vendors but also examines how the commercial model is evolving and the levers that can be adjusted to impact performance.

UK Government G-Cloud: meeting its objectives?

Georgina O'Toole

AnalystViews

Wednesday 21 May 2014

As G-Cloud 5 comes into being, this PublicSectorViews research note analyses G-Cloud sales to date. Which suppliers are winning? Who is buying? And what is being bought? We also consider whether G-Cloud is meeting its objectives and what we can expect moving forwards.

NHS IT: learning lessons from 'Choose & Book'

Tola Sargeant

AnalystViews

Wednesday 21 May 2014

In this research note we ask what lessons can be learnt from the NHS' electronic appointment booking system, Choose & Book, and examine whether the new e-Referrals service, set to replace it, stands any better chance of success.

Will Agilisys get it all its own way with 'Digital'?

Georgina O'Toole

AnalystViews

Tuesday 29 April 2014

This research from the PublicSectorViews team paints a picture of the competitive landscape for 'Customer Experience Management' solutions in UK local government and asks how Agilisys Digital stacks up.

Computacenter outlines "growth plays"

Kate Hanaghan

AnalystViews

Wednesday 07 May 2014

Computacenter's UK services business has become a well oiled machine, delivering market-beating revenue growth in the past couple of years. But what can CEO, Mike Norris, and his management team do to sustain those achievements against an increasingly competitive supplier landscape? In this piece we outline Computacenter's target investment and growth areas and give our view on its prospects.

Does the market need Big Data driven applications?

Angela Eager

AnalystViews

Tuesday 22 April 2014

At the start of 2014 we identified the data driven business as one of the trends for 2014. One of the enablers of this business approach are Data Driven Applications (DDAs). This research takes a snapshot of the early stage DDA market, its structure, emerging new players, and how suppliers are approaching it.

Still pipedreaming in the Brazilian IT market?

Anthony Miller

AnalystViews

Wednesday 16 April 2014

In this latest bumper issue of BrazilViews, Anthony Miller looks at the prospects for suppliers in the Brazilian IT market. This issue also includes his impressions of some of the global suppliers operating in the Brazilian market after meeting the heads of IBM Brazil, Wipro Latin America and Infosys Brazil.

German GFT wins the hand of Rule Financial

Peter Roe

UKHotViewsExtra

Monday 30 June 2014

Much sought-after Rule Financial has fallen for the charms of German technology group, GFT Technologies AG, who will now acquire this UK Business Consulting and IT Services firm specialising in the Investment banking sector and all its international subsidiaries. Find out how this will affect Rule Financial in this UKHotViewsExtra article.

CGI UK: building on recent wins

Georgina O'Toole

UKHotViewsExtra

Wednesday 14 May 2014

The PublicSectorViews team caught up with CGI's UK President Tim Gregory to discuss the H1 results. The UK business improved during the period, with a stronger Q2 than Q1 and Gregory expects this positive news to continue into Q3 off the back of some recent long-term outsourcing deals.

Idox continues to make progress (update)**John O'Brien**

UKHotViewsExtra

Thursday 12 June 2014

Idox has now emerged from a period of restructuring and reorganisation in a much stronger position financially. Following a conversation with CEO Richard Kellett-Clarke, we conclude it is also in a good position for future growth, targeting areas within managed services and business process services, built around its core IP and domain expertise.

Symphony to make music with McKesson**Tola Sargeant**

UKHotViewsExtra

Monday 02 June 2014

Much of McKesson's International Operations Group (IOG) looks to have finally found a new home. Parts of the business, which was put up for sale in May 2013 are to be acquired by US-headquartered private equity firm Symphony Technology Group. Find out what this will mean for McKesson in this note from PublicSectorViews.

Civica local government BPS model gaining traction**John O'Brien**

UKHotViewsExtra

Monday 28 April 2014

Last July, Civica was awarded its second significant local government BPS deal to date. We recently spoke with Civica, and Wychavon District Council, the lead authority for the South Worcestershire shared service (SWSS), to get an update on progress and learn more about Civica's platform-based BPS/Business Process as-a-Service (BPaaS) offering and opportunities going forward.

Pulsant sustains double-digit growth**Kate Hanaghan**

UKHotViewsExtra

Tuesday 15 April 2014

FY13 financial results from Pulsant show the firm had another year of good growth. The managed hosting, co-location and cloud company grew 12% to £43.7m, while EBITDA increased 23%. Kate met with CEO Mark Howling to discuss how things are progressing for Pulsant. Read the full report in this UKHotViewsExtra piece.

Sopra & Steria in UK: similarities & differences**Georgina O'Toole**

UKHotViewsExtra

Tuesday 08 April 2014

Following the announcement of a Steria and Sopra "friendly tie-up", PublicSectorViews research director, Georgina O'Toole caught up with Steria's UK CEO, to find out why 2014 was crunch time for this merger.

SME Software Europe cuts NHS expenses bill**Tola Sargeant**

UKHotViewsExtra

Wednesday 02 April 2014

Software Europe may not be operating in the most exciting area of the UK SITS market – its flagship product is cloud-based expenses software - but it's a great example of a UK SME punching above its weight in the NHS IT market. It also provides a welcome example of IT benefiting the NHS by enabling significant savings. Find out how Software Europe has made such great progress in PublicSectorViews research director, Tola Sargeant's report.