

**TechMarketView LLP**

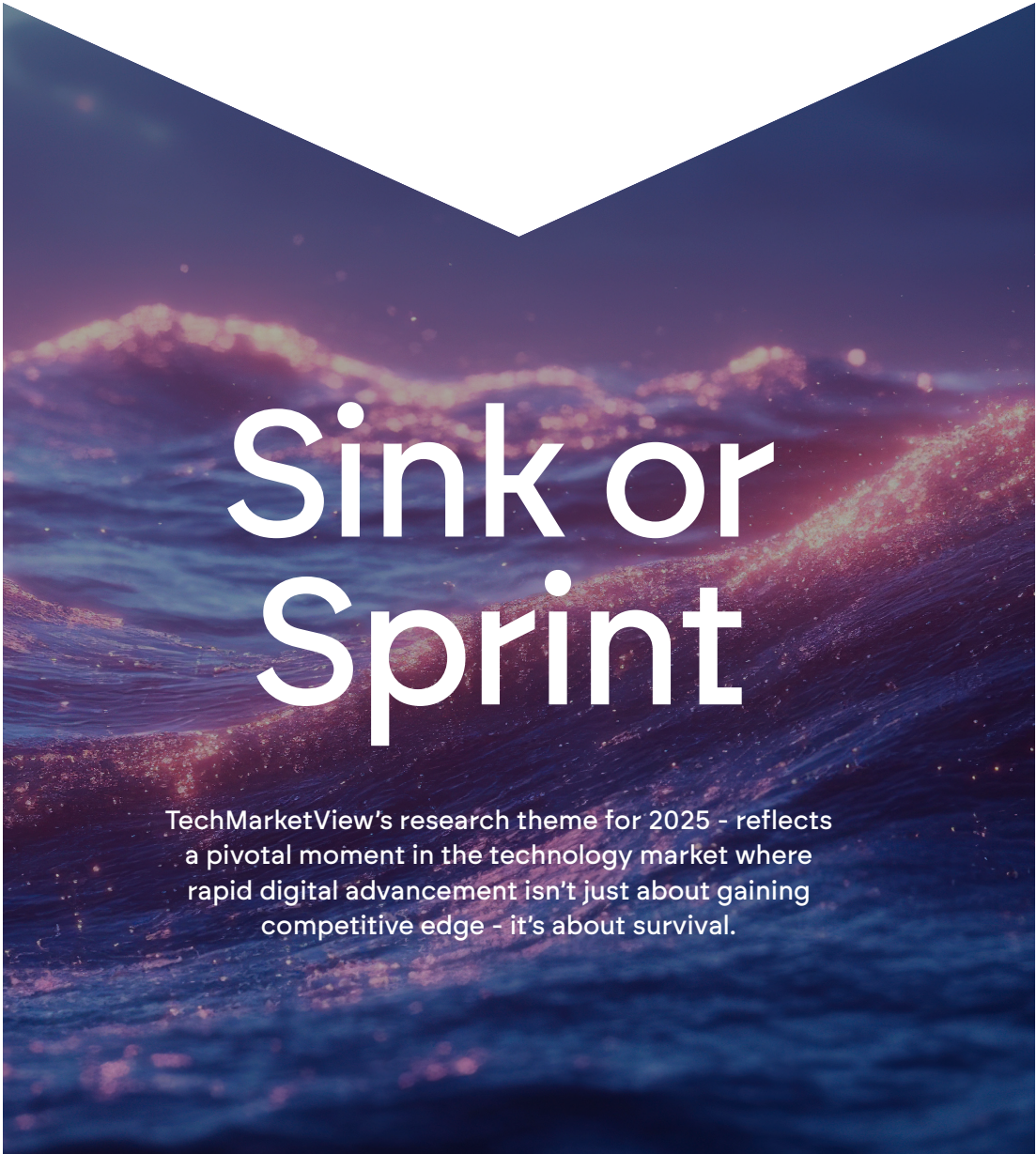
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**techMarketView<sup>™</sup>**

Sink or Sprint 2025

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## Welcome from our partners



**Deb Seth**

Chief Commercial Officer  
and Managing Partner



**Georgina O'Toole**

Chief Analyst and Partner



**Kate Hanaghan**

Chief Research Officer  
and Partner

# This year marks a crucial intersection of economic opportunity and technological imperative.

As temporary economic tailwinds combine with significant legislative changes, organisations face unprecedented pressure to demonstrate measurable returns on their technology investments, particularly in AI and GenAI deployment.

At TechMarketView, we're uniquely positioned to guide you through this critical period. Our research and advisory services offer the precise, actionable insights needed to help your organisation sprint ahead. Whether through our data-driven analysis, custom research projects, or strategic advisory services, we provide the clear, independent guidance needed to navigate this high-stakes environment.

Throughout this brochure, you'll discover how our comprehensive research platform and advisory services can support your organisation's journey from survival to success in 2025.

Our team is ready to help you translate technological investment into tangible business outcomes. Connect with any of our team members using the contact details in the following pages - we're here to ensure your organisation doesn't just survive but thrives in this sprint to success.



# Sink or Sprint



Georgina O'Toole  
Chief Analyst & Partner

We are delighted to present TechMarketView's research theme for 2025: Sink or Sprint.

As our regular readers know, each year our theme captures the essence of what we believe will shape the tech market in the months ahead. Our 2025 theme – Sink or Sprint – reflects the critical junction at which organisations now find themselves, where swift technological advancement has become fundamental to survival.

The economic landscape adds particular urgency to this dynamic. While the Office for Budget Responsibility forecasts modest growth for 2024 and 2025, organisations face mounting pressure to maximise this window of opportunity before more challenging conditions emerge from 2026 onwards. This pressure intensifies with recent government changes to labour laws and associated costs, pushing businesses to seriously consider technology-led solutions.

We are witnessing organisations take a more measured approach to their technology investments, particularly in AI and GenAI deployment. The focus has shifted from experimentation to execution, with businesses demanding clear evidence that their technological investments deliver tangible financial returns. Those who have already established robust digital foundations find themselves well-positioned to accelerate, while others risk falling irretrievably behind.

The next twelve months will see organisations focus intently on transforming their early technology investments into measurable business value. Success will require not just speed, but precision—choosing the right use cases, deploying appropriate tools, and ensuring robust security measures. External partners will prove crucial in this journey, providing the expertise needed to drive value from emerging technologies at pace.





# TechMarketView is defined by its people and its fiercely independent spirit.

Our highly-respected analysts offer unbiased views on the UK tech sector and insightful commentary on disruptive technologies.

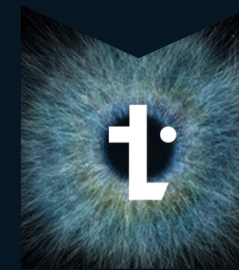


## Our people

Since its inception, TechMarketView has attracted, developed and retained one of the best teams in the business and we are proud of each and every one of our team members.

Our analysts have been drawn from many backgrounds bringing different experiences and fresh perspectives to our research. Our client services team are knowledgeable and approachable and welcome close interaction with our clients. The contribution of the team is what makes TechMarketView a great company and a great place to work.

We are an inclusive workforce recognising that our peoples' backgrounds encourage creative innovation in the workplace. We acknowledge the importance of a healthy work-life balance and love that our individual members cherish their careers - we like to think that is reflected in how we serve our clients.



## Our values

Our clients, partners and team are at the 'heart' of everything that TechMarketView does. Our ambition is to provide consistently high-quality services that drive value and trust within our community.

TechMarketView aims to make a positive impact through our brand, our commercial relationships, and our voluntary contributions such as our longstanding partnerships with the Prince's Trust Technology Leadership Group and annual fundraising activities for charities including Great Ormond Street Hospital. Whilst we wish to grow and succeed as a company, we strive to do business in an open and fair way. This is evidenced by our support of tech SMEs. We also work to promote diversity in the tech industry and are proud to be part of the TechTalentCharter and #StartsWithAName initiatives.



## Sustainability

TechMarketView recognises the responsibility organisations have in minimising environmental impact and promoting sustainability.

A pioneer of remote working, we have never had an office and encourage our employees to minimise their carbon footprint whilst working from home and use public transport to travel to client meetings where possible. We strive to achieve our clients' and partners' sustainability initiatives understanding that our whole ecosystem needs to preserve natural resources whilst reducing pollution and minimising the adverse impact on climate change.

# TechMarketView offers qualitative and quantitative research that influences how organisations achieve their goals; helping them understand market conditions and players, and evaluate potential strategy.

TechMarketView’s experts blend a deep understanding of the UK tech sector and its suppliers - augmented by privileged conversations with CXOs across the industry - with insight on global tech trends, enabling us to cut through the hype and analyse what’s really going on in the sector.

We have a passion for the start-up and scale-up scene in the UK and are delighted to continue to identify and support innovative SMEs through our TechMarketView Innovation Partner Programme.

Getting close to these innovators also gives us great insight into emerging technologies and future disruptors.

With unrivalled experience and track record, the team at TechMarketView offers clients a unique perspective of the tech sector; one that combines corporate, market and financial analysis of the software and services companies operating in the UK tech scene. You can take advantage of our extensive knowledge and insight through a corporate subscription that allows access to differing research areas depending on needs.

Our Corporate research is organised into five research streams:

## Core research

FoundationService		TechSectorViews		SustainabilityViews	
Foundation Service focuses on the core market trends and industry dynamics driving the UK SITS scene.		TechSectorView focuses on the areas crucial for accelerating digital change. Covering;		In-depth analysis of how SITS are being deployed in pursuit of environmental sustainability goals. Areas include:	
MarketView	IndustryView	Automation	Cybersecurity	Data & Decision-making	Goods & Services
CompanyView	OffshoreView	Experience	Data, Analytics & AI	Lifestyle & Logistics	Power & Utilities

## Vertical focus

PublicSectorViews			FinancialServicesViews	
Provides detailed market size and forecast data, along with analysis of supplier performance and prospects.			With an expanding view of the tech savvy newcomers in the shape of FinTechs and InsurTechs. Covering;	
Central Government	Local Government	Education	Banking & Payments	Insurance
Health	Police	Defence	Financial Markets	Wealth Management





# UKHotViews

UKHotViews

techMarketView

## UKHotViews Newsletter - 'must read' comment and opinion

For tens of thousands of tech executives and professionals, UKHotViews is their first and definitive source of informed opinion and comment on the events, issues and players that drive the UK tech sector.

UKHotViews is delivered free of charge every morning via email, or it can be accessed at any time via our website, RSS and Twitter.

Subscribers to any TechMarketView research stream, including our new UKHotViews Premium service, can also enjoy searchable access to every UKHotViews post we have ever written, including the subscriber-only UKHotViewsExtra archive. We've already published well over 20,000 comments on company results, funding activity, acquisitions and trends in the UK tech sector, and add dozens more each week. We're often told that the UKHotViews archive is the best source of 'instant' market intelligence on the UK tech scene.

## UKHotViews Premium

The individual subscription service for entrepreneurs and tech professionals.

Our UKHotViews Premium service is available to individuals\* (not companies) on an annual basis. A subscription includes access to the UKHotViews archive, all UKHotViewsExtra articles plus our IndustryViews research. In addition, subscribers benefit from preferential rates for TechMarketView events and a 50% discount on one individual report purchase per annum.

### The subscription includes:

- UKHotViewsExtra
- IndustryView
- UKHotView Archive
- Discounts on reports and events

\* The subscription fee is per person and the usage rights are not transferable to other individuals.

Sign up for free at [www.techmarketview.com/ukhotviewssignup](http://www.techmarketview.com/ukhotviewssignup)



# Our subscription research

17	TechSectorViews
19	Foundation Service
21	SustainabilityViews
23	PublicSectorViews
25	FinancialServicesViews



TechSectorViews

Designed for the digital age, TechSectorViews is home to TechMarketView’s detailed ‘horizontal’ research and analysis on the UK tech market.

Bringing together an expert team of highly experienced analysts, the research programme covers a broad spectrum of technologies and services, trends and suppliers; from design thinking to cloud-based platforms, AI to quantum, and innovative start-ups to established global players.

Core reports provide market sizing and forecasts, market trends and supplier landscape analysis for the Consulting, Cyber, Enterprise Software, Solutions, Infrastructure Operations, Application Operations and Business Process Operations segments of the UK tech market.

Essential reading for anybody operating in the tech market, TechSectorViews’ unique research also provides insight into the disruptive suppliers, emerging technologies and business issues that will shape the market in years to come, helping you to identify opportunities early and smoothly navigate change.

Chief Research Officer, **Kate Hanaghan**, Senior Research Directors, **Marc Hardwick**, Research Director, **Duncan Aitchison**, and Principal Analyst **Simon Baxter**, all contribute to TechSectorViews. A senior and formidable team with many years’ experience between them, they are never happier than when working directly with clients providing strategic advice, custom research projects, or keynote presentations.

TechSectorViews Analysts



**Kate Hanaghan**  
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## FoundationService

The Foundation Service is the cornerstone of TechMarketView research— a go-to source of insight and analysis on the UK tech sector for tech suppliers, investors and professionals.

Encompassing four interrelated streams, the Foundation Service covers significant market trends and supplier activity, as well as industry dynamics across corporate activity, stock market performance and VC investment.

A subscription to the Foundation Service is also the only way to access TechMarketView's keynote annual reports for the UK Software Led by Principal Analyst Craig Wentworth, SustainabilityViews is essential reading for anybody with a stake in technology-assisted sustainability initiatives.

Unlike other TechMarketView research streams, SustainabilityViews takes more than a UK-only view of the space when it comes to tracking use case developments for emerging technologies in sustainability-related fields.

However, we do focus primarily on UK-present SITS suppliers and UK examples of activities in our detailed supplier and IT Services (SITS) market as a whole: Market Trends & Forecasts, Predictions and Supplier Rankings.

Pair a Foundation Service subscription with TechSectorViews and our vertically-focused research streams – PublicSectorViews and FinancialServicesViews - for the complete, in-depth view of the UK tech market.

### Foundation Service Analyst



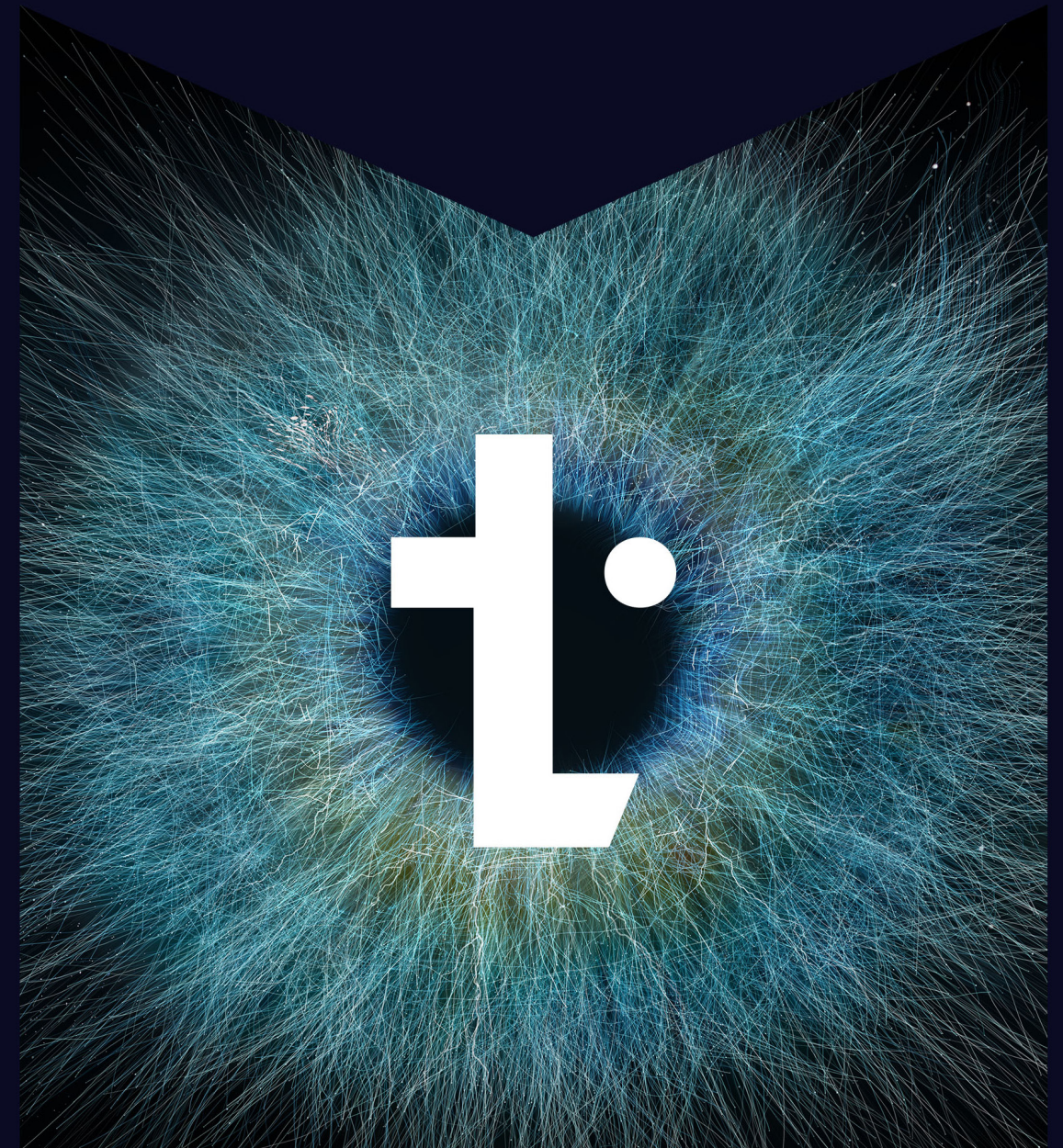
**Kate Hanaghan**

Chief Research Officer & Partner

**Research focus:** Heritage  
Groundworks and Cloud Platforms

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## SustainabilityViews

The SustainabilityViews research stream is dedicated to in-depth analysis of how software and IT services are being deployed in pursuit of environmental sustainability goals.

Led by Principal Analyst Craig Wentworth, SustainabilityViews is essential reading for anybody with a stake in technology-assisted sustainability initiatives.

Unlike other TechMarketView research streams, SustainabilityViews takes more than a UK-only view of the space when it comes to tracking use case developments for emerging technologies in sustainability-related fields. However, we do focus primarily on UK-present SITS suppliers and UK examples of activities in our detailed supplier profiles and case studies. Core reports include our comprehensive Sustainability Technology Activity Index, TechMarketView's unique take on the sustainability technology landscape.

In this stream you'll also find in-depth profiles and evaluations which look at the credibility of SITS suppliers in the sustainability space and analysis of funding and M&A activity.

Plus, we provide regular round-ups of how key technology areas have a role to play in delivering sustainability impact.

### SustainabilityViews Analyst



#### Craig Wentworth

Principal Analyst

**Research focus:** Data & Decision Making, Goods & Services, Lifestyle & Logistics, Power & Utilities

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PublicSectorViews

The PublicSectorViews research stream provides in-depth analysis of the UK public sector tech market. You'll find market sizing, forecasts, supplier and market trend analysis covering the Central Government, Local Government, Defence, Police, Education and Health & Care sectors in the UK.

Spanning software, IT services, business process services and emerging tech, the research provides a comprehensive picture of the UK public sector market and the opportunities and challenges it presents.

Our expert team of public sector-focused analysts– including the stream's lead Senior Research Director Dale Peters, TechMarketView's Chief Analyst Georgina O'Toole and Principal Analyst Craig Wentworth - have tracked the market for more decades than they care to remember.

They are frequently called up to provide independent insight on the sector in the UK and Ireland, informing the decisions of both tech suppliers and public sector organisations alike.

PublicSectorViews Analysts



**Dale Peters**  
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# FinancialServicesViews

The FinancialServicesViews stream is where you'll find TechMarketView's in-depth analysis of the tech market for the financial services vertical. Alongside core research covering market trends, forecasts and the supplier landscape, you can expect analysis of hot topics and disruptors across the sector.

Led by Research Director Jon Davies, who has more than 30 years' experience in the sector, FinancialServicesViews covers the established areas of Banking, Insurance and Financial Markets, as well as the emerging FinTech and InsurTech scene.

Whether you're a tech supplier, end-user of technology or investor in the sector, you'll benefit from actionable insight on the evolving supplier landscape, emerging market trends and latest tech developments.

## FinancialServicesViews Analyst



**Jon C Davies**  
Research Director  
**Research focus:** Banking, Insurance, Financial Markets, Fintech and InsurTech  
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# Let's work together



TechMarketView's team of experienced analysts has been helping organisations understand what's really going on in the UK tech market for many decades.

### Growth Partner Programme

TechMarketView offers a unique programme, to its 'top tier' clients, to partner through a series of research and analysis-based engagement modules to support, validate, and accelerate a company's UK Growth Strategy.

### Bespoke research projects

Experts in their fields, our analysts are frequently called upon to support our clients with bespoke research assignments. We'll work alongside your business to offer insight and guidance to assist with strategic decision making through custom research where the topic is a natural fit with our expertise. Typical projects might, for example, include advising a supplier on its approach to the UK public sector or financial services market; identifying potential providers in a particular software niche for an end-user organisation; or sizing a discrete area of the UK or Irish IT or business process services market to support business planning.

### Custom engagements

Our analysts carry out a range of speaking and custom engagements for our subscription clients, delivering in-depth sector knowledge, independent analysis and honest opinion, and fostering collaborative discussions to help you meet your business objectives.

### Executive Advisory Service

We also offer an Executive Advisory Service (EAS). Delivered as either a series of dinners, attended by key members of your management team alongside senior members of the TechMarketView team, or as a programme of 'virtual' engagements and sounding board sessions. Whichever format, TechMarketView acts as an independent and experienced partner, highlighting strengths and areas for optimisation, and offering research-backed insight that can be leveraged to enhance the overall strategy.

■ Contact us: learn more and discuss your requirements: [info@techmarketview.com](mailto:info@techmarketview.com)

The Tech User Programme supports the end-user community with their digital transformation and technology agendas by taking advantage of our knowledge and expertise in this sector. Members to the programme access research that draws upon our unique position in the UK tech sector.

## Become a member

To become a member of the Tech User Programme and read the Market Readiness Index (MRI) reports (and other research) your organisation must be an 'end-user' of tech.

Membership is on an annual basis and once an organisation is set up, individuals within that organisation can enjoy access to the Tech User Programme research and analysis.

**Find out more:** Visit [www.techmarketview.com](http://www.techmarketview.com) or email us [info@techmarketview.com](mailto:info@techmarketview.com)



## Readiness Index

TechMarketView's Market Readiness Index (MRI) is designed to help end user organisations – tech buyers – determine the readiness of their ICT supplier ecosystem and to support them as they seek to transform their organisations. The MRI applies our highly regarded, rigorous, research approach to assess suppliers across six key areas:

Corporate Resilience; Suitability of Offerings; Skills & Resources; Partner Ecosystem; Industry Expertise; and Delivery & Execution.

If you are a supplier organisation and wish to read our MRI reports then each report is available for a one-off fee.



Whether you are an established enterprise tech company looking to bring innovative, differentiated solutions to your clients, or a growth tech company looking to expand your channels to market, the TechMarketView Innovation Partner Programme (TIPP) can help you find the right partners.

With our unrivalled knowledge of the UK tech sector, we help you create a compelling partnership proposition to attract companies that are most likely to be a good fit for your business, and then we extensively promote your campaign through all our marketing channels.

### TIPP for enterprises

Designed to find partners for enterprise tech companies with a well-known brand serving leading commercial corporations and government institutions.

### TIPP for scale ups

Designed to find partners for growth tech companies with a low market profile.

 Learn more: Email us [info@techmarketview.com](mailto:info@techmarketview.com)

Our flagship product, UKHotViews, is a daily newsletter boasting a monthly readership of over 20,000 individuals.

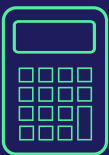
Delivered by email, published to the website and sent via our Twitter stream, it covers the latest, breaking news on the UK SITS scene as it happens and is a must have resource for anyone with an interest in this market.

By advertising with TechMarketView, you can take advantage of this high calibre audience including the most senior executives of the largest SITS players and emerging SMEs; as well as key players in the investment community, the press, government users and CIOs.

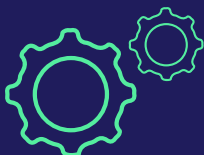
Why advertise with us?



Reach the business elite and key influencers in the UK SITS market



Cost effective solutions to reach new audiences



Experience and support from the TechMarketView team



Grow your business support network



Lead generation



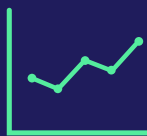
Promote an event, product or service



Build your brand or service



Launch a new product



Fast, effective and measurable results



Our Client Services team covers all the support disciplines required to underpin our research services, from subscription account management through sales & marketing to advertising, sponsorship and engagements.



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Our team exists  
to ensure that  
our clients enjoy  
the best possible  
service experience



