

# Research Summary

February 2025 – April 2025



**FS** Foundation Service **PSV** PublicSectorViews **FSV** FinancialServicesViews **TSV** TechSectorViews **SV** SustainabilityViews **TUP** Tech User Programme **HVX** UKHotViews Extra



## Mastek UK Secure Government Services: Steady growth amid market challenges

**PSV**

Georgina O'Toole / Report / 30 April 2025

Mastek's UK Secure Government Services (SGS) business has significantly evolved since its initial £1.4m government project in 2014. What began as a single modest engagement has blossomed into an impressive portfolio of multi-year contracts spanning digital services, business decision systems, automation-led systems integration, and critical national infrastructure (CNI) systems.

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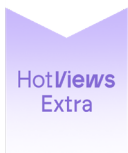
## Market Readiness Index: The Road to AI Part 2

**TUP**

TechMarketView Analyst Team / Report / 29 April 2025

Now widely used within the UK senior tech buyer community, the TechMarketView Market Readiness Index is based on a proprietary assessment methodology created to understand and quantify the performance of tech suppliers. Those in this year's cohort are Top 20 ranking players in the UK market (based on TechMarketView analysis). They are: BT Group, CGI, Deloitte, Fujitsu, Kyndryl, NTT DATA, PwC, Sopra Steria, Tech Mahindra, and Wipro.

[Find out more >>](#)



## Unity Advisory launching to disrupt Big 4

**HVX**

Georgina O'Toole / UKHotViewsExtra / 28 April 2025

Last week, former **EY UK** Chairman Steve Varley and **PwC UK**'s Marissa Thomas announced the launch of **Unity Advisory**, backed by an impressive \$300m investment from private equity giant Warburg Pincus. The new firm aims to challenge the Big 4 consulting model with a tech-driven, CFO-focused approach that eliminates audit conflicts.

[Find out more >>](#)



## Computacenter: Building long-term value

**FS** **TUP** **TSV**

Kate Hanaghan / Report / 25 April 2025

As Mike Norris celebrates 30 years as CEO, we take a look at the company in 2025 and the ways in which he has left his mark. During his 30 years in the role, Mike has overseen the transformation of Computacenter. What started as a PC reseller serving the City of London has become a global Group with multi-country revenue streams from three service lines.

[Find out more >>](#)



## US-UK tariff situation: UK tech market implications

**FS**

Georgina O'Toole / Report / 10 April 2025

This report examines the recent US imposition of tariffs on cars and other UK exports, creating significant challenges for the UK tech market that extend beyond directly affected sectors. While manufacturing represents just 10% of the UK SITS market, the ripple effects across an already weakened economy threaten broader tech spending, with organisations now required to fund GenAI investments from existing budgets rather than new spending.

[Find out more >>](#)

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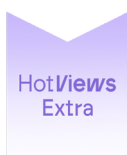
## View from the Top - Atos UK&I's new CEO, Michael Herron

Georgina O'Toole / Podcast / 09 April 2025

In the inaugural "View from the Top" podcast series from TechMarketView, our Chief Analyst, Georgina O'Toole, sits down with Michael Herron, the newly appointed CEO of **Atos** UK&I, for a candid conversation about taking on one of the most challenging leadership roles in the UK tech sector. In this revealing interview, he explains why he was keen to take on the challenge, points to signs of a rebound, and outlines his vision for the future of Atos UK&I.

[Find out more >>](#)

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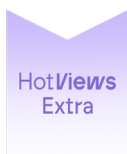
## OneAdvanced launches sovereign AI service

Simon Baxter / UKHotViewsExtra / 09 April 2025

UK HQ'd software supplier OneAdvanced has announced the launch of 'OneAdvanced AI' – a secure, compliant and UK sovereign service that can enable access to a Large Language Model (LLM) operating in a private, closed, and fully encrypted environment. We recently caught up with Amanada Grant, Chief Product Officer at OneAdvanced, to understand how this new service and platform will better enable organisations to further their AI adoption.

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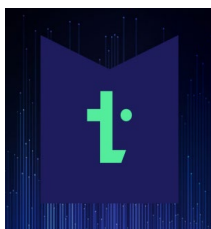
## Fivium: Scaling success through product focus and culture

Georgina O'Toole / UKHotViewsExtra / 07 April 2025

Three years ago, we reported on Fivium as it reached a pivotal moment in its evolution, shifting from project-based work to a more product-centric approach (see Fivium: From reactive to proactive | TechMarketView). Now, based on a recent interview with CEO and Co-founder Matt Fletcher, we revisit the UK public sector specialist to examine how that transformation is progressing.

[Find out more >>](#)

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## Public sector supplier prospects 2025 and beyond

Dale Peters / Report / 04 April 2025

This report discusses the Top 20 suppliers in the UK public sector software and IT services (SITS) market based on revenue in 2023. The report briefly reviews the performance of these suppliers in 2023, before considering how this performance evolved in 2024. Then it considers how each of these suppliers will look to maximise their performance in 2025 and beyond, providing suggestions for improving areas of weakness and how they might boost their potential.

[Find out more >>](#)

PSV



## NTT DATA: UK Public Sector Performance and Prospects

Georgina O'Toole / Report / 03 April 2025

In this report, Chief Analyst Georgina O'Toole's latest report examines NTT DATA's impressive performance trajectory, particularly in Public Safety & Defence, and its designation of Public Sector as one of three global strategic priorities. With significant investments to build UK sovereign capability, we analyse NTT DATA's strategy for pursuing 'mega deals', leveraging global AI innovations, and expanding its healthcare sector presence in 2025.

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## Totally Sust #10: Pairing sustainability with profitability

Craig Wentworth / Podcast / 03 April 2025

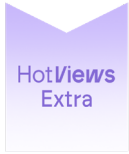
The tenth episode in TechMarketView's Totally Sust podcast series features an interview with Faith Taylor (Senior Vice-President for Global Citizenship & Sustainability at Kyndryl). Here, subscribers to SustainabilityViews can hear the full version of her conversation with the research stream's lead analyst Craig Wentworth about how the company is decarbonising its infrastructure and helping customers reduce their own greenhouse gas emissions.

[Find out more >>](#)

SV

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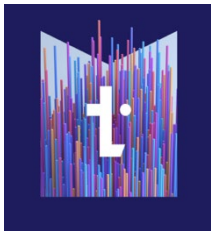
## AI (with adoption assistance) dominates at Oracle and NetSuite events

HVX

**Craig Wentworth / UKHotViewsExtra / 01 April 2025**

Both Oracle and Oracle NetSuite held their flagship UKNetSuite customer events in London recently, and AI advancements stood behind the major announcements for both companies. Whilst Oracle's news focused on big AI infrastructure investments and multicloud capabilities for enterprises, NetSuite's ambitions were more modest, focusing instead on AI in the mid-market.

[Find out more >>](#)



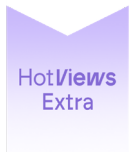
## The UK Customer Experience Market 2024-2027

TSV

**Duncan Aitchison / Report / 27 March 2025**

The UK Customer Experience (CX) Software and IT Services arena is now the focus for over a fifth of all SITS expenditure in this country and has become one of the most intensely competitive parts of the market. Success in the CX segment demands keeping pace with the rapidly evolving changes in buyer expectations, investment priorities and technology strategies. This report contains our estimates of the sizes and growth rates of the CX SITS market and its primary segments.

[Find out more >>](#)



## Spring Statement prioritises defence technology spending

HVX

**Dale Peters / UKHotViewsExtra / 27 March 2025**

Given the government's commitment to holding just one major fiscal event each year in the autumn, yesterday's Spring Statement was supposed to have been a minor update. However, the Office for Budget Responsibility (OBR) reduced its real GDP growth forecast to 1% this year (half that forecast in October 2024), and higher debt interest payments coupled with weaker-than-expected receipts removed the small amount of headroom in the government's 'non-negotiable' fiscal stability rule.

[Find out more >>](#)



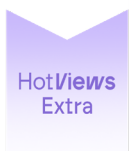
## Social value in the Public Sector 2025

PSV

**Craig Wentworth / Report / 17 March 2025**

This report looks at social value in the UK Public Sector, analysing the approaches of TechMarketView's Top 10 Software and IT Services (SITS) suppliers to the sector (examining their strategies, implementation and measurement approaches, and the outcomes they achieve).

[Find out more >>](#)



## Tech implications of abolishing NHS England

HVX

**Dale Peters / UKHotViewsExtra / 14 March 2025**

The government has announced it will abolish NHS England (NHSE) as part of its plans to reform the British State, cut bureaucracy, and shift money to the front line. The move, which was announced by Prime Minister Keir Starmer and then expanded upon by Health Secretary Wes Streeting, will see management of the NHS in England brought back under direct departmental control, a move that will have major implications for the UK's health technology sector.

[Find out more >>](#)

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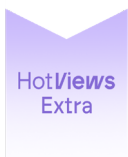
## Totally Sust #9: Sustainability in the food supply chain

SV

**Craig Wentworth / Podcast / 6 March 2025**

The ninth episode of the Totally Sust podcast series features an interview with Davide Ceper (former CEO of Varda, which has now transitioned into the Varda Foundation) and Alexander Watson (Founder and CEO at OpenForests). Subscribers to SustainabilityViews can listen to the full version of their conversation with the research stream's lead analyst Craig Wentworth about how the two organisations are democratising agricultural data to unlock climate finance and transform sustainable farming.

[Find out more >>](#)



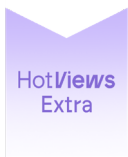
## 'Better Capita' looks to improve profitability on declining revenue

HVX

**Marc Hardwick / UKHotViewsExtra / 5 March 2025**

Capita's FY 2024 results out this morning were previewed back in December's 11-month trading update. This morning's results are on trend with the other Big (Public Sector) BPO players Serco and Sopra Steria, who published their results in the last couple of weeks and also experienced improving profitability on declining revenue. All three firms have had to deal with a tricky market environment and have leaned heavily on the levers of operational efficiency and tech/AI deployment.

[Find out more >>](#)



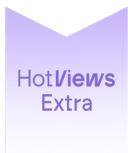
## UK Defence Innovation: A New Era or History Repeating?

HVX

**Georgina O'Toole / UKHotViewsExtra / 4 March 2025**

There are certain times when our chosen research theme appears more relevant than ever. TechMarketView's 2025 Research Theme of "**Sink or Sprint**" perfectly captures the crossroads facing the UK's defence sector. After decades of post-Cold War rationalisation followed by a counter-terrorism focus, Western defence departments now face a changing geopolitical landscape and peer adversaries advancing rapidly in critical technology domains.

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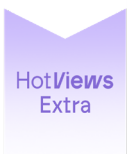
## Temenos looks to maximise the opportunity

HVX

**Jon C Davies / UKHotViewsExtra / 27 February 2025**

Temenos' latest annual results show impressive growth for the Swiss banking software provider. The financials for the year ended December 31, 2024 revealed increased revenue, a healthy sales pipeline, and a positive trading outlook. These results mark the first since Jean-Pierre Brulard became CEO, offering insight into the leadership team's progress. Following a turbulent period, Jon Davies examines the impact of recent months on Temenos and evaluates the company's future under its new management.

[Find out more >>](#)



## What is the future of creative content?

HVX

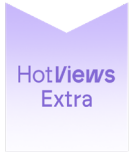
**Simon Baxter / UKHotViewsExtra / 25 February 2025**

Across UK tabloids, creative industries are battling government proposals allowing AI companies to use copyright-protected work without permission. Over 1,000 musicians, including Annie Lennox and Kate Bush, protested by releasing a silent album. The government proposes an exception for "text and data mining" with an "opt-out" system, but critics doubt the effectiveness of any rights reservation process. While understanding creators' livelihood concerns, this may be an unwinnable fight. AI systems will naturally learn, copy, and create new content.

[Find out more >>](#)

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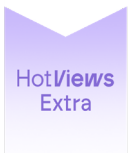
## National Data Library: Time to 'Sink or Sprint'?

HVX

**Georgina O'Toole / UKHotViewsExtra / 25 February 2025**

The National Data Library (NDL) began as a Labour Party Manifesto concept last summer. While evolving from a manifesto promise to budget commitment, details and timelines remain scarce despite frequent government mentions. A new report from the Tony Blair Institute and The Entrepreneurs Network proposes a transformative approach to how government data could drive AI innovation. With competing government visions and ambitious implementation targets, in this research note, we examine whether the NDL can overcome typical government IT project challenges and strengthen the UK's global AI position.

[Find out more >>](#)



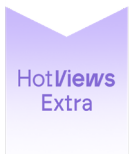
## Procurement Act 2023 comes into force

HVX

**Dale Peters / UKHotViewsExtra / 24 February 2025**

The Procurement Act 2023 came into force on 24th February 2025, marking a significant change in UK public sector purchasing. The Act implementation was delayed to allow the new government time to review and refine the accompanying National Procurement Policy Statement (NPPS). The changes that are introduced now signal a clear shift towards using public procurement as a strategic tool for achieving broader government objectives. Here we look at the key changes to public procurement processes, support for SMEs, the importance of maximising public benefit and social value, and the likely impact on technology suppliers.

[Find out more >>](#)



## Corporate diversity at a crossroads

HVX

**Dale Peters / UKHotViewsExtra / 11 February 2025**

In response to the changing US political landscape, major tech companies are rapidly re-evaluating their Diversity, Equality and Inclusion initiatives. While UK rules differ, this shift will impact the tech industry's Equality, Diversity and Inclusion approach globally. Companies including Amazon, Google, Meta, Intel, PayPal, and Accenture have announced plans to reduce DEI initiatives by eliminating hiring targets, diversity reporting, and demographic-focused development programmes. Meanwhile, Apple, Cisco, and Microsoft defend their diversity approaches as business-critical. The stark UK-US differences create challenges for companies operating in both regions.

[Find out more >>](#)



## UK Financial Services SITS Supplier Prospects 2025

FSV

**Jon C Davies / Report / 6 February 2025**

This report profiles the performance and prospects of the top 10 leading SITS vendors (by revenue) active in the UK Financial Services sector. It explores the recent progress of each of these companies, highlights some of the latest developments and discusses their potential in 2025 and beyond. The ten Financial Services SITS suppliers profiled in this report are TCS, Amazon Web Services, Accenture, Microsoft, HCLTech, IBM, Wipro, DXC Technology, Infosys and SS&C. This report should be read alongside UK Financial Services SITS - Suppliers, Trends and Forecasts 2024.

[Find out more >>](#)



## Totally Sust #8: EPC rating for software

SV

**Craig Wentworth / Podcast / 6 February 2025**

The latest episode in TechMarketView's series of Totally Sust podcasts sees SustainabilityViews' lead analyst, Craig Wentworth, interview Gareth Edwards (Chief Client Officer, GoCodeGreen) and Sonia Ghandi (Head of Social Value UK & Europe, Mastek) about GoCodeGreen's approach to helping customers lower the carbon emissions associated with their software applications - something Edwards describes as an "EPC rating for software" - and how Mastek has used this service to make its software development lifecycle greener.

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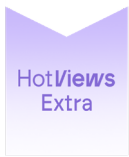
## UK Financial Services SITS Market Update

FSV

**Jon C Davies / Report / 5 February 2025**

This report contains TechMarketView's updated outlook for the UK Financial Services Software and IT Services market from 2024 to 2027. The report includes a revision of our forecasts that were originally published in June 2024. The changes reflect a variety of factors, including weaker economic confidence, a slowdown in GDP during the second half of 2024, the impact of the UK general election, and new administrations in the UK and the US.

[Find out more >>](#)



## NTT DATA – differentiating through R&D

HVX

**Marc Hardwick / UKHotViewsExtra / 4 February 2025**

NTT DATA is not your typical 'run of the mill' Systems Integrator (SI), possessing access through the wider NTT Group to an enormous Research and Development (R&D) machine being channelled to help address some of the biggest issues posed by the rise of 'Society 5.0'. In the Software and IT Services (SITS) market, where many SIs sound 'me too' with similar ecosystems and value propositions, NTT DATA stands out as clearly different. Marc spent some time earlier last week listening to members of NTT DATA's UK&I team run through some of the key research areas and how they are being used to solve real-world problems.

[Find out more >>](#)

