

Research Summary

March 2025 – May 2025



 Foundation Service
  PublicSectorViews
  FinancialServicesViews
  TechSectorViews
  SustainabilityViews
  Tech User Programme
  UKHotViews Extra



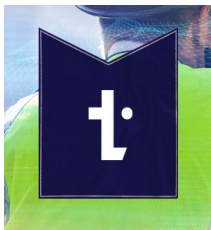
AI Impact: Front Office Operations

Simon Baxter / Report / 29 May 2025

In our new report 'AI impact: Front Office Operations', we explore the key trends that are driving the transformation of the contact centre and customer service roles, from the rapid rise of 'agent assist' solutions to the emergence of GenAI-enhanced voice-based conversational platforms. We also analyse a selection of disruptive and innovative suppliers who are exploiting the latest in GenAI technologies to disrupt incumbents and transform existing delivery models for business process services.

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Policing Digital Strategy 2025-2030

Dale Peter / Report / 29 May 2025

This report reviews the Policing Digital Strategy 2025-2030 publication. It discusses the key changes between this strategy and its predecessor, which was published in 2020, and the likely implications for police technology suppliers.

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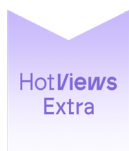
Atos& UKI Manufacturing: Enabling growth

Georgina O'Toole / Report / 28 May 2025

UK manufacturing faces a pivotal moment as it navigates global uncertainty, structural skills shortages, and the imperative to embrace Industry 4.0/Smart Manufacturing technologies. In the UK software and IT services market, it was the fastest-growing industry vertical in 2023 and 2024. Growth is expected to slow in 2025, but technology remains key to allowing manufacturing organisations to achieve sustained growth despite headcount challenges.

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Roc addresses Construction inefficiencies with launch of Coria software house inaugural product – Digital Cost Assurance

Marc Hardwick / UKHotViewsExtra / 16 May 2025

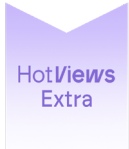
Roc has launched Coria – a Roc company, focused on developing intelligent automation solutions that address pervasive industry problems at scale. The name itself—a re-arrangement of Roc AI —reflects the company's commitment to embedding artificial intelligence within its solutions while maintaining a distinct yet complementary brand identity to its parent.

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Atos 'Genesis': Birthing a new beginning

Georgina O'Toole / UKHotViewsExtra / 15 May 2025

The term 'Genesis' carries significant weight across multiple disciplines. At its core, it represents "the miraculous processes of creation, reminding us that every moment holds the potential for new beginnings and extraordinary transformations" (Source: Pages of History). It's a fitting name, then, for Atos' new four-year strategic and transformation plan, unveiled by CEO Philippe Salle at the company's Capital Markets Day on 14 May 2025.

[Find out more >>](#)

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Totally Sust #11: Scaling soil carbon markets

Craig Wentworth / Podcast / 07 May 2025

The eleventh episode in TechMarketView's Totally Sust podcast series features an interview with Kanika Chandaria (Climate Lead at Agreea) and Thomas Gent (regenerative farmer and founder of Gentle Farming). Subscribers to SustainabilityViews can hear their conversation about how Agreea connects farmers implementing regenerative practices with corporations seeking to meet sustainability targets.

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Tech Confidence Index 2025 - Spring Edition

Marc Hardwick / Report / 07 May 2025

Tech Confidence Index (TCI) is a bellwether for the state and prospects of the UK tech sector. The six-monthly survey of UK technology sector leaders is tracking the confidence of the UK technology scene to help both Software & IT Services (SITS) suppliers and end users understand market sentiment, whilst planning and preparing for the period ahead.

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Trustmarque's Public Sector regional-based strategy

Georgina O'Toole/ Report / 01 May 2025

In the year since Chris Jones joined as Head of Public Sector at Trustmarque, the division has made notable progress in establishing itself as an "optimisation partner" – a strategy detailed by CEO Simon Williams last summer. In a sector increasingly focused on place-based regional strategies and improved citizen services, Trustmarque's public sector business is evolving.

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Mastek UK Secure Government Services: Steady growth amid market challenges

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

TechMarketView Analyst Team / Report / 29 April 2025

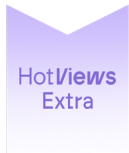
Now widely used within the UK senior tech buyer community, the TechMarketView Market Readiness Index is based on a proprietary assessment methodology created to understand and quantify the performance of tech suppliers. Those in this year's cohort are Top 20 ranking players in the UK market (based on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

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Unity Advisory launching to disrupt Big 4

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.

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Computacenter: Building long-term value

Kate Hanaghan / Report / 25 April 2025

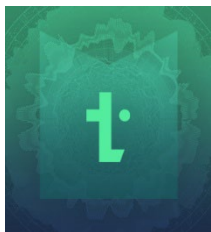
As Mike Norris celebrates 30 years as CEO, we take a look at the company in 2025 and the ways in which he has left his mark. During his 30 years in the role, Mike has overseen the transformation of Computacenter. What started as a PC reseller serving the City of London has become a global Group with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

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US-UK tariff situation: UK tech market implications

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.

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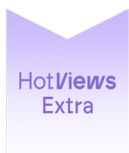
View from the Top - Atos UK&I's new CEO, Michael Herron

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.

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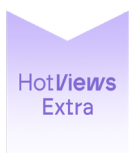
OneAdvanced launches sovereign AI service

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

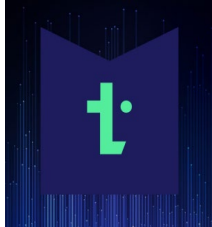
Three years ago, we reported on Fivium as it reached a pivotal moment in its evolution, shifting from project-based work to a more product-centric approach (see Fivium: From reactive to proactive | TechMarketView). Now, based on a recent interview with CEO and Co-founder Matt Fletcher, we revisit the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

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Public sector supplier prospects 2025 and beyond

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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 >>



NTT DATA: UK Public Sector Performance and Prospects

PSV

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.

Find out more >>



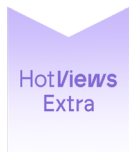
Totally Sust #10: Pairing sustainability with profitability

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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 >>



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

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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.

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The UK Customer Experience Market 2024-2027

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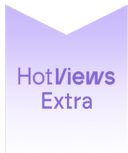
Duncan Aitchison / Report / 27 March 2025

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.

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Spring Statement prioritises defence technology spending

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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 >>



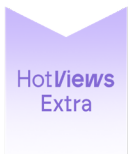
Social value in the Public Sector 2025

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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

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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 >>



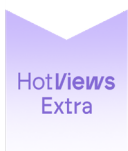
Totally Sust #9: Sustainability in the food supply chain

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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.

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'Better Capita' looks to improve profitability on declining revenue

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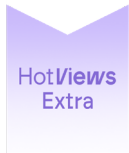
Marc Hardwick / UKHotViewsExtra / 5 March 2025

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.

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UK Defence Innovation: A New Era or History Repeating?

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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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